

## For Information Only

### Council Orientation and Strategic Planning

Presented To:	City Council
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Type:	Managers' Reports

#### Resolution

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#### Relationship to the Strategic Plan / Health Impact Assessment

This report refers to operational matters.

#### Report Summary

This report provides a recommendation on an orientation process that will assist the incoming Council as well as outlines an anticipated schedule and timing of orientation activities. Staff is also preparing a recommendation on the development of a strategic planning process that produces a longer term vision and strategy for Greater Sudbury.

#### Financial Implications

There are no financial implications associated with this report.

#### Signed By

**Report Prepared By**

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General Manager of Corporate  
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*Digitally Signed Jul 27, 18*

**Financial Implications**

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**Recommended by the Department**

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## **BACKGROUND**

Greater Sudbury's Municipal and School Board elections will take place on October 22<sup>nd</sup>. Staff have been gathering input into the purpose, scope and method for delivering an orientation process to the next City Council.

There are several activities that must, or should, occur when a new City Council starts its term of office. Some of these, like the establishment of Committees, Boards and advisory groups, or providing training about administrative matters like how the Procedure Bylaw works, are necessary components that a new Council must complete. Some activities, like updating the Strategic Plan, are good practices that could assist a new Council with defining its priorities for the term. While the primary focus of this report is to recommend an orientation process that will assist the incoming council, it also touches on interactions with these other activities in an effort to effectively organize and schedule them. The recommendations are made acknowledging the need for flexibility. Newly elected Councillors may have input they wish to provide that staff did not anticipate and could address as part of the orientation process.

## **ANALYSIS**

The City Solicitor / Clerk and the General Manager of Corporate Services have met with a majority of current Council members and have reviewed historical and planned approaches in other major municipalities. These meetings focused on Council members' views on the purpose of the orientation process and preferred approaches for completing it. These views not only informed the analysis in this report, but they also influenced the 2019 Council schedule of meeting dates and deadlines.

Most Councillors indicated the following contents as most urgent early in a Council orientation process

1. Role clarity – define roles and service responsibilities of councillors, executive leadership team and directors
2. Resolving citizen inquiries and service requests – define the process for responding to individual residents' inquiries and service requests
3. Navigating the organization structure – provide names, contact information and responsibilities for key staff

The amount of new contacts and introduction to the array of services a municipality provides creates a significant amount of content for new councillors to review and become familiar with. Most municipalities provide reference material that all councillors are expected to become familiar with and that establishes a reference point for other orientation activities that provide a "deeper dive" into certain aspects of

the municipality's work. There are also a variety of new initiatives, legislative changes or ongoing strategic directions that staff are pursuing associated with each service that need to be communicated. Some of these initiatives involve work with other orders of government, municipal or sectoral associations or private sector clients and partners.

Councillor feedback also identified the need to make good use of orientation activities to support effective relationship building among councillors and between councillors and staff. The orientation process will incorporate steps that support the development of positive, effective working relationships.

## **ANTICIPATED TIMING AND CONTENT**

### **1. Councillor Reference Material – November 2018**

The reference material will contain departmental overviews using a common format that provides introductory information such as:

- Summary of the organization structure, service profiles and approved service levels, and key contacts for each of Greater Sudbury's approximately 60 lines of business.
- Links to Master, strategic, and official plans related to the services, and a summary of prior period results.
- Current status of open projects, anticipated 2019 milestones, subject to the next Council's choices about strategy and budget.

The method for delivering this material could take a variety of forms. Many municipalities will produce a briefing binder of material or offer a website or portal that presents the information in a helpful way using summaries with links to more detailed information, videos and interactive presentations. This material could be published in November and staff, in particular senior staff like Department heads (General Managers) and Divisional leaders (Directors) will be available throughout the period leading up to the inauguration to meet one on one and review material according to the specific needs of new and returning Councillors. These meetings would also describe the format and approach to subsequent orientation activities and solicit feedback on desired level of detail. It is also anticipated that General Managers and Directors could make more in depth presentations on the points contained in the briefing documentation at early standing committee meetings.

## **2. Administrative Matters – November and December 2018**

### *Introductory Processes*

The administrative “sign on” and introductions to Council support staff, along with office set up and technology provision can take place in the period after the election and prior to December 1<sup>st</sup> inauguration. Further, staff will organize an informal gathering in late November to provide the opportunity for introductions and conversation between senior staff and members of Council.

### *Legal Matters*

Shortly after the commencement of the term, the City Solicitor and Clerk (potentially with the assistance of external legal counsel) will review current and pending legal matters, discuss risk, liability and solicitor client privilege as well as information security, privacy and the freedom of information process.

### *Procedure Bylaw and Key Roles and Responsibilities*

Council's first meeting after inauguration is on Tuesday, December 11<sup>th</sup>. It is the only meeting scheduled that week. A meeting may be scheduled for Monday December 10<sup>th</sup> which would focus on a review of the Procedure By-law and “meeting mechanics” and could include an introduction to roles and accountabilities of statutory officials, Chief Administrative Officer, Auditor General, Integrity Commissioner, Council Members and the Head of Council via the basics of Municipal Act and relevant By-laws.

### *Key Policies*

Further, Councillors can expect that staff will establish an orientation schedule which can be accomplished during regular Council or committee meetings on subjects like public procurement and our Procurement By-law, Labour Relations and Employee obligations, Health and Safety legislation, media, communications and French Language Services. Council as a whole must also participate in mandatory Water/Wastewater training according to the *Safe Water Drinking Act* and this will be scheduled in Q1 or Q2 of 2019.

## **3. Policy Decisions – January 2019**

City Council will engage the services of its new Integrity Commissioner, Robert Swayze effective December 1<sup>st</sup>. Some time will be set aside on the January 15<sup>th</sup> meeting agenda to allow for a presentation from the Integrity Commissioner and a review of the new Council Code of Conduct and the Council – Staff relations policy.

Many Councillors indicated a desire to discuss and understand the purpose and scope of Councillor involvement in committees, Boards and advisory bodies. Staff will provide

Council and candidates with background information in the fall of 2018 regarding the Board and advisory bodies in a tabular report that will include details like the purpose for Councillors' participation, the time commitment required, the remuneration (if any) for sitting as members and the traditional make up of these bodies. Staff then intend to set up a Board, committee and advisory panel "fair" in January, potentially on the afternoon of the 15<sup>th</sup>, or 22<sup>nd</sup> prior to scheduled meetings. This fair would allow members of Council and prospective community appointees to learn more about the various bodies, meet with representatives of the organizations and then proceed to the appointment process, potentially at the January 22<sup>nd</sup> or February 12<sup>th</sup> Council meetings.

#### **4. Strategic Plan Development and 2019 Budget Deliberations – January and February 2019**

Staff intends to create strong linkages between these orientation activities and the type of information Council would use in two important processes that will take place early in 2019, namely, the determination of a new Council strategy and finalization of the 2019 budget.

The time horizon for strategic plans since amalgamation has been the term of Council. Most have been considerably shorter than four years in duration as planning activities take time at the beginning of the term and the actions in the plan are truncated to reflect the remaining time left in the term. This has resulted in a focus on projects with less emphasis on a longer term vision that Council has for the community.

Staff recommend using a strategic planning process that produces a longer term vision and strategy for Greater Sudbury. The process would describe desired outcomes that may require more than one term of Council to achieve and provide clear steps for the next four years that indicate how Council expects to make progress toward them. Good municipal examples include the Region of Peel's twenty year "Community for Life" vision covering the 2015 – 2035 time horizon, Vision 2051, York Region's latest long term strategic effort and CK Plan 2035, Chatham – Kent's 20 year strategic plan.

Councillors have expressed a desire to begin their strategic planning work ahead of the completion of the 2019 budget. Staff will have a background report ready in November that would provide the necessary background for the development of a longer term strategy and will outline a recommended process at the December 11<sup>th</sup> meeting of City Council. There are a number of inputs into a strategic planning process that already exist. For example, we have recently completed a world café on population health, the aforementioned master plans and strategies contain strategic alternatives for consideration, employee, citizen and customer service surveys have all been refreshed in 2018 and we have relatively new long term financial plans and policy outcomes that can provide valuable input. Staff also intend to gather feedback from

business leaders across the various sectors and municipal champions as input into the strategic background report.

Strategic planning meetings and activities would commence in January and February. This preliminary work could inform Council's budget deliberations, scheduled for the first quarter of 2019. The strategic plan development schedule would be complete by the end of the second quarter of 2019.

Budget deliberations would begin in late January with a full background on Municipal Finance and the issuance of the budget booklet to commence deliberations on the Operating, Capital and Outside Board budgets for 2019.

## **ONGOING PLANNING AND FEEDBACK FROM NEWLY ELECTED COUNCIL MEMBERS**

While this report outlines the best thinking based on feedback to date in terms of orientation planning, it is a starting point and could be further refined. Staff are working on the elements described in this report and will meet immediately after the election with the incoming Members of Council to confirm these (and potentially other) plan elements and finalize schedule and timing. The end result that the next Council can expect is:

- Adequate support and background information to establish early function in role,
- A clear understanding of how Council and staff will work with and relate to one another and
- Processes leading to the identification of strategic change initiatives for the 2018 – 2022 term and that describe a desired vision of the future for the community.