
CITY OF KELOWNA

MEMORANDUM

Date: May 29, 2003
File No.: 6430-20

To: City Manager

From: Planning and Corporate Services Department

Subject: Strategic Plan Update

RECOMMENDATION

THAT staff be directed to issue a proposal call for consultant preparation of a Strategic Plan which incorporates the scope of work summarized in the Planning and Corporate Services Department's report dated May 29, 2003;

BACKGROUND

City of Kelowna Council endorsed the City's existing community Strategic Plan in 1992. The Strategic Plan has since then provided direction to city activities. The Plan identified 24 action items, of which all have now been initiated, and most completed. The City's (1995) Official Community Plan (reviewed in 2002) is based on the direction of the 1992 Strategic Plan.

Since 1992, the City's population has increased by 25,000, over 9000 homes have been built, and approximately 8 million square feet of commercial, industrial and institutional space has been constructed.

The City has, over the past decade, obtained community feedback on development-related issues through two Official Community Planning processes. However, since 1992, there have not been any comprehensive processes intended to determine community values, priorities and overall expectations of the City. While the results from annual Citizen Surveys suggest that the City's performance is generally satisfactory, Council has indicated that it wishes to take a more proactive approach to obtain public feedback on the suitability of City processes and the principles that guide civic decisions and actions.

In response to community changes and the substantial completion of activities spelled out in the 1992 Strategic Plan, Kelowna City Council has requested an update of the City's Strategic Plan. The objective of the Strategic Plan would be to effectively respond to "big picture" community issues, priorities and expectations.

DISCUSSION

In response to Council's earlier direction, staff have begun preliminary work on the Strategic Plan update. Staff have reviewed the 1992 plan and have begun the benchmarking process to determine the degree to which the action items emerging from that Plan have been implemented. Staff are also in the process of assessing community trends that could affect the direction of the Strategic Plan update. Factors being considered are: demographic, financial, economic, social, environmental and legislative variables. Although staff can play an important support role in the review of the Strategic Plan, it is suggested that the services of a consultant with specialized Strategic Planning expertise could be helpful in facilitating the strategic planning process and in preparing a final report.

A consultant could help:

- A. Develop a detailed Strategic Planning process model for the City's consideration and approval. The model should be designed so as to effectively obtain input, negotiate trade-offs between opposing perspectives, harness innovative ideas, develop consensus, and collate the information into a concise workable document.
- B. Hold a session to obtain Council's direction for the update. This would involve setting the context/refining the process etc.
- C. Conduct and document strategic planning meetings with groups of internal stakeholders. The meetings may include S.W.O.T. (Strengths, Weaknesses, Opportunities and Threats) or equivalent analyses.
- D. Use innovative methods to obtain input from citizen voices not typically heard from through formalized stakeholder groups. Consideration should also be given to community surveys. The objective would be assurance that the voices heard through the process are truly representative.
- D. Publicize and conduct strategic planning meetings with groups of external stakeholders (various community groups) and document, in detail, meeting results. Some of the external stakeholders that should be involved in this process include (but are not limited to):
 - Various Community Groups (resident, business, arts, athletic, volunteers, seniors, youth, etc.)
 - School District Board/Staff
 - Service Organizations
 - Development Industry
 - Environmental Advocates/Regulators
 - Non-profit Societies

Community workshops, possibly featuring relevant key-note speakers should be considered as a way to facilitate dialogue.

- E. Prepare drafts of the Strategic Plan (based on the information gathered and the consensus reached at earlier meetings) for the City's review and adoption. The Strategic Plan should include, as a minimum, the following:
- Summary of the strategic planning process;
 - Various strategic issues relevant to the City;
 - Agreed upon long-term vision (beyond 20 years) for the City and strategic goals to pursue in the short-term;
 - Guiding principles to assist in decision-making;
 - Action plan to achieve the strategic goals;
 - Performance measurement tools during the implementation process; and
 - Communications/marketing plan.
- F. Submit a final report consolidating the work completed. The reasons for all decisions and recommendations should be thoroughly documented.

It is suggested that the Consultant should expect a close working relationship with Council and staff throughout this assignment.

It is anticipated that consultant efforts on the Strategic Plan update process would begin by fall 2003 and would extend into 2004.

The Strategic Plan process for 2003 can be funded through existing Policy/Research/Strategic Planning operating budgets transferred to this project.

SUMMARY

It is recommended that staff be directed to issue a proposal call for consultant preparation of a Strategic Plan update which incorporates the scope of work summarized in the Planning and Corporate Services Department's report dated May 29, 2003, to be funded through existing budgets.

Signe K. Bagh, MCIP
Manager
Policy, Research & Strategic Planning

Approved for inclusion ☐

R.L. (Ron) Mattiussi, ACP, MCIP
Director of Planning & Corporate Services