



2020 - 2023 DEPARTMENT BUSINESS PLAN

Corporate Planning

Date of last revision

JANUARY 2020

TABLE OF CONTENTS

MESSAGE FROM THE DIRECTOR	1
PLANNING FOUNDATION	2
Strathcona County vision	2
Corporate mission	2
Corporate values	2
DEPARTMENT MISSION STATEMENT	3
DEPARTMENT OVERVIEW	3
DEPARTMENT PROGRAMS	5
Business planning	5
2020 – 2023 forecast	5
Organizational effectiveness	5
2020 – 2023 forecast	5
Performance measurement	6
2020 – 2023 forecast	6
Operational budget development	7
2020 – 2023 forecast	7
Capital budgeting	7
2020 – 2023 forecast	7
Long-range financial planning	7
2020 – 2023 forecast	8
Financial enterprise resource planning sustainment and reporting systems management	8
2020 – 2023 forecast	8
Business process management	8
2020 – 2023 forecast	9
Organizational project management	9
2020 – 2023 forecast	9

DEPARTMENT ANNUAL CAPITAL IMPROVEMENTS.....	11
Department support roles (annual capital improvements)	11
DEPARTMENT IMPROVEMENT INITIATIVES .	12
Enterprise strategic portfolios implementation (INIT 90).....	12
Performance measurement maturity improvements and service level review (INIT 89).....	13
Program based budgeting and reporting framework (INIT 32)	14
Strathcona County business transformation (SCBT) project (AUTO 1003)	15
Department support roles (improvement initiatives)	16
APPENDIX 1:	18
STRATHCONA COUNTY GOALS AND RESULTS	18
Strategic goals (external community facing)	18
Corporate organizational excellence goal (internal facing).....	20

MESSAGE FROM THE DIRECTOR



I am fortunate to lead a department of dedicated and passionate individuals who are customer oriented and improvement focused.

The next four-year business planning cycle will continue to be focused on continuous improvement of the corporate environmental scanning, planning/budgeting, execution and tracking and reporting processes in support of our department mission.

To support our organizational excellence goal, the department is leading key corporate projects related to creating a more integrated, strategic management; and improving the county's enterprise performance management and project management maturity. This work represents foundational elements that will support the County's journey from "Good to Great".

Strathcona County administration is ultimately accountable to Council and the community for its performance. Asking ourselves whether the services we provide are relevant, efficient and effective in achieving what is desired will make up a big part of this business cycle. Transparency and engagement will be vital to our success, as will robust collaboration with Council, Executive Team, Senior Leadership Team and every department in Strathcona County.

Don Legge

Director, Corporate Planning

PLANNING FOUNDATION

STRATHCONA COUNTY VISION

Living in Strathcona County

Strathcona County, located in the heart of Alberta, is an energetic and thriving community. A leader in North America’s petroleum industry and a champion for advancing diverse agricultural business, we use our energy to power our new tomorrow.

We are a specialized municipality and work cooperatively with our urban and rural residents to govern as a single municipality. Proud of our distinct governance model, we promote and demonstrate our achievements.

We are a welcoming place to live and attract people of all ages, cultures and walks of life to join us. Families thrive in our dynamic, caring and safe community.

We strive to be a model of ecological integrity, protecting our environment and preserving our agricultural heritage.

Investment in infrastructure, quality services, cultural and recreational programs, and facilities is a priority and sets us apart.

Becoming Canada’s most livable community

CORPORATE MISSION

We are committed to working collaboratively, efficiently and effectively to provide quality service delivery to citizens, business, and industry alike.

CORPORATE VALUES

Our values help to form our organizational identity and define our culture.

Integrity	We demonstrate ethical standards and behaviours We display honest behaviour at all times We do what we say we will do
Respect	We treat others with care and dignity We pay attention to each other We welcome a variety and diversity of ideas
Safety	We consistently demonstrate safe work practices We build an environment of openness and trust We make it safe for each other to voice opinions or concerns
Fairness	We consider how our actions might affect others We treat everyone impartially and equitably We are willing to share the reasoning behind our thinking and decisions
Cooperation	We support, assist and learn from each other We give credit to others for their contributions We compromise when needed to achieve common goals

DEPARTMENT MISSION STATEMENT

Corporate planning collaborates closely with Council, Executive Team, Senior Leadership Team and departments to articulate integrated, evidence-based plans that evaluate and adapt the County's diverse programs and services to meet the changing needs of our community, to address risks in our operating environment and to ensure long term financial sustainability.

DEPARTMENT OVERVIEW

Corporate Planning's collaborative, fully integrated, multi-year business planning and capital and operating budgeting processes advance our strategic priorities through integrated, evidence-based decision making.

We have three branches within our department: Corporate Business Planning, Financial Planning, and Corporate Advisory Services.

Corporate Business Planning

The Corporate Business Planning branch leads the annual, collaborative multi-year business planning process.

An annual, corporate environmental scan sets the stage to support a strategic plan review and priority setting exercise with Council and Executive Team. This direction supports the identification of potential community building and improvement opportunities across the County's diverse programs and services. Business cases and Priority-Based Budgeting (PBB) support evidence-based evaluation and prioritization of potential investments to allocate resources to strategic priorities.

The branch also leads corporate performance measurement to support the identification of opportunities for continuous improvement and resource re-allocation. This work supports our Organizational Excellence Goal by enabling reviews that ensure that programs and services are relevant, efficient and effective.

The three programs the branch delivers are:

- Business planning
- Performance measurement
- Organizational effectiveness

Financial Planning

The Financial Planning branch provides the corporate financial analysis and parameters that underlie the annual multi-year business planning process and leads the development of the corporate operating and capital budgets.

The branch plays a critical role in planning by providing the corporate financial context and in evaluating and prioritizing investment options by supporting the financial aspects of business cases.

The branch also provides service to the organization through advising and coordinating the development of departmental operating and capital budgets.

The Long-Term Financial Sustainability Framework (LTFSF) is also led by the branch to drive future fiscal policy and financial decisions.

The three programs the branch delivers are:

- Operational budget development
- Capital budget development
- Long-range financial planning

Corporate Advisory Services

The Corporate Advisory Services branch provides advice and coordination services to the organization through its project management office; business process management (BPM) support; and the provision of financial information system service and support.

The three programs the branch delivers are:

- Organizational project management
- Business process management
- Financial Enterprise Resource Planning (ERP) sustainment and reporting systems management

DEPARTMENT PROGRAMS

BUSINESS PLANNING

Coordination and assistance in the development of the strategic plan, corporate business plan and departmental business plans to guide budget development. These plans work together to identify priorities and focus for the next four-year cycle at a strategic, corporate and department level, and help to further inform branch plans, and individual staff performance plans.

2020 – 2023 FORECAST

Corporate business planning facilitates an annual environmental scan, SWOT (Strengths, Weaknesses, Opportunities, and Threats) and PESTLE (Political, Economic, Social, Technological, Legal and Environmental) analysis, to support building share understanding of planning considerations. This includes looking for improvement opportunities based on an examination of our internal weaknesses and service performance. It also identifies external risks we need to mitigate and the evolving needs of the community and businesses that should be addressed.

The branch then facilitates direction setting discussions with Council and Executive Team to identify and communicate strategic priorities to the organization. This direction guides business and financial planning so that we can create aligned 4-year operating and 5-year capital plans that cascade across our diverse set of programs and services.

During plan execution, Corporate Business Planning collects and reports on initiative progress through tri-annual updates to Executive Team and Council.

ORGANIZATIONAL EFFECTIVENESS

Leading strategic/corporate initiatives and special projects that enhance organizational effectiveness, including priority-based budgeting and efficiency/effectiveness reviews.

2020 – 2023 FORECAST

The priority-based budgeting tool combined with the Service Definition initiative will support evidence-based, program relevance, effectiveness and efficiency reviews. This information is critical to systematic identification of continuous improvement opportunities.



The Service Definition initiative will create a program and service framework for the County that aligns to the Municipal Reference Model (MRM). This work includes developing service descriptions, identifying levels of service and performance measures, and analyzing the cost to deliver the current levels of service. This information will allow us to update the PBB tool with the more consistently defined programs and services and will allow us to add more resource and cost information for analysis and prioritization.

Corporate Business Planning will work with the Corporate Advisory Services (CAS) Branch to clarify how our portfolio of corporate improvement initiatives fit together under our organizational excellence goal. We will develop recommendations for a programmatic approach to management of improvement initiatives and clarify the desired future state. This includes developing a tactical, delivery-oriented roadmap to clarify interdependencies and impacts across projects.

PERFORMANCE MEASUREMENT

Coordination and assistance in the development of key performance indicators and performance measures to identify our performance as an organization in achieving targets, and highlights areas for improvement. Also includes reporting and analytics to assist evidence-based decision-making.

2020 – 2023 FORECAST

To improve the County’s performance measurement maturity, the Service Definition project will identify service measures and levels of service for all County services. Developing performance measures will enable managers to set targets, measure, monitor and report on performance; systematically analyze whether programs and services are relevant, effective and efficient; and identify continuous improvement opportunities to better manage resources.

It will be critical to support performance measurement by developing and rolling out training to support the skills, knowledge, and tools that will enable program and service managers to manage performance.

OPERATIONAL BUDGET DEVELOPMENT

Coordination of the operating budgets and forecasts including development of financial solutions to assist decision makers in allocating resources by providing quality and relevant information related to current and long-term needs.

2020 – 2023 FORECAST

For 2020, the focus will be continued improvement and refinement of the Multi-Year Planning & Execution (MYPE) process and aligning and incorporating the MYPE processes into the new ERP platform. It will likely take two budget cycles to transition completely.

Starting in 2021, the focus will shift to the development and implementation of the program-based budgeting (PGBB), which is not expected to be completed until 2023. External expertise will be required for the PGBB project.

CAPITAL BUDGETING

Coordination of the capital budgets and forecasts including development of financial solutions to assist decision makers in allocating resources by providing quality and relevant information related to current and long-term needs.

2020 – 2023 FORECAST

For 2020, the focus will be continued improvement and refinement of the Multi-Year Planning & Execution (MYPE) process and aligning and incorporating the MYPE processes into the new ERP platform. It will likely take two budget cycles to transition completely.

Starting in 2021, the focus will shift to the development and implementation of the program-based budgeting (PGBB), which is not expected to be completed until 2023. External expertise will be required for the PGBB project.

LONG-RANGE FINANCIAL PLANNING

Provision of long-term financial planning to improve the understanding of the County's financial situation with a focus on sustainability to favourably influence its financial future.

2020 – 2023 FORECAST

In 2020, significant scenario work and analysis will be performed to look at economic, political and social pressures, and how they could affect the County's long-term financial health, and to recommend appropriate strategies to mitigate or eliminate financial threats. Specific attention and focus will be upon any recent and/or future policy changes enacted by the Provincial Government and their ramifications.

FINANCIAL ENTERPRISE RESOURCE PLANNING SUSTAINMENT AND REPORTING SYSTEMS MANAGEMENT

Provision of financial information system service and support with a focus on business process management, continuous improvement, and project management excellence.

2020 – 2023 FORECAST

Along with ongoing operational sustainment activities, projects are scheduled and in progress for reviews / upgrades to Questica Budget, Crystal Reports and/or Insight Reporting (Hubble), Bellamy and other applications or interfaces in the enterprise resource planning (ERP) ecosystem. Key members of the Corporate Advisory Services financial ERP sustainment team are dedicated to the Business Transformation (SCBT) project until 2020, where they will be instrumental in helping the corporation transform the finance function in the areas of people, process and technology. The branch will help to deliver a new finance target-operating model and replace the corporate ERP(s). As part of the SCBT project, we will also help define the future corporate financial ERP sustainment and governance model. This 2019/2020 project work ensures the corporate finance function realizes key business benefits, sees continuous improvement, and maximizes the business-led, partner-enabled approach to managing this critical corporate asset for the next 15-20 years.

BUSINESS PROCESS MANAGEMENT

Business process management (BPM) for the corporation will ensure end-to-end enterprise business processes to support achievement of strategic outcomes. Corporate Advisory Services manages the Blueworks Live corporate process tool and repository for the Strategic and Financial Management division. BPM focuses on improving corporate performance by managing business processes and optimizing efficiency and consistency with a lens of continuous improvement.

Engagements include documenting current process states, capturing pain points and quick win opportunities and defining improved future states, and then planning how to bridge the gap between them.

2020 – 2023 FORECAST

The BPM environment and corporate Blueworks repository will see dramatic improvements in all content areas, including reviews of existing current state process maps leading to the completion of future state process maps for the entire finance function. BPM governance and sustainment for the corporation will be improved during this period. The bulk of this work will be completed in 2019 and 2020. Corporate Advisory Services branch have dedicated resources directly to the Business Transformation (SCBT) project to help complete this work and set up a BPM model that will enable continuous process improvement throughout 2021 and 2022.

ORGANIZATIONAL PROJECT MANAGEMENT

Organizational project management (OPM) is how organizations execute strategy and achieve objectives through investments in projects. OPM is the framework of processes, tools and technology, and people, that organizations use to prioritize, plan, manage, and execute their portfolio of project investments to deliver strategic value.

Through the maintenance and continuous improvement of the OPM framework, this program plays a key role in enabling the organization to deliver value to community from its project investments, by facilitating the prioritization and selection of proposed project investments and enabling consistent and repeatable project delivery.

2020 – 2023 FORECAST

During 2019 and 2020, our corporate project management office (PMO) will work with our Project Portfolio Management (PPM) implementation partner to complete the design, configuration, implementation and training of our new corporate PPM solution. This PPM solution will be implemented for Corporate Planning, Executive Team and our initial pilot group of department partners (FAC, ITS, TPE, Fleet, Transit). This will enable and enhance the efficiency and effectiveness of operationalized MYPE processes used to allocate, coordinate and report on approved initiatives that support the strategic direction of the County. An example deliverable will be an executive dashboard that enables strategic, evidence-based discussions and decisions pertaining to resource utilization, initiative implementation and other key indicators. This work will set the foundation for corporate portfolio and project management practice, processes



and toolsets that will lead to continuous improvement and ongoing maturity in those capabilities in 2020 through 2022.

Our corporate project management office (PMO) will work to implement Project Portfolio Management (PPM) methodologies and solutions, as one component of an OPM framework. Initial focus will be on portfolio selection capabilities, wherein a solution will be deployed for the creation, evaluation, and prioritization of project business cases for potential inclusion in the organization's project portfolio. This initial solution will also include a preliminary approach to project status reporting to enable reporting and management of the project portfolio.

Following this initial PPM focus on portfolio selection capabilities, plans will be made to work with pilot group of key departmental partners to extend the solution into project management capabilities. This proposed project will be mutually beneficial, providing the departments with critical project management capabilities, while at the same time improving the organization management of its project portfolio by adding capabilities such as real-time reporting and resource capacity planning.

DEPARTMENT ANNUAL CAPITAL IMPROVEMENTS

DEPARTMENT SUPPORT ROLES (ANNUAL CAPITAL IMPROVEMENTS)

This table illustrates the initiatives that this department will be expected to support during the 2020 – 2023 Business Plan timeline. Lead departments are responsible for providing clear plans to support departments. These plans are to advise support departments on particulars of the support required and timing.

INIT/AUTO #	Annual capital improvement	Description	Department lead	Timeframe
AUTO 1309 1310 1311 1312 1313	Annual Information Technology Corporate Infrastructure Replacement Program - Municipal	To support computer and technology infrastructure components remain current and able to deliver on services and reduce risk of service interruptions.	Information Technology Services	Ongoing
AUTO 1284 1285 1286 1287 1288	Annual Facility Capital Lifecycle Program	To maintain safe, functioning and operating County facilities.	Facility Services	Ongoing

DEPARTMENT IMPROVEMENT INITIATIVES

ENTERPRISE STRATEGIC PORTFOLIOS IMPLEMENTATION (INIT 90)

This project is looking at how we can group our diverse programs and services into portfolios based on related strategic outcomes. The organization will establish enterprise strategic portfolios to ensure corporate investment decisions are evidence-based and driven by the collective input and best recommendations from departments.

This approach will allow for a more integrated, strategic management approach; including improved planning, prioritization and execution.

Linkage to corporate business plan organizational excellence goal and result(s):

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Supports insight-driven/evidence-based decision-making
- Engages stakeholders in decision-making
- Collaborates with departments

Department role:

Lead: Corporate Planning

Support: All departments

Timeframe:

Start time: Q2 2018

End time: Q4 2022

PERFORMANCE MEASUREMENT MATURITY IMPROVEMENTS AND SERVICE LEVEL REVIEW (INIT 89)

This initiative has been renamed to Service Definition Initiative. The organization will develop a comprehensive set of output (efficiency) and result (effectiveness) measures across all County programs and services to support ongoing program reviews and continuous improvement.

In addition, the initiative will include conducting a service level inventory by program and then evaluating our offerings with comparable service levels in other municipalities.

The service level inventory will enable program managers to identify where service levels need to increase or decrease; improve program service definitions and expectations; and identify how service levels can be optimized to better drive results.

Linkage to corporate business plan organizational excellence goal and result(s):

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Supports long-term financial sustainability
- Supports insight-driven/evidence-based decision-making
- Supports continuous improvement

Department role:

Lead: Corporate Planning

Support: All departments

Timeframe:

Start time: Q1 2019

End time: Q4 2022

PROGRAM BASED BUDGETING AND REPORTING FRAMEWORK (INIT 32)

To budget and report actuals based on program delivery for the entire organization.

Linkage to corporate business plan organizational excellence goal and result(s):

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Supports long-term financial sustainability
- Supports continuous improvement
- Communicates to stakeholders about County programs and services

Department role:

Lead: Corporate Planning

Support: All departments

Timeframe:

Start time: Q3 2021

End time: Q4 2024

STRATHCONA COUNTY BUSINESS TRANSFORMATION (SCBT) PROJECT (AUTO 1003)

To transform and align people, process and technology in four of the County's core business functions of finance, human resources, procurement and contract management. Included in process and technology are utility billing and property tax. Included in technology is corporate asset management.

SCBT project is as much about process improvement as it is about an Enterprise Resource Planning (ERP) software replacement. As such, Corporate Planning's continuing efforts to improve processes for the organization will serve as valuable inputs. In particular the organizational financial function is one of the key processes being considered. There are strong linkages between the Financial Planning (FP) branch (budgeting and the Long Term Financial Sustainability Framework – LTFSF) and Corporate Finance. The FP branch will be asked for their perspective on potential changes in the financial function and subsequent impacts on budgeting and the LTFSF.

Linkage to corporate business plan organizational excellence goal and result(s):

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Supports insight-driven/evidence based decision making
- Supports long term financial sustainability
- Supports continuous improvement

Department role:

Lead: SCBT project team

Support: All departments, and particularly Assessment and Tax, Corporate Finance, Information Technology Services, Procurement Services branch and Utilities

Timeframe:

Start time: Q3 2017

End time: Q1 2021

DEPARTMENT SUPPORT ROLES (IMPROVEMENT INITIATIVES)

This table illustrates the initiatives that this department will be expected to support during the 2020 – 2023 Business Plan timeline. Lead departments are responsible for providing clear plans to support departments. These plans are to advise support departments on particulars of the support required and timing.

INIT/AUTO #	Annual capital initiative	Description	Department lead	Timeframe
INIT 30	Digital Workplace Program	To establish a single, integrated, modern electronic content and collaboration technology platform that will replace several isolated software applications that exist today.	Information Technology Services	Q1 2019 – Q4 2021
INIT 66	New Occupational Health and Safety (OHS) Legislation Implementation	To be fully compliant with the new OHS legislation coming into effect June 1, 2018.	Human Resources	Q1 2019 – Q1 2023
INIT 86	Corporate Inclusion and Diversity Training	To develop staff skills and knowledge to help create and maintain an inclusive work environment and promote inclusion within the community through citizen interactions	Human Resources and Intergovernmental Affairs	Q1 2019 – Q4 2022
AUTO 1823	OHS / Disability Management Technology Project	To create a digital workflow system to address information on the County's OHS and DM areas.	Human Resources	Q2 2019 – Q1 2021
INIT 63	Succession Planning Strategy	To develop a succession planning strategy.	Human Resources	Q3 2019 – Q4 2022
INIT 14	Enterprise Risk Management Program	To develop an enterprise risk management program.	Corporate Finance	Q1 2020 – Q4 2022
INIT 8	Business Expense Policy Review and Update	To review and update the Employee Business Expense Policy.	Corporate Finance	Q1 2021 – Q3 2021

INIT/ AUTO #	Annual capital initiative	Description	Department lead	Timeframe
INIT 26	Enterprise - Wide Communications Service Level Review	To conduct an enterprise - wide review of communications services.	Communications	Q1 2021 - Q4 2021
INIT 104	Municipal Emergency Management and Business Continuity Management Systems Integration	To properly interconnect and update department business continuity and municipal emergency response plans.	Emergency Services	Q1 2020 - ongoing
INIT 38	Corporate Payment Options Review	To complete a comprehensive review of the different payment options offered to customers in various Departments.	Corporate Finance	Q1 2022 - Q4 2022

APPENDIX 1: STRATHCONA COUNTY GOALS AND RESULTS

STRATEGIC GOALS (EXTERNAL COMMUNITY FACING)

Goal 1: Build strong communities to support the diverse needs of residents

- Opportunities for meaningful connections within communities
- Diverse and inclusive communities
- Appropriate access to the social service system through partnerships
Affordable basic municipal services
- Programming meets the changing needs of residents
- Opportunities to be healthy and active

Goal 2: Manage, invest and plan for sustainable municipal infrastructure

- Efficient and effective multi-modal transportation network
- Safe, reliable utility infrastructure
- Innovative “smart” infrastructure
- Accessible cultural, recreational and social infrastructure
- Accessible, reliable internet connectivity
- Partnerships enhance infrastructure investment opportunities

Goal 3: Cultivate economic diversification, within the petro-chemical industry and beyond, through a business-friendly environment

- Strategic partnerships promote business growth and retention
- Planning supports strategic development
- Critical physical and technology infrastructure supports business, industry, and agriculture Investment attraction and retention focus on downstream, value-added industry
- Strengths and innovation provide a competitive advantage, and support attraction and diversification

- Growth opportunities increase through regional brand and economic development strategies

Goal 4: Ensure effective stewardship of water, land, air and energy resources

- Appropriate and effective use of agricultural land
- Natural areas and resources balance value for current and future generations
- Municipal buildings deploy efficient technology where appropriate
- Growth and development balanced with recognition and protection of the biosphere (Beaver Hills)
- County uses best practice approach to waste management

Goal 5: Foster collaboration through regional, community and governmental partnerships

- Improved regional land use and resource management planning
- Regional assets leveraged for mutual benefit
- Innovation and lifelong learning opportunities occur through collaboration with educational institutions
- Community partnerships leveraged to expand the County's ability to respond to the changing needs of the community

Goal 6: Provide facilities and services that are available and accessible to residents

- Connected, accessible multi-modal transportation network, including trails
- Available, accessible and affordable recreational opportunities
- Diverse, affordable neighbourhoods, amenities and housing opportunities
- Enhanced community interaction and connectedness
- Accessible community and cultural events, entertainment, shopping and dining opportunities

Goal 7: Provide opportunities for public engagement and communication

- Community is informed about County decisions
- Community – urban and rural – satisfied with opportunities to provide input
- Community is confident in how tax dollars are managed

- Public engagement efforts and information sharing mechanisms are innovative and accessible

Goal 8: Foster an environment for safe communities

- Law enforcement, emergency and social services respond to community risk
- Proactive safety education and community involvement
- Utility infrastructure provides safe, clean water, manages wastewater treatment, and provides effective storm-water management
- Citizens feel safe to express themselves in ways that represent their values, beliefs, and lifestyles
- Transportation network, including trails, allows people and goods to move safely and efficiently

CORPORATE ORGANIZATIONAL EXCELLENCE GOAL (INTERNAL FACING)

Goal 9: Continuously improving the way we work, as one organization, in an agile and sustainable manner

- Collaborates with regional, community and government partners
- Integrates information and technology
- Supports long term financial sustainability
- Supports infrastructure management
- Supports workplace culture that builds trust and promotes employee contribution
- Supports development of employee capacity through training and development
- Supports insight-driven/evidence-based decision making
- Supports continuous improvement
- Ensures compliance with regulations, laws, procedures and policies
- Supports integrated planning
- Leverages tools (i.e. technology, equipment) to assist in service delivery
- Engages stakeholders in decision making
- Communicates to stakeholders about County programs and services
- Collaborates with departments