

Evaluation Framework for the 2023-2026 Strategic Plan

Evaluation Process

In previous years, one of Compass Kitchener’s primary challenges during the evaluation process was a lack of sufficient information to effectively assess projects. To address this, Compass Kitchener now sends standardized briefing templates to be completed by project managers for each finished project. The briefing template provided below asks staff to provide a brief summary (e.g., two- to three-sentences) of how the project has met each evaluation criterion, along with any supporting documents for additional information.

Briefing templates will be distributed to project managers in February, with submissions due by the end of the month. Compass Kitchener will commence their evaluations in March by reviewing completed project briefings. If Compass Kitchener has any outstanding questions, members will request short voluntary presentations by project staff.

Prior to finalizing their report and presenting to Council, Compass Kitchener will share the draft report card with CLT in May for review.

Evaluation Criteria

1. Responsible Project Delivery:

This criterion focuses on how well project goals, budgets and timelines are managed. It emphasizes the importance of monitoring and tracking progress to ensure projects are completed efficiently and effectively, achieving goals within financial constraints and deadlines.

- Note: Given that the 2023-2026 Strategic Plan is intended to be adaptive, responsible project delivery also recognizes that timelines may shift due to shifting priorities and needs.

2. Impact/Public Value:

This criterion assesses how the impact of the project will be tracked and evaluated, and the extent to which a project (has the potential) to create positive outcomes for the community and contributes to the goal(s) of the Strategic Plan.

3. Transparency & Communication:

This criterion focuses on the dissemination of information through staff reports and other channels. It emphasizes the importance of relevant, clear, timely, and accessible communication to the community, ensuring that project goals, progress, challenges, and outcomes/impacts are openly shared.

4. Public Engagement:

This criterion evaluates how well a project involves the community and/or relevant parties in its planning and execution.

Equity Lens



Using the definition of equity outlined in Kitchener’s Equity, Inclusion & Anti-Racism policy, Compass Kitchener will also incorporate an equity lens to underpin the evaluation of all projects.

“An equity approach creates the conditions for fair and equal access and opportunity for everyone, by addressing discriminations, exclusions and barriers experienced by distinct groups. Equity is not the same as equality, nor is it the same as inequality.”

Evaluation Rating

Compass Kitchener will evaluate each project using the following rating scale: exceeds expectations, meets expectations, and does not meet expectations.

The evaluation rating will be determined based on the extent to which all **applicable** evaluation criteria are met, recognizing that some criteria may not be applicable to each project. Each individual criterion will be assigned a rating, and based on the ratings of all applicable criteria, Compass Kitchener members will determine an overall rating through a consensus vote.

COMPASS KITCHENER STAFF EVALUATION

CREATING AN ECONOMICALLY-THRIVING CITY TOGETHER

We use our collective strengths to grow an agile and diverse local economy powered by talented entrepreneurs, workers, and artists. We work together to create opportunities for everyone and a resilient future that propels our city forward.

Accelerate Commercial Business Approvals

Accelerate Commercial Business Approvals Staff Report
<p>Project Description: Facilitate streamlined business process and approvals for brick-and-mortar retail business across the City.</p>
<p>Responsible Project Delivery: This criterion focuses on how well project goals, budgets and timelines are managed. It emphasizes the importance of monitoring and tracking progress to ensure projects are completed efficiently and effectively, achieving goals within financial constraints and deadlines.</p>
<p>Please describe how your project meets this criterion and provide any additional supporting material. If this criterion is not applicable, please explain why:</p> <ul style="list-style-type: none"> • The project was guided by a Terms of Reference document that defines its goals, scope, methodology, stakeholders, roles and responsibilities, communications and milestone timelines. • Since external consultants were not engaged during the Lean review, a budget was not required, as all work was completed with a full-time, dedicated internal staff resource. The project was completed within the planned timeline (September 2023-March 2024). • To ensure efficiency and effectiveness in meeting project deadlines and objectives, risk and mitigation strategies were identified early in the process. • Accountability was maintained through monthly check-ins with project sponsors, while progress reports were submitted to council throughout the course of the review as part of the city’s current strategic plan reporting process. • Additionally, to support the implementation of the 55 action items identified in the Lean review, project leads were assigned to oversee each improvement project, stakeholder engagement needs were identified, and a timeline was established for each improvement project. • After the Lean review was completed and an implementation plan established (i.e., after the strategic plan project was completed), a project manager was hired, through the creation of an 18-month internal secondment opportunity, to oversee and execute the

necessary tasks, ensuring responsible project management oversight and coordination of the continuous process improvement projects.

Impact/Public Value: This criterion assesses how the impact of the project will be tracked and evaluated, and the extent to which a project (has the potential) to create positive outcomes for the community and contributes to the goal(s) of the Strategic Plan.

Please describe how your project meets this criterion and provide any additional supporting material. If this criterion is not applicable, please explain why:

- The objective of this project is to streamline permitting, approvals, and licensing processes for new business owners, relocating businesses, or owners undertaking major renovations so that they can open their doors quicker; ensure we are delivering first-rate customer service; and ensure that Kitchener remains attractive to new businesses and entrepreneurs. The following are a few examples of actions that would positively impact businesses:
 - Develop a visual ‘roadmap’ document/guidebook designed to provide clarity around various approvals and considerations when opening a new business;
 - Facilitating ‘pre-application’ meetings with relevant staff and business owners to identify all approvals required;
 - Digitize Sign Permit reviews rather than paper printing and wet signatures.
- The Lean review resulted in an implementation tracking sheet (documented in Excel) with 55 action items. Project leads are assessing the impacts of each of these items individually using various methods to measure success such as, satisfaction surveys with new business owners, data comparison (pre- and post-improvement), reduced processing time, and reduced fees.
- As a part of the completed Lean review, ‘Prioritization Workshop’ was conducted using a ‘PICK’ chart to determine the high/low impact and high/low effort of various action items. The objective of each action item was created to streamline processes, deliver first-rate customer service, and attract new businesses in the city. Within the final 55 action items, 36 out of 55 (65%) were identified as ‘quick wins’ - low effort, high impact. These will be used to collectively determine the impact of these changes on the community and their contribution to the goals of the Strategic plan.

Transparency and Communication: This criterion focuses on the dissemination of information through staff reports and other channels. It emphasizes the importance of relevant, clear, timely, and accessible communication to the community, ensuring that project goals, progress, challenges, and outcomes/impacts are openly shared.

Please describe how your project meets this criterion and provide any additional supporting material. If this criterion is not applicable, please explain why:

- Council report was made publicly available online at the end of the project and progress on this strategic plan item was reported to council as part of

<p>the city’s strategic plan update process (i.e., 3 times per year) ensuring transparency.</p> <ul style="list-style-type: none"> • Staff closed the loop individually with business owners by sending a project closure email update and providing a link to the council report.
<p>Public Engagement: This criterion evaluates how well a project involves the community and/or relevant parties in its planning and execution.</p>
<p>Please describe how your project meets this criterion and provide any additional supporting material. If this criterion is not applicable, please explain why:</p> <ul style="list-style-type: none"> • The project actively engaged internal staff, the Waterloo Region Small Business Centre, and business owners that recently navigated our approvals processes. • Internal stakeholders were involved through 24-hours of intensive workshops and interviews, and external stakeholders were involved in over 12 hours of in depth, one-on-one interviews and surveys, providing valuable input throughout the process. • As follow-up to the interviews at the outset of the project, two email updates were shared to keep external participants informed about project developments (and requesting additional feedback) and how their feedback influenced decisions.
<p>Overall Evaluation (select one):</p>
<p>Meets Expectations/Exceeds Expectations/Does Not Meet Expectations</p>
<p>Additional Notes (if applicable)</p>
<p>Update on Implementation Efforts:</p> <ul style="list-style-type: none"> • As of now, 31 of 55 action items have been completed, 8 action items are in progress, and the rest are dependent/not started. • In February 2025, business owners and staff were engaged in a drop-in, all-day focus group session to get feedback on new booklets/guideline documents to support them in navigate the process for opening their businesses in an efficient way. • The Project Manager continues to meet monthly with each project lead that oversees the remaining action items. • The Project Manager meets quarterly with project sponsors and leads to discuss successes, challenges and next steps for supporting businesses.