City of Kelowna: Strategic Clarity in a Growing City

A StrategyBlocks Success Story

City of **Kelowna**

> *For a growing city like ours, clarity is everything. StrategyBlocks helps us see the big picture, track progress in real time, and make confident decisions that align with our long-term vision."*

— **Mike McGreer** *Department Manager for Corporate Strategy and Performance, City of Kelowna*

The City

The City of Kelowna is located on the west coast of Canada in the province of British Columbia. It is home to 170,000 residents and is one of the fastest-growing communities in the region, with an increasingly younger demographic. A critical hub for economic, social and cultural development, Kelowna employs approximately 1,300 staff and operates with an annual budget of nearly $900 million.

City management oversees a complex array of services and priorities, operating under broad council priorities that are established every four years. These include a focus on critical areas such as safety, transportation, social development, housing affordability and homelessness, economic development, environment and agriculture.

Quick glance
- 1,300 staff members serving 170,000 residents
- $900 million annual budget
- Operates approximately 20 different municipal services including waste management, airport operations, recreation, and social services
- Fast-growing community with evolving demographics
- Manages dozens of strategic and departmental plans across the organization

The Problem

As a rapidly growing municipality committed to good governance, transparency and accountability, City managers faced significant challenges in making their strategic plans visible and actively managing them. Kelowna's growth brought new opportunities, but also complexity.

For years, the City's strategic and departmental plans were stored across disparate shared folders and documents, making it difficult to track progress or ensure everyone was working from the most current version. Important matters, but not necessarily urgent ones, would

fade from visibility, and accessing reliable information about project status or strategic alignment was labor-intensive. Internal collaboration across finance, HR, IT and other departments lacked a centralized, active management layer. For an organization serving as an internal consultant to various city departments, this proved problematic.

> *Seeing progress was challenging. If someone wanted to see a departmental or strategic plan, they'd have to search through shared folders and multiple versions, which was a labor-intensive process," said Mike McGreer, Department Manager for Corporate Strategy and Performance. "As people transitioned in and out, it was especially hard to quickly see what the plan was, where we were on key items, and to practice active management. For a city of our size and complexity, it wasn't a sustainable model."*

What's more, the City faced a strategic maturity challenge familiar to many local governments: when immediate issues arise that require significant resources and attention – such as wildfires – organizations risk losing sight of their long-term goals. Kelowna wanted a solution that would keep its strategic plan front and center while still allowing for flexibility to address urgent issues as they came up.

Kelowna initially considered building an in-house solution, but as part of their wider IT strategy, they were moving away from custom development and toward more off-the-shelf solutions. The simplest alternative – a shared folder system – would have severely limited their ability to interact with and actively manage strategic information.

Kelowna conducted a formal RFP process to find the right solution. After initially selecting another vendor, they persevered with that tool for about a year before recognizing it wasn't meeting their needs. At that point, they were introduced to StrategyBlocks through a partner in Canada who had used the platform successfully.

> *We chose StrategyBlocks because of the caliber of their response and to their very thoughtful approach to meeting our needs," said McGreer. "The StrategyBlocks team shared features of the platform, but also spoke to the shift in behavior we needed and the outcomes we were trying to drive. We recognized that the solution offered practicality for managing strategy but also addressed the broader behavioral and management practices that were key to moving our strategic vision forward."*

The Solution

StrategyBlocks delivers a highly visual, easy-to-understand system that helps organizations connect their vision to delivery. It is engineered to elevate strategic execution management by providing an all-encompassing view of an organization's strategic performance. The platform's core strength lies in linking work management data (delivery progress) with numeric results (outcome metrics/KPIs), thereby merging quantitative and qualitative performance data.

The platform's flexible architecture allows for customized dashboards and views tailored to different teams and use cases, while its collaborative features ensure that strategic information is accessible, current and actionable across the entire organization.

The City of Kelowna took a thoughtful, phased approach to incorporating StrategyBlocks across departments, positioning it within a broader context of organizational changes tied to good governance, transparency and data-driven decision making. These phases included:

Phase 1: Introduction and Migration

The first wave focused on introducing the tool and communicating the "why" behind the change. The team worked with departments to migrate whatever plans they had into StrategyBlocks, establishing the foundation for consistent planning practices.

Phase 2: Consistent Management Practices & Quality Standards

The second phase focused on the inputs into the platform and developing a clear outline of what good strategy looks like. The goal was to increase the quality and consistency of strategic planning across departments.

Phase 3: Active Management and Measurement

Three years into working with StrategyBlocks, the City's current phase emphasizes active management, including reviewing at a regular cadence, actively measuring plan execution, adjusting as needed and establishing performance metrics as standard practice with a common tool.

The City's primary use case is managing departmental strategic plans that look out 3-5 years, taking a balanced scorecard approach that examines how departments are improving service delivery, ensuring they have the right people in place and managing the financial aspects of their operations.

> *StrategyBlocks has become a foundational building block. We're able to use the metadata to create really good reporting for our council activities. Questions like 'What did you accomplish last year and what do you want to accomplish next year?' can be answered quickly," said McGreer. "The StrategyBlocks team consistently listened to feedback for features and different improvements which helped us with adoption."*

The Results

With increasing adoption of StrategyBlocks across the organization, success stories are emerging at multiple levels. The implementation has fundamentally changed how the City approaches strategic planning and execution.

> *A couple of moments stand out," said McGreer. "In monthly management meetings, you can see StrategyBlocks on the screen with key projects displayed. We're having proactive conversations such as how is this project tracking, do we need to shift resources, is something holding us up, can we make decisions now? It's active management and decision making in real time."*

One particularly compelling validation came from an unexpected source. "Our airport team is very focused on value because they run a self-funded, complex, highly regulated business," McGreer explained. "StrategyBlocks gave them increased visibility and made it easy to share progress with the broader team. That was incredibly validating for them as they knew they had a highly demanding use case."

At the individual level, team members can now see how their work fits into broader outcomes and the city's overall vision. "In looking at the StrategyBlocks model and the way we've configured it, it shows the logic chain of what we're doing," said McGreer. "It allows us to be crisp on the outcomes we want and how best to measure those outcomes to ensure optimal impact. When employees catch that vision, it helps everyone to see how and where their own activities fit into our broader goals."

The visual, interactive nature of the platform has proven transformative. "The ability to interact and click into a project or click into a result offers an easy-to-grasp, tangible nature of the work," McGreer noted. "One thing we saw in our first wave of implementation was that we put teams' plans into the system and they all looked quite different. That wasn't necessarily a bad thing, but it did highlight how we plan quite differently and use different concepts and words. StrategyBlocks allows us to bring more consistency to our efforts, which has been a benefit to everyone involved."

The City has demonstrated remarkable strategic maturity, maintaining focus on long-term objectives even during crisis situations. According to Craig Catley, Managing Director at StrategyBlocks, "As many cities do, Kelowna has faced significant challenges. Just a couple of years ago, for example, they dealt with a major fire that forced evacuations across the city. In those moments, it's natural to take your eye off the long-term ball. But despite those headwinds, they've maintained their strategic focus with a maturity that allows them to continue to work toward their goals for the future."

The City has also influenced product development at StrategyBlocks. "They've come up with some really cool use cases," said Catley. "Recently we pushed out functionality to report on portfolio delivery status across the city, which is the ability to see how many projects are tracking ahead of schedule, falling behind, haven't been started, or are in a warning state. You can roll back a month or more to see trends over time. This is exactly the kind of metric Kelowna wanted to track."

What's Ahead?

The City of Kelowna continues to expand its use of StrategyBlocks and deepen its strategic management practices, including exploring how to leverage StrategyBlocks to manage the full complexity of its operations.

> *A city is quite a complex organization. We run about 20 different services from waste management to the airport to recreation to social services," McGreer explained. "That means we may end up with dozens or even hundreds of plans. We're looking at how we might use StrategyBlocks to keep a more accurate picture of all the good thinking that has been done and create a plan for managing this backlog of activities and ideas."*

As a public entity, the City is also interested in leveraging the platform to improve public transparency and reporting. "We have a commitment to report publicly and be transparent, and that takes time," said McGreer. "There's an ability to streamline these processes more in the future."

Looking ahead, StrategyBlocks is working with the City on next-generation capabilities. "We're going to start seeing them measure the hard outcomes of their strategic delivery," said Catley. "They've been successful at measuring delivery. Now it's about linking the work they do with the outcome, and considering the potential for risk, which is what StrategyBlocks is fundamentally about."

StrategyBlocks' AI capabilities are fundamentally interwoven into the platform rather than added as standalone features. For Kelowna, this means AI can analyze their existing strategic plans to suggest relevant activities and break down low level tasks into actionable milestones – an enhancement the City requested specifically. What's more, StrategyBlocks is able to recommend outcome metrics aligned with Kelowna's measurement framework, all while requiring human approval before any AI-generated content becomes part of their live strategic plan.

> *"These AI tools have the potential to accelerate our planning cycles while maintaining the quality and rigor we've built," said McGreer. "It's about enhancing what we're already doing well, not replacing the strategic thinking that got us here."*

The City is well-positioned to continue evolving its strategic management practices while maintaining the visibility, accountability and active management that have become hallmarks of their approach to serving one of Canada's fastest-growing communities.
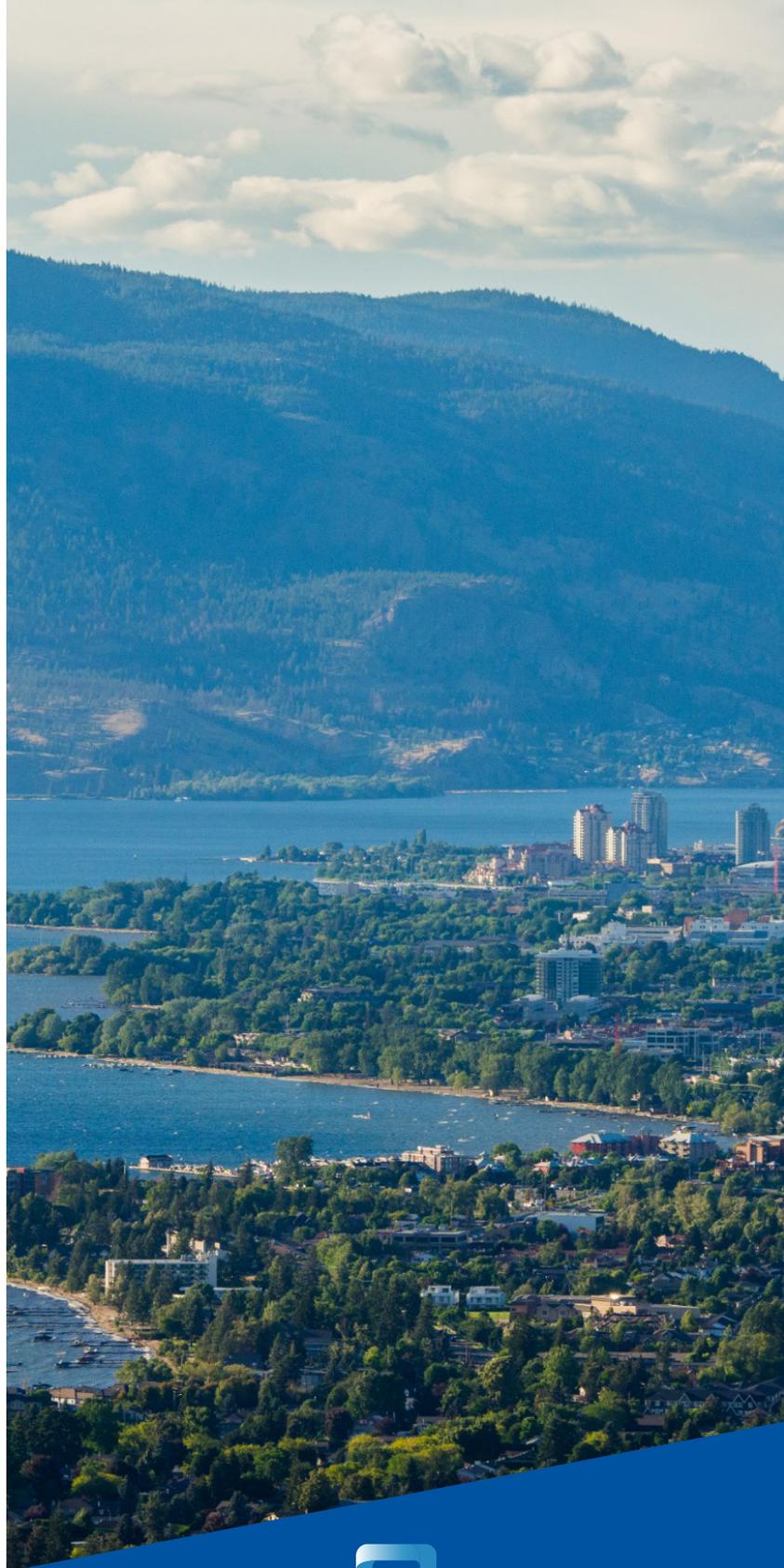
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Have a sales representative contact you within the next business day:

+44 7787 536225 (UK)   +64 4 499 4280 (Asia Pacific)

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