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Item No. 12.2
Executive Standing Committee
May 27, 2019

TO: Chair and Members of Executive Standing Committee

-Original Signed-

SUBMITTED BY:

Kelly Denty, A/Chief Administrative Officer

DATE: May 16, 2019

SUBJECT: Strategic Multi-Year Business Planning and Budget Process

ORIGIN

On December 6, 2016 Regional Council adopted a Strategic Planning Framework, established priority outcomes for their term and directed staff to develop multi-year plans to advance those outcomes. Consistent with past practice, the administration is providing an update and seeking Council's direction on the approach for development of the 2020/21 multi-year plan.

LEGISLATIVE AUTHORITY

Council and Chief Administrative Officer relationship 34 (1) The Chief Administrative Officer is the head of the administrative branch of the government of the Municipality and is responsible to the Council for the proper administration of the affairs of the Municipality in accordance with the by-laws of the Municipality and the policies adopted by the Council.

Executive Standing Committee

The Executive Standing Committee shall:

- (a) have strategic oversight of progress on HRM's Corporate Performance Objectives and priority areas of the Council; and
- (b) perform other Administrative matters as may be determined and directed by the Council.

RECOMMENDATION

It is recommended that the Executive Standing Committee recommend that Regional Council

1. Approve replacement of the annual Outcome Planning Presentations with a consolidated Annual Strategic Plan Report and direct staff to prepare the 2020/21 business plan based on the report;
2. Approve a citizen engagement plan including the use of pop-up's to inform the 2020/21 business planning and budget process as outlined in this report; and,
3. Approve the 2020/21 Committee of the Whole Business Planning and Budget Meeting Schedule (Attachment F).

BACKGROUND

1. Multi-Year Strategic Outcome Planning

Halifax Regional Council adopted the Council Priority Area approach, (formerly known as Council Focus Areas), in the 2006/07 budget year. This process engages a newly elected Council in strategic priority setting for its 4-year mandate through the establishment of Council Priority Outcomes. The priority outcomes are strategic aspirations for the community that focus on medium to long term desired outcomes. These are not operational or tactical objectives; instead they describe a desired end-state sought for the overall betterment of the entire community. The tactics and resources used to advance these outcomes are developed as part of the annual budget and business planning process and are provided for approval to Regional Council's Committee of the Whole as Priority Outcome Presentations, usually delivered in the November timeframe. These presentations have provided the opportunity for Council to provide input early in the business planning and budget process; and Council's approval formally kicks off the development of detailed business plans and budgets by the administration.

In 2016, Regional Council adopted a Strategic Planning Framework (Attachment A) and approved the 2017-2021 Council Priority Outcomes (Attachment B). Regional Council also adopted a multi-year approach to budget and business planning which commenced for the 2017/18 and 2018/19 fiscal period. This approach provides for the presentation of a 2-year planning view; however, budget approval is confined to the first year with the second year approved in principle.

Over this most recent budget cycle, outcomes were developed for the Administrative Priority Areas, which are key pillars in the Municipality's Strategic Planning Framework (Attachment A/C). The definition of these outcomes enables the organization to advance Regional Council's strategic mandate as well as the administrative priorities of the organization.

2. Citizen Engagement in the Business Planning and Budget Process

A) Citizen Survey

Since 1997, the Citizen Survey has been the Municipality's primary public engagement tool to gather information to inform decision-making and investments in the community. The survey is designed to gauge the satisfaction of citizens with the services provided by their municipal government and help to identify the mix of programs and services to best meet their expectations. The survey is offered in two formats: invitation-based survey (Invitation), and an online-only (Open) version that is open to all residents. The Invitation survey is a formal, invitation-based scientifically-valid survey giving residents the opportunity to respond online, by paper copy, or by telephone. The Open survey is the same survey offered openly to all residents; however, the results of the Open survey cannot be considered scientifically valid due to a lack of control over the sample and the possibility of residents completing multiple copies of the survey.

Prior to 2010, the Citizen Survey was administered on an adhoc basis in a non-standardized format which diminished the ability to trend the information. Therefore, in 2011 the Executive Standing Committee discussed the concept of a long-term survey cycle (in the table below) to be administered every 2 years

with standardized questions that could be used by both Regional Council and the administration to better understand changes in citizen priorities and level of satisfaction with services.

Long-term Survey Cycle

Year	Survey Type	Survey Release
2010	Full Priority and Satisfaction	April 2011
2012	Community Priority/Expectations	April 2013
2014	Community Priority/Service Satisfaction	April 2015
2018	Community Priority/Service Satisfaction	October 2018
2020	Community Priority	Aug-Sept 2020 (proposed)

The Citizen Survey does collect some demographic information but has typically compiled data at the Regional level due to the inability to control for enough respondents at the geographic community (by postal code) or ethnic community to ensure that their results meet an acceptable margin of error (confidence that the results are representative of their community as a whole).

B) Budget Allocator

The “Shape Your City” budget allocator tool was developed in 2013 to provide an interface for citizens to allocate percentages of the budget to a host of services provided by the Municipality. The intent of this tool is to engage citizens in providing input into the budgetary process by informing Regional Council and staff of their preferences for which services should receive a budget increase and thereby an increase in the level of service; what services should be maintained at current level of funding, and what services might receive budget cuts and therefore a decrease in the level of service.

The budget allocator has been promoted over the past six years through a variety of mediums: social media, mail outs, online, and print media advertising. Unfortunately, it has not yielded the levels of citizen engagement which would be considered representative of the entire community. Like the Open Citizen Survey, the budget allocator cannot be considered scientifically valid.

Budget Allocator Engagement

Budget Year	Number of Respondents
2018	695
2017	522
2016	130
2015	582
2014	434
2013	367

C) Open Forums

Since amalgamation in 1996, the Municipality has invited the public to provide input into the budget process at Community Council which, beginning in 2006, was switched to Regional Council’s Committee of the Whole meetings. Residents are invited to attend business plan presentations and contribute to the process by addressing the COW or filling out a comment card.

This process, like the allocator, receives advertising but attendance at these meetings has been extremely low. Demographic information related to participants is not captured.

3. Annual Committee of the Whole Budget Schedule

The budget schedule establishes the sequence of reports and presentations that will be heard by the COW in the fulfillment of budgetary obligations.

The budget season traditionally runs from September to April when the final budget is ratified by Regional Council; however this schedule has varied from time to time.

DISCUSSION

1. Multi-Year Strategic Outcome Planning Report

Several concerns with the current Regional Council and Administrative Outcome planning process have been identified by Regional Council and staff:

- The timeline is too compressed. Normally kicked off in September, the completion of the work and resulting presentations are delivered to the COW in November leaving little room to integrate meaningful public engagement and provide staff reflection time when building business plans;
- The Regional Council and Administrative Priority Outcome presentations and business plan presentations are often a duplication of work with significant overlap in content between the two presentations. Regional Council may choose to move an item to the “parking lot” during the Priority Outcome presentations, but Council is only able to impact the budgetary process when the business plan and budget presentations are delivered;
- The current practices for Council and Administrative Priority Planning do not provide a consolidated and comprehensive view of Regional Council’s Strategic Plan for public consumption, nor does it provide continuity of outcome progress over the long-term thereby limiting transparency.

To address these concerns, staff is proposing replacing the Regional Council and Administrative Priority Outcome presentations with a consolidated Annual Strategic Plan Report. This report would contain the information that COW is accustomed to seeing during the outcome presentations but with added context and traceability back to progress against the defined outcomes.

The cross-functional Regional Council and Administrative Priority Outcome staff teams will continue to meet throughout the year and would guide development of the content for the report which would be provided to the COW in October.

As with the presentation format, the COW would have the opportunity to ask questions and to provide direction to guide development of the budget and business plans.

The benefits of this approach include:

- Annual production of a consistent, integrated Annual Strategic Plan Report that provides:
 - additional transparency to Regional Council, the public, administration, and staff;
 - a consolidated view that supports enhanced decision-making;
 - continuity of information over the duration of Regional Council’s mandate.
- Development of a citizen dashboard that will reflect municipal performance measures to support the strategic plan
- Refocussing efforts of Council Priority and Administrative Priority Outcome staff teams allowing time for enhanced research, better informed recommendations, and quarterly monitoring of progress
- Efficient use of time for both Regional Council and administration; allowing more time for reflection and changes before business plans are developed.

The Annual Strategic Plan Report is proposed to include:

- Introduction of the Halifax Regional Municipality
- Message from Mayor
- Regional Councillor Information (district and photo)
- Message from CAO
- Vision, Mission, Values
- Organizational Chart
- Description of Strategic Plan Framework
- Citizen Engagement Results
- Highlights/achievements from past budget cycle
- Council and Administrative Priority Outcome Area Updates
 - Descriptions of outcome area and related outcomes
 - Outcome-supporting initiatives in progress for 19/20 and planned for 20/21
 - KPI's results from 2017/18 and 2018/19; with 2019 Q1 results where available

This recommended planning approach is consistent with that of many jurisdictions who desire more open and transparent communications of their Council's Strategic Plan (Attachment D). There is also a trend to create long-range (20 to 25 year) Community Visions; mid-range (4-5 year) plans with each new Council; and short-term plans (1-2-year) – all with associated citizen dashboard communicating performance results.

2. Citizen Engagement in the Business Planning and Budget Process

Over the past budget cycle, Regional Council expressed a desire to increase the level of engagement in the business planning and budget process and attain more specific information about communities that they represent from a geographic and ethno-cultural perspective. Apart from the Invitation-based Citizen Survey which provides some demographic information, the Municipality's business planning and budget process does not accommodate for the collection of specific community feedback.

To understand how other jurisdictions are engaging citizens in the budgetary process, the administration undertook a jurisdictional scan (Attachment D) and found that, of the municipalities surveyed, most were using Citizen Survey and Budget Allocator tools to inform the process with many cities selecting community pop-ups or public hearings to further engage citizens.

Given the desire of Regional Council to increase the amount of community-based feedback in the business planning and budget process, the administration is recommending implementation of a pilot program of 6-8 community pop-ups to inform the 2020/21 planning cycle. Best effort will be made to deploy these pop-ups in communities that are representative of the community at large (urban, suburban, rural) as well as diverse communities.

A variety of mediums will be used to attract residents to the pop-up event where a kiosk with an online survey as well as paper-based survey will be provided. The survey will request additional demographic/geographic questions as permitted under privacy law to gain an understanding what strategic priorities and services are most meaningful to the community being polled.

The citizen engagement pilot program will take place over the month of September 2019 with the results and recommendation for a longer-term strategy for citizen engagement delivered in October 2019.

3. Annual Committee of the Whole Budget Schedule

The proposed 2020/21 COW Business Planning and Budget Schedule has been changed to accommodate both the Annual Strategic Plan Report and Citizen Engagement Report; best efforts have been made to optimize the overall schedule. The proposed schedule is contained in Attachment F. This schedule may change subject to further Council direction following the capital budget process in July and August.

FINANCIAL IMPLICATIONS

There will be budget implications resulting from the approval of these changes:

Budget estimates as follows:

Design / production of Strategic Plan Report, development of updated Business Planning documentation set, and design for Citizen Dashboard	\$75,000
Advertising materials for Citizen Engagement	<u>\$50,000</u>
Total	\$125,000

Funding has been included in M310-Other Fiscal Services, account-6999 Other Goods/Services.

It should be noted that the cost of the design/production of the annual Strategic Plan template may only occur every four years when the mid-range plan is cast by a new Regional Council.

The cost for advertising the pop-ups in various communities will be required every second year.

RISK CONSIDERATION

Potential risks related to these changes:

Risk	Likelihood (1-5)	Impact (L/M/H/VH)	Risk Level (L/M/H/VH)	Mitigation
The risk that the Annual Strategic Plan does not meet Council's need to inform the Strategic Planning Process	2	Low	Low	The process by which Council can inform the process remains unchanged. If there is a desire to return to prior format a presentation can be developed.
The risk that Citizen Engagement pop-ups are not well attended and provide little value to the business and budget planning process	3	Low	Low	The pop-up's will be advertised through various media and mail outs

COMMUNITY ENGAGEMENT

No community engagement was undertaken for the purpose of this report.

ENVIRONMENTAL IMPLICATIONS

There are no environmental implications resulting from this report.

ALTERNATIVES

The Executive Standing Committee may recommend that Regional Council:

- 1. Continue with existing practices and conduct enhanced citizen engagement** - The Council Priority and Administrative Priority Outcome Teams could continue to develop and present priority area

presentations to the Committee of the Whole. These presentations would be delivered in October, following integration of citizen engagement feedback.

2. **Continue with existing practices and conduct only citizen survey** - The Council Priority and Administrative Priority Outcome Teams could continue to develop and present priority area presentations to the Committee of the Whole. These presentations would be delivered in October but would not include citizen engagement from community pop-ups; instead the 2018 Citizen Survey would serve as a guiding document to citizen's interest and level of satisfaction. A Citizen Engagement Report and Strategic Plan Report would not be presented to Regional Council.

3. **Strategic Plan Report delivered with no increase to citizen engagement** - The Council Priority and Administrative Priority Outcome Teams would meet to develop multi-year plans for input into the Annual Strategic Plan document, but an increased level of citizen engagement would not occur. The Strategic Plan Report would be delivered in the October timeframe.

ATTACHMENTS

Attachment A – Strategic Planning Framework

Attachment B – 2017- 2021 Multi-Year Council Priority Outcomes

Attachment C – 2019-2021 Multi-Year Administrative Priority Outcomes

Attachment D – Jurisdictional Scan Public Engagement by Type

Attachment E – Jurisdictional Scan Strategic Planning Documents by Type

Attachment F– 2020/21 COW Business Planning and Budget Schedule

A copy of this report can be obtained online at halifax.ca or by contacting the Office of the Municipal Clerk at 902.490.4210.

Report Prepared by: Wendy Lines, Manager Corporate Planning 902.490.3818

-Original Signed-

Report Approved by: Jane Fraser, Director of Finance, Asset Management and ICT/CFO, 902.490.4630

Attachment A – HRM’s Plan On A Page: 2017 – 2021

HRM’s Plan on a Page: 2017-2021

The Plan on a Page articulates the values of our organization and demonstrates our key priorities.



19/20 20/21 Multi-year Council Priority Outcomes

Economic Development	
HRM is a sought after business destination that encourages entrepreneurial spirit and is responsive to the needs of the community	
Priority Short Name	Priority Outcome
Attract and Retain Talent	Halifax is a welcoming community where the world's talent can find great opportunities.
Promote and Maximize Growth	Halifax promotes a business climate that drives and sustains growth by improving competitiveness, minimizing barriers and leveraging our strengths.
Rural Economic Development	The economic viability of rural communities is included as an integral aim of regional economic growth strategies and their implementation.
Focus on the Regional Centre	Halifax has a vibrant, animated and economically healthy Regional Centre that is a cultural, business and education hub with a growing population.
Supply of Industrial, Commercial and Institutional Lands	Ensure that there are sufficient industrial, commercial and institutional lands available to provide economic opportunities.
Arts, culture and heritage	Recognize and support heritage, cultural activities, and arts to bolster the creative economy and the vitality of the region.

Governance and Engagement	
HRM's governance structures and communications approach provide maximum opportunity for public engagement in and enables appropriate stewardship of municipal affairs.	
Priority Short Name	Priority Outcome
Municipal Governance	Halifax citizens have confidence in the governance structures of the municipality.
Communications	Halifax citizens and communities participate in open and transparent communication with the municipality.
Public Engagement	Halifax citizens and communities are engaged in the development of public policy and plans.
Fiscal Responsibility	HRM manages municipal resources with integrity and considers the impact on taxpayers when making decisions.

Healthy, Liveable Communities	
HRM is a safe, liveable and sustainable community that encourages public engagement and participation in complete communities. civic life	
Priority Short Name	Priority Outcome
Public Safety	Halifax citizens and visitors are safe where they live, work, and play
Energy and Environment	Halifax builds resiliency by providing leadership in energy management, sustainability and environmental risk management both as an organization and in the community we serve.
Recreation and Leisure	Halifax citizens have access to facilities, natural assets and programs that enable a range of choices for structured and unstructured leisure, learning and recreation activities.
Community Well-Being	Halifax shall be an active partner in supporting community well-being.

19/20 20/21 Multi-year Council Priority Outcomes

Service Delivery	
HRM meets the needs of the people it serves, resulting in greater satisfaction with, and confidence in the Municipality	
Priority Short Name	Priority Outcome
Service to our Business	HRM simplifies processes and delivers service to promote and encourage a vibrant business environment
Service to our People	HRM understands the needs and perspectives of the people they serve, and provides quality service through a person focused approach.
Innovation	Halifax will foster a corporate culture that values innovation and bold ideas and supports the rapid deployment of experimental pilot projects and civic innovation project teams.

Social Development	
HRM's communities have access to social infrastructure that supports all segments of the community.	
Priority Short Name	Priority Outcome
Social Infrastructure	HRM communities, families, youth and seniors have access to social infrastructure that enables them to participate fully in their community.
Accessible Community	Halifax is a leader in building an accessible community where everyone can participate fully in life, including persons with disabilities and seniors.
Housing and neighborhoods	Halifax is a leader in fostering partnerships that provide access to a full range of quality, affordable housing options in safe and vibrant neighborhoods
Equity and Inclusion	Halifax is a diverse and inclusive community that supports everybody.

Transportation	
Integrated, multi-modal, long range plan to move people and goods in HRM in support of neighbourhoods, communities & economic growth.	
Priority Short Name	Priority Outcome
Interconnected, Sustainable and Strategic Growth	Halifax has an integrated mobility strategy that supports growth, development and the transportation of goods and people of all ages and abilities, using all modes including walking, cycling, transit, and motor vehicles, consistent with the Regional Plan.
A Well-maintained transportation network	The Halifax Transportation Network is comprised of well-maintained assets.
A Safe and Accessible Transportation Network	The Halifax Transportation Network is safe, accessible, and supportive of an enhanced multimodal user experience.
Pedestrian Safety	Drivers, cyclists and pedestrians all-share responsibility for travelling safely together. Through education, enforcement, and improved infrastructure (engineering), engagement and evaluation, pedestrians in Halifax are provided with a safe environment in which to walk.

Changes to the following approved during 19/20 Business Planning cycle.

- Transportation - Interconnected, Sustainable and Strategic Growth
- Transportation - A Safe and Accessible Transportation Network
- Healthy, Liveable Communities - Recreation and Leisure
- Healthy, Liveable Communities - Community Well-Being

Halifax Regional Municipality Administrative Priorities

Financial Stewardship We manage public funds equitably, sustainably, with integrity.	
Strategic Objectives	
Risk Management Framework	Develop a Risk Management Framework that supports decision-making
Strategic, Multi-year Business and Budget Plans	Advance strategic, multi-year business plans and budgets that are equitable and sustainable
Financial Position	Optimize HRMs' financial position

Our People HRM is a workplace that inspires our people to provide great service to the communities we serve.	
Strategic Objectives	
Engaged Workforce	Develop a skilled, engaged and diverse workforce that lives our values
Diverse and Inclusive Environment	Advance diversity and inclusion to foster innovation and support an improved understanding of the community
Healthy and Safe Workplace	Create a safety and wellness culture that results in improved health and a reduction in injuries and lost time

Service Excellence Our community receives the services it values.	
Strategic Objectives	
Performance Excellence	Advance performance excellence through process improvement and technology utilization to deliver services to our community on their terms.
Inclusive Community Engagement	Community engagement that fosters inclusion in the services HRM delivers to our community

Public Engagement – By Type

	Calgary	EDM	Gr. Sud	Halton	Regina	T. Bay	Toronto	VAN	Victoria	WAT	Windsor	WPG
Citizen Survey	X	X			X	X		X	X			X
Budget Allocator	X	X	X		X				X	X		X
Road Show		X	X									
Town Hall						X			X		X	
Pop-Ups / Open House	X		X	X	X							X
Ward Meeting											X	X
Engage Portal	X							X				
Public Hearing						X	X	X		X		

- Only 2 cities mention targeting special groups / business during budget consultations (Calgary / Vancouver). Halton does consult with business for its strategic planning.
- Response rates typically higher for citizen surveys / budget allocation

HALIFAX

Public Engagement – Planning & Budgeting

Jurisdictional Scan

Jurisdictional Scan – Overview

- Invites sent to all MBNCanada partners. Received 10 responses
 - Halton, Greater Sudbury, Regina, Thunder Bay, Waterloo, Windsor, Winnipeg all completed the survey.
 - Calgary / Toronto both provided links / documents for review / interpretation.
 - Montreal replied that they are considering public engagement. No current process.
- Conducted scans of Edmonton, Ottawa, Vancouver, Victoria.

Public Engagement - Consultation

- All cities (with exception of Montreal) conduct some form of annual consultation on their budget / business plan.
- Several indicated consultations when undertaking their strategic planning process (mostly in line with new Council / every 4 years).
- Vary by City. Some start early. Typically around budget deliberations at end of budget cycle.
- Public engagement usually a joint responsibility of Communications and Finance departments.
- Variety of channels used to communicate / inform the public about engagement opportunities, including: social media, news releases / PSA, website, email, displays at facilities.

Public Engagement – Format

- Engagement varies by city. Most engage in multiple forms of public consultation:
 - Online / Citizen surveys (7 of 12)
 - Budget Allocator tools (7 of 12)
 - Road shows (2 of 12)
 - Town Halls (3 of 12)
 - Citizen feedback portal (e.g. Shape Your City – 2 of 12)
- Length of engagement varies by type.
 - If running a survey / budget allocator – typically 4-6 weeks.
 - Road shows / Pop-ups – vary by frequency of sessions.

Strategic Planning Documents

	Calgary	Hamilton	Edmonton	York	Brampton	Toronto	Victoria	Mississauga	London	Peel
Community Vision (20-25 Yrs.)	X	X	X	X	X	X		X		X
Strategic Mid-Range Plan (4-5 Yrs.)	X	X	X	X	X	X	X	X	X	X
Business Plan	4	X	X	X	X	X		X	X	X
Progress Report	X			X		X		X	X	X
Citizen Dashboard		X	X		X					

Engagement Profile – Calgary

Timing of engagement	<p>Every 4 years as part of service plan / budget development. Phased engagements with the public:</p> <ul style="list-style-type: none"> • Phase 1 (April) – rank value dimension for public facing services • Phase 2 (May-July) – targeted survey to understand what specific groups value / personal experiences with services • October – pop up engagement sessions / Online engagement survey • November – Feedback on proposed 2019-2022 Service Plans & Budget, public hearing on budget at Council.
Method of engagement	<p>Pop up engagement sessions in each Ward in various locations. Online budget tool. Choice of participation in-person or online.</p>
Length of engagement	<p>April – November</p>
Targeted engagement	<p>Business community surveyed in May. 135 panelists representing small, medium, and large businesses</p>
Response Rate	<p>Pop-up sessions: 727 conversations Online engagement tool: 522 contributions Citizen’s View Panel: 865 responses</p>

Engagement Profile – Calgary

How Promoted	Pop-up dates were listed on www.engage.calgary.ca/your-services Marketing of the engagement directed Calgarians towards the webpage. Marketing occurred through the One Calgary E-newsletters, organic and paid social media, internal digital display units. ~ Online advertisements from October 10-23, 2018.
Variances in approach	Varied by timing in cycle. Broad, then specific engagement.
Citizen Feedback Use	Results of engagement on Service Plans and Budgets communicated to Council in May Strategic Session
How results are communicated	Calgary website – www.engage.Calgary.ca Council reports
Engagement Lead	n/a

Engagement Profile – Edmonton

Timing of engagement	<ul style="list-style-type: none"> • August – October: “My Budget” Survey • August – September: Budget Roadshow (at festivals / community events) • November – Public hearing on 2019-2022 Operating and Cap budgets
Method of engagement	<ul style="list-style-type: none"> • Budget Roadshow • Online budgeting tool (incr. / decr. Department budgets), with informational component / comments • Social media • Citizen Survey (annual)
Length of engagement	August – November
Targeted engagement	None noted
Response Rate	Budget Roadshow (19 events) – 3000+ engagements My Budget Online Survey – 4,500 visits, 1,500+ completed surveys
How Promoted	Social media Road Shows
Variances in approach	More consultative initially, then informative.
Citizen Feedback Use	Information reports / summary of results presented to Council.
How results are communicated	Budget / capital presentations, website
Engagement Lead	Unclear

Engagement Profile - Halton

Timing of engagement	<ul style="list-style-type: none">• July - Public budget process starts with Budget Directions report• November - Preliminary budget presentation• December - Committee budget review meetings and approval
Method of engagement	Meetings with special interest / advisory groups. Public open houses.
Length of engagement	Unclear.
Targeted engagement	For strategic plan, various special interest groups are consulted, including business. Nothing for the budget.
Response Rate	Not much response to budget engagement. Higher for strategic plan.
How Promoted	Newspapers, website, social media
Variances in approach	None
Citizen Feedback Use	Feedback guides strategic plan development. Presented through report to Council.
How results are communicated	Information made available on website and in Council reports
Engagement Lead	Communications & Finance

Engagement Profile - Regina

Timing of engagement	2018: September – October (proposed budget – November) 2019: April / May – budget survey, September – in-person consultation
Method of engagement	Citizen survey, followed by an online budget survey Issue-specific research as required to inform planning
Length of engagement	2 months (moving to 6 months)
Targeted engagement	None
Response Rate	~ 3,500 responses to 2018 surveys.
How Promoted	Website, social media, radio, emails
Variances in approach	Broad citizen survey / satisfaction, followed by budget-specific engagement.
Citizen Feedback Use	Summary reports distributed to Executive Leadership Team. A presentation is done to both the Executive Leadership Team and Council about the Citizen Survey and Budget Survey.
How results are communicated	News releases and online information
Engagement Lead	Communications and Public Engagement, Financial Strategy & Sustainability

Engagement Profile – Sudbury

Timing of engagement	Varies – for 2020 will occur just prior to presentation of proposed budget document, and in following weeks prior to budget deliberations.
Method of engagement	Online interactive budget tool In-person sessions (vary in format: Information session, drop-in sessions, pop-up events). City Services Fair - allow residents to learn more about services / service levels
Length of engagement	6 weeks
Targeted engagement	None specifically
Response Rate	~ 350 responses to online budget tool
How Promoted	Digital billboards at libraries and Citizen Service Centres, PSAs, information cards, social media, newspaper ads, media interviews
Variances in approach	How information is provided to Council at various stages.
Citizen Feedback Use	Citizen feedback incorporated into decision-making during final budget deliberations. Resident input included in report to Council, and in proposed budget document (depending on timing of engagement).
How results are communicated	Report to Council / Proposed budget document
Engagement Lead	Communications and Community Engagement in partnership with operating department

Engagement Profile – Thunder Bay

Timing of engagement	<ul style="list-style-type: none"> • June – Public pre-budget consultation (Town Hall) • Jan: Public pre-budget deputation meeting (after proposed budget) • End-Jan: Post-budget deputation (pre-ratification). • Community feedback during budget review
Method of engagement	Town Hall (pre-budget – June). Citizen feedback, and “Less or More” service level questionnaire. “Have Your Say” online or forms distributed at local libraries. Citizen Survey (bi-annual)
Length of engagement	Throughout process.
Targeted engagement	None specified. Business community / Chamber encouraged to attend.
Response Rate	Public pre-budget consultation: 20-40 people “Have Your Say” – 5-45 responses Citizen Survey: ~ 525
How Promoted	Social media, website, newspaper, news release
Variances in approach	Pre-budget meeting more open-ended. Once budget prepared, more information-oriented.
Citizen Feedback Use	Summary of pre-budget meeting questions and ‘less or more’ and “Have Your Say” results provided to Council / Admin.
How results are communicated	Information report to Council made public.
Engagement Lead	Finance and Corporate Communications.

Engagement Profile - Toronto

Timing of engagement	Varies if election year. Typically mid-budget process (October).
Method of engagement	Two days – four locations across city scheduled for public input Public meetings, Info sessions. Communication tools including: whiteboard animation, YouTube videos explaining service/budget issues and how to participate.
Length of engagement	Two days
Targeted engagement	Unclear. Apply an equity lens to impacts of budget.
Response Rate	Unclear.
How Promoted	Public notice of all budget meetings in 15 newspapers / 10 languages Social media, City website.
Variances in approach	
Citizen Feedback Use	
How results are communicated	All decisions posted by City Clerk on budget website. Councillors may hold town hall meetings to educate public on budget. Financial Planning Division staff provides tool kits for Councillors / attend to make presentations / support question periods.
Engagement Lead	

Engagement Profile – Vancouver

Timing of engagement	<ul style="list-style-type: none"> • July – Opinion Poll (results presented in October) • Oct/Nov – Talk Vancouver Online Survey • December – Info session pre-budget presentation
Method of engagement	<p>Citizen Survey Talk Vancouver – online feedback forum similar to Shape Your City Public meetings / Community outreach (education displays with comment cards)</p>
Length of engagement	July – December
Targeted engagement	Yes, businesses and residents.
Response Rate	<p>Telephone survey – 800 responses (600 residents, 200 business) Talk Vancouver online survey – 2,532 residents, 564 business owners Community outreach – 740 completed comment cards 3-1-1 Telephone survey: 813 respondents Youth workshop: 5 attendees / Stakeholder Webinar: 6 attendees</p>
How Promoted	Social media advertising, media announcement, city’s website, email
Variances in approach	<p>Phase 1 – IPSOS Reid survey of residents and business to understand satisfaction with services / priorities. Guided service/budget planning. Phase 2 – Range of digital and in-person activities to test emerging directions in budget prior to presenting to Council. Info session to public pre-budget presentation to inform, and prepare resident to speak to Council</p>

Engagement Profile – Vancouver

Citizen Feedback Use	These inputs would be included alongside Council priorities, technical analysis, long-range planning and ongoing public and stakeholder listening throughout the year.
How results are communicated	Website / Council reports.
Engagement Lead	n/a

Engagement Profile – Victoria

Timing of engagement	Public Consultations on draft Financial Plan – December Online survey / correspondence – Dec/Jan Budget Engagement (Town Hall / e-Town Hall) – Jan 16 Strategic Plan Engagement – Jan 19
Method of engagement	Online survey (Budget Simulator / priorities / value for dollar / budget elements). Budget Town Hall with e-Town Hall component. Correspondence with city (various channels)
Length of engagement	Online Survey – 4 weeks
Targeted engagement	Focus on increasing youth and renter feedback. Worked with City of Victoria Youth Council, and created renter-specific messaging to encourage participation
Response Rate	1,483 responses to online survey 56 online submissions for e-Town Hall 148 participants at Strategic Plan engagement.
How Promoted	Social media / home page placement on city website / print advertising / digital display boards at facilities, e-newsletter, email, posters, etc.
Variances in approach	See above
Citizen Feedback Use	n/a
How results are communicated	n/a
Engagement Lead	n/a



Engagement Profile - Waterloo

Timing of engagement	During Budget Committee Review stage
Method of engagement	“Bang the Table” budget tool Public input to Budget Committee
Length of engagement	N/A
Targeted engagement	Somewhat. Previous results reviewed for representation by demographics. Target awareness campaigns to under-represented groups.
Response Rate	485+ responses to budget tool. 1000+ users of tool.
How Promoted	Social media, newspapers, regional publications, website
Variances in approach	None – consistent use of budget tool
Citizen Feedback Use	Use public engagement results to inform Budget Committee on value of services / proposed service level changes
How results are communicated	Email communication of budget tool results to registered users. Reminders to revisit to see results.
Engagement Lead	Joint effort of Finance, Program staff, and Communications

Engagement Profile - Winnipeg

Timing of engagement	Spring (2017: April)
Method of engagement	Online and in-person. Annual Citizen Survey. Online: Survey Monkey, Engagement HQ, MetroQuest In-Person: workshops, pop-ups
Length of engagement	One month (April).
Targeted engagement	None mentioned
Response Rate	15 pop ups (one per ward). 600+ in-person interactions 850+ online surveys completed (budget tool and traditional survey)
How Promoted	Popups, postcards, print advertising, social media, posters, emails
Variances in approach	None
Citizen Feedback Use	Results circulated to departments .
How results are communicated	Results presented as part of strategic planning presentation to Council. Citizen Survey results included in Community Trends Report (budget doc).
Engagement Lead	Office of Public Engagement, working with Corporate Finance. Financial Planning leads contracting and Citizen Satisfaction survey

Engagement Profile - Windsor

Timing of engagement	Fall – mid budget cycle
Method of engagement	Annual ward meetings / Town Hall Receive feedback through 311, Councillor interaction with public Interested in a web-based budget tool (had inquired about HRM use)
Length of engagement	One month (Fall)
Targeted engagement	Never for a specific demographic.
Response Rate	10 ward meetings – approx. 75+ per session on average.
How Promoted	Canada Post direct mailing by ward Social media Website
Variances in approach	None
Citizen Feedback Use	Admin attends ward meetings, or Council Services, who provide feedback to administration. Feedback at ward meetings may generate service requests (311)
How results are communicated	311 ticket # to follow up on requests. Direct comms with Council Services staff
Engagement Lead	Council Services Dept.(includes Communications Division)

Attachment F – 2020-21 COW Budget Schedule

Subject	Target Dates	Contingency Dates
Recommendation Report: to Executive Standing Committee respecting changes to Multi-year Strategic Business Planning Process	May 27, 2019	N/A
Recommendation Report & Presentation: Budget Committee re: : Asset Investment Framework (16Jan19 Motion Response)	July 16, 2019	N/A
Recommendation Report & Presentation: Budget Committee re: Prioritizing Capital Outcomes (16Jan19 Motion Response)	July 19, 2019	N/A
Recommendation Report: Budget Committee re: Impact Analysis: Long-term Capital Strategy and Signature Projects (16Jan19 Motion Response)	Aug 13, 2019	N/A
Recommendation Report: Budget Committee re: Capital Funding Framework (16Jan19 Motion Response)	Aug 16, 2019	N/A
Recommendation Regional Council: Citizen Engagement in Budget Process	October 9, 2019	N/A

Recommendation Report: Budget Committee: Annual Strategic Plan Update	Oct 22, 2019	N/A
Recommendation Report and Presentation: Budget Committee re: Fiscal Services/Fiscal Budget	Nov 12 ,2019	N/A
Recommendation Report & Presentation: Budget Committee re: Capital Budget Recommendation (Advanced Tenders, Reserve Withdrawals, Multi-Year Projects)	Nov 26, 2019	N/A
Business Unit	COW Meetings (weekly)	Contingency Dates
Business Unit and Budget Presentations: Admin Services Bundle and Auditor General (CAO, Legal, HR & FICT and AM)	Wednesday Jan 15, 2020	Friday Jan 17, 2020
Transit, TPW and CCS	Wednesday Jan 22, 2020	Friday Jan 24, 2020
Parks and Rec, Library and P&D	Wednesday Jan 29, 2020	Friday Jan 31, 2020
Police and Fire	Wednesday Feb 5, 2020	Friday Feb 7, 2020

Budget Adjustment List (BAL) Review	Wednesday Feb 12, 2020	Friday Feb 14, 2020
Production and Quality Control	Feb 14 -Feb 21, 2020	N/A
Business Plan/Budget Print Production	Feb 22 – March 3, 2020	N/A
Recommendation Report: 2019/21 Budget and Business Plan Approval	Tuesday March 10, 2020 (Regional Council)	Tuesday March 24, 2020 (Regional Council)