

# HALIFAX

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**Item No. 6**  
**Committee of the Whole on Budget**  
**October 26, 2021**

**TO:** Chair and Members of Budget Committee (Standing Committee of the Whole on Budget)

**SUBMITTED BY:** Original Signed by   
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Jacques Dubé, Chief Administrative Officer

**DATE:** October 12, 2021

**SUBJECT:** 2022/23 Strategic Multi-Year Business Planning and Budget Process

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## **ORIGIN**

On January 12, 2021 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 Budget Committee's direction on the approach for development of the 2022/23 Multi-Year Plan.

## **LEGISLATIVE AUTHORITY**

The Halifax Regional Municipality Charter, S.N.S. 2008, c. 29 subsection 35 (1)(b) provides:

35(1) The Chief Administrative Officer shall

...

(b) ensure that the annual operating and capital budgets are prepared and submitted to the Council.

## **RECOMMENDATION**

It is recommended that Budget Committee:

1. Approve the Annual Progress Report format, and;
2. Approve the 2022/23 Business Planning and Budget Schedule

## **BACKGROUND**

On December 1, 2020 Regional Council's Budget Committee approved the [2021-2025 Strategic Planning Framework](#) and directed the Chief Administrative Officer to develop discrete plans (Council and Administrative) in accordance with this Framework. The recommended updates to the 2021-2025 Council Priorities and interim progress is presented by the Chief Administrative Officer to Regional Council's Budget Committee as a Recommendation Report and the 2021- 2025 Administrative Priorities are now provided as an Information Report.

On January 12, 2021 Regional Council's Budget Committee approved the [2021-2025 Strategic Priorities Plan](#). This plan remains in place over the duration of the mandate of Regional Council but is reaffirmed annually. Adjustments may be made by recommendation to Regional Council by the administration resulting from the annual strategic outcome planning process or by Regional Council to the administration during the tabling of the annual Council Priorities Presentation. The annual presentation features highlights, accomplishments and performance results associated with the previous period.

The commencement of the strategic outcome planning process begins with the adoption of or changes to the multi-year strategic business planning and budget process as well as the approval of the business planning and budget schedule.

## **DISCUSSION**

There are several changes and updates leading into the 2022/23 Strategic Planning and Business Planning activities.

### **Annual Progress Reports**

Annually it is necessary to provide Regional Council's Budget Committee with any recommended changes to the 2021-2025 Council Priorities. These changes may include revisions to Priority Outcomes, strategic initiatives or even Vision, Mission and Values statements resulting from strategic priority outcome planning. It is also the time when Regional Council may recommend changes to the Plan. Approval of these changes allows the development of business plans and budgets to move forward.

Currently, it is difficult to provide an Annual Progress Report when the year is not complete; therefore, the following recommendation is proposed. Annually in Nov/Dec, the CAO will present the recommended changes to the 2021-2025 Council Priorities along with an interim update on the progress to the Plan, this will not include key performance indicators. Then in May/June, once the budget has been approved and the organization can update its year end indicators, an Annual Progress Report, for both the Council and Administrative Priorities, will be provided to Regional Council through an Information Report. This report can be called into a session of Regional Council should a member of Council choose to do so. The Annual Progress Report will also be posted to Halifax.ca.

The benefits of such an approach is the elimination of a great deal of work to create a document which is already out of date by the time the budget is approved. It also eliminates duplication between the Council Priorities update and business unit presentations. This approach also ensures that key performance indicators are not lagging by a full year which will provide Regional Council with current results leading into the next planning cycle. A current set of results will greatly enhance decision-making relative to activities and the funding of activities associated with Council's Priority Outcomes.

### **2021 Resident Survey**

A Resident Survey was conducted between September 1 – September 24, 2021. The Resident Survey is conducted every two years and provides the organization with information on the priorities of residents as well as their level of satisfaction with the quality of municipal services. The results of the survey are used

as both strategic and operational key performance indicators to inform outcome planning and performance improvement initiatives.

The Resident Survey was sent to 20,000 households. HRM received 1,654 online responses, 56 telephone completions, and approximately 70 paper-based completions. Of the 20,000 mailed invitations, nearly 1,000 were returned as non-deliverable. This results in a response rate of 9.37%, and a margin of error of 2% at the Regional level. What this means is that the results for the survey can be considered to represent the opinion of the general population of HRM 95% of the time, with a range of +/- 2%. For example, a question with a 75% "Yes" response with a 2% margin of error means that between 73% and 77% of the general population think the answer is 'Yes.' A lower margin of error provides more accurate results and increased confidence in applying this data to decision making.

The survey responses will be distilled in the coming weeks and the final report provided to Regional Council in November.

### **Strategic Snapshot (Public Dashboard)**

The organization will be launching the Strategic Snapshot, which is a public facing dashboard of HRM's strategic indicators and results aligned with the 2021-2025 Strategic Priorities Plan. The dashboard will be hosted on Halifax.ca and provide members of the public with information on how HRM is progressing relative to our priority outcomes.

The data that supports the key performance indicators is stored in the central data warehouse and receives the appropriate governance to ensure its integrity. The data is utilized by business intelligence and presented in ESRI's Story Maps, which is part of the ArcGIS online suite of software to provide a performance story aligned to the Strategic Plan.

The review of KPI results is part of the continuous improvement lifecycle associated with the Strategic Outcome Planning and Performance process. During outcome planning, Outcome Teams review the results and initiative actions that are integrated into business plans to strive to improve results for the next cycle.

The dashboard will launch shortly after Budget Committee approves the 2022/23 Council Priorities, anticipated for December 2021.

### **World Council on City Data (WCCD)**

During the summer of 2021, HRM entered into a partnership with the WCCD, an international non-profit organization that created and administers the first globally comparative international standard on city indicators: [ISO 37120](#) – Indicators for Sustainable Cities. Since that time the organization has been working towards certification, that depending on the number of indicators reported, can range from bronze to platinum.

The partnership with the WCCD provides the municipality with important quality of life indicators and the ability to benchmark against other Canadian and international jurisdictions to determine where we may want to focus to improve quality of life for our communities. Additionally, some of the WCCD indicators will be incorporated as performance measurements for strategic outcomes and will be represented in the Strategic Snapshot. This program is anticipated to launch in December 2021.

### **2022/23 Business Planning and Budget Schedule**

The proposed schedule is contained in **Attachment 1**. This schedule may be adjusted following direction from Budget Committee at any stage of the process

### **FINANCIAL IMPLICATIONS**

There are no financial implications associated with this report.

### **RISK CONSIDERATION**

There are no risks associated this report, however enterprise are risks are reviewed as part of the strategic outcome planning process and mitigating initiatives incorporated into business planning activities to reduce or eliminate the impact and likelihood of the risk occurring.

### **COMMUNITY ENGAGEMENT**

No community engagement was undertaken for this report; however, the 2021 Resident Survey took place from September 1 - 24. The results of the resident survey will be made available to strategic outcome planning teams and business units to incorporate into their analysis of opportunities for improvement.

### **ENVIRONMENTAL IMPLICATIONS**

There are no environmental implications associated with this report.

### **ALTERNATIVES**

Budget Committee could choose not to accept the recommendation.

### **ATTACHMENTS**

Attachment 1 – 2022/23 Business Planning and Budget Schedule

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A copy of this report can be obtained online at [halifax.ca](http://halifax.ca) or by contacting the Office of the Municipal Clerk at 902.490.4210.

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**ATTACHMENT 1**

2022/23 Business Planning and Budget Schedule

<b>Subject</b>	<b>Budget Committee Dates</b>	<b>Contingency Dates</b>
Report and Presentation: Fiscal Framework	Tuesday, November 23, 2021	N/A
Report and Presentation: 2022/23 Council Priorities	Tuesday, December 7, 2021	N/A
Report and Presentation: Capital Budget Recommendation (Advanced Capital Reserve Withdrawals, Multi-year Projects)	Tuesday, December 14, 2021	Friday, December 17, 2021
<b>Business Unit and Budget Presentations</b>		
Finance & Asset Management, Assessment Update, CAO, Auditor General	Wednesday, February 2, 2022	N/A
Legal & Legislative Services, Corporate & Customer Services, People, Communications & IT	Friday, February 4, 2022	N/A
Transportation & Public Works	Wednesday, February 9, 2022	Friday, February 11, 2022
Halifax Transit, Parks & Recreation	Wednesday, February 16, 2022	N/A
Planning & Development	Friday, February 18, 2022	N/A
Halifax Regional Police, RCMP	Wednesday, February 23, 2022	Friday, February 25, 2022
Halifax Regional Fire & Emergency, Halifax Public Libraries, Fiscal	Wednesday, March 2, 2022	Friday, March 4, 2022
<b>Subject</b>	<b>Budget Committee Dates</b>	<b>Contingency Dates</b>
Report and Presentation: Consolidated Accounts: Budget Adjustment List (BAL)	Wednesday, March 23, 2022	Friday, March 25, 2022
<b>Report: 2022/23 Budget and Business Plan Approval</b>	Tuesday, April 12, 2022	Tuesday, April 26, 2022