



# Report back on Public Consultation Best Practices and approach for the Capital Plan and Budget

February 20<sup>th</sup>, 2018

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# Agenda

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- Council Motion
- Current State & Research
- Benchmarking Case Studies
- Four Key Areas of focus
  - Process Improvements
  - Survey Approaches and Delivery
  - Improved Civic Literacy & Education
  - Integration into Broader Planning Processes
- Moving Forward
  - Recommended Approach and Timeline

# Council Motion

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During the “2018 Capital and Operating Budget” Council meeting held on December 12th 2017 the following motion was carried unanimously.

*“THAT the following be added to the motion:*

*THAT staff review the efficacy of the current public survey tools in light of emerging technologies and best practices and report back prior to commencing public outreach on the 2019 Budget and 2019-2022 Capital Plan”*

The intention of this report is to:

- Report back to Council
- Present an overview of the recommended approach for the 2019 Budget and 2019-2022 Capital Plan consultation

# Current State – Annual Budget

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- Following our best practices review in 2012, the public engagement process for the Capital Plan and Budget was refined.
  - Extensive budget survey using our Talk Vancouver panel
  - Some augmentation from third party opinion research firms.
  - Growth in online participation.
- Innovation in face-to-face engagement
  - Focus on youth, young families, under-represented communities, COV committees, and community partners.
- Multiple channels for input – in-person, online, advisory committees, stakeholders
  - Important to ensure an inclusive broad reach
- Introduced some new tools like budget simulators

## Welcome

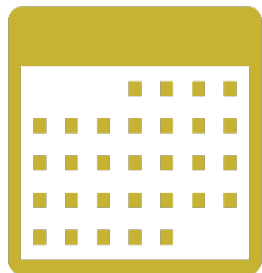
Help us build a better Vancouver by becoming a member of the City's community of trusted, local advisors. We are excited to hear from you. Registration is quick and easy. Join today!



**15,000+**  
**Diverse**  
**Members**



**100**  
**members**  
**per month**



**5+ activities**  
**per month**

- In 2017, 48+ questionnaires were deployed with 62,000 submissions received in total.
- Budget survey has been conducted on Talk Vancouver annually for the last five years.

# Current State – Capital Plan

- Primary outcome: Solicit public feedback on Draft 4-year Capital Plan prior to Council and Park Board approving Final Capital Plan
- Combination of online and face-to-face tools
- Increased participation over past plans:

| Capital Plan | Open Survey | Random Sample Survey           |
|--------------|-------------|--------------------------------|
| 2003-2005    | 236         | no survey                      |
| 2006-2008    | 372         | 636 residents                  |
| 2009-2011    | 137         | 600 residents & 300 businesses |
| 2012-2014    | 200         | 600 residents                  |
| 2015-2018    | 1,087       | 526 residents & 269 businesses |

# Current State – Capital Plan

- Improvements made in two previous rounds:
  - 2011:
    - Integrated City & Park Board processes
    - Created easy-to-read booklet
    - Used ‘Talk Vancouver’ platform
    - Used ‘calculator tool’
  - 2014:
    - Created 2 rounds of engagement:
      - Longer-term priorities (NEW) & review of Draft Capital Plan
    - Created easy-to-read website



| WHAT WE PROPOSE INVESTING FOR 2015-2018 |  |   |
|---|--|---|
| AREA                                    | THE CITY OF <b>TODAY</b> (renewal): \$50 M   | THE CITY OF <b>TOMORROW</b> (new): \$75 M   |
| <b>PARKS &amp; OPEN SPACES</b>          | <ul style="list-style-type: none"> <li>• Total investment from the City: \$15 million for the ongoing renewal of park and open space features (e.g. playgrounds, sport fields, fieldhouses, sport courts, seawall, public art, and park infrastructure)</li> </ul> | <ul style="list-style-type: none"> <li>• Create new parks:               <ul style="list-style-type: none"> <li>- At Smithe and Richards Streets in Downtown South</li> <li>- Along the Fraser River in Marpole (park and trail)</li> </ul> </li> </ul> |

# Where Are We Headed?

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- We are national leaders with many practices to retain, but need to refine and refresh our approaches
- Look to latest thinking and research
  - *The Wellesley Institute for Urban Health Study, 2012*
  - *Better Budget TO, Review of 2015 Process City of Toronto*
  - *Our City, Our Budget, Our Future, City of Calgary 2011*
  - *National Advisory Council on State and Local Budgeting Government Finance Officers Association, 1998*



# Looking Ahead – Best Practices

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- Resident and business engagement
  - Engage community partners **early** to understand what services are valued and how the budget can better reflect local needs.
  - Give reasonable timelines to give input
  - Engage in multiple ways, including more than one touchpoint before final budgets are approved.
  - Clarity on input to decision-making processes (where and how input is used to inform budgets)
- Increasing accountability and transparency through Third Party
  - Working with third party or arms length organizations to learn about stakeholder priorities.
  - Improves credibility of process and results.

# Looking Ahead – Best Practices

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- Increasing transparency by making budget processes more accessible
  - Improved education and plain language accessible provision of budget documents.
  - Tools like budget simulators.
  - Regular and frequent reporting of budget priorities and decisions.
  - Develop and communicate a comprehensive budget calendar so there is an opportunity to plan and participate in the process.

# Benchmarking Case Studies

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Cities benchmarked against: Calgary, Edmonton, Toronto

- Tools and tactics used
  - Resident satisfaction surveys
  - Third-party research
  - Digital engagement
  - Integration into service planning/ timing
  - Budget Literacy and Education to Set the Stage
  - Exploration of trade-offs
  - Participatory Budgeting
  - Civics education

## 2016:

### Citizen Satisfaction Survey

The City of Calgary uses the Citizen Satisfaction Survey to understand the needs and perceptions of Calgarians and identify areas for improvement.

## Quality of Life in Calgary

**83%** rate their quality of life as good

**82%** agree Calgary is a great place to make a life

**86%** agree we are on track to becoming a better city

**88%** are proud to live in their neighbourhood

**84%** perceive their neighbourhood as safe



### TOP 3 MOST IMPORTANT (CITY) ISSUES FACING CALGARY COMMUNITIES



**35%** Infrastructure, traffic and roads



**21%** Transit



**15%** Crime, safety and policing

### AREAS TO IMPROVE QUALITY OF LIFE




**25%** Transportation

**23%** Employment, cost of living and homelessness

**18%** Recreation and community services

## City Programs and Services

**79%** are **satisfied** with the level and quality of City programs and services 



**95%** are satisfied with the quality of drinking water



**95%** are satisfied with Calgary's parks, playgrounds and other open spaces



**93%** are satisfied with residential blue cart recycling



**92%** are satisfied with community services such as support for community associations and not for profit groups



**91%** are satisfied with The City's environmental performance



**88%** are satisfied with Social services for individuals such as seniors or youth



**86%** are satisfied with roads and infrastructure



**84%** are satisfied with land use planning



**82%** are satisfied with Calgary Transit

## Contact with The City



**54%** say they receive 'just the right amount' of information from The City



**44%** say they receive 'too little' information

### HOW CALGARIANS CONNECT WITH THE CITY:



**53%**  
Call 311



**20%**  
Via the internet, for example at a website



**10%**  
Visit a City office or facility

### AREAS TO WATCH:

#### QUALITY OF LIFE

Although perceptions about the quality of life in Calgary remain strong, several quality of life metrics have declined significantly.

#### VALUE OF PROPERTY TAX DOLLARS

The perceived value of property tax dollars remains steady; however, the tolerance for tax increases is down markedly from previous years.

#### KEY ISSUES

Although it is decreasing in prominence from previous years, "infrastructure, traffic and roads" remains in the top position on the 2016 issue agenda, "transit" continues to hold second place, and "crime, safety and policing" is a solid third. The "economy" has now emerged as an important issue.

#### CALGARY'S FUTURE

Despite facing challenging times, Calgarians as a whole remain resilient. A number of surveys, including the 2016 Citizen Satisfaction Survey, report that people have a generally optimistic view about the future and their overall quality of life, while slightly lower, is still quite high.

Calgary Action



# Welcome to the Calgary Action Plan 2015-2018 Budget Simulator

Once every four years, City Council and City Administration look ahead and plan Calgary's strategic direction, work plans, budgets and tax rates. We would like you, Calgarians, to help make these decisions by using our Budget Simulator to register your priorities for spending.

The results of this consultation will be shared with Members of Council, City Business Planners and the public later this spring to be taken into consideration in the development of the 2015-18 business plans and budget – which will be officially deliberated by City Council in November 2014.

[More info](#)

[Create your Budget »](#)

Runs from:  
**March 3, 2014**

Until:  
**March 21, 2014**

ease

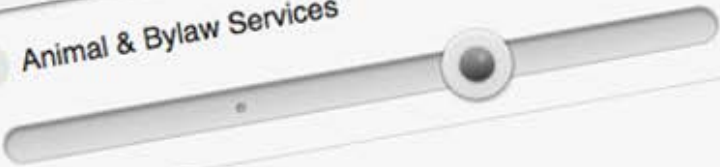
Property  
**\$430000**

Your net \$ changes  
**\$-39**

**\$1950**

Service Impact

> **i** Animal & Bylaw Services



Maintain service levels and response times; Maintain visible officer presence from beat patrols, bike and pathway patrols; Maintain graffiti abatement and community clean-ups... [More](#)

> **i** Calgary Fire Department



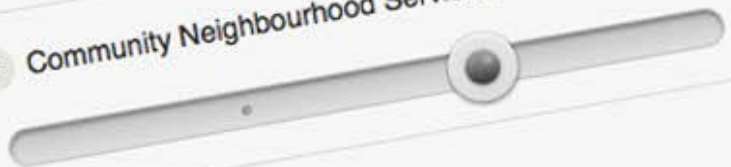
Some of the cumulative firefighter and fire station deficits will be addressed to provide core services to existing and new communities... [More](#)

> **i** Calgary Police Service



Does not allow CPS to adequately address increasing call loads and response times as a result of continued development and population growth... [More](#)

> **i** Community Neighbourhood Services



Able to reach 2,000 more children with Calgary AfterSchool programming... [More](#)

> **i** Parks



New parks received through development have minimal funding. Moderate changes to grounds maintenance - 10% reduction in mowing cycles... [More](#)

Both emergency and non-emergency calls answered  
Target: Ability to maintain service levels during



# Four Key Areas of Exploration

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Cities across North America are exploring ways to make their budget engagement processes more strategic, transparent and meaningful to residents, businesses and stakeholders.

We propose four areas to address:

1. Process Improvements
2. Survey Approaches and Delivery
3. Improved Civic Literacy and Education
4. Integration into Broader Planning Processes

# 1. Process Improvements

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## Recommended Approaches

- ↘ Give more time for input and feedback on what was heard
- ↘ Clearer articulation how input informs process and outputs
- ↘ Clearer articulation of the different streams of input that inform the budget
- ↘ Separate satisfaction survey from budget input

## 2. Survey Approaches and Delivery

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### Recommended Approaches

- ↘ Add Third party research into service satisfaction
  - 12+ Canadian cities use this model
  - Ensures randomized sample and provides view and analysis from outside
- ↘ Retain existing tools including Talk Vancouver panel
- ↘ Continued multi-modal (in person + surveys + focus groups)
- ↘ Survey results integrated into departmental planning, evaluation, benchmarking

# 3. Improved Civic Literacy & Education

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## Recommended Approaches

- ↘ Improved information and activities that demonstrate knowledge of how City finances work
- ↘ Use of plain language and visual/video education
- ↘ Use of budget simulators to model budget trade offs as a learning tool
- ↘ Pilot Participatory Budgeting and Civics 101 as a learning opportunity for the public

Your budget is in deficit (\$-40,000). If you're finished, **submit your choices**. Otherwise, **cut activities or add revenues to balance the budget**.

## CULTURAL CENTERS & ARENAS

### Increase or decrease the number of exhibitions at the Brun Creative Arts Centre

Currently, the cultural centre is open 312 days a year and 30 hours per week. Each year, nearly 125 shows and about twenty exhibitions are held. Increasing the number of cultural exhibitions requires additional opening hours and staff for the center. Fewer cultural exhibitions could result in a service reduction for the our arts community.



**Your choice**

0 Exhibitions      10      20

\$40,000      -\$40,000

### Renovate one of three arenas to accommodate skateboarding, rollerblading and BMX [Learn more](#)

Should one of our town's hockey arenas be renovated for \$40,000 to accommodate these new and in-demand sports? The Facilities Department has identified three arenas that could be renovated at the same cost. This would result in a service level increase for our town.



**Costs: \$40,000**

**YES**

\$0      -\$40,000

### Increase or decrease the number of recreational programs for Senior Citizens

Our town has over 40,000 residents over the age of 65. We could add new services for them in our community center this year such as bridge





# State Budget Civic Academy

**TOGETHER**  
LOUISIANA

Statewide Issues Conference  
Saturday, February 15, 2014

Overview of #BBD2015

BETTER BUDGET TO

| Morning  | Afternoon   |
|--|---|
| <p>Introduction</p> <p>Panel: "The Politics of Budgeting"</p> <p>Review of the 2015 budget process</p> | <p>Workshops</p> <ul style="list-style-type: none"><li>• Participatory budgeting</li><li>• Budget process review</li><li>• Media</li><li>• Civic tech</li><li>• Community organizing</li><li>• Communications</li><li>• Budget headlines of the future</li><li>• Open Data</li><li>• Communicating complexity</li></ul> |

Lunch





# 4. Integration into Processes

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## Recommended Approaches

- Deeper dive every four years as part of Capital Planning processes with focus groups and more intensive learning
- Public input informs the capital and budget planning cycles
- Annual resident and business satisfaction ratings used as input to department service planning
- Opportunity to canvass participations on process

# Summary of Approach

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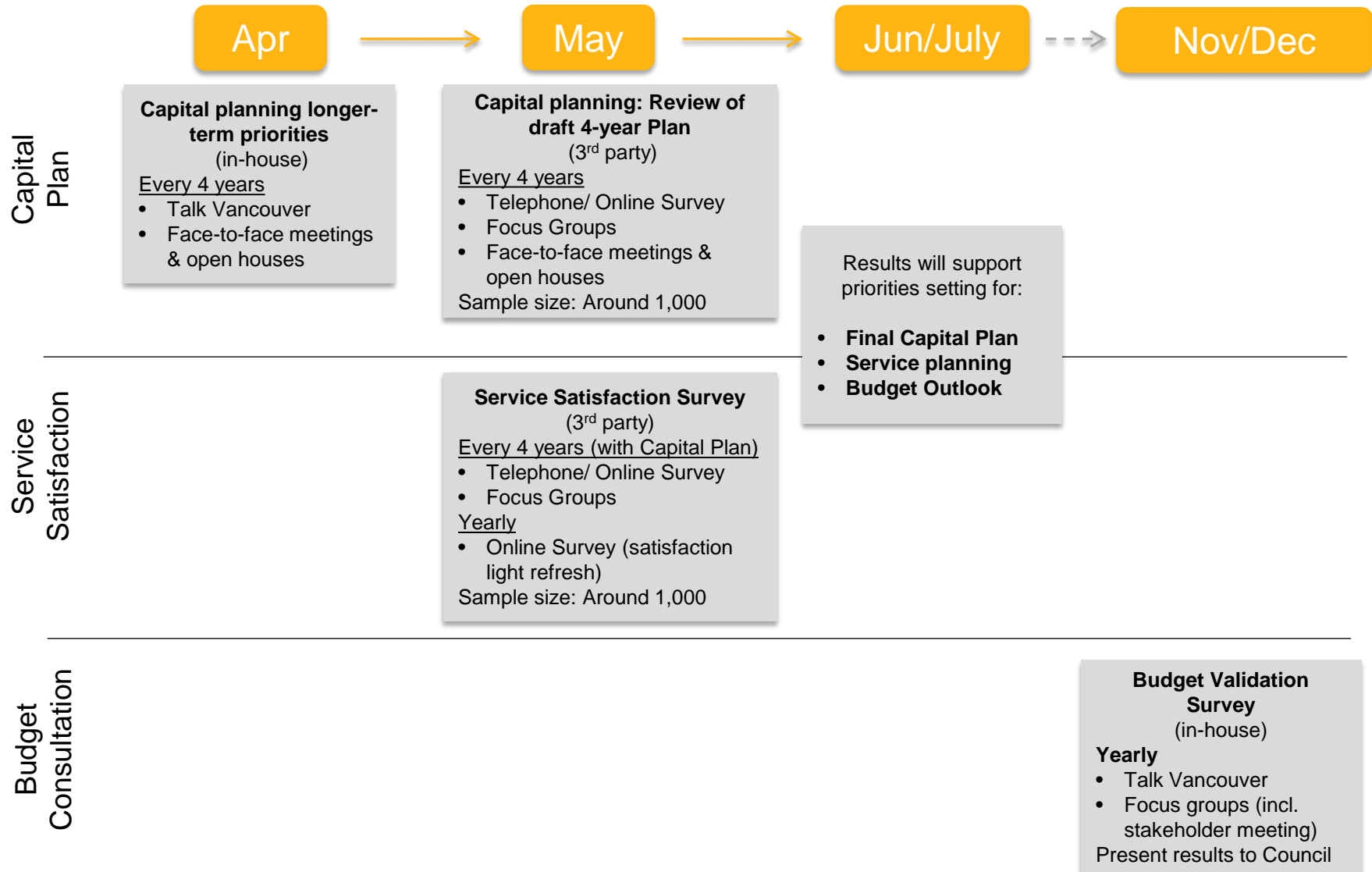
- ↘ Build on strengths of current process and tools
- ↘ Separate Service Satisfaction Survey (spring) from budget validation/learning (fall).
- ↘ Use of 3rd party firm for Service Satisfaction survey
- ↘ Integrate feedback into four year planning cycle
  - Deeper dive with third party research focus groups for Capital plan and annual service satisfaction tracking with survey.
- ↘ Improve education, civic and financial knowledge through improved annual budget outreach and activities
  - Continue TalkVancouver budget survey, budget workshops and roundtables, use a budget simulator tool.

# Summary of Approach

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- ↘ Council input - workshops will be held early in March to help guide overall long term priorities and Capital Planning, and in the fall for the annual budget.

# Proposed Steps and Timeline



# 2019-2022 Capital Plan Engagement

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- ↘ March:
  - Council workshop on longer term capital priorities
- ↘ April:
  - Public Engagement on longer term capital priorities
- ↘ May:
  - Draft Capital Plan presented to Council and Boards
- ↘ May:
  - Public engagement on the Draft Capital Plan
- ↘ July:
  - Council report and approval of Final Capital Plan

Thank you