



City of Hamilton

2015 Budget Process & Schedule

General Issues Committee
July 7, 2014
Item 7.1
FCS14049 / CMO14008

Presentation Outline

1. The Evolution of Business Planning & Budget Processes
2. 2015 Budget Schedule

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The Evolution of Business Planning & Budget Processes

Strategic Priority #2 – Valued & Sustainable Services

Strategic Objective 2.1

Implement processes to improve services, leverage technology and validate cost effectiveness and efficiencies across the Corporation

Strategic Actions

- (i) Complete a Service Delivery Review, establishing performance measures and identification of recommended service levels
- (vi) Develop and implement a Financial Sustainability Plan
- (viii) Develop a Corporate template for Departmental business plans, aligning to the 2012 – 2015 Strategic Plan and future budgets

Our Journey 2008-2018

2008 – 2010

Council Direction

Multi-year budgeting, service based budgeting, citizen centered, address issues of affordability balanced against corporate sustainability

2010 – 2014

Beginning the Conversation

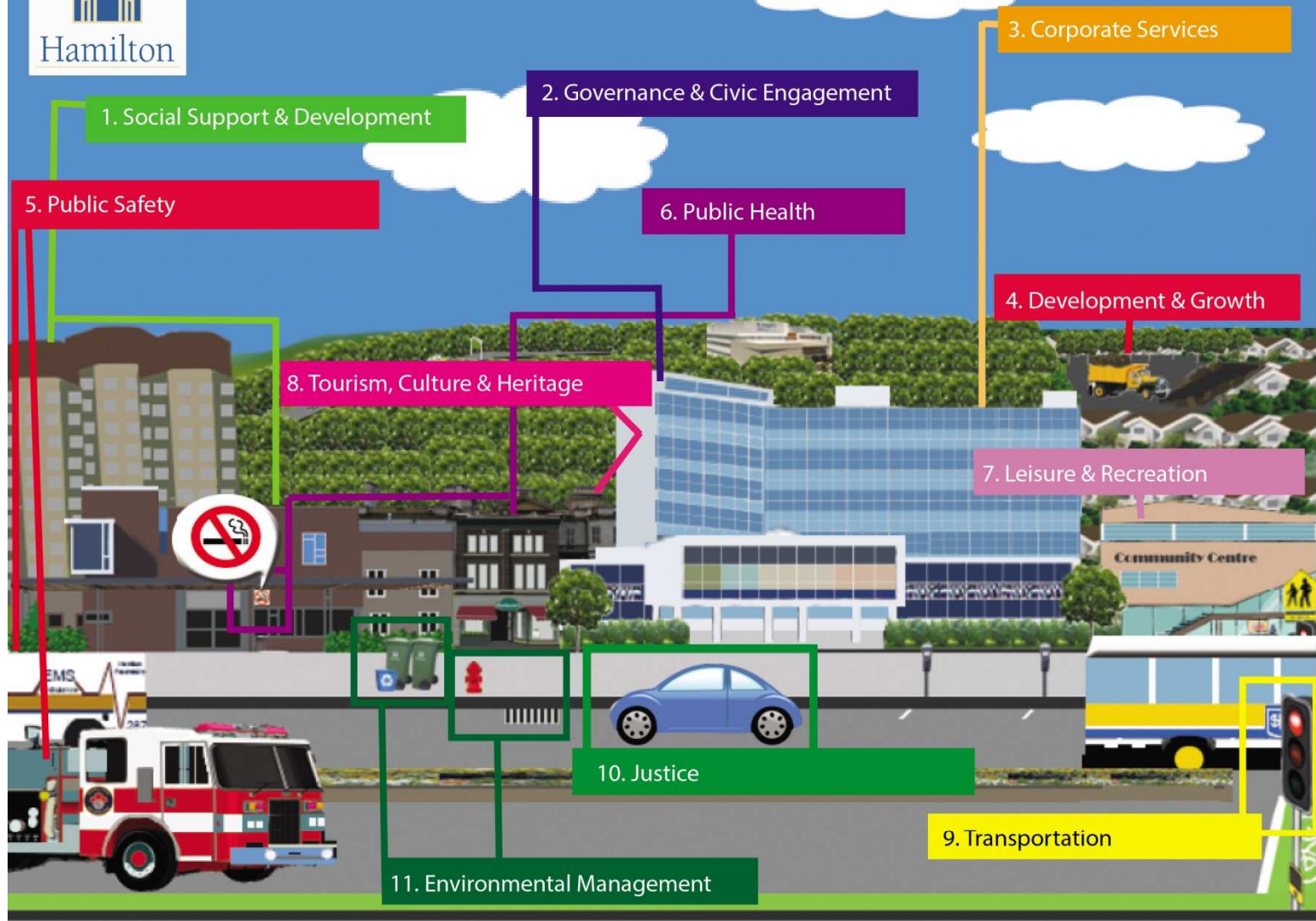
Service delivery review and development of service profiles, business plans



We are here



City Services



11 Programs
 9 External/Citizen Facing
 2 Internal

89 Services
 To accomplish...

256 Sub-Services

What is Financial Sustainability?

- Living within your means
- Making choices and tradeoffs (balance between wants and needs)
- Looking beyond today and preparing for the future



Current Business Plans

- Primarily a list of actions to be undertaken in support of the Strategic Plan
- Considers only current year



A Prosperous & Healthy Community

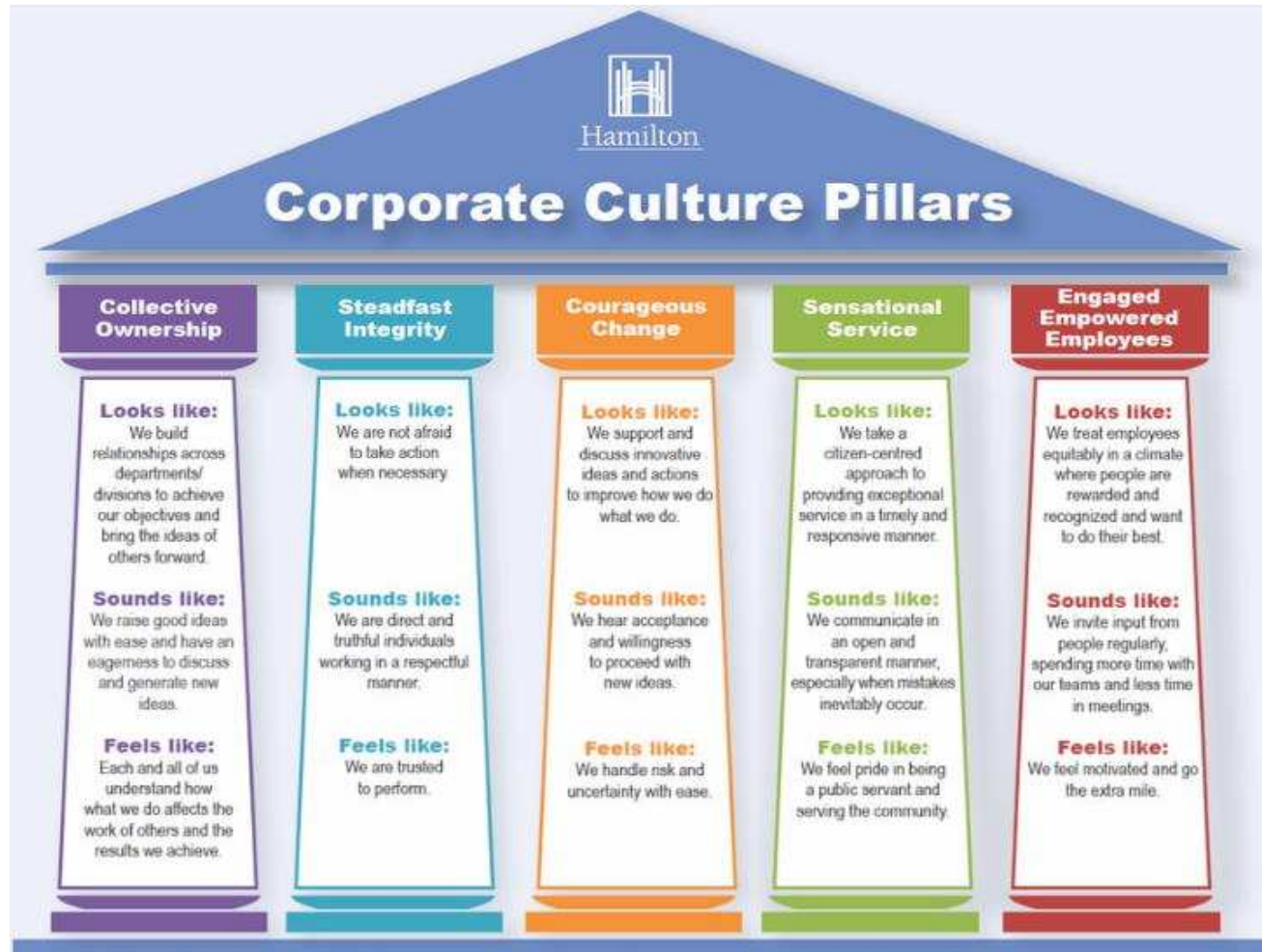
Strategic Priority	WE enhance our image, economy and well-being by demonstrating that Hamilton is a great place to live, work, play & learn								
Strategic Objective	1.2 Continue to prioritize capital infrastructure projects to support managed growth and optimize community benefit.							Linkage with Service Delivery Profiles	
*	Strategic Action / Departmental Objective	Task	Departmental Lead and partners	Timeframe	Status	Budget Source	Other Comments	Program	Service Area & Sub-service (if applicable)
(iv)	Completion of a Refined Staging of Development Program and Wastewater Capacity Allocation Policy	Advice to lead department	CMO - Legal (CDP Section) / PW / PED / FCS	2012-2014	√	TO		Corporate Services	Legal
(v)	Stormwater and drainage coordination, education and consultation	Coordinate with Insurance communities for flood related matters	PW / CMO - Legal (DR Section)	Continuous task, 2012 - 2015	√	RC		Corporate Services	Legal
(vi)	Priority for Infrastructure document preparation and advice	Service delivery for capital projects including arranging extra support to meet essential deadlines without significantly impacts regular services	CMO - Legal (CDP Section) / PW	2012/2014	√	TO/TC or RC depending on the project		Corporate Services	Legal

Current Process

- 7 different processes
- 8 separate documents plus other supporting material
- 10 month process
- 100's of staff involved



Guiding Documents



Guiding Documents

**Community Vision – Desired
Future State (25+ year plan)**

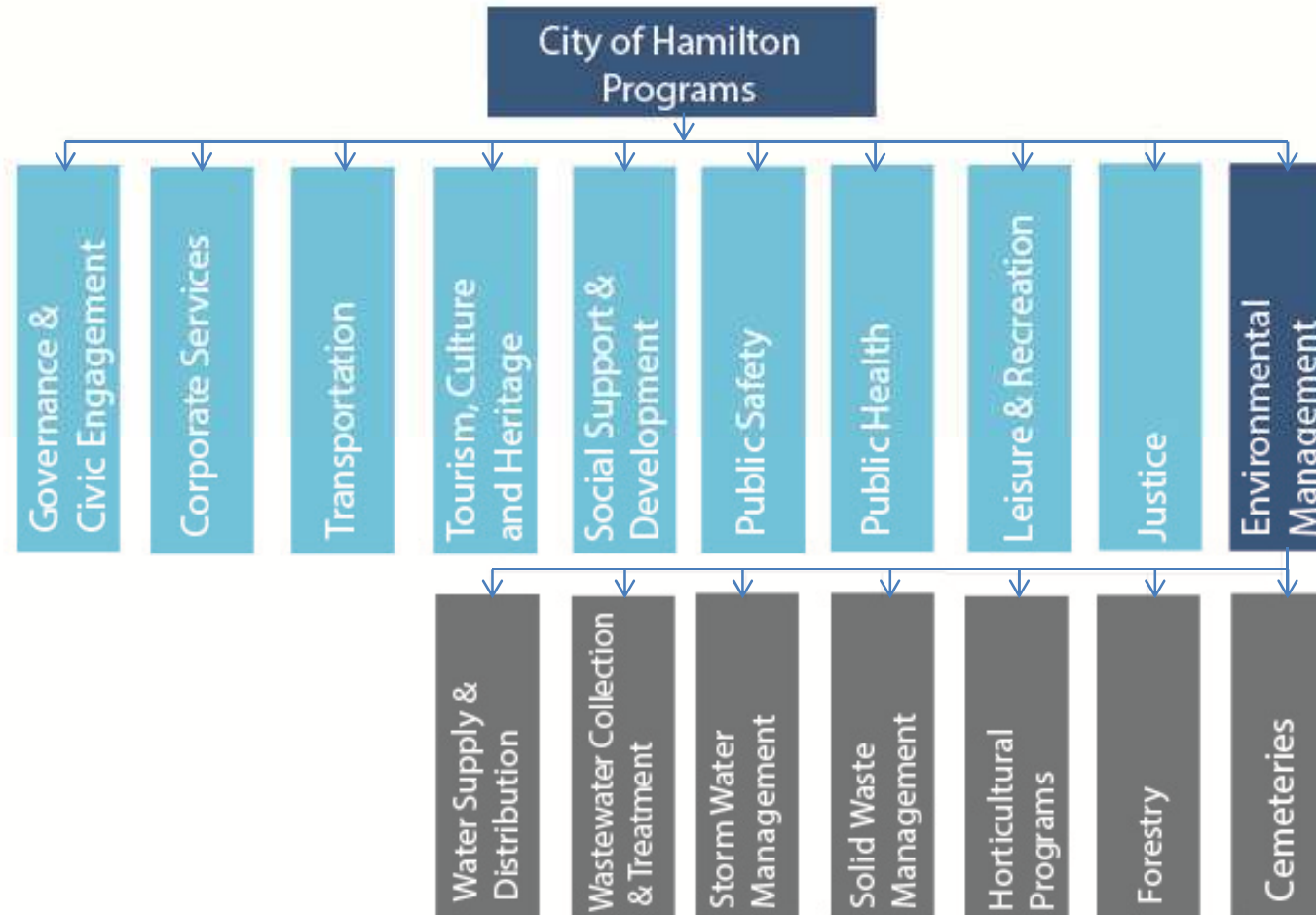
**Strategic Plan – Municipal Goals
& Priorities (10 year plan)**

**Integrated Business Plans &
Budgets (4 year rolling plan)**

**Operational & Individual Work
Plans (1 year plan)**

Business Planning Concept

Appendix C to Report FCS14049/CM14008



Conditions for Success

- Engage Council & Community
 - Establish a Sub-Committee of Council to guide evolution to integrated Business Plan & Budget system
 - Ensure community needs are considered
- Engage & Support staff
 - Invest in tool development, training and technology
- Link Business Planning with Community Vision & Strategic Plan
- Improve processes incrementally over the next 3 – 5 years

Our Journey

2010 – 2014

Beginning the conversation

Service Delivery Review and development of service profiles, business plans

2016-2018

Integrated Business Plan & Budgets

2014 - 2015

Evolve People, Processes & Technology to support changes
Based on updated Vision & Strategic Plan

2008 – 2010 Council Direction

Multi-year budgeting, service based budgeting, citizen centered, address issues of affordability balanced against corporate sustainability

Questions?

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2015 Budget Schedule

Budget Schedule

- No Budget GIC dates until January 2015
- Presentation of budgets will start with an overview presentation in mid-January and include all the major components:
 - Rate Operating & Capital
 - Tax Capital
 - Tax Operating
 - User Fees

Budget Schedule

Appendix A to Report FCS14049/ CM14008



ITEM	GIC DATE
2015 Budget Process and Schedule Report (TODAY)	July 7 th , 2014
2015 Tax and Rate Operating/Capital Budget Books Distribution	Early January 2015
City Manager Budget Overview Presentation	Mid-January 2015
2015 User Fee Report	Mid-January 2015
2015 Rate Supported Budget Report	Mid-January 2015
2015 Tax Supported Capital Budget Report	Mid-January 2015
2015 Tax Operating Budget Report	Mid-January 2015
2015 Tax Supported Operating Budget – Boards and Agencies Presentations	February 2015
2015 Tax Supported Operating Budget – Department Presentations	February 2015
2015 Tax Supported Operating Budget – Public Delegations	February 2015
2015 Tax Supported Operating Budget – GIC Deliberations	February 2015
2015 Tax Supported Operating Budget – GIC/Council Approval	March 2015



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Thank You

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