



The Corporation of the District of Saanich

Report

To: Mayor and Council
From: Laura Ciarniello, Director of Corporate Services
Valla Tinney, Director of Finance
Date: September 21, 2018
Subject: Strategic and Financial Plan Engagement – Results and Implementation



RECOMMENDATION

That Council:

- 1. Receive the report from Dialogue Partners on the findings and recommendations arising from the Strategic and Financial Plan Engagement process
2. Approve the Implementation Plan
3. Confirm allocation of the remaining funding of \$110,000 for implementation

PURPOSE

To present the findings and recommendations report for the Strategic and Financial Plan Engagement from Dialogue Partners and provide a recommended Implementation Plan and associated funding.

BACKGROUND

Council approved a public engagement process to obtain broad public input to guide the development of strategic and financial plan public participation programs. Dialogue Partners was selected to perform the work through a Request For Proposals process. The engagement was conducted from July 12 to August 10th. Part of the scope of work was a comprehensive Findings and Recommendations Report (DP Report) which is provided as Attachment A.

DISCUSSION

The key recommendations outlined in the DP Report are:

- 1. Start by developing concise, compelling and creative informative materials.
2. Raise awareness of opportunities to participate.
3. Integrate online engagement options into existing processes.
4. Develop opportunities to engage earlier in financial planning process.
5. Incorporate an interactive discussion opportunity during financial planning.
6. Establish an "open to all" meeting opportunity in strategic planning.
7. Communicate the changes in an effort for continuous improvement and evolution of the process.

Each recommendation will be discussed further from an implementation perspective:

- R1** Start by developing concise, compelling and creative informative materials (print, web content, videos etc.). Specifically, information will be developed about:
- a. How the strategic and financial plans are developed
 - b. How the strategic and financial plans are linked
 - c. How the strategic plan and the OCP are linked
 - d. How other organizational plans inform development of the strategic and financial plans (OCP, Active Transportation Plan, Strategic Facilities Master Plan, etc.)
 - e. How and where money and resources are allocated
 - f. Current measures within the strategic plan, where they came from, what they mean and why they are tracked
 - g. Budget in brief; cost drivers, external impacts, investments and savings

This recommendation is relatively simple to implement, however requires financial and staff resources. Some internal resources exist to support broader informational materials on the Strategic Plan, but the Finance Department does not have resources with the ability to develop quality graphic materials. External resources would be required to develop the initial graphic materials that could then be updated with current financial data each year. Development of the right materials up front will be critical to the success of what was the most requested change. Allocation of the remaining budget to this work is recommended.

- R2** Raise awareness of opportunities to participate.

Finance and Corporate Services staff can work together to develop a communication schedule that incorporates more and broader distribution of information about Strategic and Financial planning processes and where/when/how the public can participate. This can be accomplished with existing resources through the Saanich website, media, digital and social media.

- R3** Integrate online engagement options into existing processes.

An online strategy for strategic and financial planning would be developed and may incorporate such tools as online surveys, a budget simulation tool, and/or crowd sourcing platforms as examples. Implementation of this recommendation may require the acquisition of software and result in an ongoing resource request in the 2019 budget. Implementation of this recommendation would be targeted for the 2020 budget process, however depending on the final strategy there may be tools that can be implemented for the 2019 process.

- R4** Develop opportunities to engage earlier in the financial planning process.

Based on the current budget schedule, the public identified that incorporating public input as part of the Budget Guideline stage would be beneficial. While the Budget Guidelines deliberations are currently open to public comment and Council debates them in an open meeting, opportunities for more interactive engagement need to be explored. Options can be developed for the next Budget Guideline discussion in the summer of 2019.

This recommendation may also be seen to mean that the entire budget process be held earlier. Council has considered the organizational impacts of such a shift in the past. The timing of the 2019 process has already been established; any changes to future schedules may be considered by the incoming Council. Given the magnitude of the organizational impact of such a change, it is recommended that this be considered after the simpler changes have been implemented to determine if further change is still needed.

R5 Incorporate an interactive discussion opportunity during financial planning

The current “public input” model is established through the Council Procedures Bylaw. Implementing this recommendation will require identification of an appropriate format (open house, town hall, online Q&A etc.) in discussion with Council. It is recommended that this decision be made by the incoming Council as the final decision on what type of format to use may require a bylaw amendment. Options will be brought forward in a subsequent Council report.

R6 Establish an “open to all” meeting opportunity in strategic planning.

Staff can develop options for incorporating open meetings for Strategic Planning for consideration by the incoming Council. As the main Strategic Planning process only happens once every four years, the process pending for early 2019 will incorporate some easy to implement options with any major changes implemented after the 2022 election. The annual check in processes will also be revised over the next term to include “public input” components.

The citizen and public surveys have historically been used as the public engagement tool for Council’s Strategic Planning. These surveys are scheduled for January 2019 and it is recommended that this engagement tool be retained, but improved by conducting it on a more frequent basis. This will require additional funding and will be submitted to Council as a resource request in the 2019 budget.

R7 Communicate the changes in an effort for continuous improvement and evolution of the process

This will be an important part of the communication to the public on the results of this consultation and the actions that can be taken in the short/medium/long term. The process has provided some clear information on what needs to be accomplished early on and as there are some manageable building blocks there is confidence that the recommendations can be implemented.

Other municipalities:

In addition to the work undertaken by Dialogue Partners, staff conducted a survey of other similar sized municipalities in BC and across Canada. The themes discovered were:

- Public engagement efforts vary widely
- Public engagement on Strategic Planning is not common
- Although actual use may be low, many municipalities are incorporating budget simulation tools for online engagement (e.g. Prince George 100 surveys for 74,000 residents)
- Getting people to engage and obtaining meaningful input is challenging regardless of the opportunities provided; input tends to be topic specific
- Engagement programs are evolving; there is no “one best way”
- Surveys are a key component of all engagement programs

Implementation Plan:

The original intention was to provide implementation options to Council, however as the recommendations do not drastically change the current process and will not require significant ongoing financial investment, the implementation is reasonably accomplished over a 12-18 month time period and in the normal course of the strategic and financial planning cycle.

With Council approval to proceed, the original implementation timeline is on schedule to commence the first phase of developing the new Consultation Program.

	2018												2019							
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A
Strategic Planning/Budget Consultation Improvements																				
1. RFP for consultant																				
2. Public Engagement																				
3. Report out to Council																				
3. Build new program																				
2019 Budget Process																				
2019-2022 Strategic Planning																				
2020 Budget Process																				

Phase 1

October 2018 to May 2019

- Provide information to the public on the results of the engagement process and the approved implementation plan (R7)
- Develop new educational materials to inform the public about strategic and financial planning generally and for the 2019 budget specifically. (R1)
- Develop and implement an enhanced communication program for the budget materials and promote existing participation opportunities earlier and more broadly. (R2)
- Conduct the citizen and business surveys including investigation of the feasibility of an online component (R3)
- Create online opportunities for both processes where possible (limited) (R3)
- Incorporate public meeting(s) into Council’s Strategic Planning process (R6)

Summer 2019

- Incorporate additional educational materials on the Strategic Plan and how it links to the Financial Plan (R1)
- Implement interactive online and in person public opportunities for development of the 2020 Budget Guidelines (R3, R4 and R5)
- Council deliberation in open meeting on 2020 Budget Guidelines incorporating input received through new processes.

Fall 2019

- Report to Council on progress of implementation
- Direction to staff for Phase 2
- Possible online survey to assess public acceptance of educational materials and participation opportunities.

Phase 2

October 2019 to January 2020

- Improve educational materials as needed. (R1)
- Improve enhanced communication program as needed. (R2)
- Further enhance online opportunities (R3)

FINANCIAL IMPLICATIONS:

Council allocated \$200,000 from the Strategic Initiatives Contingency Fund (SICF) to undertake this project. \$90,000 has been expended to date to conduct the initial engagement process. The next phase of recommended work is development of educational materials and an enhanced communication plan. The remaining funding will enable Finance to engage a graphics resource to complete the initial design and development of the base materials/tools that staff can then update annually with financial data. Any unexpended funds will be retained in the SICF.

As the online engagement strategy is developed, staff will identify any new tools or processes requiring funding and bring them forward as resource requests for consideration in the budget process.

The addition of public engagement opportunities are unlikely to have any notable financial impact, but will require Council and staff time above and beyond the current Council meeting schedule.

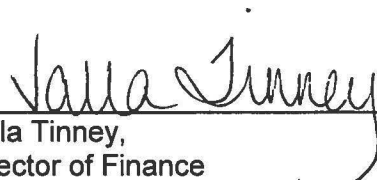
OPTIONS:

1. Approve the recommendations.
2. Provide alternate direction to staff.

Prepared by:



Laura Ciarniello
Director of Corporate Services



Valla Tinney,
Director of Finance

Attachments:

1. What We Heard Report and Recommendations Report from Dialogue Partners

CHIEF ADMINISTRATIVE OFFICER'S COMMENTS:

I endorse the recommendation of the Directors of Corporate Services and Finance.



Paul Thorke
Chief Administrative Officer

District of Saanich

Strategic and Financial Plan Engagement #YourSayYourWay

What We Heard Report & Recommendations
September 2018



We are building a path for our strategic and financial plans, stopping along the way to include your input.

Tell us how you want to be part of the ride.

As your Saanich representatives, we face choices every day that affect those who live and work here. What programs should we offer? How many instructors do we need for swim lessons? Should we host that major sports event this year? We make these kinds of decisions with the guidance of plans – our four-year strategic plan and yearly budget - that set the direction for our community's future and how to pay for it.

We regularly invite community members to offer feedback on our planning and budgeting process. But, we're curious to know if you want more opportunities, and if there are things we could do to make participation easier.

The more input we have from those living and working in Saanich about our decisions, the better they will be. This summer, our goal was to find out the best way to involve you in building our strategic plan and budget.



[Click here](#) to watch the video

A NOTE TO READERS: We want to say thank you to all those who have participated in this consultation process. We are grateful to those who shared stories, provided input and feedback and contributed to the conversation.

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Executive Summary

Saanich Council directed staff to engage the community to determine what a future ongoing consultation program for the strategic and financial plans could incorporate and to gather input and feedback on specifics of the what, when, where, and how people want to be engaged.

Local governments across the province and Canada are developing a variety of ways to interact with the public to gain input and feedback on major planning initiatives. While there are several groups and individuals in Saanich very interested in engaging on strategic and financial planning, turnout at meetings and input via letter or email has historically been low and has typically been from a limited number of residents. Saanich seeks to develop an engagement program for strategic and financial planning that meets the needs of the broad community, provides useful information for Council in its plan creation and decision-making, and is sustainable for years to come.

The consultation process was launched on July 10 and closed August 12, 2018. It was an intensive period that hosted a series of 25 community pop up events, an online survey, stakeholder meetings and web polls. Recognizing the potential challenge of engaging during the summer months, the engagement process was actively tailored to reach Saanich residents where they are. The process realized almost 5,000 points of engagement varying from in-depth discussion and conversation to sharing social media posts and videos.

This “What We Heard” report summarizes and highlights the detailed findings and results from the Strategic and Financial Plans engagement process.

A number of themes emerged from the budget and strategic planning consultation process, they are as follows:

Overall What We Heard

Citizens indicated an interest in wanting to participate in future engagement opportunities and expressed desire to see heightened efforts to raise awareness of the opportunities to participate. In addition, the input suggested the need for budget and strategic planning information to be easily accessible to build understanding and knowledge of what is perceived as a complex topic. It is also important to note, that because many participants did not have previous experience engaging in strategic or budget planning processes that their needs, preferences and willingness may change as participants become more knowledgeable and practiced in the available engagement opportunities.

Focus on and improve information and education materials

- Citizens would like to understand more about the budget including how their tax dollars are invested each year and what measures have been taken to reduce costs.
- There is a desire to see increased information related to the budget overall including additional context for budget priorities, cost drivers, and the budget process.
- The additional and/or new information should be presented and explained in an accessible and easy to understand way, reinforced with compelling visuals and tools.

“What are the budget drivers – outline them so it’s clear what is driving the costs and investments.”

“I just moved here but am interested in learning more & getting more involved. I appreciate online information as a reminder of when key events are coming up, etc.”

Awareness-raising initiatives are needed

- Many citizens weren’t aware of the opportunities to participate in the budget process but felt they would participate if they understood more about the budget and the opportunities available.
- Citizens would like to have earlier notification of the opportunities to participate, and advertised through more channels, including social media and online mediums. Many felt multiple channels were needed to reach as many people as possible.

“It’s almost impossible to participate based on the information currently provided and the opportunities are not well advertised. I don’t think I have ever seen anything about providing input into the municipality’s priorities.”

Future engagement opportunities could benefit from change

- When citizens were asked how they would like to participate, there was a strong preference to include an online engagement component.
- There is value in continuing to engage the public near the end of the budget-building process but to also explore earlier opportunities to invite public input, including during strategic planning.
- Public budget meetings could be improved to encourage greater public involvement and dialogue opportunities between citizens, staff and elected officials.
- Some stakeholder groups also saw potential for the municipality to be working more closely with them to help encourage greater public involvement (e.g. new Canadians, young parents, busy families and community associations.)
- “Authenticity” of public engagement efforts was noted as important, wanting to know at the outset how their input would be used and increasing reporting publicly on what input was heard from the public.

“I’d like to pick more than one, but I enjoy quick online options, as well as information that is easy to find. That way I can help start important conversations with my neighbours.”

Regarding strategic planning

- In terms of the strategic planning consultation process, there was moderate awareness of the current process.
- There is a desire to better understand the strategic vision the municipality is working towards, as well as how priorities are funded and will be measured to determine whether progress is being made.
- Participants suggested additional engagement opportunities be offered during the development of the strategic plan.
- Several stakeholder groups highlighted a desire to see greater alignment between the strategic plan and the budget in terms of funding priorities and reporting on progress and challenges.

“ Would like to see the strategic plan more informed by neighbourhoods. ”

Summary of Recommendations

Building on the input and feedback gathered, there are a number of recommendations that may be implemented when planning future processes designed to increase the public's engagement. In light of the coming year being a transition year as a new term of Council begins, there are a number of opportunities and considerations.

Further details and specific considerations for recommendation can be found starting on page 19.

The International Association of Public Participation (IAP2) spectrum of public participation starts from a place of “inform” and advocates for quality, complete and accessible information being a foundation for greater, more meaningful public participation. This should be top of mind as changes to the process are made.

Recommendation # 1 - Start by developing concise, compelling and creative informative materials

The majority of respondents felt that they currently did not have enough information to know how to participate but indicated a desire for improved information and participation options. We feel that with a strong focus on improved information and communications, citizens will have the information and knowledge they need to determine how they would like to participate further.

Recommendation #2 – Raise awareness of opportunities to participate

Consider increasing communication efforts to raise the awareness of opportunities to participate in both the strategic and financial planning processes.

Recommendation #3 - Integrate online engagement options into existing processes

Introducing online options for public participation are recommended. They can be cost-effective, timely and immediate, and the community has indicated they are the preferred way of providing input.

Recommendation # 4 – Develop opportunities to engage earlier in the financial planning process

Respondents indicated both an interest and value in the opportunity to be involved earlier in the development of the financial planning process. Consider creating input and feedback opportunities earlier in the development of the annual budget.

Recommendation # 5 – Incorporate an interactive discussion opportunity during financial planning

Consider the introduction of engagement opportunities that allow for discussion and dialogue during the financial planning. Participants suggested an interest in being able to ask questions, gather responses and have interactive discussions regarding financial planning to provide more informed feedback and input.

Recommendation # 6 – Establish an “open to all” meeting opportunity in strategic planning

Participants indicated a desire to be involved in the strategic planning processes and therefore consider hosting an “open to all session” – meaning anyone who is interested – to attend and contribute to the development of the strategic plan.

Recommendation #7 – Communicate the changes in an effort for continuous improvement and evolution of the process

Changes to municipal budget and strategic planning processes can take time but should also be seen as evolutionary with a commitment to continuous improvement. It may take a couple annual cycles to grow awareness and introduce new tools. Timed with the new term of Council, this may allow the municipality to adapt the process while working with the new Council to continually improve.

Who Participated?

The engagement process was specifically focused on collecting data from a variety of Saanich residents and stakeholders and reach a broad range of participants who come from unique backgrounds, preferences and perspectives. The focus was centered on collecting a breadth of input required to support informed, sustainable choices.

Participation rates



Total responses via survey, poll & in-person exchange, stakeholder meetings and interviews

556



Total responses via social media interactions (i.e., likes, retweets, etc.)

206



Total video views

4200

Demographics

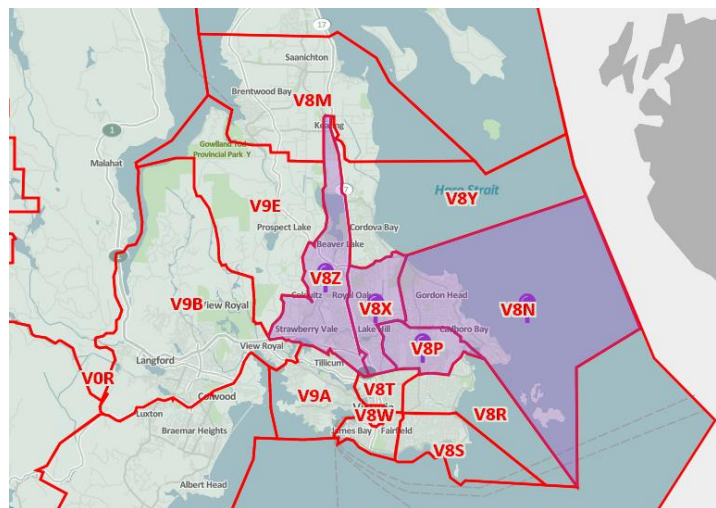
Postal Code

Survey respondents were asked to submit the first three characters of their postal codes, otherwise known as a forward sortation area (FSA), to gauge what geographical area respondents were located from within the community of Saanich, or otherwise.

A total of 16 FSAs were identified by participants who completed the question, with the highest volume of responses (76% collectively) coming from four FSAs, which included:

- V8P (17%)
- V8N (18%)
- V8Z (19%)
- V8X (22%).

The map depicts the geographical regions of the top four FSAs in which participants stated their postal codes to reside within.



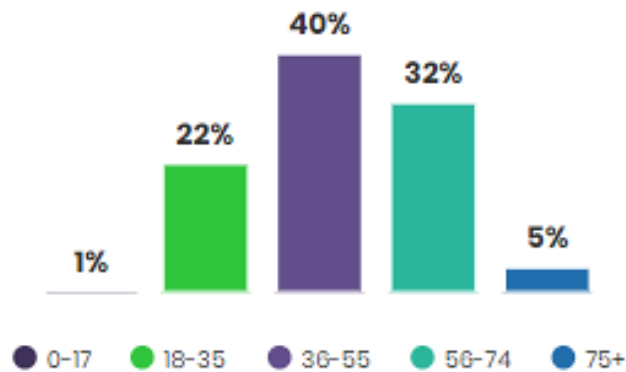
Age

When asked about their age, respondents were given five ranges in which they could choose from, which included: 0-17; 18-35; 36-55; 56-74, or; 75+.

A total of 301 engagement participants reported their age, with the results as follows:

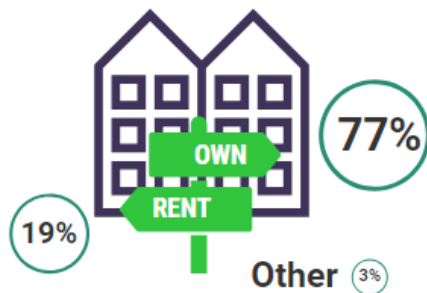
- 40%, identifying themselves as being between the ages of 36-55.
- 32% of respondents reported they were between the ages of 56-74
- 22% respondents indicated they were between ages of 18-35.
- 5% of respondents indicated they were 75 years or older
- Approximately 1% of respondents identified themselves as being between the ages of 0-17

Most participants indicated they were between ages 36-55.



Housing

A total of 299 submissions from participants were received regarding whether they owned or rented their home.



77% of respondents indicated that they owned their home, while 19% of respondents indicated that they currently rent their home.

Of the 299 respondents that completed this question, 3% indicated that they neither rented nor owned a home.

Response to these questions were not mandatory.

Key Findings & Engagement Results

Current state of knowledge in strategic and financial planning

Participants were asked to identify their knowledge and awareness of the current Saanich four-year Strategic Plan, and how the annual budget is developed. These questions were specifically designed to determine residents' current level of understandings on the two subjects, and participants could select one of five options, which were:

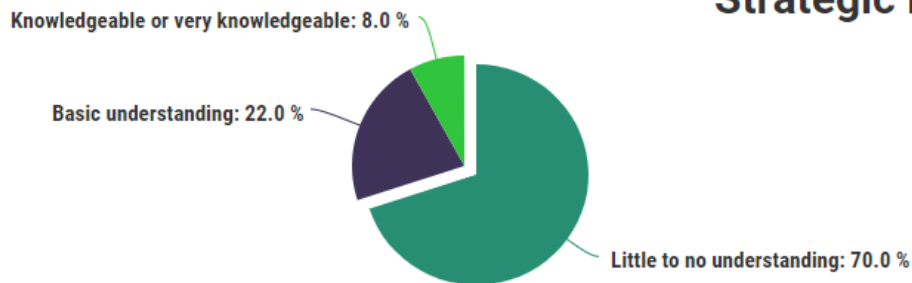
- I don't know anything
- I know very little
- I have a basic understanding
- Knowledgeable
- I'm very knowledgeable

Strategic Plan

Respondents provided the following results regarding their knowledge or awareness of the current strategic plan:

- 70% who participated noted that they had little to no understanding of the current four-year strategic plan
- 22% had basic knowledge of the plan
- 8% indicated that they were knowledgeable or very knowledgeable of the current strategic plan

70% of participants have little to no knowledge or awareness of the current four-year Saanich Strategic Plan.

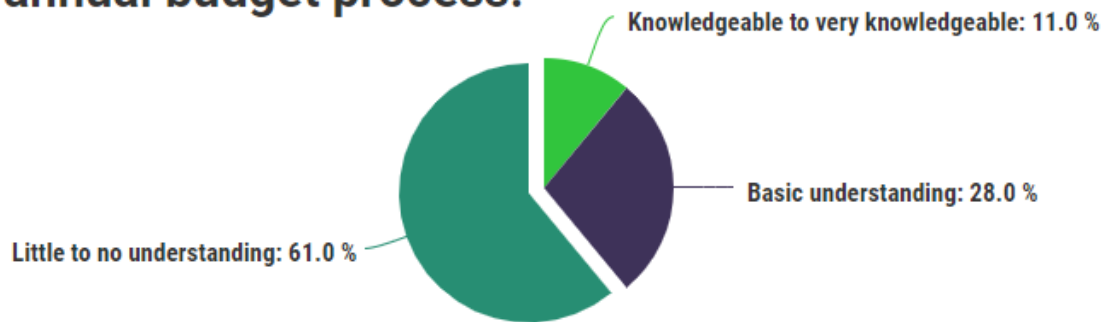


Financial Plan

Respondents provided the following results regarding their knowledge or awareness of the financial plan:

- 61% noted that they had little to no understanding
- 28% had a basic understanding
- 11% indicated that they were knowledgeable or very knowledgeable

61% of participants have little to no understanding of the annual budget process.



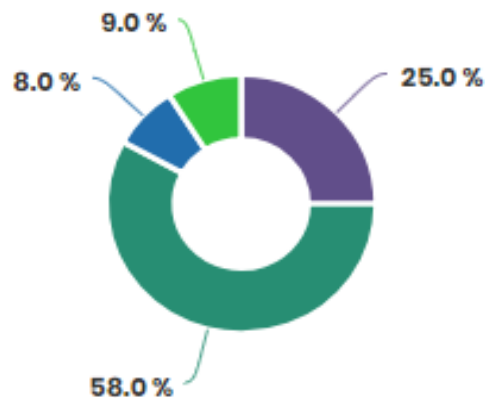
Past involvement in financial plan development

Participants were also asked “[h]ow involved have you been in past budget building processes”. The following options were available for responses:

- I haven’t participated, I’m not interested
- I would like to participate, I don’t know how, and I need more information
- I’ve participated and keen to continue
- I’ve participated and want more opportunities to be involved

Of the responses collected:

- 58% participants indicated that they would like to participate in budget building processes, but they don’t know how and need more information to do so
- 25% indicated they had not participated in the past and were uninterested in participating moving forward
- 9% of participants wanted more opportunities to be involved
- 8% of respondents had engaged in previous budgeting processes to some degree and were keen to continue in the same way



- **I haven't participated, I'm not interested**
- **I would like to participate, I don't know how, and I need more information**
- **I've participated and keen to continue**
- **I've participated and want more opportunities to be involved**

When/Where in the existing process do people want to be involved?

Questions were carefully designed to assess the engagement needs of participants along the decision-making cycle. Participants were given a visual roadmap (see below) that depicted the current steps and processes used to develop strategic plans and annual budgets and were asked to identify when they would like to be engaged in the two processes.

Overall, participant responses indicated a desire to engage in the following “stops” along the process:

- Strategic Plan, Saanich Priorities
- Early in the process, such as “Council adopts budget guidelines”
- Later in the process, such as “Public Input Budget Meetings”



About the strategic planning process...

Respondents noted an interest in opportunities to inform the strategic plan however typically did not offer specific suggestions of when or how. The interpretation of these responses suggests that because of the limited understanding of how the strategic plan has historically been developed and lack of previous involvement many participants were unsure of how they could best contribute and add value in the plan development. Some stakeholder groups suggested making some of the meetings open to the public to increase transparency and increase public input into the plan beyond the input gathered from the citizen satisfaction survey.

About the financial planning process...

Responses from participants indicated a keen interest in being engaged in the financial planning process, with the majority of respondents interested in becoming involved during the public input budget meetings “step”. However, the responses also indicate that while this is the one of the beneficial “steps” to engage participants, the current opportunities could be improved and aligned with participant and stakeholder preferences as outlined on pages 17-18 of this report.

Participants also indicated an interested in participating during the “August, Council adopts Budget Guidelines” step. Participants saw this as an opportunity to integrate the Strategic Priorities with the budget guidelines as well as creating an opportunity for the public to understand the current context or “state of affairs”. This also provides an opportunity to gather input earlier in the process and then demonstrate later how the input was used and considered. This can be an important step in educating the public of the constraints and opportunities facing the District, and the guidance being given to staff in preparation of annual budgets.



Changing the process

Some of the stakeholder groups offered input and ideas about how the development of the budget process could change, including options such as extending the time available to provide input or moving the budget cycle up into the fall of the previous year. Some of these groups have researched what other municipalities are doing for the budgeting process and see opportunities to apply similar processes to the Saanich budget development process.

Input on continued opportunities in other planning processes

Some participants noted that they were interested in being engaged through citizen and business surveys step of the strategic planning process, while six responses indicated an interest to be involved in the direction on specific issues and topics from Master or Action Plans step of the process. A total of three responses from participants indicated an interest in being engaged during the guidance from the Official Community Plan step.

How do participants prefer to be involved? (tools, tactics, techniques)

There are a variety of ways the public can be involved in informing strategic priorities or budgets. Participants were asked to identify ‘which method works best for [them]’ to engage in these types of initiatives, which included the following selection options:

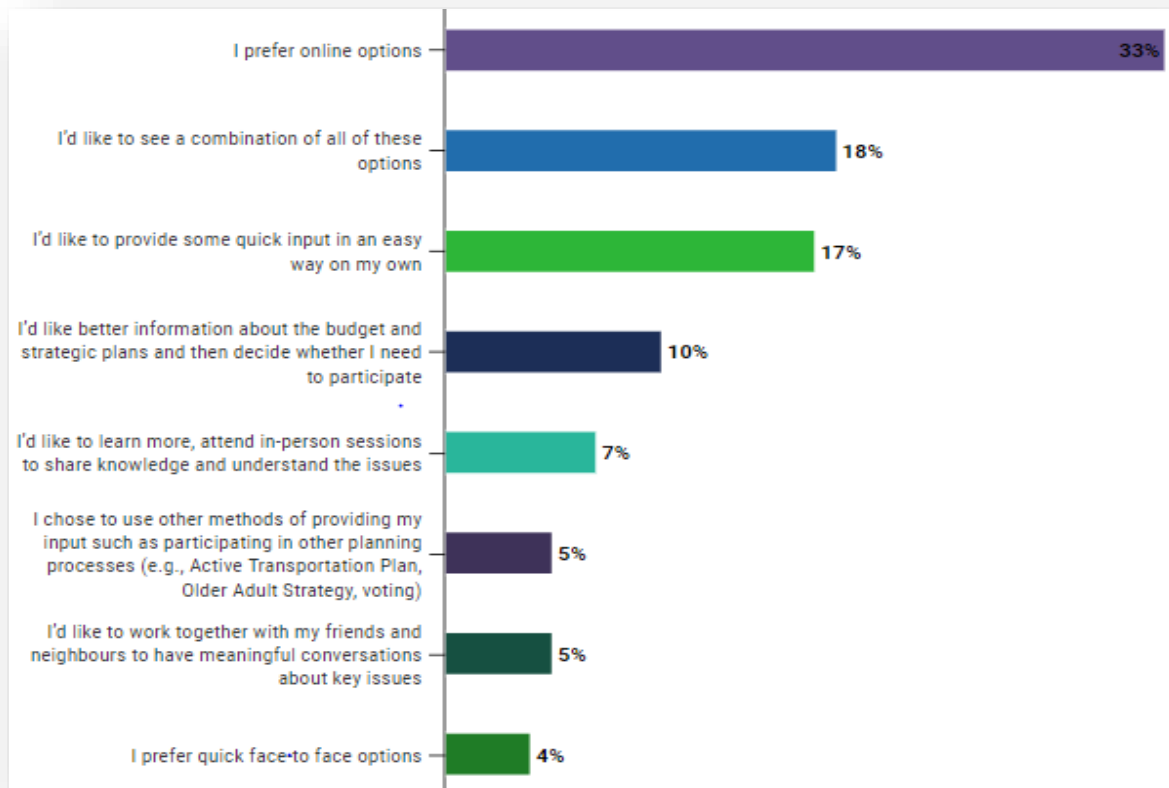
- I’d like to provide some quick input in an easy way (face-to-face or online options)
- I’d like to learn more, attend in-person sessions to share knowledge and understand the issues
- I’d like to work together with friends and neighbors to have meaningful conversations about key issues
- I’d like to see a combination of all these options
- I’d like better information about the budget and strategic plans and then decide whether I need to participate
- I chose to use other methods of providing my input such as participating in the Citizen and Business Survey or by voting for an elected official

Respondents were also given the option to select “other” option, which enabled them to describe a way they would like to be involved in strategic and financial planning processes.

The table (see next page) indicates the preferences of those who responded to engagement opportunities. The highlights of these responses include:

- **33%** of respondents indicated that they had a preference to be involved through online options.
- **18%** of respondents indicated that they would like to see a variety of these options available to them.

What We Heard Report



A total of 43 open-ended submissions were received under the “other” option. The following provides a summary of the themes arising from responses provided by community members:

Increased available information and communication: Overall, most responses noted that they would like to be involved in strategic and financial planning processes in some capacity, with an emphasis on increased availability of information and communication from the District of Saanich to help guide on local issues and plans.

Serve as content experts: Respondents indicated that they could serve as content experts, in terms of being active, regular users of programs and services. They saw value in providing “expert” advice on specific issues and could support Saanich in having greater level of involvement informing decision-makers and staff at committee meetings.

Online preferred: Some open-ended comments left in this section noted the value of being able to access information via social media platforms (e.g., Facebook), while many noted that online surveys were preferred.

Continued, ongoing commitment for authentic engagement: Respondents shared past experience where they felt the input that was offered was not considered or integrated into decision-making processes. This feedback comes from past financial planning processes experience but also other engagement initiatives undertaken by Saanich. This may suggest that a greater need to increase communication efforts regarding how citizen feedback is used and reported out on moving forward.

So what's stopping people from participating?

Participants were asked “[w]hat has or could stop you or others from participating in strategic planning or budgeting processes in the past”, to better understand some of the barriers residents face in becoming involved with planning efforts in their communities.

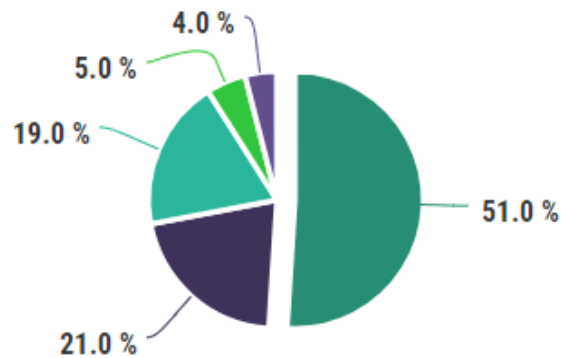
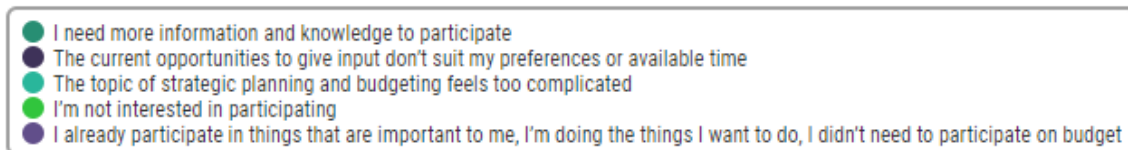
Respondents were given five structured options to choose from, which included:

- The topic of strategic planning and budgeting feels too complicated
- I need more information and knowledge to participate
- The current opportunities to give input don't suit my preferences or available time
- I'm not interested in participating
- I already participate in things that are important to me, I'm doing the thing I want to do, I didn't need to participate on the budget

Respondents were also given the option to choose “other” and submit their own feedback on the question. Below is a chart depicting the submitted results.

The chart below depicts the responses submitted by survey participants:

The majority of responses from participants indicated that they felt they needed or need more information to participate in strategic planning and budgeting processes. This may lead to many community members not engaging in the two processes.



Summary and Recommendations for Moving Forward

So what do these results tell us...

Citizens indicated a high interest in wanting to participate in future engagement opportunities, and expressed desire to see heightened efforts to raise awareness of the opportunities to participate, and the need for budget and strategic planning information to be easily accessible to build understanding and knowledge of what is perceived as a complex topic. It is also important to note, that because many participants did not have previous experience engaging in strategic or budget planning processes that their needs, preferences and willingness may change as participants become more knowledgeable and practiced in the available engagement opportunities.

Citizens need information to build their knowledge...

Provide more information to increase understanding: Respondents indicated that they feel they need more information and knowledge to participate in strategic and financial planning processes. Respondents advocated for resources to be available to residents so that they can make informed decisions on local issues and greater communication of what and when there are opportunities for them to share their input.

Ensure this information accessible and easy to understand:

Provide more information to increase understanding: Respondents indicated that they feel they need more information and knowledge to participate in strategic and financial planning processes. Respondents advocated for resources to be available to residents so that they can make informed decisions on local issues and greater communication of what and when there are opportunities for them to share their input.

Ensure information is accessible and easy to understand: Participants suggested an interest in accessing information about the strategic and financial planning processes so that they could provide informed input. Furthermore, this information should be readily accessible and understandable to the average citizen. Of those who have reviewed budget materials, many respondents shared that they found the information currently provided too complex or complicated to understand. Many encouraged that information be laid out in an easy to read format. This would help to reduce any barriers that residents may face in understanding and participating in the strategic and financial planning initiatives.



So...here's the information people need: Participant feedback suggested the following information be made available:

- describe how the strategic plan and budget processes are related and guide each other.
- describe how each plan is built and the major influencers and considerations of each plan.
- each year to provide overall community context – what's driving the budget, what is Saanich planning for, responding to as well as how Saanich measures the results. In short, create a narrative for the budget approach that helps people understand where their tax dollars are being spent and what they are receiving in return.
- each year share how and where the money and resources are being allocated, in a way that is relatable to average citizens.
- each year demonstrate how and where the costs have been reduced or investments have been made.
- provide the commitment to using the public input in the decision-making process and a follow up describing what was used, what wasn't and the rationale behind those choices.

What formats or mediums work best?: Participant responses suggested tools such as:

- “Budget in brief” overview tools – package or series of visual documents or infographics that provided the basic information regarding both how financial plans are developed as well as the current year information and context.
- Raise awareness of the existing Budget 101 presentation and considering adapting how the content is presented and made available. This content could be made available via an in-person presentation or recorded to be shared via webinar or video through the District website .
- Consider the use of podcasts, video or options to connect into social media .



Citizens see the value in participating both early and later in the process

Additional input for strategic planning: Develop opportunities to engage in Strategic Planning process, participants did not indicate a desire for a large-scale engagement process but rather at a minimum have some of the meetings be open to the public and over time, explore either face-to-face or online options for citizens to offer input towards developing four-year priorities.

Continue Budget Input Public Meetings but with some changes: Participants suggested continuing to provide opportunities to engage at the public input meetings but also incorporate online engagement opportunities. Some stakeholder groups were interested in exploring opportunities such as workshops or sessions that allow for greater public involvement and dialogue opportunities between citizens, staff and elected officials.

Consider opportunities earlier in the budget development process – Participants indicated an interest and value in being involved in the financial planning process at an earlier stage. One option would include when Saanich Council is adopting budget guidelines. The value here would be for the public to provide overarching input to Council with the informed knowledge of the current context as well as the constraints and opportunities the District is currently facing.

Citizens need different tools, tactics, and techniques

Provide different opportunities that meet diverse needs: Respondents noted that they felt current opportunities to provide input do not suit preferences or available time. Respondents throughout the engagement process shared that time constraints and competing priorities often reduced or eliminated their opportunities to engage in these current opportunities. Moreover, they felt that future opportunities should take into consideration citizens who traditionally do not participate in civic engagement opportunities. Participants suggested Saanich to understand these barriers and design engagement opportunities with them in mind.

Specifically, there is a need to change the format: Respondents noted that they would like to see more online engagement opportunities available to them. This, coupled with many respondents struggles with time constraints and other competing priorities, would help to increase the ability for residents to engage in strategic and financial planning processes when they have time available.



Earlier and additional communication of engagement opportunities: Respondents noted that they would like to receive more communication regarding engagement opportunities as well as details on how to participate. Specifically, respondents offered the following feedback on current processes:

- they did not see or receive many, if any at all, communications regarding opportunities.
- they are new residents and were looking at how to get involved with local initiatives and opportunities.
- they encouraged decision-makers and/or elected officials to consider sending out information via email, letter, or circulating information on social media sites.

Many felt that there is a lack of effort to notify the public of important engagement opportunities available for them to participate in.

- Of those who were more familiar with how strategic planning is currently done, there is a desire to see some of the strategic planning meetings held in public. Most acknowledged the need for some meetings to be held in-camera but didn't feel all should be.

Considerations for the development of the plans

The following section provides a summary of the input and feedback received regarding consideration of the overall development of the strategic and financial plans. While this is not specifically related to the public engagement component of the building of these plans it does impact citizen and stakeholder perceptions of the process and willingness to participate.

Aligning strategic plan with community needs: Participants suggested that by further enhancing public engagement efforts and including residents in these processes, these plans may be more representative of community needs.

Appreciate there is a perceived disconnect: During stakeholder interviews, feedback was collected suggesting a perceived disconnect between strategic plan and budget priorities and that there was an opportunity for Saanich to more effectively demonstrate integration of the priorities outlined in the strategic plan with the initiatives, programs and activities funded in each yearly financial plan. Respondents stressed the importance of tying the Strategic Plan into decision-making processes around budgeting.

Content & concrete action: respondents would like to see greater context provided for strategic priorities (what is the need we are looking to address) and how those priorities will be addressed in terms of concrete actions vs. broad statements or list of projects.

Plan Targets & Measures: Respondents suggested the addition of standards, targets and measures should be established to guide the work of strategic plans, helping to support the work of District staff in operationalizing work plans.

Note: Saanich does have extensive measures and targets in place for the strategic plan and results are reported out annually. This feedback indicates there is value in raising the awareness of understanding of the targets and measures before determining the need for new and/or different targets.

Continued, ongoing commitment to government accountability and transparency:

Participants shared that they felt that input and feedback that they had given in previous engagement activities (both related to the budget and other initiatives) was not taken into consideration when a decision was made. Respondent comments shared experiences of previous engagement opportunities had seemed “insincere” or inauthentic, while others questioned whether their input would make a difference. Respondents suggested that it is important for local decision-makers to continually be accountable and transparent about how decisions are made, which includes the use of public feedback. This includes continuous improvement in how Saanich records, reports and communicates how input and feedback was used.



Recommendations for a future approach

Based on all of the input and feedback received, this final report section includes a series of recommendations to consider and undertake the proposed changes.

Recommendation # 1 - Start by developing concise, compelling and creative informative materials

The majority of respondents felt that they currently did not have enough information to know how to participate but indicated a desire for improved information and participation options. We feel that with a strong focus on improved information and communications, citizens will have the information and knowledge they need to determine how they would like to participate further.

Recommendation #2 – Raise awareness of opportunities to participate

Consider increasing communication efforts to raise the awareness of opportunities to participate in both the strategic and financial planning processes.

Recommendation #3 - Integrate online engagement options into existing processes

Introducing online options for public participation are recommended. They can be cost-effective, timely and immediate, and the community has indicated they are the preferred way of providing input.

Recommendation # 4 – Develop opportunities to engage earlier in the financial planning process

Respondents indicated both an interest and value in the opportunity to be involved earlier in the development of the financial planning process. Consider creating input and feedback opportunities earlier in the development of the annual budget.

Recommendation # 5 – Incorporate an interactive discussion opportunity during financial planning

Consider the introduction of engagement opportunities that allow for discussion and dialogue during the financial planning. Participants suggested an interest in being able to ask questions, gather responses and have interactive discussions regarding financial planning to provide more informed feedback and input.

Recommendation # 6 – Establish an “open to all” meeting opportunity in strategic planning

Participants indicated a desire to be involved in the strategic planning processes and therefore consider hosting an “open to all session” – meaning anyone who is interested – to attend and contribute to the development of the strategic plan.

Recommendation #7 – Communicate the changes in an effort for continuous improvement and evolution of the process

What We Heard Report

Changes to municipal budget and strategic planning processes can take time but should also be seen as evolutionary with a commitment to continuous improvement. It may take a couple annual cycles to grow awareness and introduce new tools. Timed with the new term of Council, this may allow the municipality to adapt the process while working with the new Council to continually improve.

Project Background

Local governments in British Columbia are required under the Community Charter to provide opportunity for the public to provide input on the annual budget and financial plan. Additionally, starting in 2017, a citizen-led committee, known as the Governance Review Citizen Advisory Committee, led a review of the governance structure and policies within the District of Saanich and its partnership within the region and reported to Council with recommendations. This initiative included a public engagement process to inform the findings of a report. Over 30 recommendations were provided to Council and in particular one of the findings and recommendations included a “more meaningful public engagement and education processes at the start of the budget cycle”. This recommendation, along with a desire to continually engage citizens in impactful decision-making processes has provided the motivation to undertake this initiative.

Methodology

The District of Saanich and Dialogue Partners worked together to design, implement, report and evaluate on this engagement process. Over a five-week period from July 10 to August 12, 2018, Saanich residents had the opportunity to provide input and feedback through a variety of channels (see *Public Participation Opportunities and Activities* below for more information). The goals were to understand the people's level of knowledge of the strategic and financial plans and how they're developed, where and if they would like to provide feedback and what methods of providing input work best for them.

Public Participation Opportunities and Activities

A widely promoted variety of tools and channels were introduced to support broad engagement by citizens across the District. Recognizing there is no “one size fits all” method for engaging various groups and individuals, a number of in-person and online opportunities were offered. Finally, due to the need to engage over the summer months, specific tools and tactics were used to ensure the process was as accessible as possible.

Online Survey

On July 10, 2018 Saanich launched an online survey for participants to submit feedback on the strategic and financial planning processes. The survey contained specific multiple-choice options and open-ended questions.

Pop Up Events

A series of in-person pop up events were held over a five-week period. This included 25 pop up events in a variety of Saanich facilities as well as some popular community gathering locations and events including the Sunday Farmers' Market, Yoga in the Park, Saanich Uptown Mall and Music in the Park.

Website and Twitter Polls

A series of questions were developed and shared on the project website and through social media. Participants had the opportunity to submit responses and the polls results were posted weekly.

Stakeholder Meetings

A variety of stakeholder groups and organizations were contacted via email to raise awareness about the project and encourage participation in the process. Follow up phone calls were also made to stakeholders to ensure they about the opportunities to participate in the process.

In addition, a number of stakeholders groups and organizations received an invitation for a one-to-one meeting or phone call to have a conversation around strategic and financial planning processes using the key discussion questions.

Communications to Support Engagement

Stakeholder Outreach

A variety of stakeholder groups and organizations were contacted via email to raise awareness about the project and encourage participation in the process. Follow up phone calls were also made to stakeholders to ensure they about the opportunities to participate in the process.

Details of the opportunity to participate were also forwarded to Advisory Committee members via Legislative Services staff. Individual committee members were invited to contact engagement team members to discuss the project and answer the key discussion questions.

Recognizing that many District staff are also Saanich residents, District of Saanich staff members were also invite to participate in the engagement process via an “all staff” posting on the Saanich Intranet.

Media Release

To support the project launch (July 10) a media release was distributed to Capital Region media. The release provided information about the initiative, timelines, deliverables and promoted opportunities for participation.

Website

The project webpage (hosted on the District of Saanich website) provide an overview of the project and associated engagement process. Content was written in plain language and was simply designed to easily raise awareness of the project, inform stakeholders of upcoming opportunities to participate and provide updates and feedback on what’s been heard and what’s being done. Participants were able to access the infographics, project updates and upcoming activities schedule, Frequently Asked Questions and responses and the whiteboard video.

Infographics

Two infographics were created to support the process. The first “connecting the dots” infographic outlined the current decision-making process, a description of each plan and how the plans connect together.

The second two-page “roadmap” infographic highlighted the key milestones in developing and approving the strategic and financial plans and identified where residents currently have an opportunity to provide feedback. Participants also had the opportunity to identify where in the processes they would like to provide their input. The key discussion questions were on the reverse side of the page and allowed people to answer the survey questions at pop up events.

Saanich News Ads

Using established print ad templates, two advertisements were placed in the Saanich News. The first ad ran on July 11th and the second on August 8th.

Whiteboard Video

The 37 second whiteboard video housed on the project website and used in the communications and ad campaign included the call to action as well as important key discussion questions and encouraged people to respond via social media.

Facebook Ads

Working with the District's Communications Division, two rounds of Facebook ads ran in both July and August. The ads were directed at specific searches, key words and targeted interest groups. The whiteboard video was used in the ad to generate awareness and interest in the project.

Social Media Posts

The Saanich Twitter and Facebook accounts were utilized throughout the project to generate interest, and provide updates, news, and project related questions to promote participation.