

To:	Finance Committee	Item:	FIN-13-18	Date of Report:	November 28, 2013
From:	Nicole Pincombe Director of Finance/Treasurer	File:	C-2000	Date of Meeting:	December 5, 2013
Subject:	<i>Public Engagement on the City's Annual Budget</i>			PUBLIC REPORT	

1.0 PURPOSE

The purpose of this report is to respond to the June 24, 2013 Council directive:

“That staff explore and report back to Council on possible on-line interactive tools to both inform and solicit feedback and comments from a wider public audience on the annual budget including cost implications and the feasibility of these initiatives for the 2014 budget process”.

2.0 RECOMMENDATION

That the Finance Committee recommend to City Council:

That in accordance with Report FA-13-18, *Public Engagement on the City's Annual Budget*, dated November 28, 2013 that the communication plan to inform and solicit feedback and comments from the public on the annual budget as outlined in Section 5.3 be endorsed.

3.0 EXECUTIVE SUMMARY

Municipal budget and financial information needs to be accessible, comprehensive and understandable. In addition, the budget process must be transparent and provide the public with a variety of options for providing input into the annual budget and financial decision-making processes.

It is important that the public is engaged and participates as it assists municipalities in determining resident priorities. Residents have very busy schedules making it difficult to attend meetings and provide comment on municipal budgets. With the increased use and ease of online communications, there is a growing trend of municipalities soliciting and receiving public feedback on their annual budgets through online communication mediums including social media.

To meet the Oshawa Strategic Plan goals of Social Equity and Accountable Leadership, it is proposed that the City augment existing communications and implement online communication mediums to further inform and engage the public on the annual budget.

4.0 INPUT FROM OTHER SOURCES

- A survey was distributed to 36 municipalities/regions inquiring about various budget processes including how the public is engaged in the budget process. Responses from 23 municipalities/regions were received including: Ajax, Brampton, Burlington, Cambridge, Clarington, Durham, Guelph, Halton Hills, Hamilton, Kingston, Kitchener, Mississauga, Newmarket, Oakville, Ottawa, Peel, Sarnia, Thunder Bay, Toronto, Vaughan, York, Whitby and Windsor.
- Corporate Communications

5.0 ANALYSIS

5.1 Background

- The City utilizes traditional communication mediums to inform and solicit public feedback about the annual budget process. For the 2013 budget, communications included and resulted in the following:
 - 1 newspaper advertisement to provide notice of the Council meetings
 - Two evening Council meetings to receive public comments and feedback on the annual budget. Council received delegations on the budget from 37 individuals/organizations on the following items
 - Partnership grant applications – 10 individuals/organizations
 - External Agencies – 7 organizations
 - Arts and Culture Strategy – 19 individuals/organizations
 - General comments on the budget – 1 individual
 - Posting of the Council budget meeting dates on the City's website under "meetings" and under "Top Stories" on the City website homepage, which are also communicated through Facebook and Twitter
 - The complete 2013 budget submission was posted on the City's website under "Inside City Hall – Financial Information"
 - A Budget Press Package (including the transmittal letter, budget overview report, operating budget summary, capital budget report and potential adjustments list) was posted on the City's website and copies were available at Service Oshawa, City Clerk Services and Finance Services
 - A Top Story news item announcing approval of the budget, a link to the budget webpage and communication through Twitter and Facebook
 - There have been 1,470 budget webpage visits to date in 2013

- Various newspaper and radio stories reported on the budget deliberations and approved budget.

5.2 Survey of Municipalities

- Feedback from the municipalities/regions revealed that the following three primary communication mediums are used to engage the public in the budget process.
 - Public deputation/town hall meetings
 - Detailed information on the municipal/region websites
 - Use of social media
- It was also noted that there is an increasing use of online surveys to provide feedback on City spending priorities and an interactive online calculator for residents to see the impact different budget scenarios would have on their property taxes.
- Attachment 1 is a summary of feedback from the survey of municipalities/regions on methods of public engagement in the budget process.

5.3 Proposed Communication Mediums

- The table below proposes communication mediums to be implemented to engage the public on the 2014 budget as well as additional opportunities that will be explored for the 2015 budget. There is minimal incremental costs associated with these recommendations for 2014.

Communication Medium	2014 Budget	2015 Budget	Incremental Cost
<ul style="list-style-type: none"> • Update existing webpages to include detailed information on understanding the budget process, budget meeting dates, budget submission once provided to Council, how tax bills are calculated (Region, City and Education), how tax dollars are spent, etc. and profile in the home page carousel. 	X	X	0
<ul style="list-style-type: none"> • Distribute and respond to Facebook and Twitter messages regarding financial assistance programs, partnership grants, budget presentation, budget meetings, approved budget, etc. 	X	X	0

Communication Medium	2014 Budget	2015 Budget	Incremental Cost
<ul style="list-style-type: none"> • Host Online Town Hall meeting using the City's Facebook page by creating an event: <ul style="list-style-type: none"> - In advance of the meeting, questions would be received through Facebook, Twitter and/or by contacting Service Oshawa via email and/or phone; - Responses would be provided on a designated day and time. The length of the online meeting would be approximately 60 minutes (hosted by the City Treasurer); and - Following the session, a summary of questions and answers would be posted on the City's website and communicated through Twitter and Facebook. 	X	X	\$200
<ul style="list-style-type: none"> • Develop a special <i>Inside Oshawa</i> resident e-newsletter dedicated to the budget process and related information. 	X	X	0
<ul style="list-style-type: none"> • Web stream the Budget Council meetings. 	X	X	0
<ul style="list-style-type: none"> • Develop a video and post on YouTube that informs the public about the City's budget process, value for taxes and financial challenges. 	X	X	0
<ul style="list-style-type: none"> • Add an online form to the City's website to collect comments. 	X	X	0
<ul style="list-style-type: none"> • Implement an online and paper survey asking for feedback and input on City services and budget. 		X	0
<ul style="list-style-type: none"> • Implement an interactive online budget calculator for residents to learn about the impact of changes to service levels and/or addition of new programs and the potential budget impact. 		X	\$4,500 – \$6,000
<ul style="list-style-type: none"> • Placement of a newspaper advertisement in Oshawa This Week and Oshawa Express. 	X	X	0
<ul style="list-style-type: none"> • Use of the corporate radio buy. 	X	X	0
<ul style="list-style-type: none"> • Issue of media releases. 	X	X	0

Communication Medium	2014 Budget	2015 Budget	Incremental Cost
• Display promotional materials (e.g. posters, electronic monitors) at City facilities.	X	X	0
• Host an Open House/information workshop(s) at City recreation facilities in late January after the budget submission has been presented to Council. The informal workshops would provide an opportunity to provide the public with information on the budget process, budget submission and receive feedback from the public which would be provided to Council during budget deliberation.	X	X	0
• Post information on the City's iConnect (internal website).	X	X	0
• Host a Lunch & Learn for City employees.	X	X	0
• Include articles in <i>The Grapevine</i> (employee newsletter).	X	X	0
• Include information in <i>Inside Oshawa</i> (resident newsletter in both print and online formats).	X	X	0

5.4 Communication Measurement

- Communications will be monitored, measured and adjusted after the 2014 budget for the 2015 budget according to a number of informal and formal measures such as:
 - Feedback and statistics gathered through website and e-communications;
 - Number of individuals who attend Open House, Council meetings, Online Town Hall Meeting, Lunch & Learns and web streaming;
 - Feedback received through website forms, emails and phone inquiries;
 - Media analysis and coverage reports; and,
 - Informal feedback received.

5.5 Public Engagement

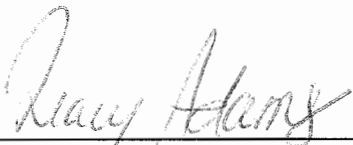
- To enhance public engagement, various communication mediums have been referenced in this report. Public engagement is a subject of a future Council report in 2014 that will outline a corporate strategy and policy, as well as identify potential online resources (e.g. online budget calculator/survey) and cost.

6.0 FINANCIAL IMPLICATIONS

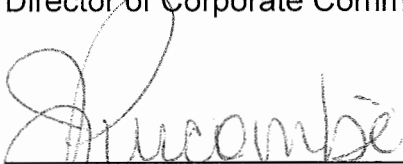
- The incremental estimated cost in 2014 for the proposed communication plan as outlined in Section 5.3 is \$200. This cost can be accommodated within Finance's 2014 base budget submission.

7.0 RELATIONSHIP TO THE OSHAWA STRATEGIC PLAN

- The proposed financial and budget process communications plan is consistent with the Oshawa Strategic Plan goals of:
 - Social Equity, and specifically the theme of An Inclusive Community and the related strategy of "continue to engage citizens of all ages"; and,
 - Accountable Leadership, and specifically the theme of Open and Transparent Government and the related strategies of "enable public involvement in decision making" and "seek feedback from customers about City services and programs".



Tracy Adams
Director of Corporate Communications



Nicole Pincombe
Director of Finance/Treasurer

Attachment

Municipality Survey Results

What does your Municipality/Region do to engage the public in the budget process?

	Communication Medium Used											
	Public Deputation /Town Hall/ Open House Meetings	City Website	Open House	Budget e-mail box	City's 311 Call Centre	Social Media	Surveys	Interactive Budget Calendar/ Online Budget Tool	Ask an Expert	Community Handbook	Information Package	Outreach at City Events
Municipality/Region	1	2	3	4	5	6	7	8	9	10	11	12
Town of Ajax	X	X	X			X					X	
City of Brampton	X					X						
Town of Burlington	X	X	X									
City of Cambridge	X											
Town of Clarington	X					X						
Region of Durham	X											
City of Guelph	X											
Town of Halton Hills	X											
City of Hamilton	X	X				X						
City of Kingston	X											
City of Kitchener	X	X				X		X	X			
City of Mississauga		X				X						
Town of Newmarket						X						X
Town of Oakville	X					X	X					
City of Ottawa	X			X	X							
Region of Peel		X	X									
City of Sarnia		X										
City of Thunder Bay	X									X		
City of Toronto	X											
City of Vaughan	X											
York Region	X	X										
Town of Whitby	X											
City of Windsor	X						X					
City of Oshawa	X	X		X	X						X	

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Municipality Survey Results – What does your Municipality/Region do to engage the public in the budget process?

1 Public Deputation/Town Hall Meetings/Open House

Opportunity for the public to address Committee/Council on the budget in either person or by writing. These meetings provide an opportunity to provide information/education on the budget to the public. Meetings are often advertised on City's website, newspapers, radio, Twitter, Facebook, internal notice boards and external sign boards at City facilities.

2 City Website

Detailed budget information available on City's website or budget webpage.

3 Budget Email Box

Suggestions, ideas and views from the public about the budget are sent to a budget's email box and are then provided to management to incorporate within the budget.

4 City's 311 Call Centre

Public can phone in and leave comments about the budget at the Call Centre.

5 Social Media

Public budget meetings are televised and discussed on social media (i.e. Facebook, Twitter updates).

6 Surveys – no additional information was provided.

7 Interactive Budget Calendar/Online Budget Tool

Public can see the impact of different budget scenarios on their property taxes and vote/leave comments on their preferred options.

8 Ask an Expert

City hosts an "Ask an Expert" event dedicated to budgets on its Facebook page. Public can post questions and get responses from Finance staff over the course of the hour.

9 Community Handbook

Handbook shows how taxes are spent by category. The Handbook is advertised on City's website, at City Hall and at local libraries.

10 Information Package

Detailed budget documents converted into an easy to understand information package placed on City's website.

11 Outreach at City Events – no additional information was provided.