Agenda

1. 2020 Budget Book Presentation
2. Budget Development Process
3. Public Engagement
4. Timelines
Staff Direction (SD-08-19)

“Direct the Director of Finance to schedule a committee workshop focusing on how to retool, rethink and reinvent the capital and operating budget process, management and delivery.”

City Services – Current Alignment

<table>
<thead>
<tr>
<th>Public Safety</th>
<th>Maintenance</th>
<th>Roads and Transportation</th>
<th>Leisure</th>
<th>Design and Build</th>
<th>Customer Relations and Citizen Representation</th>
<th>Internal Support and Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Control</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire Emergency Response</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire Hydrant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire Prevention and Public Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managing Law Enforcement and Licensing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Cemetery
- Environmental and Parks
- Parks and Open Space Management
- Fire hydrant Replacement
- Fire hydrant Maintenance
- Fire hydrant Water DFS
- Fire hydrant Management
- Transportation Planning
- Parks and Open Space Design and Development

- Parking Management
- Roads and Structures Design and Construction
- Specialized Transit
- Traffic Operations Management
- Transport
- Transportation Planning
- Parks and Open Space Design and Development

- Arts and Culture
- Organized Sport Support
- Recreation
- Building Codes
- Financial and Property Management
- Community Design and Development Review
- Facilities and Buildings Design and Construction
- Parks and Open Space Design and Development

- Council and Citizen Consultation
- Service Burlington

- Asset Management
- Corporate Legal
- Corporate Management
- Financial Management
- Fixed Management
- Geographic Information and Mapping
- Human Resources
- Information Technology
- Internal Audit
- Slip Prevention
- Strategic Communications and Government Relations

burlington.ca/budget
Vision to Focus Workplan

1. A Customer Focused Complete Service Approach

2. Demonstrates City Investment in Focus Areas
   - Operating Investment
   - Capital Projects
## City Services – Revised Alignment

### Focus Area 1: A City that Grows
- Building, Code Enforcement & Inspection
- Community Design & Development Review
- ERC

### Focus Area 2: A City that Moves
- Road & Stewardship
- Parking Management
- Roads & Structures - Design & Construction
- Traffic Operations Management
- Transportation Planning
- Transit
- Specialized Transit

### Focus Area 3: A Healthy and Greener City
- Parks & Open Space - Maintenance
- Trees Management
- Organized Sport Support
- Recreation
- Parks & Open Space - Design & Development
- Surface Water Storage
- Environmental Energy

### Focus Area 4: An Engaging City
- Arts & Culture
- Strategic Communications & Government Relations
- Library
- Tourism
- Arts & Heritage

### Focus Area 5: A Safe City
- Animal Control
- By-Law Enforcement
- Fire Prevention & Public Education
- Emergency Management
- Fire Emergency Response

### Focus Area 6: Good Governance
- Corporate Management
- Human Resources
- Mayor & Council
- Council & Committee Services
- Corporate Legal

### Enabling Services
- Information Technology
- Geographic Information Services
- Mapping
- Signage
- Sign Production Service
- Pest Management

---

### City Services – Revised Alignment

### Focus Area 1: A City that Grows
- Building, Code Enforcement & Inspection
- Community Design & Development Review
- ERC

### Focus Area 2: A City that Moves
- Road & Stewardship
- Parking Management
- Roads & Structures - Design & Construction
- Traffic Operations Management
- Transportation Planning
- Transit
- Specialized Transit

### Focus Area 3: A Healthy and Greener City
- Parks & Open Space - Maintenance
- Trees Management
- Organized Sport Support
- Recreation
- Parks & Open Space - Design & Development
- Surface Water Storage
- Environmental Energy

### Focus Area 4: An Engaging City
- Arts & Culture
- Strategic Communications & Government Relations
- Library
- Tourism
- Arts & Heritage

### Focus Area 5: A Safe City
- Animal Control
- By-Law Enforcement
- Fire Prevention & Public Education
- Emergency Management
- Fire Emergency Response

### Focus Area 6: Good Governance
- Corporate Management
- Human Resources
- Mayor & Council
- Council & Committee Services
- Corporate Legal

### Enabling Services
- Information Technology
- Geographic Information Services
- Mapping
- Signage
- Sign Production Service
- Pest Management

---

**burlington.ca/budget**
Combined Budget Book

Will include:
- Service Business Plans
- Operating Budgets for each Service
- Listing of all capital projects (10 years) for each Service Category

Capital and Operating Budgets approved together

Future Initiatives

- Service Reviews
- Further Alignment of Capital and Operating Budgets to Service Business Plans
- Multi-year Budgeting
- New ERP System
Capital Funding Pressures

- Tax Supported Capital - $9.29 million reduction
- Transit Funding
  - Provincial Gas Tax
  - Public Transit Infrastructure Fund (PTIF)
- Development Related
Operating Budget – Pressures

<table>
<thead>
<tr>
<th></th>
<th>20 Year Simulation (Appendix A F-28-19)</th>
<th>Forecasted City Tax Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Budget*</td>
<td>1.75%</td>
<td>1.75%</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>1.25%</td>
<td>1.25%</td>
</tr>
<tr>
<td>Sub-total</td>
<td>3.0%</td>
<td>3.0%</td>
</tr>
<tr>
<td>“Net” Service Enhancements</td>
<td>1.27%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Total City Increase</td>
<td>4.27%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Estimated Overall Increase</td>
<td>2.67%</td>
<td>2.45%</td>
</tr>
</tbody>
</table>

*Includes estimated assessment growth of 0.6% 

Local Boards – 1.75% increase over 2019 contribution

Continuous Improvement Initiatives

- Annual communication to Council on Budget Efficiencies
- Service Reviews have not yet commenced
- Provincial 4% Efficiency Savings
  - Audit and Accountability Fund
Business Cases

- Must demonstrate alignment to one or more of the following:
  - 4-year Workplan (Vision to Focus)
  - Approved policy
  - A new regulation or change in legislation
  - An operating impact from the implementation of a capital project
  - An enhancement to a service

Items in addition to base budget

- Infrastructure levy – 1.25%
- Operating impacts from capital projects
- Service level enhancements
### Historical Tax Rate Changes

<table>
<thead>
<tr>
<th>Year</th>
<th>City Tax Increase</th>
<th>Total (City, Region, Education)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>0.91%</td>
<td>0.94%</td>
</tr>
<tr>
<td>2012</td>
<td>3.29%</td>
<td>1.79%</td>
</tr>
<tr>
<td>2013</td>
<td>4.46%</td>
<td>1.81%</td>
</tr>
<tr>
<td>2014</td>
<td>3.50%</td>
<td>1.49%</td>
</tr>
<tr>
<td>2015</td>
<td>3.64%</td>
<td>2.08%</td>
</tr>
<tr>
<td>2016</td>
<td>3.14%</td>
<td>2.01%</td>
</tr>
<tr>
<td>2017</td>
<td>4.42%</td>
<td>2.60%</td>
</tr>
<tr>
<td>2018</td>
<td>4.36%</td>
<td>2.64%</td>
</tr>
<tr>
<td>2019</td>
<td>2.99%</td>
<td>1.96%</td>
</tr>
<tr>
<td>4-yr Avg.</td>
<td>3.73%</td>
<td>2.30%</td>
</tr>
<tr>
<td>9-yr Avg.</td>
<td>3.41%</td>
<td>1.92%</td>
</tr>
</tbody>
</table>

### Budget – Engagement

**Telephone Town Hall**

**Online Engagement**

**Questica Open Book**

**Food for Feedback**
Council Information Session

November 12th & 14th
- Capital and Operating Budgets together
- Time slots arranged by Service Category

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 4</td>
<td>COW – Budget Overview Report</td>
</tr>
<tr>
<td>November 12 &amp; 14</td>
<td>Council Information Sessions</td>
</tr>
<tr>
<td>December 10 &amp; 12</td>
<td>COW – Budget Review</td>
</tr>
<tr>
<td>December 16</td>
<td>Council – Approval of 2020 Budget</td>
</tr>
</tbody>
</table>
Thank you