Modernizing Services – Digital Budget

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Budget Transformation

2017
- Stormwater utility
- Infra Levy
- Capital Plan Unfunded
- 4-budget presentations
- Tax budget fails

2018
- One Capital Budget
- Op impacts approved with Cap Budget
- Intro to MYB
- Capital Plan Unfunded
- AODA issues

2019
- AM integration
- Intro to LT funding strategies
- More MYB
- FMW Budget Request Module
- AODA issues

2020
- Parking utility
- FMW Salary Plan
- AODA issues
- More LT funding Strat and MYB
- Extended Op impact from Cap
- Extended Debt and Reserves forecast

2021
- Alignment to Strat Plan
- Fully Digital with FMW linked to Power BI / web
- One Budget, regardless of funding type
- Modified MYB with 3-year op forecast
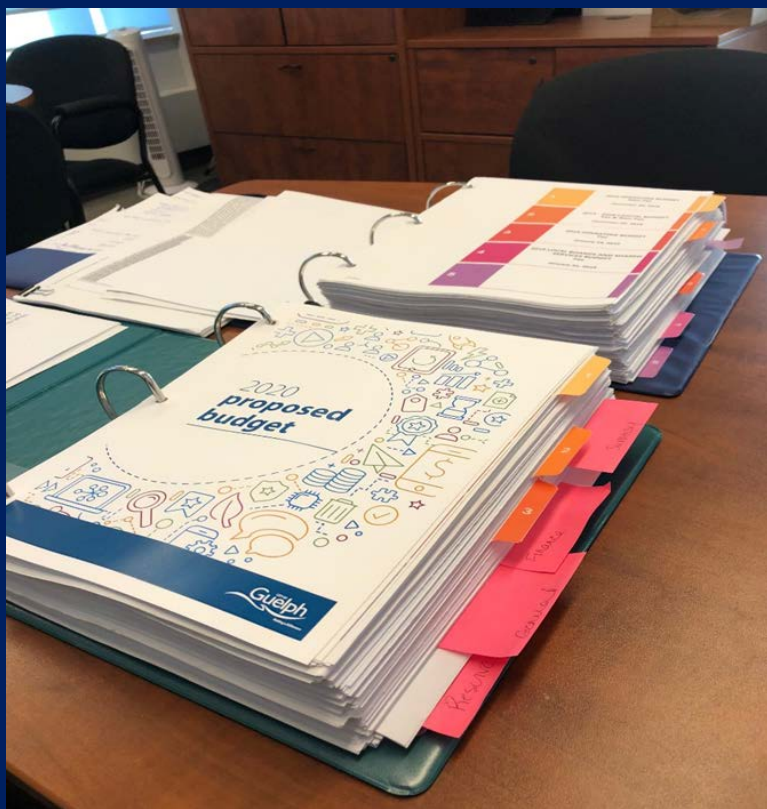
Key Budget Principles

- Simplify, declutter budget decision
- Budget is an enabler of the Strategic Plan, not net new things
- Focus on governance, policy, strategies – not operational
- Building trust with Council takes time
- Continuous improvement
- Serve the customer

Trust = Permission to Change

Why was Budget Modernization a priority?

- AODA challenges
- Effective budgets link resourcing and strategy
- Reduce inefficiency and errors
- Address communication and Council decision challenges
- Embrace COVID timing and City focus on data

A Modern Budget Document

What was different?

2020 Budget

- 4 distinct packages (Capital, Non-tax operating, tax operating, local boards operating)

- Organized by Service Area

- 4 presentation nights, 3 approval nights

- Delegations – 2 combined with presentation night and 1 stand alone meeting

2021 Budget

- 1 website (Capital and Operating)

- Organized by Strategic Pillar

- 1 presentation full day, 1 approval day

- 1 delegation night

What was different?

2020 Budget

- 100 page Pdfs on website
- Traditional comms tactics (press release, social)
- In person meetings – lots of wasted staff time
- Local boards on separate night; little coordination and guidance on content

2021 Budget

- Fully linked website
- New ways to connect – 5 town halls, podcasts, media web walkthrough
- Virtual meeting enabling staff to follow and jump in only when required.
- Local boards part of city presentation, given 10 mins, with consistent content

Challenges encountered

- Budget no longer primarily driven by Finance – takes a team and coordination/timing is challenging
    - Clerks, IT (data/web), Communications

- Council learning curve - created "budget buddies"

- Technology issues - data charts

- Media and community learning curve

Was it worth it?

	2020	2019	% Increase
Page Views	22,093	9,609	130%
Average per day	433	188	130%
Unique Page Views	13,137	3,397	287%
Average per day	258	67	285%
Peak Views	3,334	840	297%

- Significant increase in community access of budget

- Enhance ability to tell our budget story and reference other web content/meetings

- Eliminated 4,000 pages of printing

- Benefit of eliminating AODA challenges – Priceless (and about 150 hours of time)

Ingredients to Success

- Define primary goal, and/or challenge you are hoping to solve – For Guelph -MYB and AODA were driving forces

- Assess willingness of Senior Leadership – CAO was huge proponent

- Do you have a cross-functional team that wants to lead change?

- Culture of CI, incremental improvement

- Be patient, transformational change takes time – focus on building blocks early

People
+
Process
+
Technology
=
Success