



## 2017 Community Excellence Awards

### Application Form

### Best Practices, Excellence in Financial Stewardship

Please complete and return the application form by **Friday, June 23, 2017**. If you have any questions, contact UBCM at awards@ubcm.ca or (250) 356-5193.

#### SECTION 1: Applicant Information

**Local Government:** Sunhine Coast Regional District

**Complete Mailing Address:** 1975 Field Road, Sechelt, BC V0N 3A1

**Contact Person:** Janette Loveys

**Position:** Chief Administrative Officer

**Phone:** 604-885-6811

**E-mail:** janette.loveys@scrd.ca

#### SECTION 2: Staff Contact

An invitation to attend the UBCM Community Excellence Awards Breakfast Reception will be sent out via e-mail in early September. Winners will not be named before the ceremony.

Please provide the contact information for the person in your office who should receive and reply to the invitation, on behalf of the elected officials/staff who will be in attendance at the UBCM Convention.

**Staff Contact Person:** Tara Crosby

**Position:** Administrative Assistant, Corporate Services

**Phone:** 604-885-6800 ext. 6127

**E-mail:** tara.crosby@scrd.ca

#### SECTION 3: Project/Program Information

**1. Name of the Project/Program:**

Budget Engagement through Community Dialogues

**2. Project/Program Summary.** Please provide a summary of your project/program in 150 words or less

With an evolving financial plan process after the 2014 local government election, the Sunshine Coast Regional District recognized a need from the community to be more engaged and transparent on the budget process. Frequently asked questions reflected the community's desire for knowledge as to how their taxes were being spent, services provided and area allocations and resulting tax notice changes. It was an opportune time to embark on a budget engagement initiative, which has now progressed into a Community Dialogues annual event, reaching Regional District and Municipal Communities on the Sunshine Coast and providing a vehicle for the residents to interact with their local governments.

**3. Indicators of Financial Stewardship.** As outlined in the Program Guide, local governments must demonstrate complete of the following. To assist with evaluation of applications, please indicate the status or completion date for each of the following:

- Audited financial statements. April 27, 2017
- Annual report. June 22, 2017
- Financial reporting requirements for Ministry of Community, Sport & Cultural Development. June 30, 2017
- Five-year capital plan. Asset Management Plan adopted February 2015 with capital plan development ongoing.
- Financial policies. Financial Sustainability Policy last updated March 10, 2016, Debt Management, Investment Policy, and Purchasing Policy
- Budget process. The process runs from July to March of each year and starts with a budget introduction meeting through pre-budget to public engagements to two rounds of budget deliberations ending with budget adoption prior to March 31 of each year and a follow-up budget debrief towards continuous improvement of the process.
- Strategic plan. 2015-2018
- Business continuity plan.

#### **SECTION 4: Project Details**

Please answer each question in 250 words or less (our judges value directness and brevity). If you experience difficulty answering a particular question, consider the aspects of your program that may relate to the question and show us how they are linked.

Remember to include measurable results whenever possible as well as clear references to the required indicators of financial stewardship in Q. 3 above.

**4. Results.** How has this project/program improved financial stewardship in your local government and community?

By presenting a holistic view of the Sunshine Coast Regional District through Community Dialogues and encouraging the community to attend meetings and events that inform and update residents. The community will have an understanding of where their tax dollars go and how the Board reaches important operating and capital planning budget decisions. The questions and feedback that we have now received demonstrate that the community is

now better informed, not only of the financial and strategic plans, but also of the services that the Sunshine Coast Regional District provides. This process has allowed for a more personable approach to local government. As a result of a more informed community the Sunshine Coast Regional District is able to modify processes to better align with the community's needs and understand and manage financial planning decisions and processes for future years.

**5. Service Delivery.** How has the implementation of this program/project improved services within your local government and your community?

The community is more informed. In the first years of the budget engagement process the financial services website at [www.scrd.ca](http://www.scrd.ca) was updated to provide more detailed information on the budget and financial planning process. New graphs and charts showing the breakdown of taxes by area for services and this video were created: <https://www.youtube.com/watch?v=DsFK-1jjo6s>. With the Community Dialogues there is more outreach to each electoral and municipal area, including the islands located in Electoral Area catchment, and the flow of information is more widely disseminated.

**6. Effectiveness.** How is the program/project more efficient and/or effective than it was before?

The process of Community Dialogues has evolved from basic budget engagement presentations, to presenting the entire organization and the financial impacts of the services. This has provided a face to face connection with the community and reduced the stigma of local government and its roles and responsibilities.

**7. Economic Impact.** How has the program/project saved the community money and/or resources or encouraged economic development?

With the growth and development of communities on the Sunshine Coast, reaching out to present granting opportunities and discussing the Regional Economic Development Plans, shows confidence in the financial sustainability of the Sunshine Coast and reaches goals set out in the Strategic Plan.

**8. Accountability.** How has the program/project improved accountability to citizens of your local government?

Audited financial statements, an annual report and awards for financial reporting show the Sunshine Coast Regional District's confidence and commitment to being open and transparent to the community. A sense of pride in leadership presents itself at each Community Dialogue. The community's comfort level to attend and ask questions that matter, assists the Board and staff in making relative improvements to processes. In March of each year, prior to the second round of budget and budget adoption, the Sunshine Coast Regional District Board and staff appear on local television to present the preliminary budget and field questions or reply to concerns the public may have through the call-in session. The presentation is uploaded to the [www.scrd.ca](http://www.scrd.ca) site and also presented individually at Municipal Council meetings. As part of the Community Dialogues, information included in the presentation for these budget sessions are printed as hand outs for the Community, providing information relevant to each service area.

**9. Teamwork.** Tell us about the teamwork involved in making this program/project possible.

Each department of the Sunshine Coast Regional District contributes to the Community Dialogue process. The Corporate Services Department and Board of Directors provide the Strategic Planning and Financial Services information which ties together all of the other

services the Regional District provides. Each year the entire organization comes together to organize these events in the communities. Representatives from each department attend to share information and answer questions.

**10. Innovation.** What makes this program/project innovative and creative?

Being out in the community shows a proactive approach to addressing the needs of our community, aligning each year to the budget and to financial planning. The community has an opportunity to meet the people that make decisions and discuss what matters most to them. Distribution of budget and service information reaches more people by handing it out directly than simply as an insert in a tax or water bill.

**11. Sustainability.** What measures have you put in place to ensure the continued operation of this initiative? (e.g. staff time, resources, financial)

There is now an ongoing budget each year provided through Support Services for the production of the Community Dialogues. Each year, they are carefully planned and monitored for effectiveness and continue to evolve from the budget engagement presentations.

**12. Best Practices.** How do the processes behind the program/project, and the subsequent results, serve as an example of best practices?

Reaching out to the community to be upfront and transparent shows the Sunshine Coast Regional District's commitment to financial sustainability and the Strategic Plan. Building on what exists by listening to what the community would like to know about and perhaps what their vision for their local government is. This proactive approach decreases perceived barriers to finding information and allows the citizens to feel more engaged with local government.

**13. Transferability.** How is this program/project transferable to other local governments?

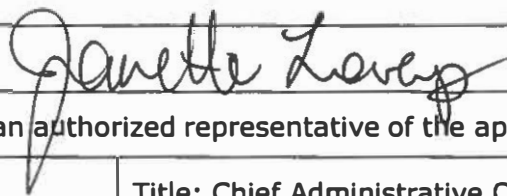
The Municipalities and other community organizations have requested to be part of the Sunshine Coast Regional District's Community Dialogues, as they see the effectiveness of it. In this, the citizens have an opportunity to understand how the Regional District differs in processes, financial planning and supported services through grants or other budgeted functions.

**14. Knowledge Sharing.** What helpful advice would you share with other communities looking to embark on a similar project?

Keep the information at a fairly high level, encourage the citizens to come and ask the questions that mean the most to them rather than simply providing a overwhelming amount of detail. The face to face approach really lends to a more comfortable conversation between residents and local government.

**15. Additional Information.** Please share any other information you think may help support your submission.

**SECTION 5: Signature**



Applications are required to be signed by an authorized representative of the applicant.

Name: Janette Loveys

Title: Chief Administrative Officer

Signature:

Date: June 29, 2017

Applications should be submitted as Word or PDF files. If you choose to submit your application by e-mail, hard copies do not need to follow.

Submit applications to Local Government Program Services, Union of BC Municipalities

E-mail: [awards@ubcm.ca](mailto:awards@ubcm.ca) or mail: 525 Government Street, Victoria, BC, V8V 0A8