



2011 COMMUNITY EXCELLENCE AWARDS Category Worksheet

BEST PRACTICES, General

Name of Local Government: District of West Kelowna

Project/Program Title: [2011 Strategic Priorities](#)

Project Summary Paragraph

Please provide a summary of your project/program in 150 words or less.

The District of West Kelowna incorporated in December 2007. The municipality, with a population of 27,000, was required to transform quickly from a rural form of governance to one better suited to meet and adapt to the needs of a rapidly urbanizing community.

To ensure the new municipality was developing in an affordable, effective and efficient manner, Council worked with the District of West Kelowna's CAO in 2008 to create the [first Strategic Priorities](#) document. Since then, the [Strategic Priorities](#) process has evolved from a single overarching document, to a comprehensive plan that includes companion [Operational Details](#) and [Core Services](#) documents. The Operational Details document outlines each Department's plans to complete Council's established priorities with timelines. Progress updates are provided to Council on a quarterly basis. The Core Services document provides a summary of each department and its divisions, resources and program and service delivery commitments.

The District of West Kelowna must strike a balance among competing priorities such as: continuing the transformation from a rural to an urbanized form of government; providing modern services to residents and customers; upgrading rural-standard or aging infrastructure; building financial reserves; and holding the line on tax increases. Council's Strategic Priorities process ensures the municipality is able to affordably, effectively and efficiently balance these competing interests.



Project Analysis

Please answer the question in 300 words or less in 11 pt Arial font (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.

1. SERVICES

How has the implementation of this program/project improved services in your community?

The creation of the Strategic Priorities has incorporated an annual [Citizens' Survey](#), which allows residents the opportunity to provide input into infrastructure improvements and programs and services levels. Council is then able to consider the input from this document, combined with its own knowledge of community needs and analysis from staff and consultants (where applicable) to determine which areas require the most focus in the year ahead. Using this collective information, the District of West Kelowna has been able to establish [major capital priorities](#) including road rehabilitation, sidewalk construction, and sanitary sewer service extensions and major planning priorities including the creation of [Westbank Centre](#), [Agricultural](#), [Waterfront](#) and [Official Community Plans](#) since incorporation in December 2007.

2. EFFECTIVENESS

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

The Strategic Priorities process is evolving. The creation of the first document in 2008 required several working sessions, as Council established priorities for the municipality's inaugural year of operations. The initial Strategic Priorities document predominantly called for the establishment of the first five year financial plan, hiring a senior management team, transferring staff and services from the Regional District of Central Okanagan, creating basic policies and bylaws, and establishing a central location for a Municipal Hall.

In 2008, 2009 and 2010, staff was able to conduct a [Citizens' Survey](#) and compile results to aid Council in setting infrastructure priorities.

Last year, the municipality was able to add an Operational Details document, providing Council with a breakdown of priorities and dates for completion by departments, with quarterly updates provided to Council.



Today, using both the annual Citizen's Survey feedback and analysis from the Financial Services Department, showing the impact that various scenarios would have on reserves and tax levels, the process has become more efficient and effective for Council and staff. Now, only a couple of sessions are required each year. From these sessions, staff is then able to create the Operational Details and a new Core Services document, which provides Council with a reference of each department's capacity to complete projects.

3. ECONOMIC IMPACT

How has the program/project saved the community money and/or resources or encouraged economic development?

As a rapidly growing municipality, with demands for modernized infrastructure, the District of West Kelowna had to quickly establish its service and capital priorities to ensure the municipality wasn't spending beyond its means, tapping excessively into limited reserves or placing too high a tax burden on its citizens. The Strategic Priorities process has enabled Council to gradually increase services, and improve infrastructure while keeping the municipality in a good financial position.

The process has assisted the municipality in building reserves ahead of a schedule established in the Westside Governance Study, which led to incorporation in December 2007. The study predicted reserves of approximately \$15 million after the first five years of incorporation, at the end of 2012. District of West Kelowna reserves will total \$24.2 million at the end of 2012.

For the past three years, proper planning through the Strategic Priorities process has also enabled the District of West Kelowna keep annual tax increases to less than five per cent – the target level established in the governance study:

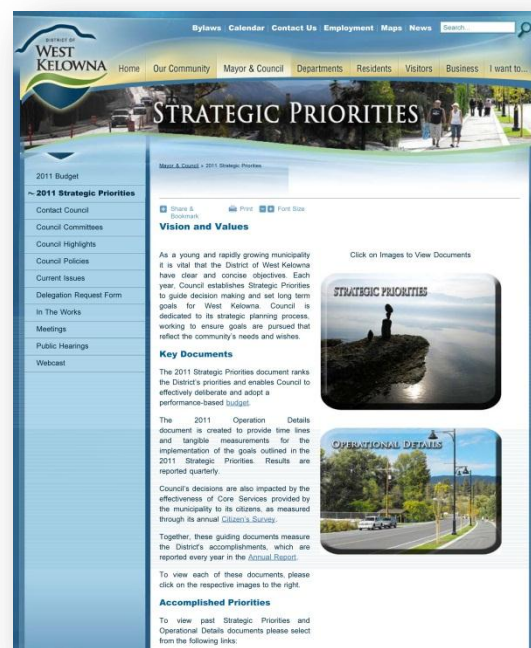
- 2.24 per cent tax increase in 2011
- 3.75 per cent tax increase in 2010
- 2.00 per cent tax increase in 2009
- 5.00 per cent tax increase in 2008

4. ACCOUNTABILITY

How has this program/project improved upon accountability to the community's citizens?

The Strategic Priorities process incorporates feedback from the annual Citizen's Survey, which is mailed to 1,000 randomly selected residents each year. The results of this survey are available to Council during its Strategic Priorities process and its budget deliberations each year.

Once the Strategic Priorities and the supporting Operational Details and Core



Services documents are finalized, they are presented in an open Council meeting to be approved by Council. The documents are then published on the District of West Kelowna's website. Quarterly updates are presented in an open meeting of Council so residents may track the progress of the projects and services established in the document.

5. AWARENESS

How has this program/project created more awareness in the community about local government actions?

District of West Kelowna Council refers back to the Strategic Priorities documents during its public budget deliberations and various consultation processes. Staff updates Council on Strategic Priorities progress at a public meeting on a quarterly basis. Staff, by policy, is required to identify a project's strategic priority in every report, so Council is aware of the importance when making decisions on matters throughout the year. The entire Strategic Priorities process enables residents to observe Council's careful consideration in setting priorities and balancing them with the financial constraints of a new municipality. Staff uses the quarterly newsletter, the [annual report](#), [the website](#) and advertisements in traditional media to inform the public of the Strategic Priorities process and results.

6. TEAMWORK

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

Communications, Corporate Services and Finance staff work together with the Senior Management Team to prepare a Strategic Priorities workshop for Council and a subsequent session (or sessions, if required) to finalize the priorities. Communications and Corporate Services staff members then work together with the Senior Management Team to complete the Strategic Priorities, Operational Details and Core Services documents for presentation to Council. After the documents are presented in an open meeting of Council and approved, Communications staff posts the documents on the municipality's website and publishes them in the Annual Report. Communications staff also ensures public service announcements are sent to news media, highlighting the main priorities. The main points of the plan are also presented in the first quarterly newsletter, which is mailed out to approximately 12,500 District properties in April. The Senior Management Team, working together with their key staff and Communications and Corporate Services staff to update the document and present it to an open meeting of Council on a quarterly basis.

7. INNOVATION

What makes this program/project innovative and creative?

The project is innovative and creative because the creation of the Strategic Priorities incorporates a weighted voting system, which was developed in house by CAO Jason Johnson. Using results from the Citizens' Survey (created in house by CFO Jim Zaffino), input from chatting to constituents throughout the previous year and their own knowledge as members of the community, Council holds an initial brainstorming session to establish priority categories for the year. After a list of categories is established, each member of Council is given five voting buttons and asked to vote on what category they consider the most important. Each button can be used only once. The categories with the most buttons then become Council's top three (or more in cases of ties) priorities for the year.

Next, Council brainstorms to establish a list of priorities under each category. After the list of priorities is established under each category, members of Council are given five voting buttons apiece and asked to select priorities, starting with the first category. Each voting button can be used only once. The items getting the most votes then become the top priorities for the year in the first category. The process then continues for the subsequent categories.

Council also has at its disposal the Core Services and the Operational Details documents from the previous year, and knowledge and analysis from staff and consultant reports presented during meetings over the past 12 months, which it may use to determine ongoing priorities and staff capacity to complete the new projects being assigned.

The results of the Strategic Priorities are then compiled and published in house by Communications Staff and presented at a public meeting of Council. Once Council confirms its priorities in an open meeting, staff then publishes the Strategic Priorities, Operational Plan and Core Services documents on the municipality's website and in the annual report.

8. SUSTAINABILITY

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

Creation of the Strategic Priorities document is part of the core work of the Chief Administrative Officer, Senior Management Team, Corporate Services Department and Communications Supervisor. The budget to create the document is part of the General Government Services – Legislation Budget (\$322,813; 2011) identified in the 2011-2015 Financial Plan.

By investing in a Strategic Priorities process, the District of West Kelowna can ensure that it is proceeding with essential work in a financially sustainable manner – one that does not require excessive tax increases, the depletion of reserves or the burden of unmanageable municipal debt.

9. BEST PRACTICES

What sets this program/project apart as a winning idea? Why should it be considered a best practice, in comparison to other similar programs?

The program was the idea of District of West Kelowna CAO Jason Johnson. It was developed in house at minimal cost and maximum benefit to the District of West Kelowna. The process enables Council, using resources such as the Citizens' Survey and collective knowledge of the community to establish priorities for the municipality. By focusing on a few priorities each year, the municipality is able to balance the need to improve or maintain services and infrastructure with the need to balance its budget and avoid large tax increases and high debt loads.

The District of West Kelowna's Strategic Priorities allows Council to consult with its public to establish the priorities of the municipality. The process provides staff assurances that the municipality is moving ahead with priorities identified by the public and supported by Council, ensuring that taxpayer dollars are targeted strategically.

The establishment of the weighted voting system should also be considered a best practice in the Strategic Priority process. Trying to simultaneously meet the needs of the community, the objectives of each member of Council and the operational requirements of a municipality can be a grueling process and quickly lead down an unsustainable financial path in the interests of trying to please everyone. A weighted voting system ensures fairness in establishing the municipality's Strategic Priorities for the year and creates a system that is efficient and affordable.

10. TRANSFERABILITY

How is this program/project transferable to other local governments?

The District of West Kelowna's Strategic Priorities process utilizes an easily replicated weighted voting system. Results can be efficiently compiled into a Strategic Priorities document and produced entirely in house.

11. KNOWLEDGE SHARING

What helpful advice would you share with other communities looking to embark on a similar project?

The District of West Kelowna is committed to building reserves, keeping taxes low and avoiding the burden of debt. Demand for programs, services and infrastructure upgrades will almost always outpace a municipality's ability to pay for those needs identified by its residents or the wishes conveyed by staff and/or Council. Striking a balance between the needs of the municipality and its ability to pay can be made easier by employing a weighted voting system in establishing Council's priorities each year. The entire process can be completed in house to ensure the Strategic Priorities exercise remains at a financially sustainable level.

12. TELL US MORE

Please share any other information you think may help us better understand your submission.

Thank you for the opportunity to apply.