

Appendix C1

Inclusive Engagement: Priorities for Spending and Services

THE CITY OF CALGARY

Action Plan

2015 – 2018



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THE CITY OF
CALGARY

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1.0 Background

1.1 engage! Policy

The engage! Policy CS009 states, in part: “*The City of Calgary (Council and Administration) recognizes that decisions are improved by engaging citizens and other stakeholder groups, and commits to conduct transparent and inclusive engagement processes that are responsive and accountable.*”

1.2 Council Direction

On Nov. 18th 2013, Council, in line with the engage! Policy, provided direction for the development of an engagement strategy to contribute to upcoming budget planning for 2015-2018 stating, “The inclusion of stakeholder input as a component of the multi-year [business planning and budgeting coordination] process enhances the quality of Council Priorities, Departmental Business Plans, Budgets, and ultimately, the services delivered to Calgarians.” The resulting project, *Action Plan 2015-2018*, and its component engagement was designed to enable Calgarians the opportunity to provide their input on how The City should prioritize spending to continue to move The City towards achievement of long-term goals.



2.0 Engagement Overview

2.1 Engagement Goals

The overarching goal of *Action Plan 2015-2018* engagement was to, “Gather insights from citizens on Council approved tax rate scenarios, City services and priorities; and from staff on efficiencies and collaboration in order to inform Council decisions on indicative tax rates and Council Priorities; and, to inform Administration in the development of departmental business plans.”

2.2 Challenge of Scale

One of the primary challenges of the *Action Plan 2015-2018* engagement involved the sheer scale of the input required. Consultation would be sought on priorities and spending that would in some way impact virtually every City department. Furthermore, virtually every Calgary citizen was considered a stakeholder.

2.3 Engagement Strategy

Given the challenge of the wide scope of the project, both in terms of business operations impact and widespread stakeholder involvement, it was determined early on that no single engagement tactic on its own could provide enough input to support Council decision making. As a result, the *Action Plan 2015-2018* engagement strategy sought feedback across distinct streams, using multiple channels and a variety of methods in order to best gather the breadth of input required to span the Action Planning process.

2.4 Summary of Engagement Streams

Action Plan engagement was first grouped into three primary streams:

- **Representative Engagement:**
Qualitative research focused on service and spending priorities with a group of citizen representatives (Appendix B1), business /business agency representatives (Appendix B2) and social agency and community group representatives (Appendix B3). Representative engagement was planned and executed in conjunction with an outside research vendor (Ipsos Reid).
- **Internal Engagement:**
Focused on identifying emergent themes and collaborative opportunities with City employees (Appendix D2) and civic partners (Appendix D1). City employee engagement was planned and executed in-house by the Engage Resource Unit. Civic Partner engagement was planned and executed in conjunction with an outside vendor (Ipsos Reid).
- **Inclusive Engagement:**
Focused on service and spending priorities with on-line and in-person activities and events open to all Calgary citizens. The input collected was organized by three primary groups: Budget Tools (Appendix C1), Priority Tools (Appendix C2), and Discussion Tools (Appendix C3). Inclusive engagement was planned and executed in-house by the Engage Resource Unit.



2.5 Summary of Inclusive Engagement

Inclusive Engagement was designed to be open and available to all citizens in Calgary. These engagement activities were structured to be interactive, maximize learning about how City budgets and plans impact citizens, and minimize the need for pre-existing specialized knowledge of municipal processes and corporate finance.

Each of the primary engagement groups – Spending and Services, Priorities for Community Vision, and Discussions – utilized a combination of on-line and in-person activities, as well as a combination of structured and open-ended input modes, to encourage input from a wide range of Calgarians.

2.5.1 Spending and Services

Provided citizens with an opportunity to compare how service level changes and budget allocation affect their property tax bill and then submit a budget allocation based on their preference of service and cost. A detailed overview of this engagement is included in this document.

2.5.2 Priorities for Community Vision

Provided citizens with an opportunity to share what ideas or priorities they think The City should focus its resources on over the next four years. Please see appendix C2 for a detailed overview.

2.5.3 Discussions

Provided citizens with an open forum to share ideas, concerns, or suggestions about priorities, spending, or any other related topics. Please see appendix C3 for a detailed overview.

In-person engagement was conducted at over 21 sessions throughout the city, ensuring at least one in-person event in each ward. Sessions were conducted using either a mobile booth setup or traveling engagement bus, and were planned for public spaces that received significant traffic within the community (such as shopping malls, grocery stores, leisure centers, and libraries). Activities at the in-person events collected input for each of the three inclusive engagement groups noted above.

On-line engagement was conducted through the period of March 3rd to 21st, 2014. Three online tools were developed and launched to capture input mirroring the three engagement groups – Spending and Services, Priorities for Community Vision, and Discussions – noted above.



3.0 Budget Tools Overview

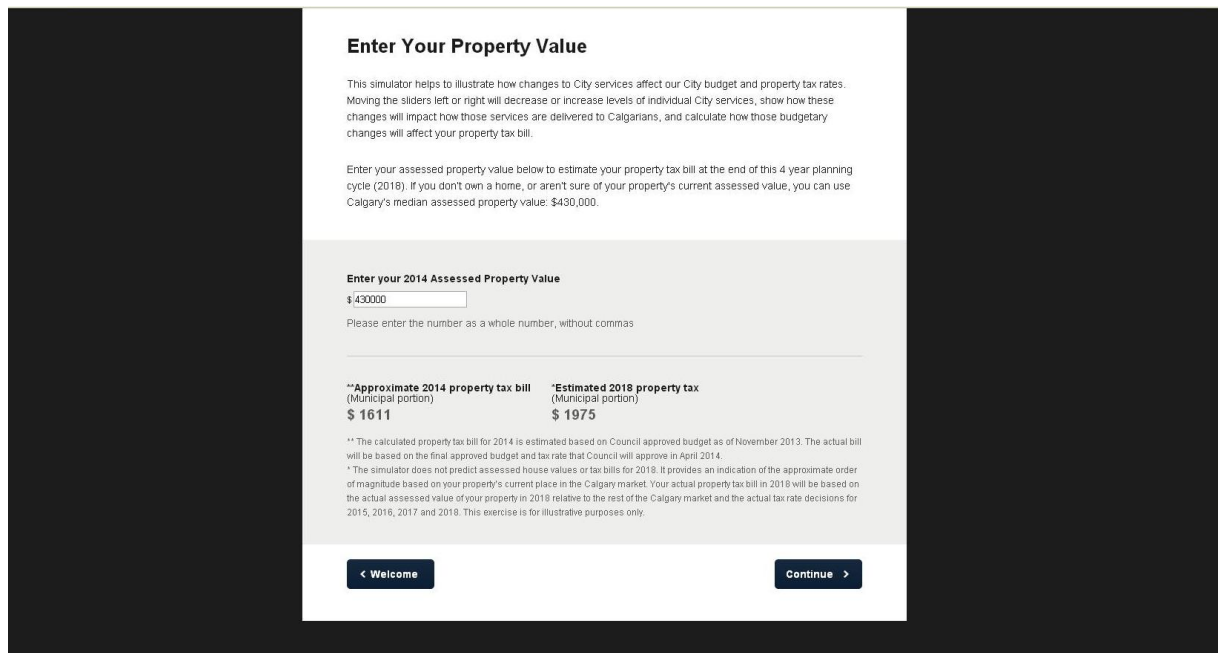
3.1 Purpose of Tools

Action Plan 2015-2018 Budget Tools were developed to provide citizens with a chance to share how they would allocate The City's tax supported budget spending. Both a comprehensive online tool and a simplified in-person post card were developed for this task. Online, after making a series of changes to the budgets, aggregate changes across participants provided a rough indication of spending priorities, tax rate scenario they would consider, and what they might give up in order to spend less.

3.2 Engagement Approach

The *Action Plan 2015-2018 Budget Simulator*, was a web-based, online application that allowed users to make choices on spending priorities, comparing increases or decreases to City services with increases or decreases to their potential property tax bill.

Rather than presenting the value of the entire tax supported budget, output from the budget simulator was scaled to the level of a residential property tax bill for relatability. Users were prompted to enter the current assessed value of their property to see an estimation of their future potential tax bill; the application started with a default value of \$430,000 (the city's median property value) for users who do not own property or know their current assessed value.



The screenshot shows a web form titled "Enter Your Property Value". The form includes an introductory paragraph explaining the simulator's purpose, a text input field for the 2014 assessed property value (with a default of \$430,000), and a table showing estimated property tax bills for 2014 and 2018. The 2014 bill is \$1,611 and the 2018 bill is \$1,975. There are "Welcome" and "Continue" buttons at the bottom.

Enter Your Property Value

This simulator helps to illustrate how changes to City services affect our City budget and property tax rates. Moving the sliders left or right will decrease or increase levels of individual City services, show how these changes will impact how those services are delivered to Calgarians, and calculate how those budgetary changes will affect your property tax bill.

Enter your assessed property value below to estimate your property tax bill at the end of this 4 year planning cycle (2018). If you don't own a home, or aren't sure of your property's current assessed value, you can use Calgary's median assessed property value: \$430,000.

Enter your 2014 Assessed Property Value
\$430000

Please enter the number as a whole number, without commas

**Approximate 2014 property tax bill (Municipal portion)	**Estimated 2018 property tax (Municipal portion)
\$ 1611	\$ 1975

** The calculated property tax bill for 2014 is estimated based on Council approved budget as of November 2013. The actual bill will be based on the final approved budget and tax rate that Council will approve in April 2014.
* The simulator does not predict assessed house values or tax bills for 2018. It provides an indication of the approximate order of magnitude based on your property's current place in the Calgary market. Your actual property tax bill in 2018 will be based on the actual assessed value of your property in 2018 relative to the rest of the Calgary market and the actual tax rate decisions for 2015, 2016, 2017 and 2018. This exercise is for illustrative purposes only.

< Welcome Continue >

Figure 1: Property Value Input Page



Once a property value had been entered, users were presented with a list of service areas, organized roughly by City department, a series of corresponding budget sliders, and a dashboard that displayed their current assessed value, calculated potential tax bill (based on slider positions) and +/- change from their estimated 2018 tax bill.

The budget sliders provided four potential positions, based on Council approved scenarios of 2.1%, 3.3%, 5.3%, or 7.0% tax rate increases, and labelled correspondingly as: Greatest Decrease to Current Service Level, Decrease to Current Service Level, Maintain Current Service Level, and Increase to Current Service Level. Budget sliders started at a default position of 5.3% increase, Maintain Current Service Level.

Moving the budget slider for each service automatically recalculated that department's budget using the chosen service level and updated the corresponding total tax cost. At the same time, impact statements, written by business planers within each business unit, gave participants the potential service impact of that choice.

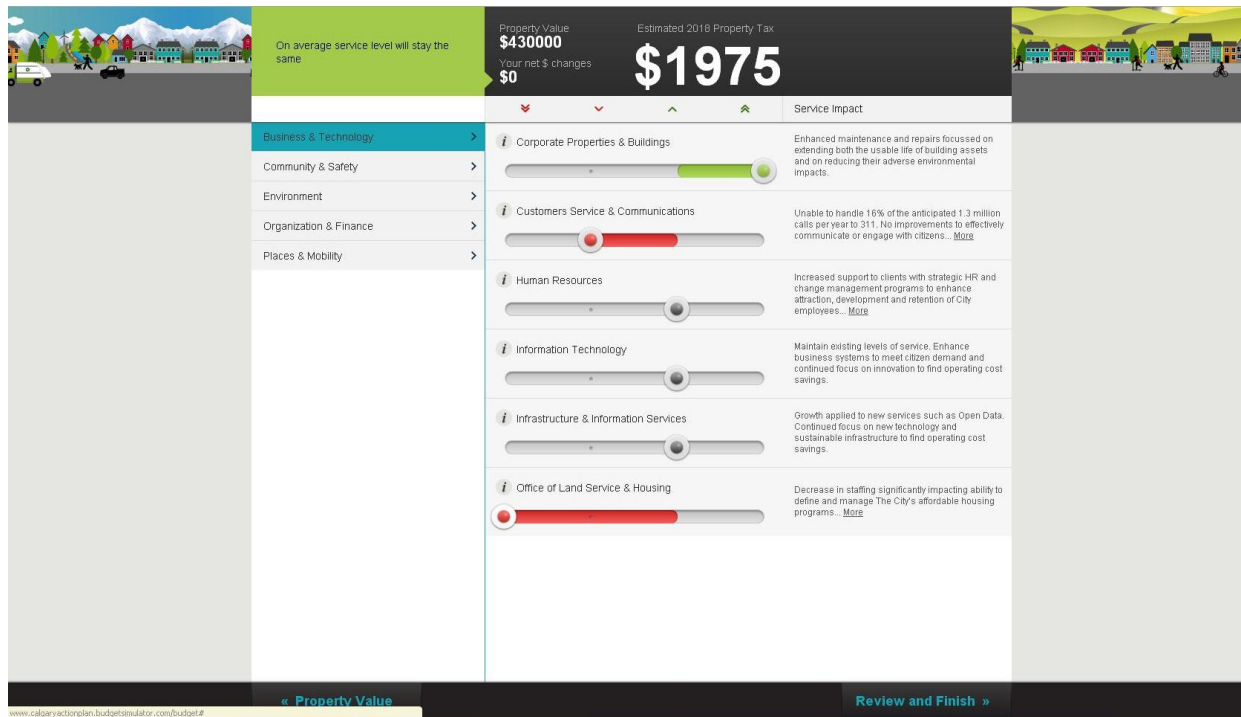


Figure 2: Budget Simulator Sliders

Once participants were finished with their budget allocation, they had the opportunity to submit their budget, make any final comments, and provide basic geographic information (community name and/or first three digits of their postal code).

Due to minimal uptake of the simplified post-card tool, in-person users were directed to the online budget simulator to provide budget-specific input.



3.2.1 On-Line Implementation

The online budget simulator was available to the public for 19 days, from the morning of March 3rd until midnight on March 21st. The simulator was hosted at www.calgaryactionplan.budgetsimulator.com and was also linked to from the *Action Plan 2015-2018* webpage at www.calgary.ca/actionplan.

Over the 19 days it was live the simulator received 3671 unique visitors, who submitted 1389 budgets. 1083 of the budget submissions included optional geographic location, and 342 also included an open-ended comment.

In order to reduce barriers to participation, and in line with engagement best practices, no log-in or identifying information was required in order to submit a budget. Likewise, geographic information collected was limited to non-personally identifying values, community name and first three letters of postal code, and was completely optional.



4.0 Results Overview

4.1 What Input Did We Collect?

The online budget simulator collected users' budget choices for each of the services under the following five service groups:

1. Business & Technology

- Corporate Properties & Buildings
- Customers Service & Communications
- Human Resources
- Information Technology
- Infrastructure & Information Services
- Office of Land Service & Housing

2. Community & Safety

- Animal & Bylaw Services
- Calgary Fire Department
- Calgary Police Service
- Community Neighbourhood Services
- Parks
- Public Safety Communications
- Recreation

3. Environment

- Environmental Safety Management
- Waste & Recycling Services

4. Organization & Finance

- Chief Financial Officer's Department
- Corporate Administration

5. Places & Mobility

- Calgary Transit
- Planning, Development and Assessment
- Roads
- Transportation Planning

Responses include a slider position for each of the service areas, corresponding with the Council approved service level and budget increase scenarios of 2.1%, 3.3%, 5.3% & 7.0%. The table of results includes the slider position for each service, as well as the relative proportion of each service within the total tax supported budget. This allows us to calculate average budget allocations for each service area, as well as for the entire tax supported budget.

Responses from the online budget simulator also include optional comments submitted along with user's budgets.



4.2 What Can the Results Tell Us?

The input from the budget tool, much like the input from any of the other streams of engagement, must be considered within the context it was collected. The budget simulator results are a useful snapshot of citizens' preferences regarding balancing desired services with taxation; however, important contextual considerations to keep in mind are:

- The service levels and corresponding budget requirements (2.1%, 3.3% 5.3% & 7.0% increases) that users considered were set by prior council direction, the tool did not allow citizens to choose service and budget levels outside of those set parameters.
- Like all the inclusive engagement streams, participants in this engagement were self-selected. While that has the benefit of making participation accessible to any citizens who would like to provide input, it means that we cannot make assumptions as to the demographic makeup of respondents.
- The budget simulator results are not the only engagement results that speak to spending and spending priorities. Rather, these results should be taken as one method of input in a larger suite of engagement inputs and results.

4.2.1 Overall Budget and Service Preferences

The simplest output to report from the online budget simulator is the total average budget change. Over the 1389 budgets that were submitted, the average of all respondents' budget submission indicated an overall budget increase of 5.22

Looking in a bit more detail at Table 1 below, the average values for each of the individual service areas, we can start to see a bit more variation in how citizens balanced budget and service level changes.

Services & Service Groups	Average Budget Allocation, n=1389
1. Business & Technology	
Corporate Properties & Buildings	5.02%
Customers Service & Communications	4.91%
Human Resources	4.39%
Information Technology	5.09%
Infrastructure & Information Services	5.01%
Office of Land Service & Housing	4.98%

Table 1: Average of all Budget Simulator Submissions by Service (continued on next page)



Services & Service Groups	Average Budget Allocation, n=1389
2. Community & Safety	
Animal & Bylaw Services	4.87%
Calgary Fire Department	5.35%
Calgary Police Service	5.20%
Community Neighbourhood Services	5.17%
Parks	5.33%
Public Safety Communications	5.37%
Recreation	5.28%
3. Environment	
Environmental Safety Management	4.96%
Waste & Recycling Services	5.33%
4. Organization & Finance	
Chief Financial Officer's Department	4.41%
Corporate Administration	4.59%
5. Places & Mobility	
Calgary Transit	5.76%
Planning, Development and Assessment	5.09%
Roads	5.54%
Transportation Planning	5.48%
Total Average Budget Allocation	5.22%

Table 2: Average of all Budget Simulator Submissions by Service (continued from previous page)

It is important to note as well, that in order to calculate the total budget increase, the percentage increase or decrease of each of the services has been weighted by its proportion of the overall tax supported budget. For example, an increase in Calgary transit, at almost 15% of the tax supported budget, will have a much greater impact than even a larger corresponding decrease in a service like HR, as their budget comprises less than 2% of The City total



4.2.2 Response Frequency Distribution

Plotting the total budget allocation of all 1389 respondents as a frequency histogram visually displays the overall trend in responses.

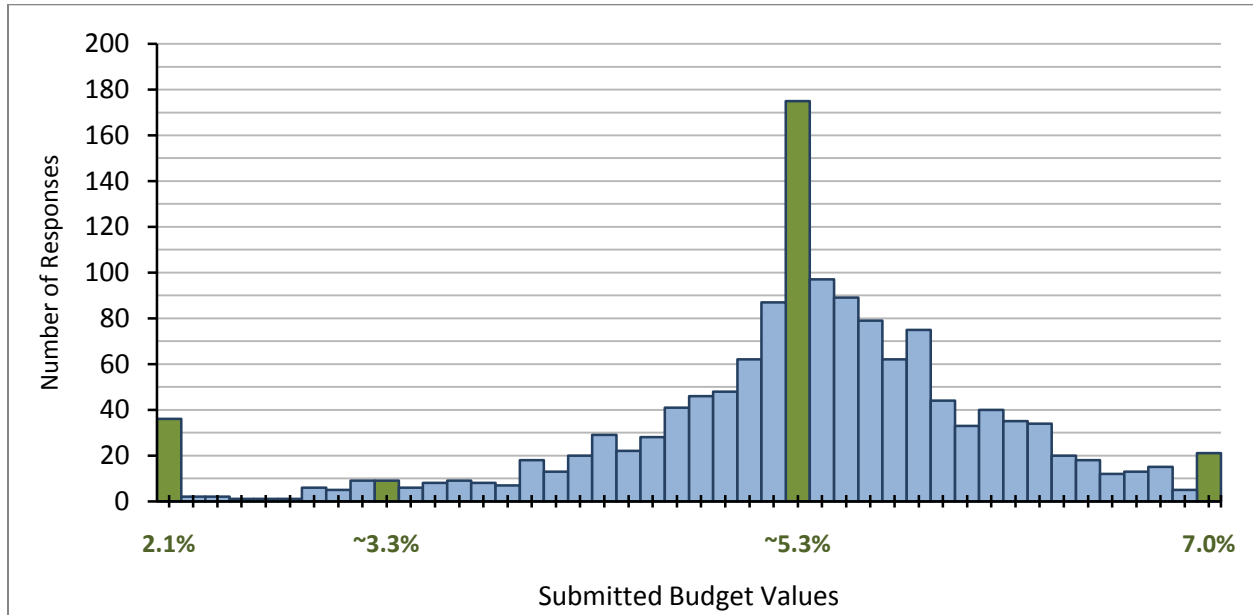


Figure 3: Response Distribution of all Budget Simulator Submissions

As suggested by total average budget change of 5.22%, the vast majority of responses land within a fraction of a percentage of the 5.3% tax increase position, with successively smaller groups of respondents choosing less services and a lower increase or more services and a larger tax increase respectively.

Small groups of outliers on each end of the distribution represent respondents who slid all sliders to either greater service decrease or service increase respectively. The distribution is slightly skewed to the right, weighted over the 5.3% level increase.

4.2.3 Variation within Individual Responses

There is variability within almost all individual submissions. That is to say, that rather than move all of the sliders to the same specific budget and service scenario point, respondents tended to make a number of incremental changes across the service areas, increasing some budget lines while decreasing others.



4.2.4 Geographic Response

Once respondents had submitted their budget preferences, they were asked for optional geographic information to let us know what ward or community they lived in. 78% of respondents provided information that allows us to attribute their submission to a specific ward. Table of detailed response sheet following shows the average budget allocation for each service area broken down by ward.

4.2.5 Open-ended Comments

All open-ended comments captured via the budget simulator tool were collated and delivered to an outside research vendor (Ipsos Reid) for organization and coding, they have been included in appendix C4.

4.2.6 Results by Ward - Table

See Table 2 on the following page.

4.2.7 Graphical representations of City-wide and Ward specific results

See graphics starting page 15



4.2.6 Results by Ward

	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5	Ward 6	Ward 7	Ward 8	Ward 9	Ward 10	Ward 11	Ward 12	Ward 13	Ward 14
Average Results per Service Areas	5.43	5.21	5.49	5.41	5.51	5.28	5.43	5.39	5.19	5.39	5.29	5.40	5.27	5.33
Business & Technology	4.98	4.96	4.97	5.05	4.81	4.83	5.24	4.97	4.94	5.02	4.85	4.96	4.72	5.01
Community & Safety	5.44	5.27	5.55	5.37	5.54	5.31	5.34	5.34	5.12	5.33	5.24	5.27	5.23	5.27
Environment	5.32	5.09	5.22	5.24	5.31	5.16	5.57	5.65	5.32	5.46	5.28	5.34	5.22	5.35
Organization & Finance	4.52	4.47	4.42	4.65	4.67	4.36	4.68	4.60	4.40	4.56	4.41	4.49	4.33	4.50
Places & Mobility	5.78	5.34	5.89	5.80	5.92	5.58	5.79	5.77	5.53	5.77	5.68	6.02	5.71	5.69
Business & Technology	4.98	4.96	4.97	5.05	4.81	4.83	5.24	4.97	4.94	5.02	4.85	4.96	4.72	5.01
Corporate Properties & Buildings	5.14	5.03	4.89	5.04	4.92	4.96	5.36	5.07	5.13	5.31	5.12	4.83	4.94	5.05
Customers Service & Communications	4.97	4.94	4.95	5.13	4.92	4.68	5.18	5.01	5.01	5.26	4.90	4.78	4.75	5.00
Human Resources	4.40	4.23	4.58	4.68	4.54	4.15	4.73	4.44	4.26	4.36	4.19	4.49	4.10	4.41
Information Technology	5.04	5.20	5.18	5.17	4.82	5.08	5.39	5.05	5.07	5.09	5.01	5.34	4.88	5.27
Infrastructure & Information Services	5.18	5.24	5.07	5.19	4.79	4.99	5.31	5.27	5.19	5.05	4.82	4.99	4.69	5.14
Office of Land Service & Housing	5.20	5.02	5.07	5.23	4.97	4.98	5.37	5.33	5.05	5.08	4.99	4.73	4.95	4.90
Community & Safety	5.44	5.27	5.55	5.37	5.54	5.31	5.34	5.34	5.12	5.33	5.24	5.27	5.23	5.27
Animal & Bylaw Services	5.11	5.04	4.84	5.09	5.24	4.86	5.19	4.96	4.80	4.80	4.90	4.93	4.65	4.81
Calgary Fire Department	5.39	5.37	5.64	5.51	5.73	5.31	5.36	5.32	5.11	5.28	5.31	5.37	5.47	5.45
Calgary Police Service	5.56	5.18	5.60	5.25	5.47	5.21	5.22	5.26	4.96	5.35	5.21	5.28	5.13	5.18
Community Neighbourhood Services	5.32	5.32	5.44	5.38	5.04	5.46	5.43	5.40	5.29	4.93	4.97	4.97	4.84	5.12
Parks	5.30	5.31	5.16	5.50	5.67	5.60	5.63	5.64	5.53	5.64	5.33	5.16	5.17	5.19
Public Safety Communications	5.33	5.55	5.54	5.42	5.40	5.48	5.49	5.44	5.36	5.44	5.39	5.32	5.32	5.65
Recreation	5.20	5.37	5.44	5.55	5.47	5.48	5.49	5.47	5.42	5.26	5.22	5.26	5.33	5.36
Environment	5.32	5.09	5.22	5.24	5.31	5.16	5.57	5.65	5.32	5.46	5.28	5.34	5.22	5.35
Environmental Safety Management	4.80	4.65	4.96	5.15	5.14	4.95	5.40	5.30	4.84	4.88	5.05	5.11	5.01	4.76
Waste & Recycling Services	5.44	5.21	5.29	5.27	5.36	5.22	5.62	5.74	5.44	5.61	5.34	5.40	5.28	5.50
Organization & Finance	4.52	4.47	4.42	4.65	4.67	4.36	4.68	4.60	4.40	4.56	4.41	4.49	4.33	4.50
Chief Financial Officer's Department	4.49	4.34	4.33	4.51	4.67	4.36	4.72	4.56	4.38	4.50	4.42	4.43	4.32	4.38
Corporate Administration	4.55	4.57	4.49	4.75	4.67	4.37	4.66	4.63	4.41	4.61	4.39	4.53	4.35	4.60
Places & Mobility	5.78	5.34	5.89	5.80	5.92	5.58	5.79	5.77	5.53	5.77	5.68	6.02	5.71	5.69
Calgary Transit	6.00	5.14	5.90	5.90	6.12	5.74	6.07	6.08	5.82	6.03	5.87	6.25	5.98	5.87
Planning, Development and Assessment	5.01	4.96	5.06	5.29	5.34	5.12	5.42	5.31	5.27	5.27	5.26	5.28	5.16	5.27
Roads	5.67	5.70	5.86	5.69	5.80	5.48	5.49	5.45	5.18	5.54	5.52	5.89	5.47	5.56
Transportation Planning	5.39	5.21	5.52	5.73	5.62	5.34	5.77	5.88	5.46	5.46	5.52	5.73	5.57	5.46

Table 3: Budget Simulator Responses by Ward