



REPORT ADM-2021-043

TO: Mayor and Members of Council

FROM: Glenn Schwendinger CAO

MEETING DATE: June 29, 2021

SUBJECT: 2021 Budget Review and Looking Forward to 2022

RECOMMENDATIONS

THAT Report ADM-2021-043 entitled 2021 Budget Review and Looking Forward to 2022 be received for information; and

That staff be directed to prepare the budget considering the following general comments and include the following specific items in the information to be brought back to Council for further information and for consideration: _____

That staff bring forward a Budget Development and Control policy at the September 22, 2021 Council Capital Budget Meeting.

DISCUSSION

Purpose

The purpose of this report is to provide a summary of responses/comments received to specific questions posed about the 2021 Budget process as well as looking forward to the preparation of the 2022 Budget.

Background

The Township of Puslinch is undertaking a budget review process. The annual Budget is arguably the most important document that Council approves each year. That is why it is important to review the process used to prepare it. Often procedures are created and

implemented and then we move on to the next issue, considering that one done. Developing and using Policies and procedures, is better as a circular process.

In the lens of continuous improvement, it can work much better in a circular fashion.



The purpose of this budget review is twofold:

1. Determine what worked well in the recent budget process which we can keep or build on, and what would we like to see refined in the budget process
2. Provide a theme or direction for staff as we move towards the preparation of the next budget.

A request for general comments as well as a list of specific questions were provided to each member of Council and each department head to seek their input and comments. These have been compiled and provided to Council for their information and consideration. Different perspectives are important. Council will typically provide their comments from the political and public impression perspective, and department heads will typically provide their comments from the operational perspective or from the perspective of new or pending legislation, improved best practices, etc. The range of perspectives will hopefully help to develop an even better “big picture” approach. We will also be using our new online public engagement tool to seek public input on a number of these questions as well as the process moves forward.

This is a process review, not a personal review. How can we make the process even better.

The approach of circulating questions ahead of time and compiling all responses received has been done intentionally to give time to reflect on the questions and provide responses. The compiled responses are provided ahead of the meeting so that Council has the time to read and consider others comments/ideas prior to the discussion with Council as a whole. This will help

save time as all of Council will have awareness of everyone's comments and can focus on a meaningful discussion of the ideas /comments submitted. Clearly other ideas/comments may arise during the discussions, which is fine. This approach is intended to help jump start the discussions.

It is not the goal to make any final budget decisions during this meeting, it is far too early for that. This is just a discussion for Council to collectively determine which topics/comments form the future "discussion list". This will then provide the opportunity and direction to staff as to what information council would like to collectively see at an upcoming budget meeting. A lot of ideas and topics are on the consolidated list, and talking about each one in detail now will take a very long time, and more importantly, there is no supporting or background information available at this point for any of these topics to assist Council in making an informed decision.

Some of the consolidated responses are general comments which will be considered as information when preparing the budget, and other responses are specific requests/questions if Council chooses to include them. In some cases responses can be duplicate, similar, or contrary to other responses received. Some questions had no responses and are noted in grey shading. The recommended approach to go through all this information is as follows:

- Each table has the numbered specific questions 1,2,3... down the left hand column and the top rows are labeled as A,B,C....
- The chair of the meeting will start off with Question 1 and Council will collectively decide which requests / direction should be forwarded to staff as instruction.
- The intent is not to debate or have a detailed discussion on any of the responses, basically just a decision is this something council collectively wants more information on and wants to discuss as part of the budget process, yes or no.
- Clarification questions can and absolutely should be asked of the commenter if anyone is unclear as to what a certain comment means.
- If a question was posed that could easily be answered by staff within a minute or so that addresses the question to the satisfaction of Council, it can be considered dealt with and removed from the list.
 - For example, if a comment was "when do we normally receive notification regarding "X" ?"
 - If staff can respond with something like "normally in July" and that satisfies Council, that matter can be considered dealt with and removed from the list
- The resolution would read something like:
 - Staff be directed to prepare the budget considering the following general comments and include the following specific items in the information to be brought back to Council for further information and for consideration:
 - Question 1: A, C, D
 - Question 2: B
 - Etc....
- This will essentially create the "to-do" list for staff for the budget process which can then be tracked

FINANCIAL IMPLICATIONS

None

APPLICABLE LEGISLATION AND REQUIREMENTS

None

ATTACHMENTS

Compiled Responses

Overall comments from the Director of Finance:

Capital Budget and Forecast:

- Each project is tied to various studies and plans (ie. 2019 Asset Management Plan (AMP), 2019 Development Charges Study, 2019 Ontario Structure Inspection Manual Report, 2019 Energy Conservation Demand Management Plan, Parks and Recreation Master Plan, Master Fire Plan, etc.).
- Capital budget sheets are completed for current year proposed projects with information regarding the purpose of the expenditure, location, description, funding sources, cash flow forecast, future project phases, operational impacts, etc.
- Capital carry forward projects are included to ensure Council is informed of projects approved from a previous year budget to be completed in a future year (ie. open projects that are not yet complete).
- Capital summaries for each year which include each project by department and its funding strategy.
- Projects by year which include all departments, project title, and total project cost over the next ten years (this pivot table does not include funding strategy).
- Capital summary - funding sources by year which includes how each department is funding its total capital costs over the 10 year forecast period (ie. grant funding, levy funding, discretionary reserve funding, restricted reserve funding).
- Current year proposed capital program compared to previous years (ie. 2021 compared to 2020 and 2019) – chart and graph format of this information.
- Current year proposed ten year plan compared to previous years' proposed ten year plan (ie. 2021 ten year plan compared to 2020 and 2019 ten year plans) – chart and graph format of this information.

Operating Budget:

- Operating Report by account which provides the proposed current year budget and includes previous year actuals, current year - year to date, previous year budget, and current year budget.
- Expense, Revenue and Reserve Transfers summary by department which includes the above information but in a summarized manner.
- Base Budget Increase forms for any new items required in the Operating Budget including the purpose, need, benefit, risk, whether it is a one-time impact or an ongoing impact, and funding strategy. This should be limited to new services, service level enhancements, or increases to staff complement moving forward.
- Itemized listings for Conference, Seminar and Training budgets by position in accordance with Staff Expense Policy.
- Itemized listings for Memberships and Associations by position in accordance with Staff Expense Policy.
- Itemized listings for Uniforms and Special Clothing by position in accordance with Staff Expense Policy.

Overall Budget:

- Impact of the proposed budget on the median/typical single family home, farmland property, small retail commercial property, and standard industrial property which factors in assessment growth and both \$ change and % change from the previous roll return including the \$ and % change per \$100,000 of assessment.
- Balances in Discretionary and Restricted Reserves over the forecast period.
- Completed capital projects reporting for the current year to determine what the capital surplus/deficit is.
- The investment required in the Asset Management Discretionary Reserve to maintain current infrastructure in accordance with the Township's 2019 Asset Management Plan.

2021 Budget Process - Council

| | Mayor Seeley A | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
|--|-------------------|-----------------------|--|--|--|
| General comment(s) | | | <ul style="list-style-type: none">Why I think this is so important: We are at our best when we recognize that the budget is the document that enables staff to implement our vision and direction that is expressed in policy. Once the annual budget is set it is staffs job to focus on the work that is funded in that budget. Our focus should then return to the long term needs and monitoring ongoing operations. Other than emergency situations, Council should resist the urge to add new work or projects that can distract us from our responsibility. Part of this responsibility is to help take the feedback and concerns that we receive from residents and use it to inform Council and staff either as part of their existing duties funded in the budget or as part of planning changes for the future. | | |
| 1. What went well during the Budget Process? | | | | <ul style="list-style-type: none">Excellent staff input into the budget which makes it very easy for council to understand the needs and requirements for the TownshipStaff being very considerate of the pandemic situation while formulating the budget to minimize the impact to taxpayer. Being mindful of what was necessary and what could maybe wait and even proposing a 0 cost of living adjustment. This shows the dedication of the staff and Puslinch is very fortunate for this.The process of having council pose questions via email in advance and then providing the information to all of council prior to the meeting is incredibly valuable. I hope this continues for the long term.The discussions during council were sometimes long but the respect that council has to allow each individual to voice opinions and then work to compromise is really something that has been imperative in getting a budget that is responsible but also addresses what each Councillor is trying to achieve based on their own experiences with the public.The capital budget sheets are AWESOME. Makes it so easy to follow | <ul style="list-style-type: none">The iterative process reduced the initial tax rate increase from 5% to less than 1%. |

| | Mayor Seeley A | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
|--|-------------------|--|------------------------|---|--|
| 2. Were there parts that were cumbersome? | | <ul style="list-style-type: none"> No but having a real-time software program would allow us to visually see budget impacts rather than have long discussions and misinterpretations. | | <ul style="list-style-type: none"> The only thing I sometimes found cumbersome was connecting the budget reports to either previous budget meeting reports or to reports and resolutions earlier in the year driving a specific budget item. I found that I was often searching for information from previous meetings and flipping back and forth to refresh my memory on the sequence of events leading to certain decisions needing to be made. I realize that this is just part and parcel with a “working document” but any links or reference to specific reports and resolutions within a budget report would help in making that part less cumbersome. | <ul style="list-style-type: none"> The last two meetings when too much time was spent to resolve understanding a budget motion. |
| 3. Are there suggestions that would improve or streamline the process? | | <ul style="list-style-type: none"> Linking any budget items to a current policy or study or plan and where it fits within it | | <ul style="list-style-type: none"> When we were preparing the 2020 budget, before we even started the process of crunching numbers, the first budget meeting consisted of the entire council going to the roads department and having Mr. Fowler give a very informal and hands on presentation regarding the needs of the roads department. We then did the same thing with Chief Gomes in the fire department. I found this INCREDIBLY helpful in really having a good understanding of both of these departments. Perhaps it might not be necessary every year to do this, but I would say at least every other year, this exercise proves to be incredibly valuable. In addition, when I first started on council, I went on a roads tour with the Director of Public Works which I also found to be very informative and it helped me greatly to understand the conditions, maintenance, issues etc... with our roads, bridges, culverts, parks and even the PCC and ORC. I truly feel that having council do this yearly whether together or separately would be extremely beneficial. I’m not sure of the feasibility of doing this, but it would be great to incorporate parts of this in the budget process. It would hopefully also streamline some of the questions and information to be discussed during the actual budget meeting, because much of it would be explained during this exercise. Alternatively, perhaps providing pictures or maps or other visual aids might also work. | <ul style="list-style-type: none"> At the very beginning have a workshop to outline the process, timeline and give the opportunity to ask questions. Take Councillors on a tour to appreciate the major budget requests. |

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| 4. Did you have the information needed to make informed decisions? | | <ul style="list-style-type: none"> • Yes, although sometimes it would be helpful to know when the last report was issued and why we are seeing a certain report. • Highlighting any budget amounts that are of concern or close to a threshold would ensure we are all aware of these. Staff could give an opinion if there is concern. • Information regarding what impact a budget decision is in the big picture would be helpful. I would like to see options (if any) on how an amount could be implemented over long term vs short term. | <ul style="list-style-type: none"> • Yes but would like to include the following for added context: <ul style="list-style-type: none"> - Some of the annual funding that we receive from the Province is to recover the cost of providing the CLTIP tax credit, Managed Forest Tax Credit and Farm tax credit,. Budget reports should compare costs of providing these programs and the offsetting funding that we receive from the Province to ensure that we are not being shortchanged by the Province. - Should include an assessment of Total cash in lieu for railways vs costs. Understood that these figures are all in the budget but not pulled together to determine if we are subsidizing the railways. - Should include cash in lieu for City of Guelph properties compared to cost of source water protection etc.... Understood that these figures are all in the budget but not pulled together to determine if we are subsidizing the City. - Budget is not a one and done item for Council. It also includes high level quarterly reports to track progress by department. I like Mary's quarterly reports and would like them to continue. Line by line information should only be provided by request since having it made available suggests to members of Council that it should be reviewed by them on a regular basis. Whereas our focus should remain on the quarterly by department figures. | <ul style="list-style-type: none"> • Yes. | <ul style="list-style-type: none"> • The information was ultimately provided but it would very beneficial to have it early in the process including: <ol style="list-style-type: none"> a) an estimate of the current year operating and capital savings and likely contribution amounts to each reserve b) an estimate of the projected funds in the Asset Management reserve and whether there is a need to add extra funds to avoid future borrowing c) an estimate of funds to be added to Parkland Dedication reserve and the allocation of funds to the proposed budget d) the projected tax revenues from growth and it's impact on the budget e) a likely projection of County's tax rate increase or even a range and the impact on overall tax rate |
| 5. Was there too much information? | | <ul style="list-style-type: none"> • Not too much information but information presented in silo where I couldn't see how it was impacted in the big picture | | <ul style="list-style-type: none"> • No – not too much information. However, I do find some of the spreadsheets that accompany the budget reports to be very difficult to follow. I do my best to make sense of them and feel that I need to be reading through them because staff have gone through the trouble of completing them, however, I find they sometimes get me completely mixed up. | <ul style="list-style-type: none"> • All the provided information was relevant and necessary in order develop the final budget. |

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| 6. If you could improve one thing in the budget process, what would it be? | <ul style="list-style-type: none"> Confirm that the resolutions match the intent/desire of Council before voting and recording. | <ul style="list-style-type: none"> I would like to see a visual of the budget. It could be similar to the corporate work plan or a timeline | <ul style="list-style-type: none"> This was just a weird year. There were lots of changes in the final report and not enough time to make sure that the impacts of those changes were well understood by both staff and Council. There were enough changes to warrant pulling the budget from being passed at that Council meeting and having a meeting dedicated to ensuring that all of Council understood the impact of the late day changes. | <ul style="list-style-type: none"> Not sure what the workaround would be, but this past budget year, after our November 25th meeting, the tax levy increase for 2021 was sitting at 5.75%. This of course, was prior to knowing what assessment growth would be, what the county increase would be, what our surplus would be and what government money was coming in for the OCIF and the Safe Restart. Of course, media plastered this 5.75% increase all over social media and we took heat even though the budget was still a work in progress. I'm not sure how we get around this, but this gets the public falsely flared up because they only see that percentage. If there is any way we can keep the conversation of "the increase" based around the dollar amount rather than the percentage until we have all the information, it allows for more productive conversations with residents as opposed to being on the defense. | <ul style="list-style-type: none"> I would have Council set a target for a tax increase at the start of the process and have staff and Council work collaboratively to strive to achieve target. |

2021 Budget Process – Department Heads

| CAO Schwendinger F | | Director of Finance Hasan G | | Clerk Hoytfox H | Director of Public Works, Parks and Facilities Fowler I | Fire Chief Gomes J | Chief Building Official Hartholt K |
|--|---|--------------------------------|---|--------------------|---|-----------------------|--|
| 1. What went well during the Budget Process? | <ul style="list-style-type: none">• Reports were thorough and accurate | | <ul style="list-style-type: none">• Timelines and targets were met. Staff and Council were very conscious of the challenges of the pandemic and made decisions that reflect this difficult time | | <ul style="list-style-type: none">• The assistance provided by our finance department, is always very helpful | | |
| 2. Were there parts that were cumbersome? | <ul style="list-style-type: none">• Some of the required detail and approval seems to be not effective use of time for regular operating item, i.e. tires | | <ul style="list-style-type: none">• Working alone on your respective department's budget is not ideal. More collaboration with other department heads and with the finance team would be a benefit. It would be helpful to understand the needs of the other departments and collaborate with other team members who have been through the budget processes before. | | <ul style="list-style-type: none">• I think asking for minor operational budget items during a Council meeting, is not the proper process or venue. An example of this was in the 2021 Fire operating budget proposal. I felt Council did not have a full understanding of the items proposed or the actual functions of the departmental operating budget. It placed Council in a position where they had to make decisions within a few minutes, but the items being proposed were thoroughly investigated by Fire management prior to being proposed. It also created a situation where Council began micro-managing operations. | | |

| | CAO Schwendinger F | Director of Finance Hasan G | Clerk Hoytfox H | Director of Public Works, Parks and Facilities Fowler I | Fire Chief Gomes J | Chief Building Official Hartholt K |
|--|--|--|---|---|--|--|
| 3. Are there suggestions that would improve or streamline the process? | <ul style="list-style-type: none"> Ensure that the AMP reflects true costs and operations Update AMP costs annually based on actuals or CPI Once base budget is approved focus primarily on changes to service levels and new projects Regular operating items should be part of base budget. These are part of doing business to provide established/approved service levels. Things like tires should not need to be justified and debated | <ul style="list-style-type: none"> Implementation of a budget system as opposed to excel spreadsheets/pivot tables in excel. Implementation of the City-wide Asset Manager Module which is currently in progress. Ongoing expenses should be funded from sustainable revenue sources to ensure continuity of services – currently, 50% of the Aggregate Levy (\$228K) funds the Public Works operating budget as this has been the practice since pre-2013. This funding should continue to be phased out of the Operating Budget and into the Capital Budget in 2022 and future years. | <ul style="list-style-type: none"> I think the corporate workplan is going to assist with planning in advance for some aspects of budget because it allows the team to regularly check in on the status of some projects. It would be helpful to collaborate in the same way through the budget process for big expenditures that are coming in the next budget cycle. | <ul style="list-style-type: none"> Update AMP annually to ensure costs are current | <ul style="list-style-type: none"> Year over year with a zero-based budget increase, many of our budget lines are not increased to match the CPI. This means that every year department heads have less funds for expenses, as expenses always increase. As a previous recommendation of Patrick Moyle, that Council is asked to approve an Operational Budget increase as a percentage and then the department heads can allocate funds to their operating budget categories that require additional funds for that fiscal year. This has many benefits and will streamline the process. | |
| 4. Did you have the information needed to make informed decisions? | <ul style="list-style-type: none"> Yes, new processes will help ensure this information is as up to date as possible | | <ul style="list-style-type: none"> Yes | | <ul style="list-style-type: none"> As a department head, I thoroughly researched all proposed items for the budget | |
| 5. Was there too much information? | <ul style="list-style-type: none"> Should need to justify consumables such as tires | | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> Yes | |

| | CAO Schwendinger F | Director of Finance Hasan G | Clerk Hoytfox H | Director of Public Works, Parks and Facilities Fowler I | Fire Chief Gomes J | Chief Building Official Hartholt K |
|--|---|--|---|---|--|--|
| 6. If you could improve one thing in the budget process, what would it be? | <ul style="list-style-type: none"> Follow this general approach: <ul style="list-style-type: none"> Set the target for the year Approve the base operating budget Approve the capital budget as per AMP Discuss new projects/initiatives/service levels and determine if the fit within target Adjust target to suit new projects/initiatives/service levels or reduce new projects/initiatives/service levels This enables efforts and discussions to focus on changes instead of justifying and debating the same things every year associated with things that will not change based on approved service levels. | <ul style="list-style-type: none"> Council/Department Heads provide new/changes to service levels that they would like to see incorporated in the budget in July/August. Department heads provide updated costing for projects based on most recent information available. Having the answers to the below questions early on in the process (July/August) and provided by Council through a Council Resolution in order to provide staff direction for how the 2022 budget should be compiled and what it should focus on. | <ul style="list-style-type: none"> Public engagement and awareness could be improved. We have some of the tools to do this and social media will help as well. It was very informative to hear that although the budget is brought before Council on several occasions before it is approved, some residents were seeing it for the first time at the Council meeting where it was being approved. I think this tells us that we can be doing a better job pushing information to the community. | <ul style="list-style-type: none"> More current costing in the AMP | <ul style="list-style-type: none"> That Council approve an Operational Budget percentage increase and that the department head allocate those funds appropriately within their department | |

2022 Budget Preparation – Looking Forward - Council

| | Mayor Seeley A | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
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| General comment(s) | | | <ul style="list-style-type: none"> The goal is to focus efforts right from the beginning of this next budget cycle in the overall vision or theme collectively decided by Council | | <ul style="list-style-type: none"> It would be helpful to have one document which lists the service levels. I am aware of a 2016 Council Report which outlines park maintenance service levels, the website which outlines snow ploughing service levels and the Asset Management Plan. |
| 1. Are there any service levels you would like to see increased? | <ul style="list-style-type: none"> More PW staff | <ul style="list-style-type: none"> Staff recognition within the community. Township benches | <ul style="list-style-type: none"> Process should include a high level report of existing service level objectives and how we are meeting or exceeding those levels before any discussion occurs about changes to existing services or adding new services | <ul style="list-style-type: none"> The township does an excellent job with service levels given the size and population. It would be interesting though to pose this question to our residents – perhaps via survey or through the bang the table software. Perhaps public expectations have changed over the course of the pandemic – it would be interesting to get some public feedback on this question. | <ul style="list-style-type: none"> I would like to see costs associated with increasing snow ploughing frequency, and increased tree maintenance. |
| 2. Are there any service levels that you would like to see decreased? | | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> I'm not aware of any. |
| 3. Are there any service levels you would like to see added? | <ul style="list-style-type: none"> Crossing guard | <ul style="list-style-type: none"> social media presence | | <ul style="list-style-type: none"> My answer to this would be the same answer to both question 1 and 9 | <ul style="list-style-type: none"> No |
| 4. Are there any service levels you would like to see removed? | | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> No |
| 5. Are there any potential legislative or policy directions or initiatives that may be coming that you are concerned about? | <ul style="list-style-type: none"> Sign by-law updated to reflect Wellington county by-law for consistency | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> The Province recently changed the Provincial Legislation regarding MZO's. This change eliminated the need for an MZO to comply with any other provincial policy except in the Greenbelt. This means that outside the Greenbelt an MZO need not conform to the PPS. This is of significant concern for Puslinch considering the aggregate resource here. In order to ensure that our residents continue to benefit from Provincial policy such as the PPS I believe that we should ask for all of the remainder of Puslinch to be placed within the Greenbelt. | <ul style="list-style-type: none"> I am concerned about the long term growth of the Township. The various plans and policies that direct the ability to grow are getting more restrictive all the time and now there is talk of expanding the greenbelt which will cripple the ability to grow even more. This is perhaps not an immediate threat, but looking ahead, this has the potential of making the sustainability of the township very uncertain in the long range. How do we anticipate and plan for what this might look like? | <ul style="list-style-type: none"> Any legislation which will affect loss of opportunity for growth such as expanding greenbelt, heritage lands, prime agricultural areas, settlement areas requiring water and sewerage services. |

| Mayor Seeley A | | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
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| 6. Are there any potential legislative or policy directions or initiatives that you would like to see implemented? | | <ul style="list-style-type: none">• Policy for trail entrance assessment at roadwork time. increased safe trail entrance parking at the many tract entrances. When a road is being improved, use this opportunity to provide safe pull off or widened shoulder spot for a car or two. | <ul style="list-style-type: none">• I am looking forward to the return of the Township Appreciation night when all of staff all of Council and all of our Committees get together for dinner. | <ul style="list-style-type: none">• Any initiatives that are available that would help and drive broadband connectivity. | <p>a) Moving forward on opportunities identified in KPMG Nov. 2019 Service Review Study that can be quickly achieved</p> <ul style="list-style-type: none">• Explore winter maintenance services and service levels with the County• Explore sharing public works facilities with County• Improve group purchasing process and combine purchasing power• Investigate coordinated investment strategy and management with rest of County• Investigate coordinated and/or shared communication, marketing and advertising services with rest of County• Investigate sharing of functional management expertise across the County and/or with other lower tier municipalities <p>b) Attracting higher quality businesses to Puslinch. Storage yards in our industrial area are poor uses of these lands.</p> <p>c) Creating opportunities for residential growth.</p> <p>d) Reconfiguring traffic lanes through Aberfoyle from 4 lanes of traffic to 2 lanes of traffic, 1 left turn lane and parking lane.</p> <p>e) Natural gas services across Township</p> <p>f) Resolution of need for west end fire station given that other parts of Puslinch are similarly underserved.</p> <p>g) Road speeds (albeit in progress)</p> <p>h) Site alteration bylaw (albeit in progress)</p> <p>i) Noise bylaw</p> |

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| 7. Are there any new projects you would like to see added for consideration? | | <ul style="list-style-type: none">Frisbee golf course | | <ul style="list-style-type: none">Water fountains/Bottle Filling stations in public facilitiesImplementation of a social media platformNot a new project but just moving up the start date of projects already budgeted for as it relates to the playground at Boreham Park and at the PCC. Both these playgrounds are in capital forecast but are in need of updating now as opposed to later. There is a significant amount of money sitting in the reserve that could allow these to be done sooner than later.Implementation of a dedicated budget page on township website where the public can more easily follow the budget process. | <ul style="list-style-type: none">I would like to see a list of below the line projects with approximate costs that can be moved up when funding is made available or droppedProjects to be considered as such include:<ul style="list-style-type: none">Recreation<ul style="list-style-type: none">Badenoch TrailStory's Bridge SR10 N between Laird and NiskaBuildingsexpanded or new municipal officeRoadspaving gravel roads (list by road) |
| 8. Are there any projects you would like to see considered for removal from past plans? | | <ul style="list-style-type: none">No | <ul style="list-style-type: none">Despite the best efforts of the staff of the day, the public was not well engaged as part of the Recreation Master Plan. As a result many of the recommendations did not reflect the usage levels of many of our parks and facilities or the value that these amenities have to our community. So it is very difficult to rely on that document for planning purposes. Perhaps the Recreation Committee could be utilized to fill this gap through enhanced engagement with the various organizations that use these facilities as well as the residents in and around the various parks that are owned and maintained by the Township. <p>In a similar manner, the Community Based Strategic Plan ended up as a Corporate Strategic Plan rather than a Community Based Strategic Plan. So the results of that plan should not be relied upon as a reflection of the Communities vision. Many of the new processes, including this exercise will provide a greater insight into the priorities of our community on an annual basis.</p> | <ul style="list-style-type: none">No | <ul style="list-style-type: none">No. |

| | Mayor Seeley A | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
|--|-------------------|---|--|--|---|
| 9. Are there any new programs you would like to see considered? | | <ul style="list-style-type: none"> Drop-in recreational programming time slots in the gym (Similar to the ice rink times eg. Monday women's drop- in basketball 7-9pm) | | <ul style="list-style-type: none"> I would love to see some municipally lead recreational and special interest programs to be available to our residents. Understandably, I have no idea what the cost or additional workload is involved, but it would be so great to see some simple programs such as a fitness class for seniors, yoga, youth home alone or first aid course, cooking class etc... Perhaps this would be something that the rec committee could assist with. Guelph Eramosa seems to have a great lineup of simple programs as an example. I worry that the community will be very disconnected coming out of this pandemic which is unfortunate because the community spirit in Puslinch is one of the things that make it so great. Implementing some of these simple programs in 2022 would maybe help to get people involved and out in the community again. | <ul style="list-style-type: none"> See 6 and 7 above |
| 10. What would the overall big picture direction to staff be that you would like considered? | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> We are a rural municipality and rural lands are employment lands. Whether that is farming, forestry or resource extraction our role is to act in support of the urban centres around us. At the same time we need to be stewards of the land since rural lands also gather, clean and store precious drinking water, filter and clean the air and provide natural spaces where people can recreate and recover. Doing these things well means serving a larger good which is not easy for everyone to understand and often difficult to achieve. However our goal should be to become the best at being the emerald in the middle of everywhere. | <ul style="list-style-type: none"> It has been an incredibly hard year but the staff corporate wide have adapted and showed incredibly resilience despite the challenges of the pandemic. With the municipal office being closed for a long period of time in combination with people being stuck in their homes and also possibly struggling mentally and financially, it is likely that there is more public complaining and irritability and anger. Keep doing exactly what you are doing – stay positive – ask for support when needed and don't get caught up in it. The residents and businesses just need to feel heard over the coming while. | <ul style="list-style-type: none"> Give Council the information it needs early in the process (see 4 above) and put forward suggestions to reduce tax impact instead of having Council members look for savings. |

| Mayor Seeley A | | Councillor Baily B | Councillor Bulmer C | Councillor Goyda D | Councillor Sepulis E |
|--|--|--|--|---|--|
| 11. In one sentence, what would you like the theme of the next budget to be? | | <ul style="list-style-type: none">I would like the upcoming budget to consider themes around communication, building community, climate mitigation and safety. | <ul style="list-style-type: none">Engagement. We have some great new staff that are unknown to our community and are equally unaware of what goes on here during normal times. We have all been shut away from each other and I believe that we will all work better together if we all get to know each other. Perhaps that will not be this year but it is a goal of mine to ensure that our community gets to know our staff and vice versa.On the same theme we have the bang the table software to take advantage of to help engage the community in the budget process as well as other items such as the Fill Bylaw.I also think we need to re-engage with our friends at the County. This Township used to work closely with staff at various levels at the County and I think we should continue to rebuild those bridges.We also need to engage with the City of Guelph, maybe not so much on the issues raised lately but on other railway issues and on Source Water Protection.I would also like this to be the year that our shiny new CAO gets a chance to engage with our local community leaders. | <ul style="list-style-type: none">Implementation of the results of the transportation and roads plan. | <ul style="list-style-type: none">Moving forward post pandemic |
| | | | | | |

2022 Budget Preparation – Looking Forward - Department Heads

| | CAO Schwendinger F | Director of Finance Hasan G | Clerk Hoytfox H | Director of Public Works, Parks and Facilities Fowler I | Fire Chief Gomes J | Chief Building Official Hartholt K |
|--|---|--------------------------------|--|---|--|---|
| General comment(s) | <ul style="list-style-type: none"> Need to focus on “base Budget” first which is the budget to do everything the same as the year before with no adjusted service levels, but adjusted for energy, fuel, COLA etc. Then add changes to see the impacts Set target from start | | | <ul style="list-style-type: none"> Additional projects and service requests through the year is very challenging with such small operating budgets Any new infrastructure needs a corresponding increase in operating budget moving forward | | |
| 1. Are there any service levels you would like to see increased? | <ul style="list-style-type: none"> Staffing and operating and capital to coincide with any new infrastructure | | | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No |
| 2. Are there any service levels that you would like to see decreased? | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No |
| 3. Are there any service levels you would like to see added? | <ul style="list-style-type: none"> Crossing Guard | | | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No |
| 4. Are there any service levels you would like to see removed? | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No |
| 5. Are there any potential legislative or policy directions or initiatives that may be coming that you are concerned about? | <ul style="list-style-type: none"> Greenbelt implications | | <ul style="list-style-type: none"> No | <ul style="list-style-type: none"> If new infrastructure proceeds at rec facilities, we need corresponding increases in staffing and operating budget. Existing staffing levels and budgets cannot accommodate more services | <ul style="list-style-type: none"> In the near future. The Ontario Fire Service is predicting that Provincial Legislation will be introduced again that will require firefighters to be NFPA certified to the level of service that they are performing | <ul style="list-style-type: none"> The septic re-inspection program is coming due this year. We may be given a grace period to extend to 2022 due to COVID. The upcoming Source Water protection meetings will bring more clarity on whether this will need to be addressed in 2021 or 2022. |

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|--|--|--------------------------------|---|---|--|---|
| 6. Are there any potential legislative or policy directions or initiatives that you would like to see implemented? | <ul style="list-style-type: none"> Social Media Policy Updated HR Policies Policy Review Plan Development of a Budget development and Control Policy Development of a Level of Service Policy | | <ul style="list-style-type: none"> Social Media Policy | | <ul style="list-style-type: none"> Staff Expense Policy 2017-002 should be reviewed by the department heads and any proposed changes presented to Council | <ul style="list-style-type: none"> No |
| 7. Are there any new projects you would like to see added for consideration? | <ul style="list-style-type: none"> Implementation of Space Needs Recommendations | | | | | <ul style="list-style-type: none"> Digitally archiving our current paper records. COVID has already started this digital shift. This project would likely take some time, but it will benefit those working remotely and help the future preservation of our existing records (especially large format drawings). By digitizing our current records, where possible, it will have the side benefit of freeing up usable space currently taken up by our physical files. Specifically in the building department, reference plans, subdivision grading plans, surveys, storm water management ponds, existing architectural plans and existing septic records would be especially helpful for future developments and building permits reviews |
| 8. Are there any projects you would like to see considered for removal from past plans? | <ul style="list-style-type: none"> No | | <ul style="list-style-type: none"> No | | | <ul style="list-style-type: none"> No |

| CAO Schwendinger F | | Director of Finance Hasan G | | Clerk Hoytfox H | Director of Public Works, Parks and Facilities Fowler I | | Fire Chief Gomes J | Chief Building Official Hartholt K | |
|--|--|---|--|--|--|--|-----------------------|--|--|
| 9. Are there any new programs you would like to see considered? | | <ul style="list-style-type: none">Continue to investigate and implement partnership and shared service agreements where appropriate | | <ul style="list-style-type: none">More awareness/involvement in economic development programs and how staff can better assist in the process for new or expanding businesses | | | | <ul style="list-style-type: none">No | |
| 10. What would the overall big picture direction to staff be that you would like considered? | | <ul style="list-style-type: none">Ensure that annual budget and associated documents are a living documents that are updated annually and are realistic and sustainable for the established / approved service levels | | | <ul style="list-style-type: none">Present a budget that is realistic | | | <ul style="list-style-type: none">Work safe, work smart and work from home if you can. | |
| 11. In one sentence, what would you like the theme of the next budget to be? | | <ul style="list-style-type: none">Responsible, Realistic Recovery Plan | | <ul style="list-style-type: none">Engage Puslinch | | | | <ul style="list-style-type: none">Responsible COVID recovery. | |