

Rob Adams, BA, MPA

Chief Administrative Officer
Town of Whitchurch-Stouffville



How to Engage Non-Financial People



Goal: Best run municipality and a fun place to work!

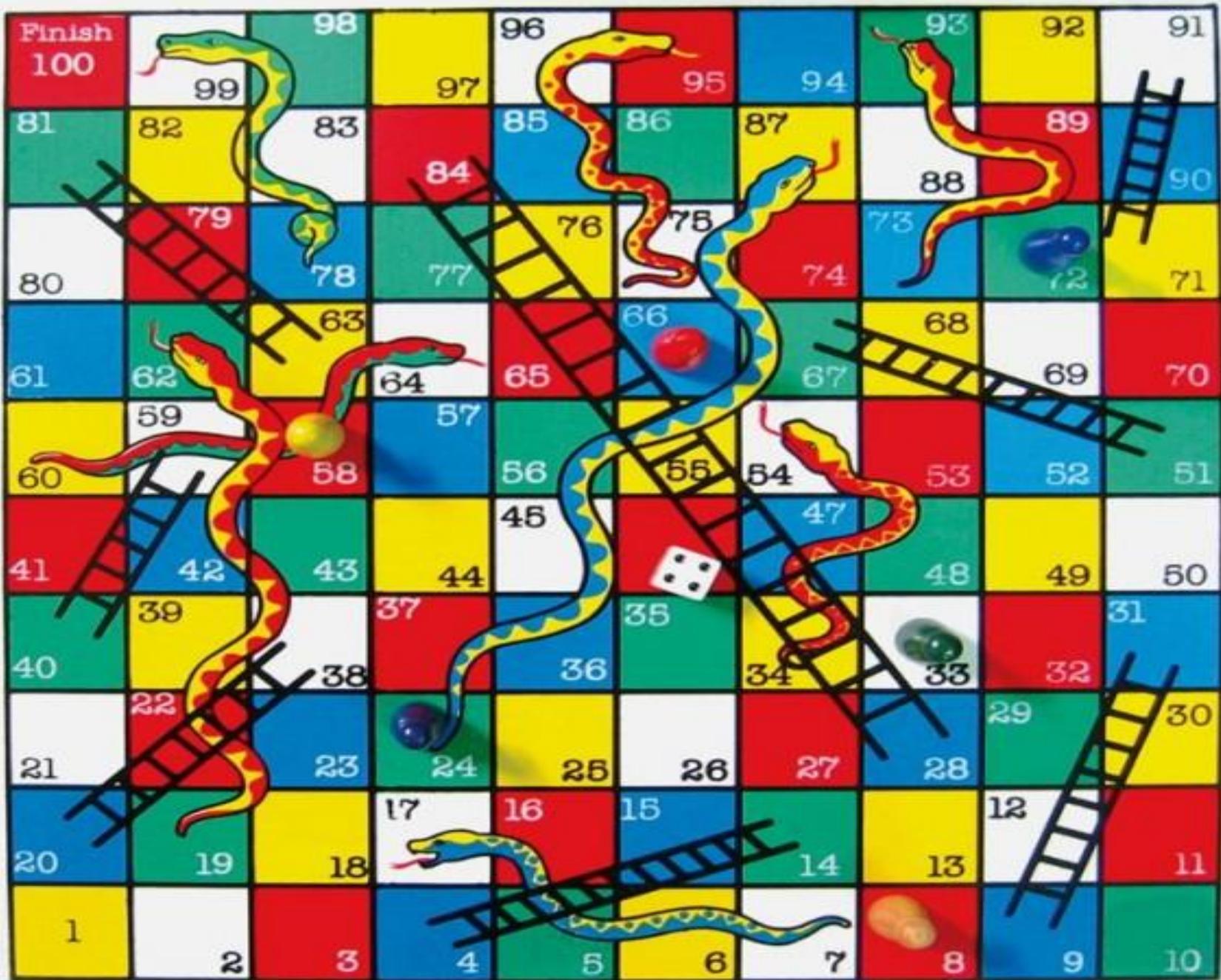
Rob Adams

A noble profession

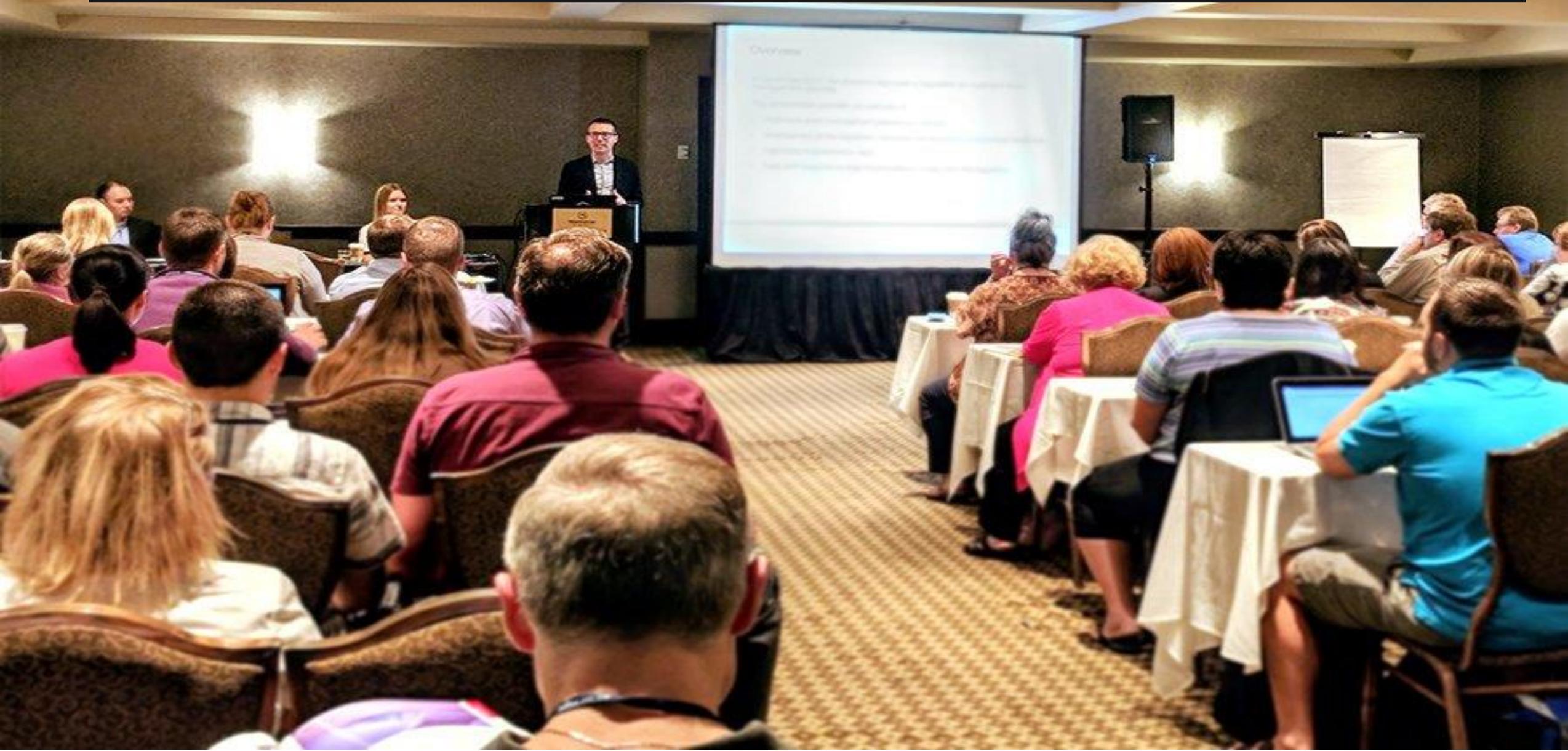
“There is no cause more noble than serving your friend and neighbors in municipal government.”



MFOA's 2019 Annual Conference



What do you hope to get out of this seminar?



5 P's

Personal Learning Styles

Plan

Prepare

Present

Perform

How to engage non-financial people

Learning styles

Art of storytelling

9 keys to explaining financial ideas

Funding cuts and innovation

Practical tips and tricks to budget success

Real examples in action





Communicating To Rate Payers and Elected Officials To Get Buy-in For Infrastructure Investment and Budget







Budget

45

25%	30%
45%	

Personal Learning Styles

Perception -Where are you in the room?



New Council



Learning Styles





Visual

2 sub-channels
linguistic and spatial

Graphs, charts, illustrations

Outlines, concept maps, agendas, handouts

Content to reread later



Auditory

Brief explanation

Summary of materials

Tell, teach, tell.



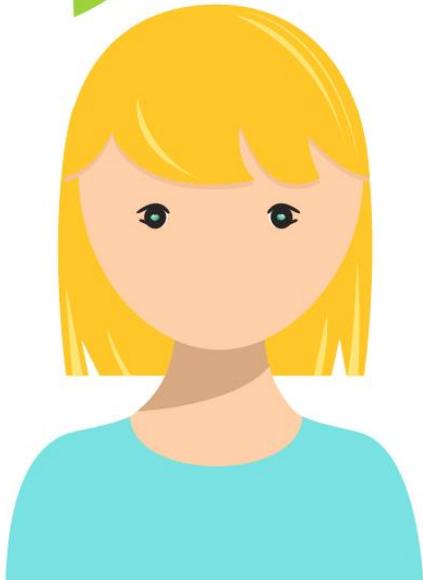
Kinesthetic

2 sub-channels
Movement and Tactile

Activities

Music, colour

Brain Breaks



Plan

WHAT'S YOUR

STORY

The art of storytelling









Stories are about 22 times more memorable than facts alone.



What's your

story?

“Spending money” became...

“Investing in your community”





Problem
Example
Relevance

Use Persuasive Frameworks
For Budget Content

Prepare

A top-down view of a wooden desk. On the left is a silver laptop. In the center is a white spiral-bound notebook with the text 'PREPARATION IS THE KEY' written in black marker. To the right of the notebook is a yellow pencil. Further right is a glass filled with several colorful pencils. At the top center is a white coffee cup on a saucer. At the bottom left is a pair of black-rimmed glasses. At the bottom right is a portion of a tablet. A small potted plant is visible in the top right corner.

PREPARATION
IS THE KEY

A close-up photograph of two hands shaking in a firm grip, symbolizing partnership and agreement. The hands are positioned centrally, with fingers interlaced. The background is a solid, muted blue color. The text is overlaid on the image in white and light grey.

Secrets to Building Great Staff-Council Relationships

“Strong partnerships between Council and Staff is a requirement to effective municipal management.”

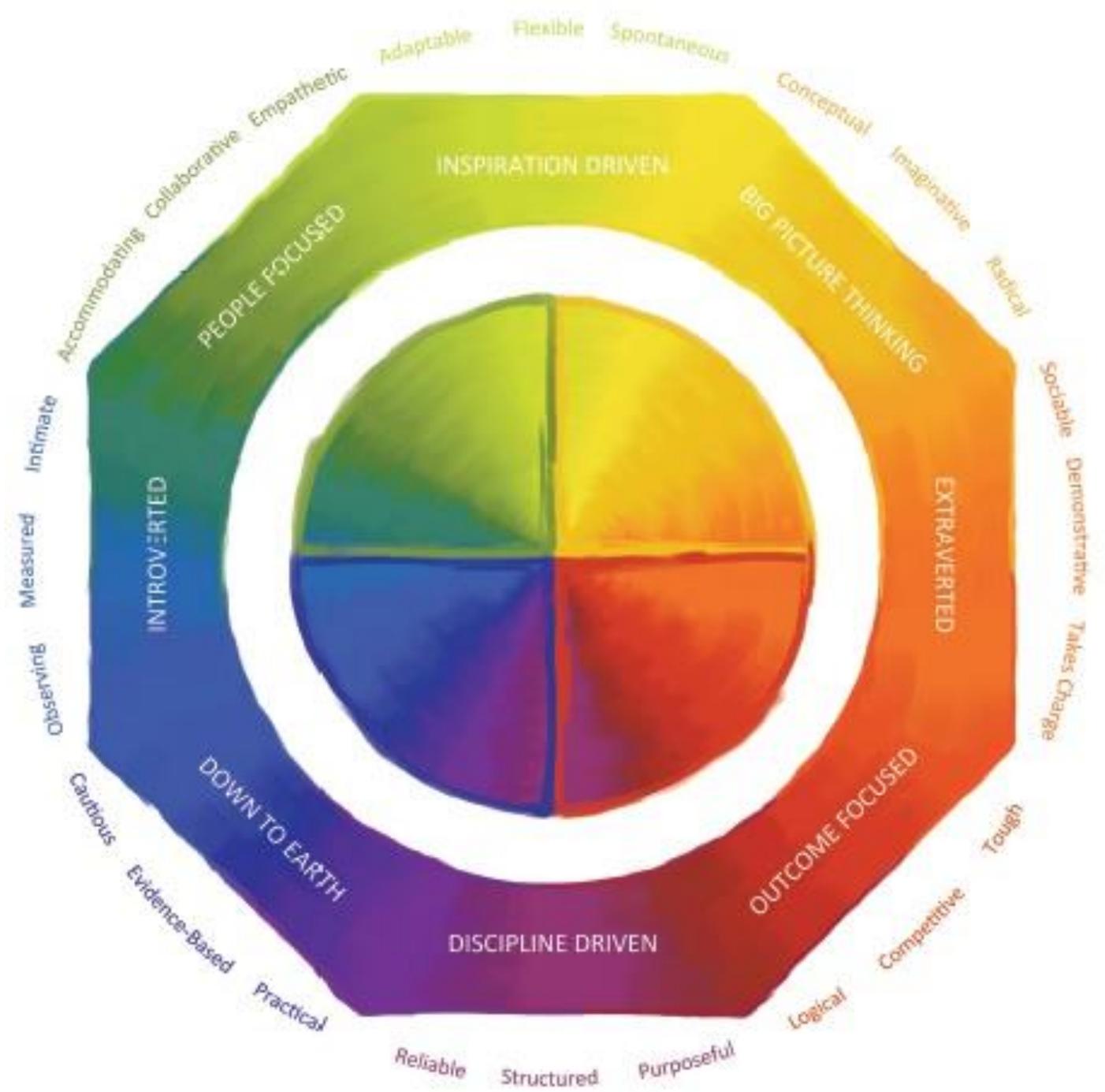
The background of the slide is a photograph of the facade of a building, likely City Hall, with the words "CITY HALL" visible in large, dark, serif letters. The image is slightly blurred and has a dark overlay.

THE IMPORTANCE OF UNDERSTANDING ROLES AND RESPONSIBILITIES

“Often the lack of harmonization is caused by lack of understanding and agreement on roles for both Council and Staff.”

Speed Dating





NATIONAL BESTSELLER

“Profound...Engaging...and packed with insights. I couldn’t recommend it more highly.”

—Stephen R. Covey

LEADERSHIP

and SELF-
DECEPTION

Getting Out of the Box

The Arbinger Institute

READ BY WILLIAM DUFRIS | UNABRIDGED

SECOND Edition

The **FIVE**
DYSFUNCTIONS
of a **TEAM**

A WORKSHOP FOR TEAMS

PARTICIPANT WORKBOOK

PATRICK LENCIONI

BASED ON THE NEW YORK TIMES BEST-SELLING BOOK

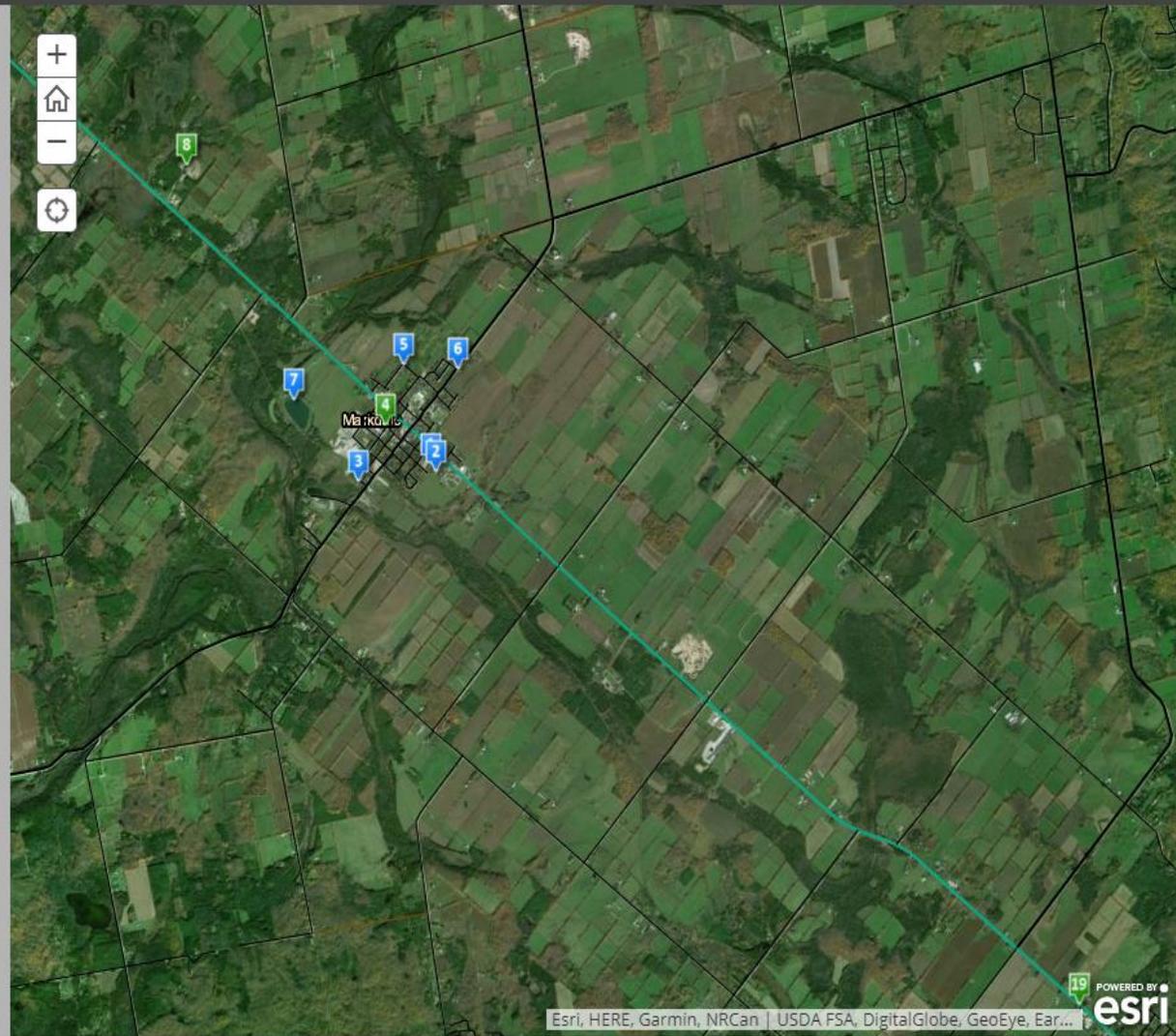


ROAD TRIP



Welcome to the 2019 Spring Road Tour

The blue points on the map represent locations belonging to the Public Utilities Department and the green points represent locations belonging to the Transportation and Environmental Services Department.



Markdale Water Tower



Markdale - Eliza St Wells #3 and #4



Markdale - Isla St Well #1



Markdale Depot



Grayview Wastewater Pumping Station



Grey Road 12 Wastewater Pumping Station



Markdale Lagoon



Markdale-Holland Waste and Diversion Site



Rocklyn Depot



Amik Lagoon

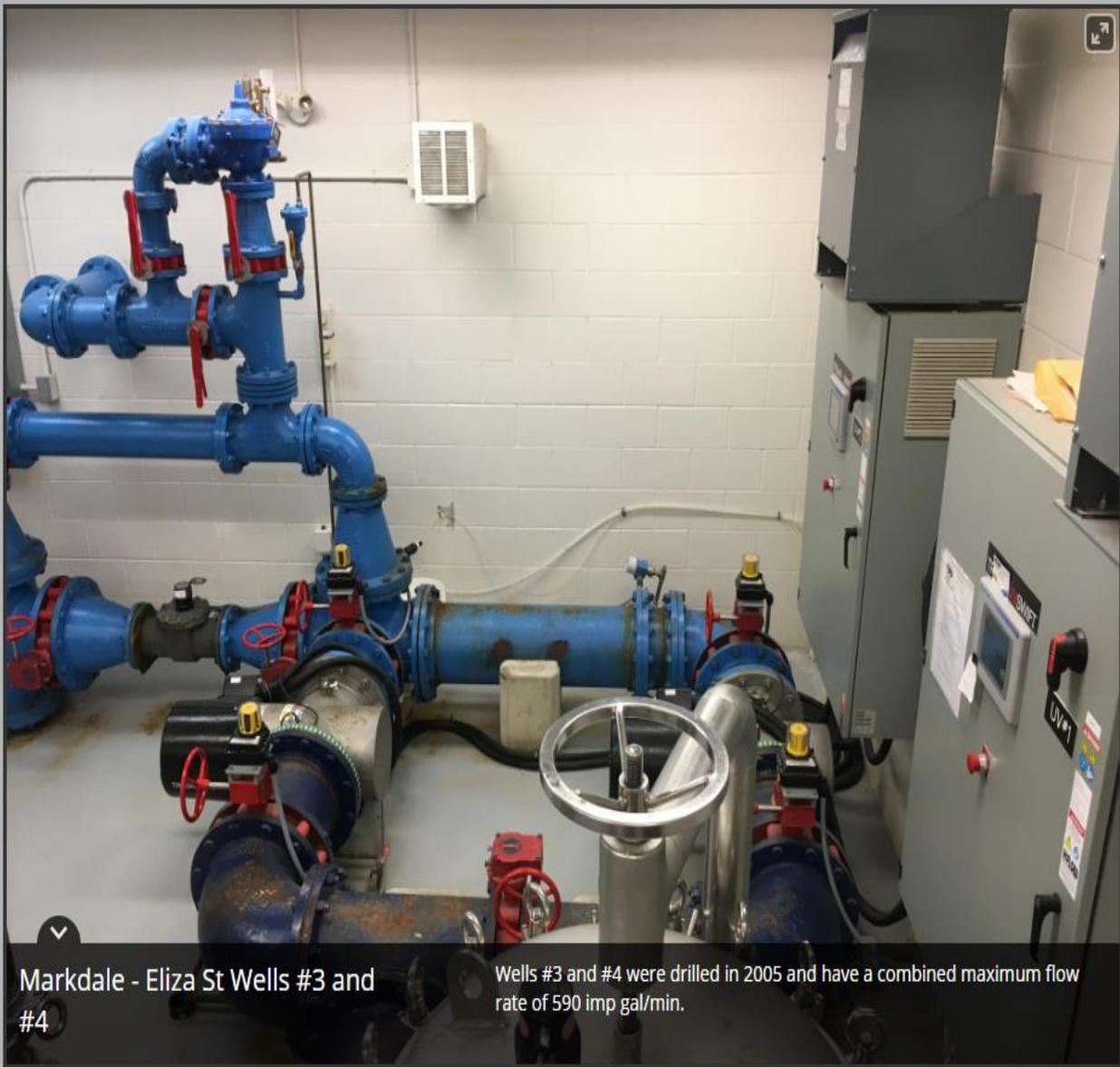


Kimberley-Amik-Talisman Water Treatment Plant



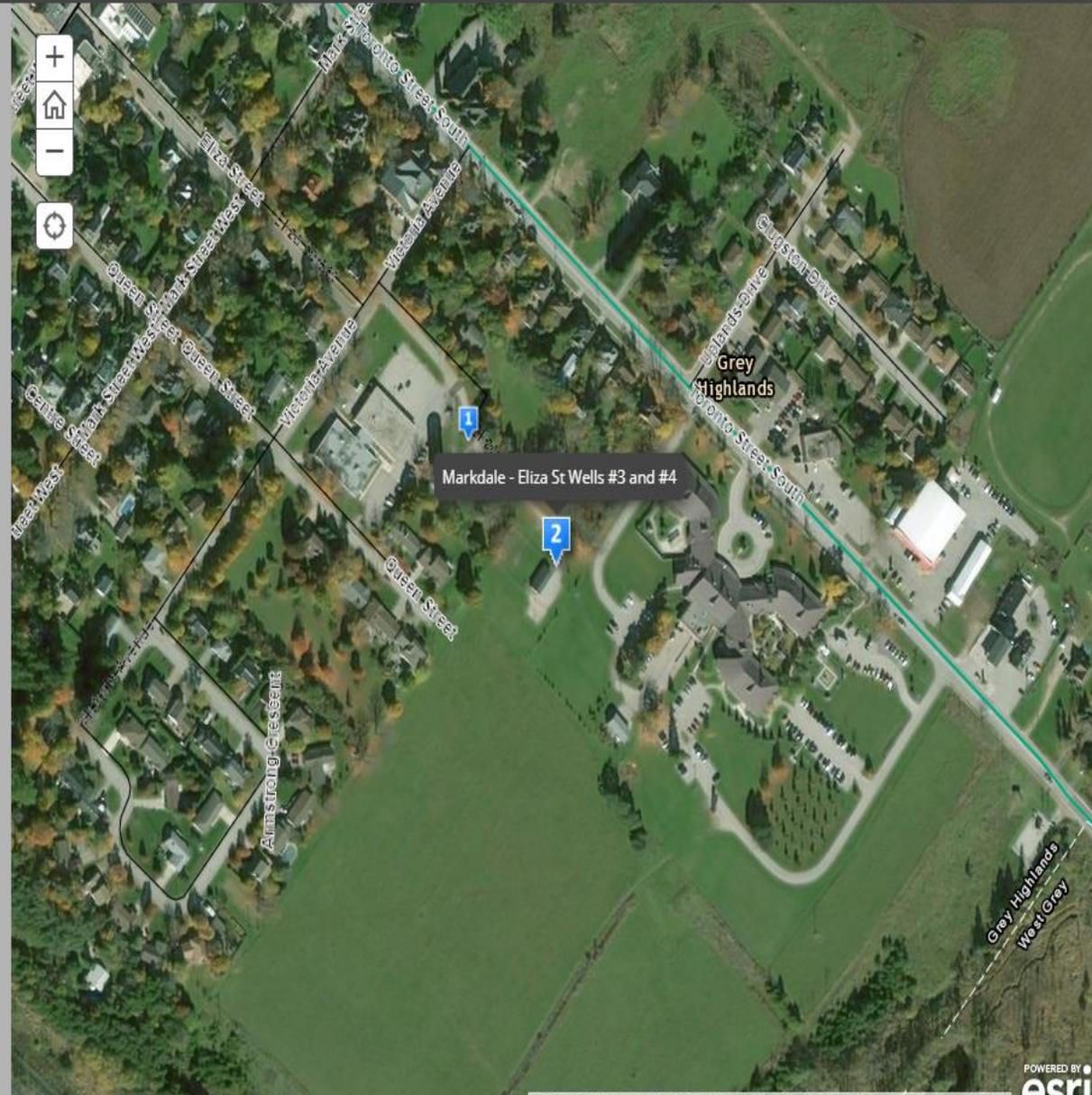
Maxwell





Markdale - Eliza St Wells #3 and #4

Wells #3 and #4 were drilled in 2005 and have a combined maximum flow rate of 590 imp gal/min.



Show the
current level
of service
through
pictures



What it looks
like now...



What it
should look
like...





Tony Rose
Memorial
Sports Complex





Road Surfaces



	2015	Ideally
# km paved	13.5	21.5
Estim. Cost	\$5,258,500	\$6,450,000
<u>Funded from</u>		
1. Gas Tax	2,460,000	1,750,000
2. DC	405,800	600,000
3. Taxation	2,392,700	4,100,000

Road Surfaces



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Whitchurch-Stouffville Budgeting 101

Helping You Understand
The Budget



Haiqing Xu
Director

Development Services

Overview

The Development Services Department consists of four divisions: Policy Planning, Development Planning, Engineering, and Building. It administrates and oversees key aspects of the land use and development approval process through policy development and administration of engineering review, building code review, and development approvals.

Mission Statement

To proactively create a sustainable and vibrant community by respecting, collaborating and engaging residents and customers and providing efficient and quality professional services.



Understanding Development Charges

Corporate Asset Management Plan 2016

Town of Orangeville



“A municipal council is a collection of diverse individuals applying their variant opinions to a multiplicity of complex problems.”



The power of
Strategic Plans



FUTURE AHEAD

Strategic Plan

Council Work Plan

Vision: 5, 10, Years Out

Succession Planning

Objectives, Goals &
Targets per Department

Asset Management Plan

Design Guidelines
(Urban, Heritage,
Streetscape)

Facilities Assessment

A photograph of a business meeting. In the foreground, a person's hand in a light blue shirt is pointing at a document. Another person's hand is visible in the upper right, also pointing at the same document. The document contains a pie chart and some text. In the background, a laptop keyboard is visible. The overall scene is brightly lit, suggesting an office environment.

The Importance *of* Strategic Planning



Orangeville

Historic Charm

Dynamic Future



A 3D rendering of a computer keyboard. The central focus is a single key that is bright green with a white border. On this key, the words "Strategic Planning" are written in a bold, white, sans-serif font, arranged in two lines. The key is slightly raised and tilted. Surrounding it are other keys, some of which are also green with white borders, while others are plain white. The background is a soft, out-of-focus white, suggesting a clean, modern aesthetic. The lighting creates subtle shadows and highlights on the keys, giving them a three-dimensional appearance.

**Strategic
Planning**



Strategic Planning

Conversion of the initiatives into financials

The plan dovetails nicely with the annual budget

Strategic plans become the budget's descriptive front end

Strategic Plan

Strategic Pillars

Fiscal Sustainability

Working toward a sustainable budget that ensures the protection and maintenance of core services now and into the future.

Expanding the tax base through a growing, diversified economy

Building and maintaining a tax base that supports the highest quality program and service delivery.

Service Excellence

Supporting a collaborative, timely, customer-focused approach to operations that enhances efficiency, effectiveness, and customer satisfaction.

Asset planning, maintenance and development

Successful stewardship of the infrastructure and facilities required to support a growing community and vibrant economy

Strategic Plan

Strategic Pillars

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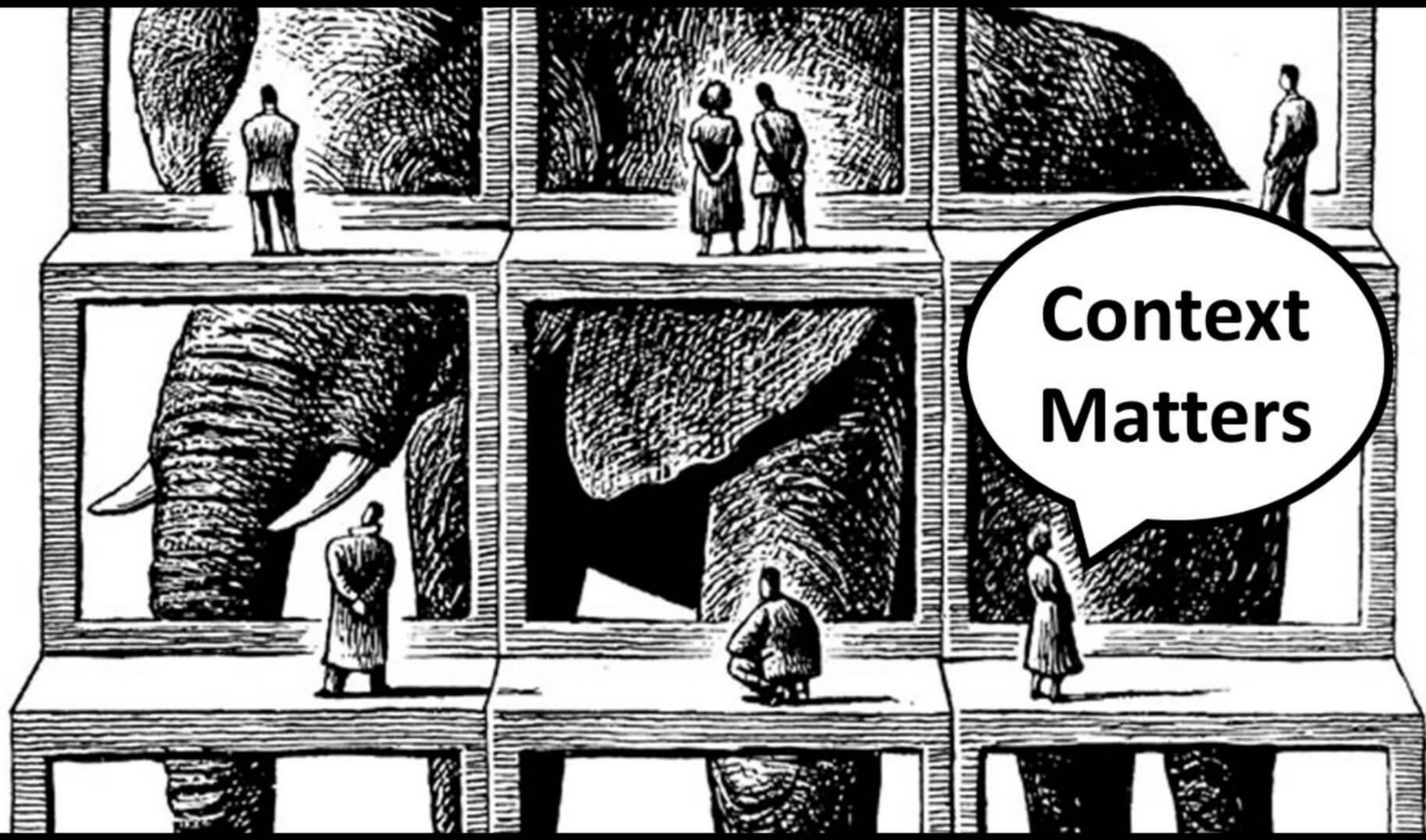
Gamify Your Most Important Tasks
Monopoly night for Strategic planning

Presentation





Budget Overview
—
High Level



**Context
Matters**

Make it picture perfect -hide your notes and bullet points

- Too much text will kill any presentation. People just don't respond to blocks of uninterrupted information. To make a financial presentation interesting, ensure you have at least a few interesting and relevant graphics slides.
- There's nothing wrong with a handout or take away, but if you put your whole presentation on the handout or on the screen behind you, your audience will read ahead and then tune you out. It's a fact of human nature and we've all done it at least once in our careers.
- Make sure your handouts and slides don't detract from what you're saying. Remember that you and what you have to say are the main event. Keep your slides simple and then expand and explore with your own commentary.

Make it pi bullet poi

- Too much text v
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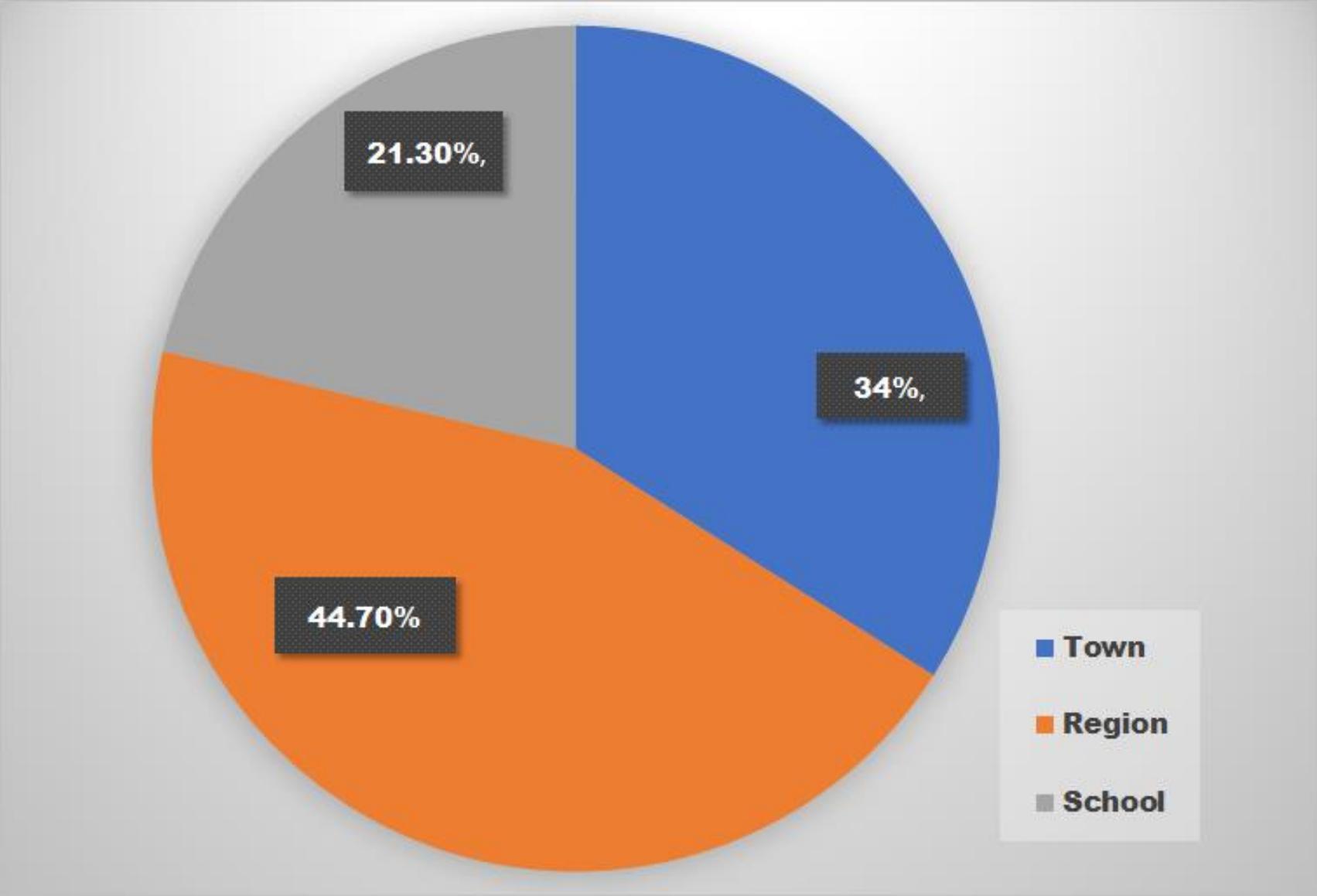


notes and

t respond to blocks
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if you put your
mind you, your
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what you're saying.
ain event. Keep
ur own

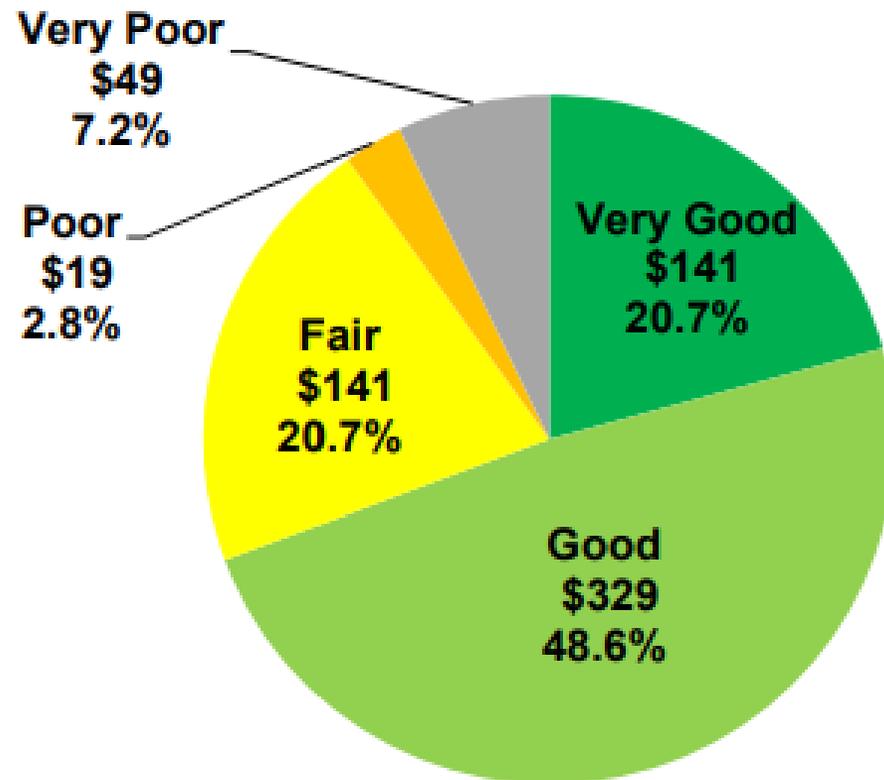




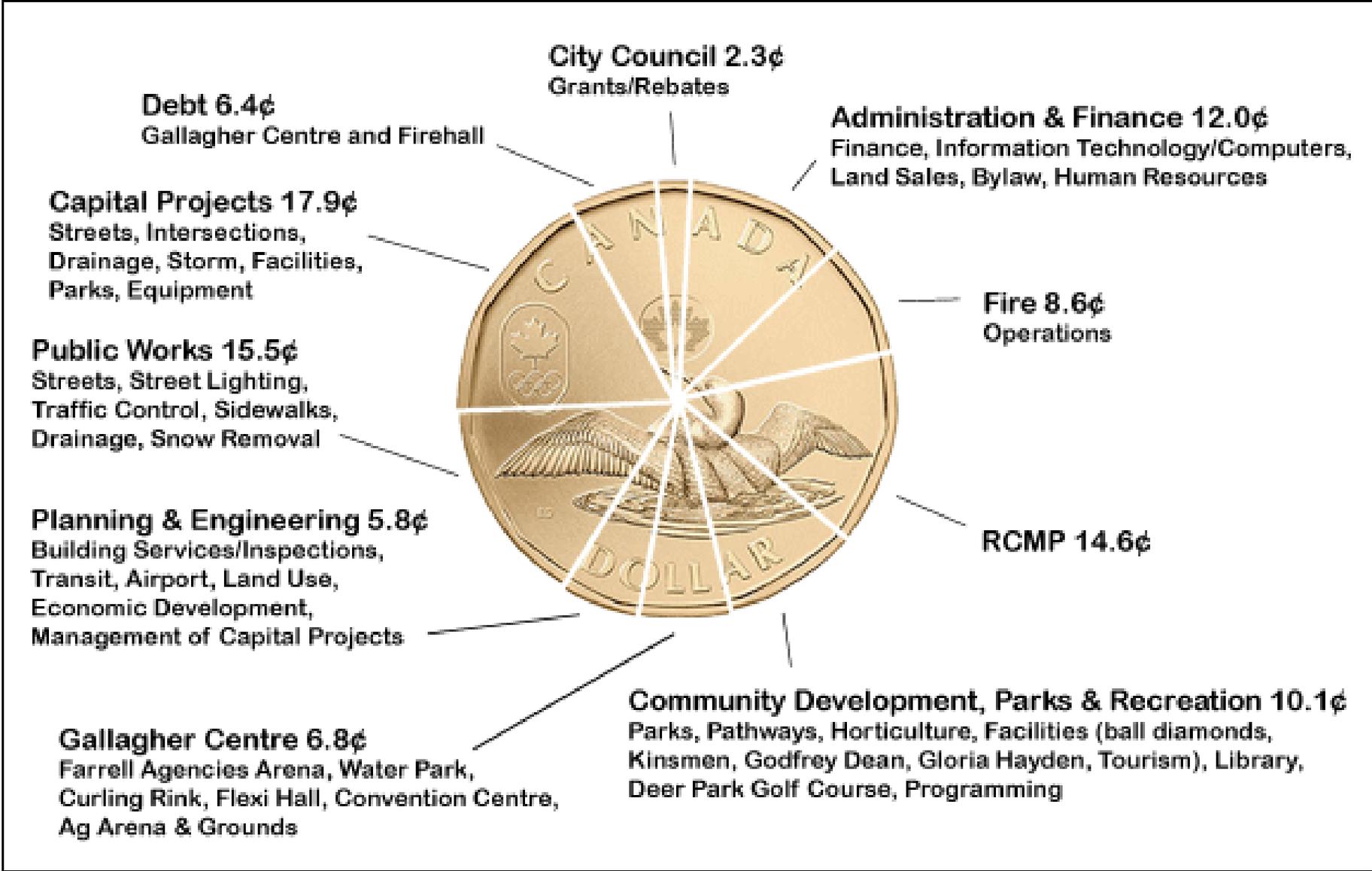
BUDGET CUTS

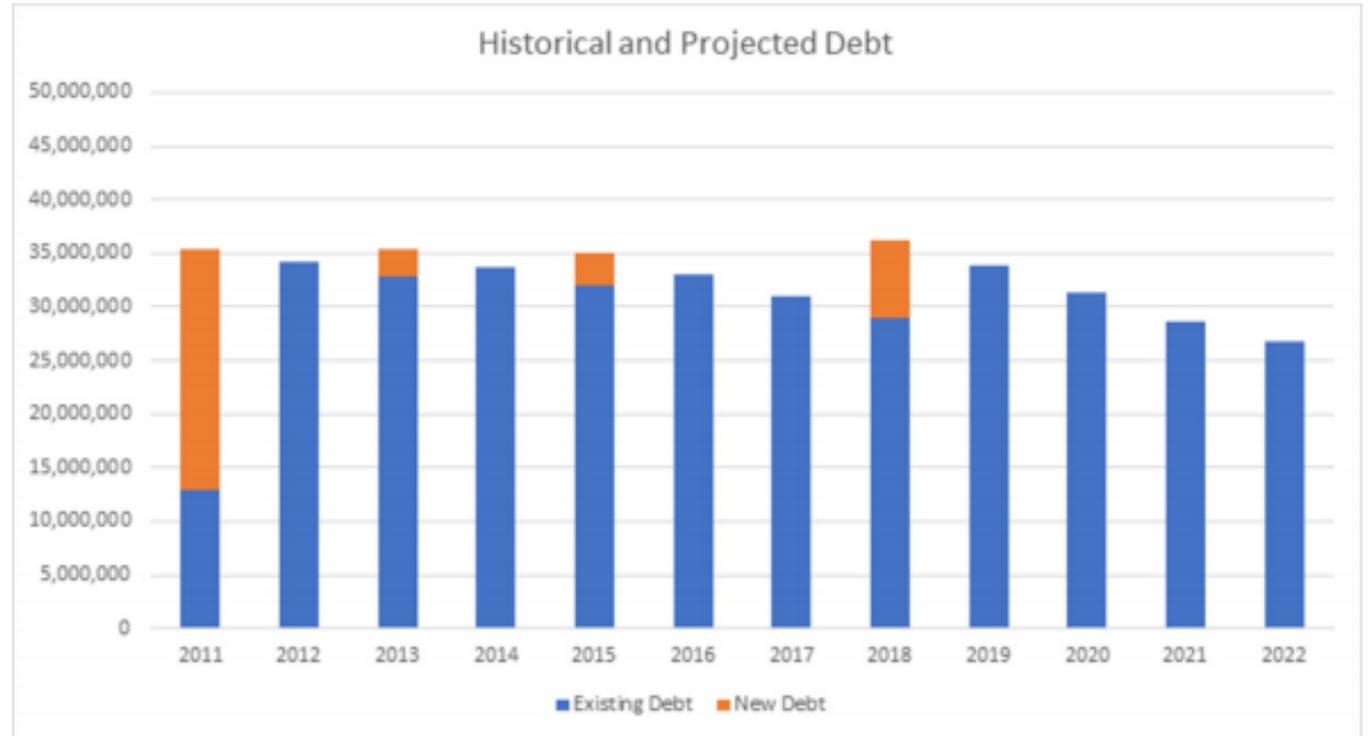
We've had to scale down our new first line of defense.

Figure 1 Asset Condition, \$678.8 million (2016\$M)



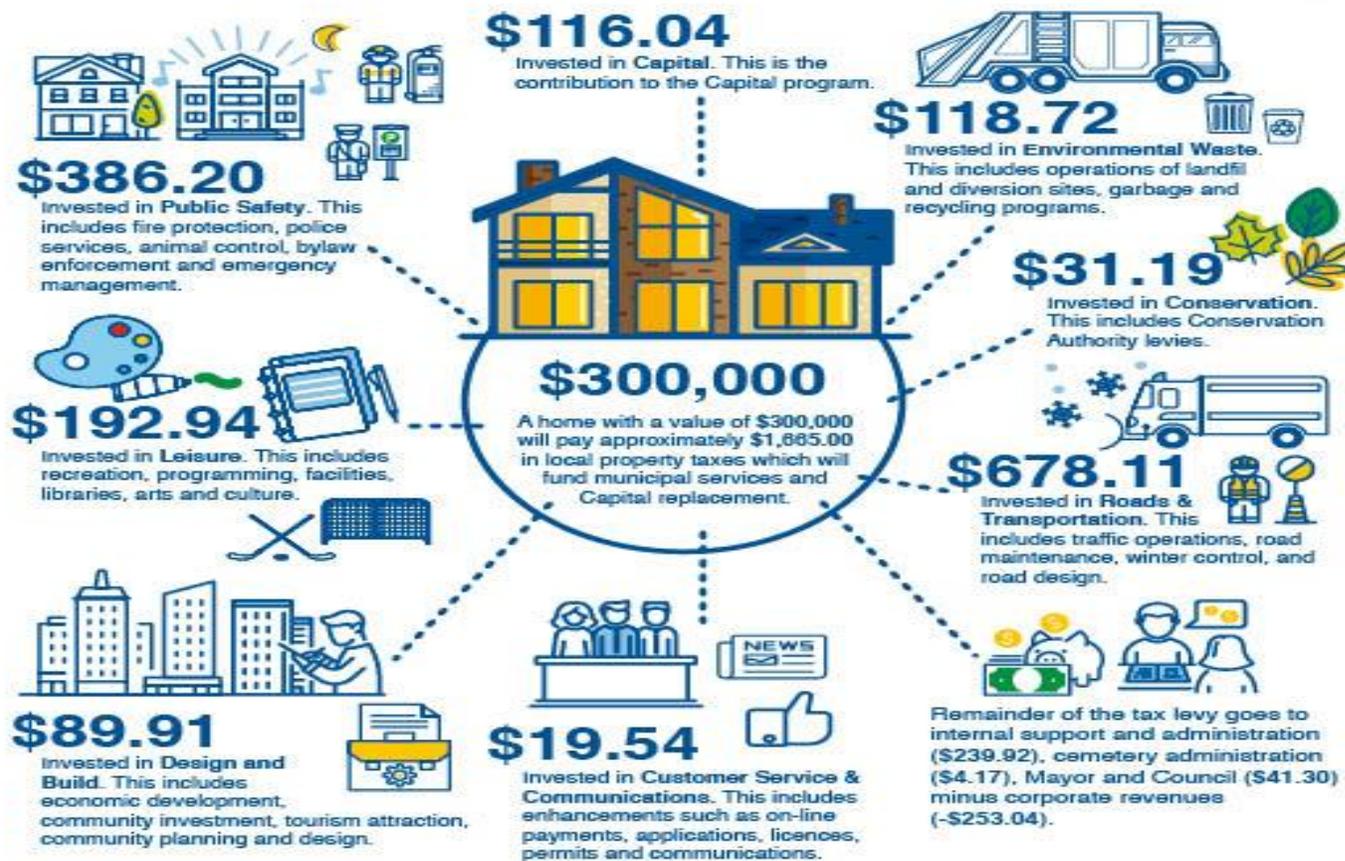
The assets estimated to have a Very Poor condition represent those assets that are close to, or past, the end of their Maximum Potential Life, and therefore represent assets that are expected to require renewal immediately or in the near future. The condition estimate will be improved as the Town carries out condition assessments on additional assets.





FINANCE

Approved 2019 Budget with a tax levy increase of 4.8%



\$3,932,395
Invested in **Capital Projects**. This includes roadways, facilities and buildings, fleet vehicles and equipment, parks and recreation. 76% of the capital budget is focused on the renewal of our existing infrastructure.

5 P's

Personal Learning Styles

Plan

Prepare

Present

Perform

A photograph of a council chamber. In the foreground, a curved wooden table is set with several potted poinsettias in gold-colored pots. Black chairs are arranged around the table. In the background, a Christmas tree stands near a wall with flags. A staircase with grey seats is visible on the right side of the room. A large black text box with white text is overlaid in the center of the image.

9 keys to explaining Complex Financial ideas so your Council will understand



MAKE
IT
RELATABLE



Avoid Tribal Language

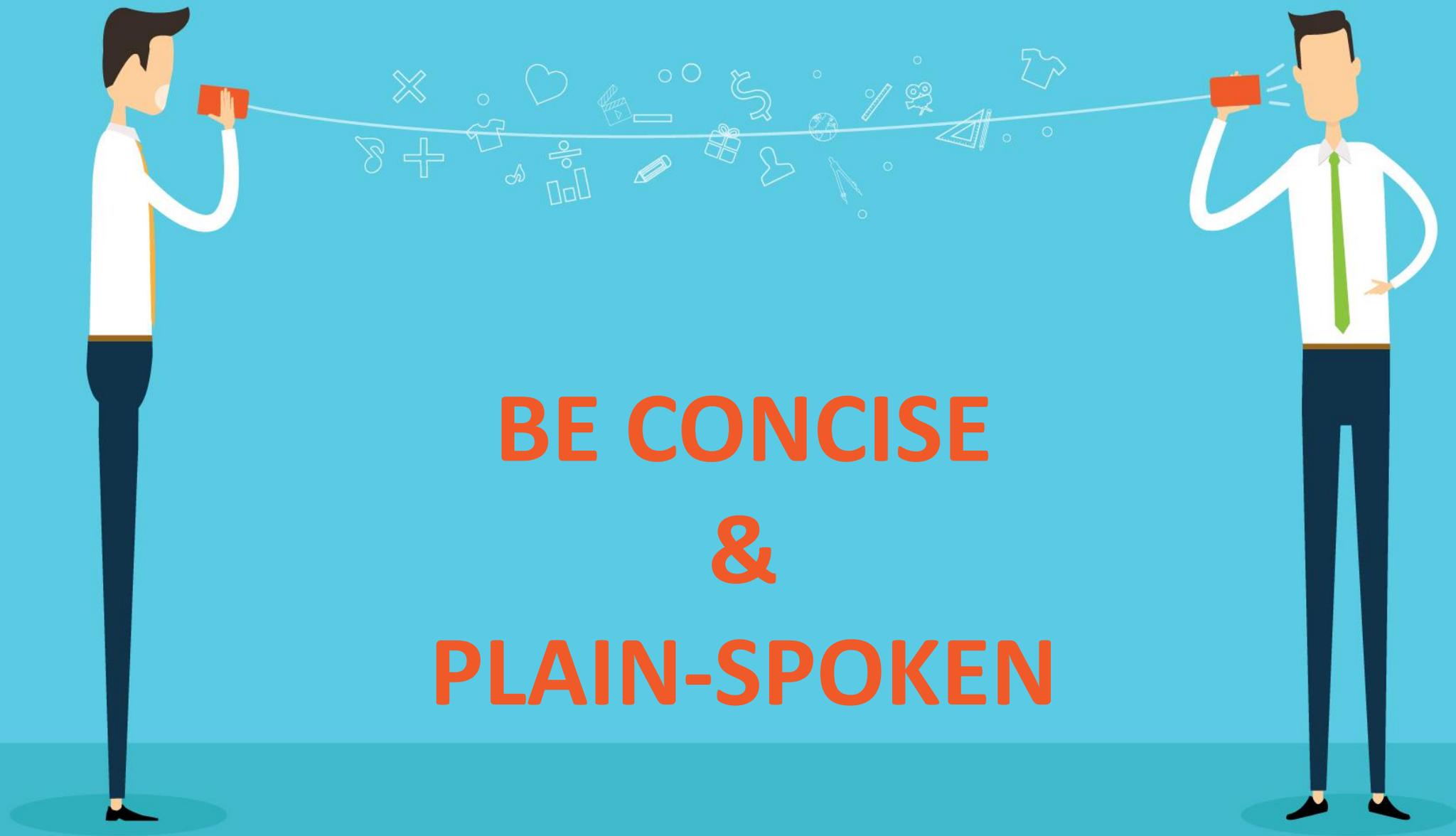




WARNING

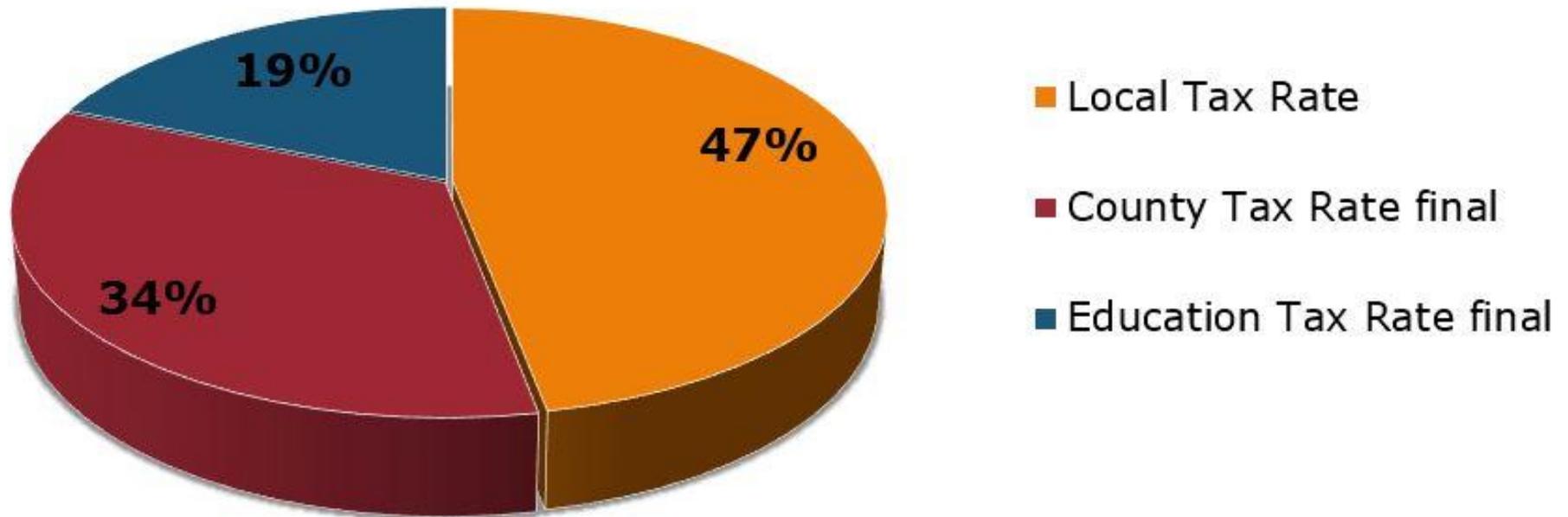
ACRONYMS

AHEAD



**BE CONCISE
&
PLAIN-SPOKEN**

Simplify –use pie charts



Present Information in a Logical Sequence



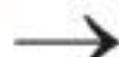
Seed



Root



Stem



Flower



Crop



Questions



2019 Operating & Capital Budget

DRAFT



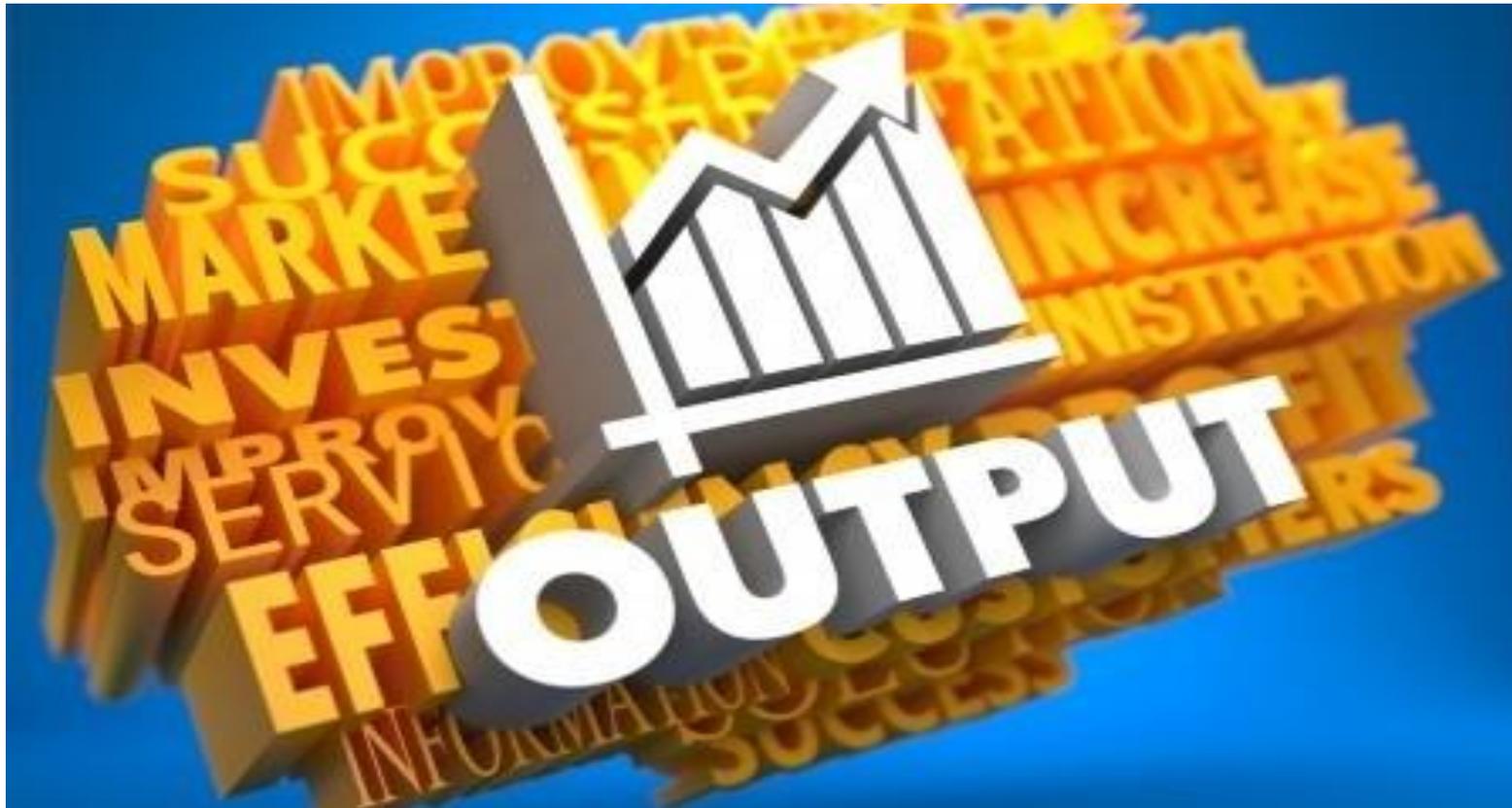
The Budget Hierarchy



Budget Schedule

Date	Action
Aug 17, 2017	Departmental Budget Templates distributed to Department Heads
Aug 28, 2017	Departmental Meetings with Finance Staff Commence
Sep 5, 2017	CAO and Treasurer Review Compensation and Benefit Projections
Sep 15, 2017	Departmental Submissions due to Finance Department
Oct 3, 2017	Capital Priority Setting Meeting held with the CAO
Oct 16, 2017	Proposed budgets consolidated and finalized and reviewed with CAO
Oct 23, 2017	Operating & Capital Budgets tabled at Council
Nov 20 & 21, 2017	Budget deliberations commence
December	Operating, Capital and Rate Supported Budget submitted to Council for approval

Budgets often focus on inputs and neglect to articulate outputs or outcomes as community goals



Whenever a project gets deferred, its **future** cost goes up (price increases/job size change)





The Infrastructure Gap



Risks & Consequences



Draw on the facts and data



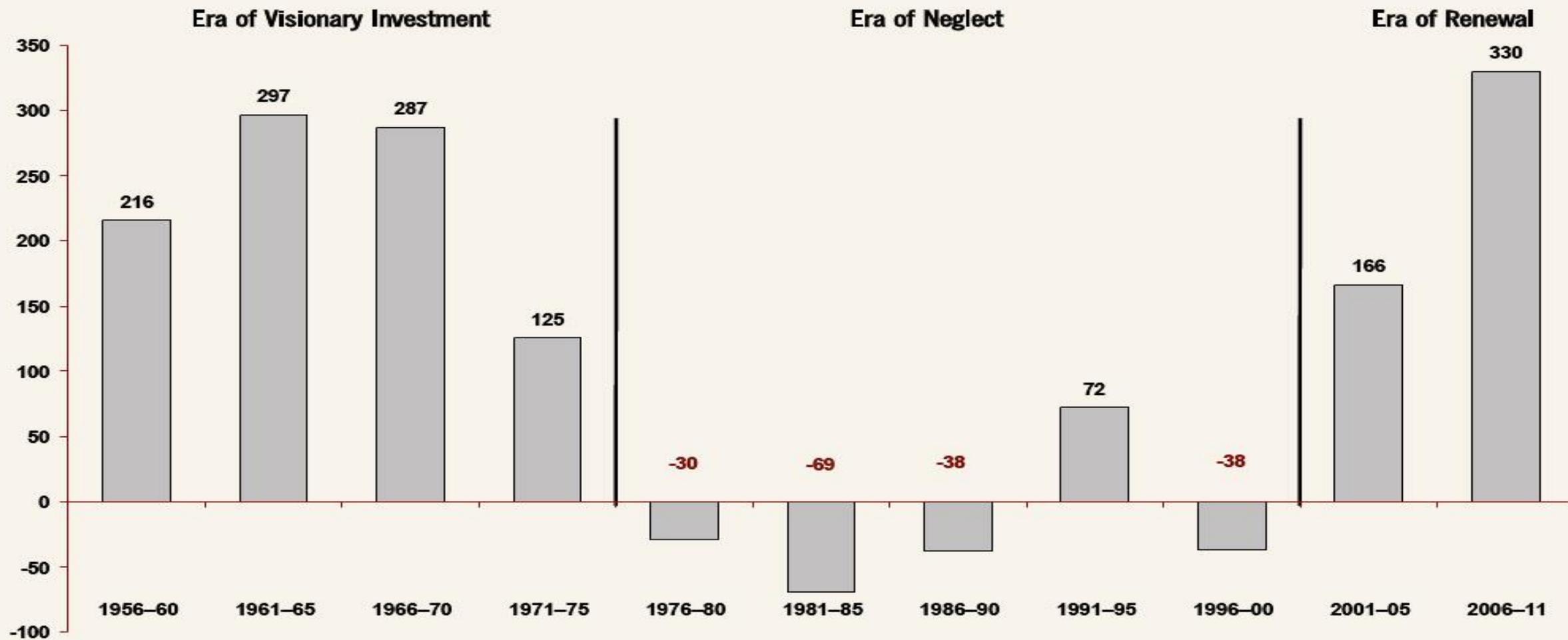
Smoothing the Graph



CHART 1

Ontario Per Capita in Net Public Capital Stock

Constant 2002 Prices

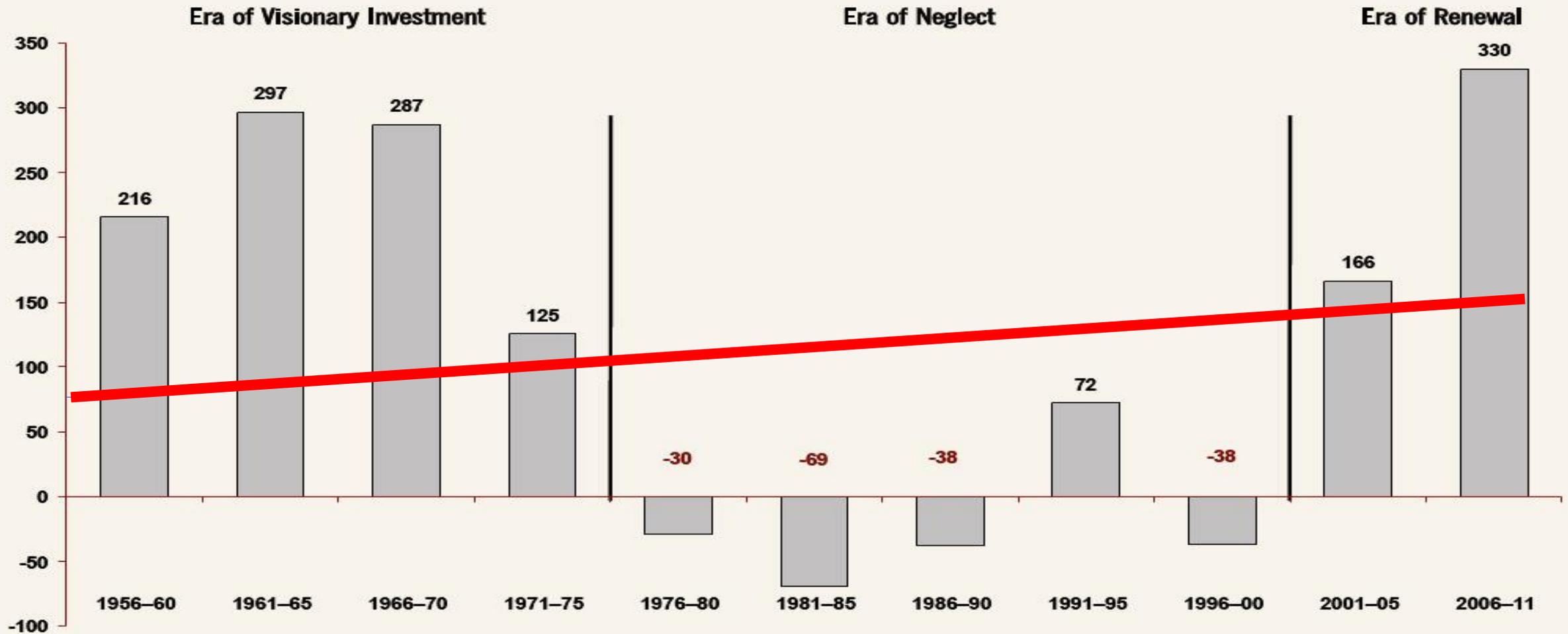


Sources: Statistics Canada and Ontario Ministry of Infrastructure

CHART 1

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Constant 2002 Prices



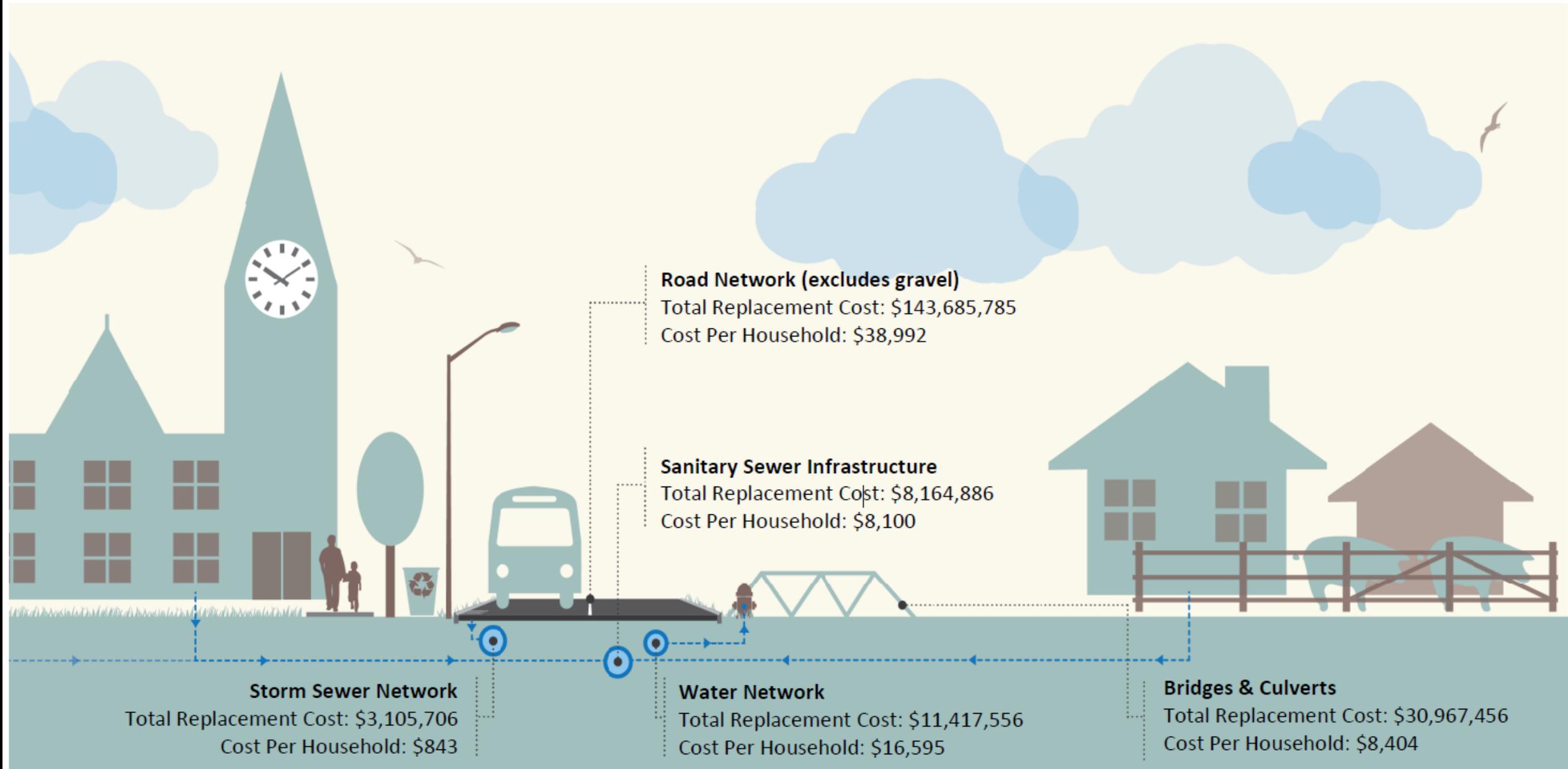
Sources: Statistics Canada and Ontario Ministry of Infrastructure

BEST PRACTICE

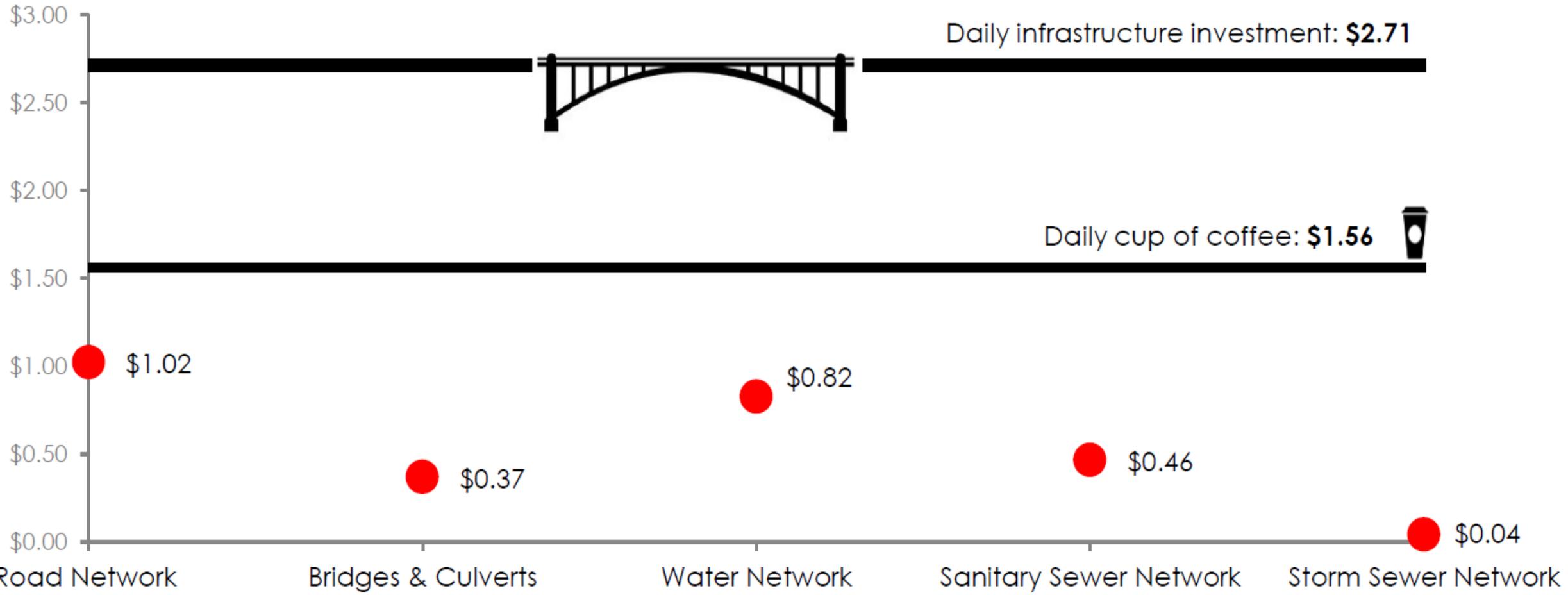


Infrastructure Replacement Cost Per Household

Total: \$72,934 per household



Daily Investment Required Per Household for Infrastructure Sustainability





Daily investment
=
Cup of Coffee \$1.56

Expert to add credibility



Asset Management Plan = Jobs



Economic & Business Development



Waterworks long-term financial plan
“phase-in” approach worked well



Empathy for
receiver of the
message



House repairs –understandable



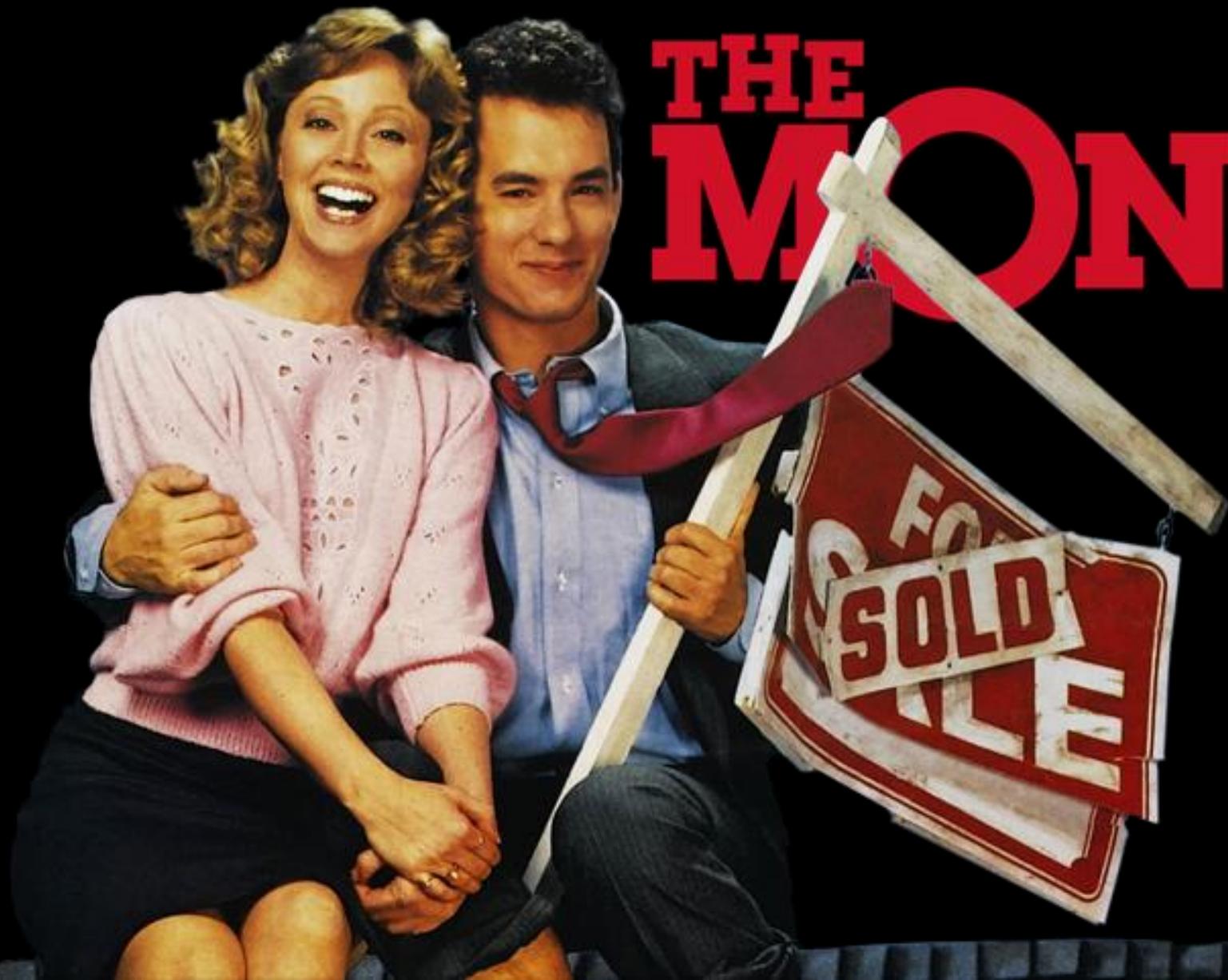
Household Budget

HOUSEHOLD BUDGET

PAYCHECK	\$2,000
COMMISSION&TIPS	\$1,500
CHECKING ACCOUNT	\$1,200
Total Income	\$4,700
Total Expenses	-\$3,000
Total Available	\$1,700



THE MONEY PIT





Explain what success looks like



Funding tied to Asset Management Plan and efficiency



Create an Easy Customer Experience



By taking advantage of technical automation.

With shrinking
dollars,
Innovation and
efficiency are
required



Virtual Town Hall and app





Quality



Speed



Efficiency



Cost

Help Council Communicate



Council Communication Strategy



Public Communication Strategy



Engagement tools, Bang the Table

Home FAQ Why Engage? Staff Shout Outs! GreyHighlands.ca Search Sign In Register

CONNECT
GREY HIGHLANDS

Welcome to Connect Grey Highlands, the new online engagement site that allows you to contribute your ideas and feedback on community matters important to you! We want to empower you, our residents, to be more active in shaping your community and future. We will listen to what you say, take your opinions into account and report back to you on how community input contributes to decisions.

Capital Asset Management Plan

How do I develop my organisation and processes to manage my assets?
ASSET MANAGEMENT IMPLEMENTATION

How do I measure the performance of my asset portfolio?
PERFORMANCE MANAGEMENT

Which maintenance actions should I give priority?
RISK-BASED MAINTENANCE & AGEING CONTROL

How can I get and keep in control my CAPEX projects to assure their lifecycle performance?
PROJECT PLANNING & CONTROL

Which investments do I need to keep my assets in the right state?
STRATEGIC PLANNING

© October 29 2017

New Hospital

Recycling and Waste

Speak Up & Sign Up

News Feed
© November 16 2017

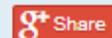
Public Skating Schedule
© November 01 2017

HOW WOULD YOU SPEND THE GREY HIGHLANDS 2018 BUDGET?

Have your say in the 2018 Municipal Budget! As the Municipality of Grey Highlands prepares its 2018 budget, we want to engage our community and get your opinion on key services that are funded by tax dollars. From November 3rd to November 16th we will be asking the public to have their say using the interactive budget tool. The tool will allow you to decide if spending for key services should increase by 3%, decrease by 3%, or if spending should match the proposed budget for 2018. Results and comments received before November 16, 2017, will be provided to Council prior to the budget meetings on November 20th and 21st.

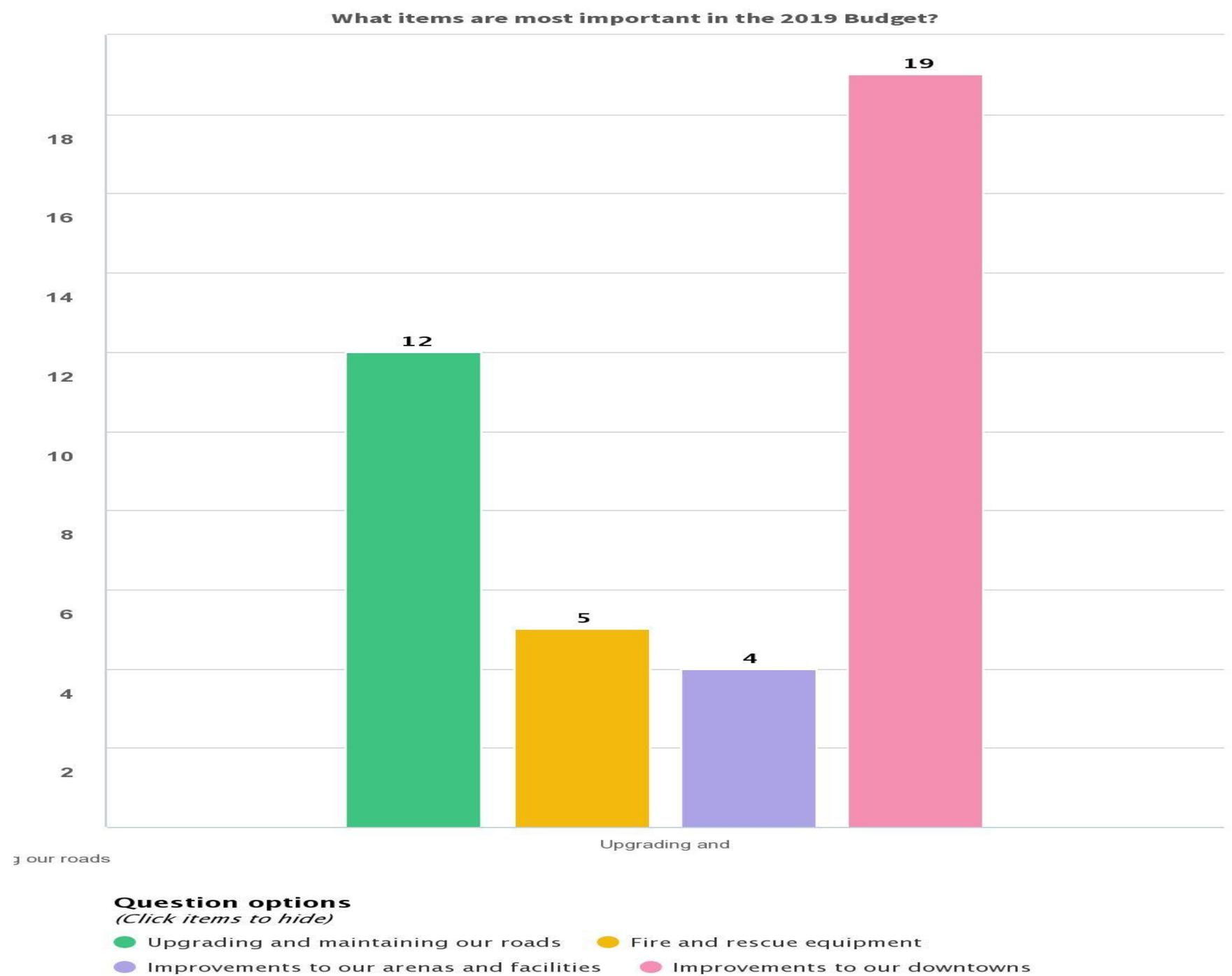
Click 'Share your Opinion' to get started!

Share your Opinion



Budget
Allocator
tool

Public
Engagement
Software







Communicate, Communicate,
Communicate





A Good Budget looks long term,
it's connected to the Strategic Plan and Organizational
Plans and focuses on outcomes as community goals.

Brand Action Plan Map

4X TAX REVENUE/ACRE
3X ASSESSED VALUE/ACRE
#1 PRIVATE EMPLOYER
#4 PUBLIC EMPLOYER

GENERATED **\$130,500,000** IN TOTAL SALES
 RESULTING IN **\$16,950,000** OF NET REVENUE

3,555 Instagram Followers
 2,000 Facebook Followers
 6,176 Twitter Followers

What We Do

- Event Facilitator
- Area Marketer
- Policy Influencer
- Public Realm Investor

BRAND LEADERSHIP TEAM

Focus Project	Project Name	Connect With
Developing Gathering Places	Project Name	Project Name
Project Name	Project Name	Project Name
Project Name	Project Name	Project Name
Project Name	Project Name	Project Name
Community	Project Name	Project Name
Project Name	Project Name	Project Name
Project Name	Project Name	Project Name

ORGANIZATIONAL

Brand Presentation	Brand Product
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Brand Marketing	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name

COMPLETED

Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name
Project Name	Project Name

Symbol Guide	Complete	Under
Deliverable Types	One Time Projects	Continuing



Map Legend

- BIA Projects
- City Projects
- Private Projects
- BIA Boundary

Patio Program
 \$250,000 Investment

Gelcreative: Strategy into Action

SAM (Strategic Action Map)

Benefits:

Simple and clear communication and understanding

Keeps the **strategy top of mind**

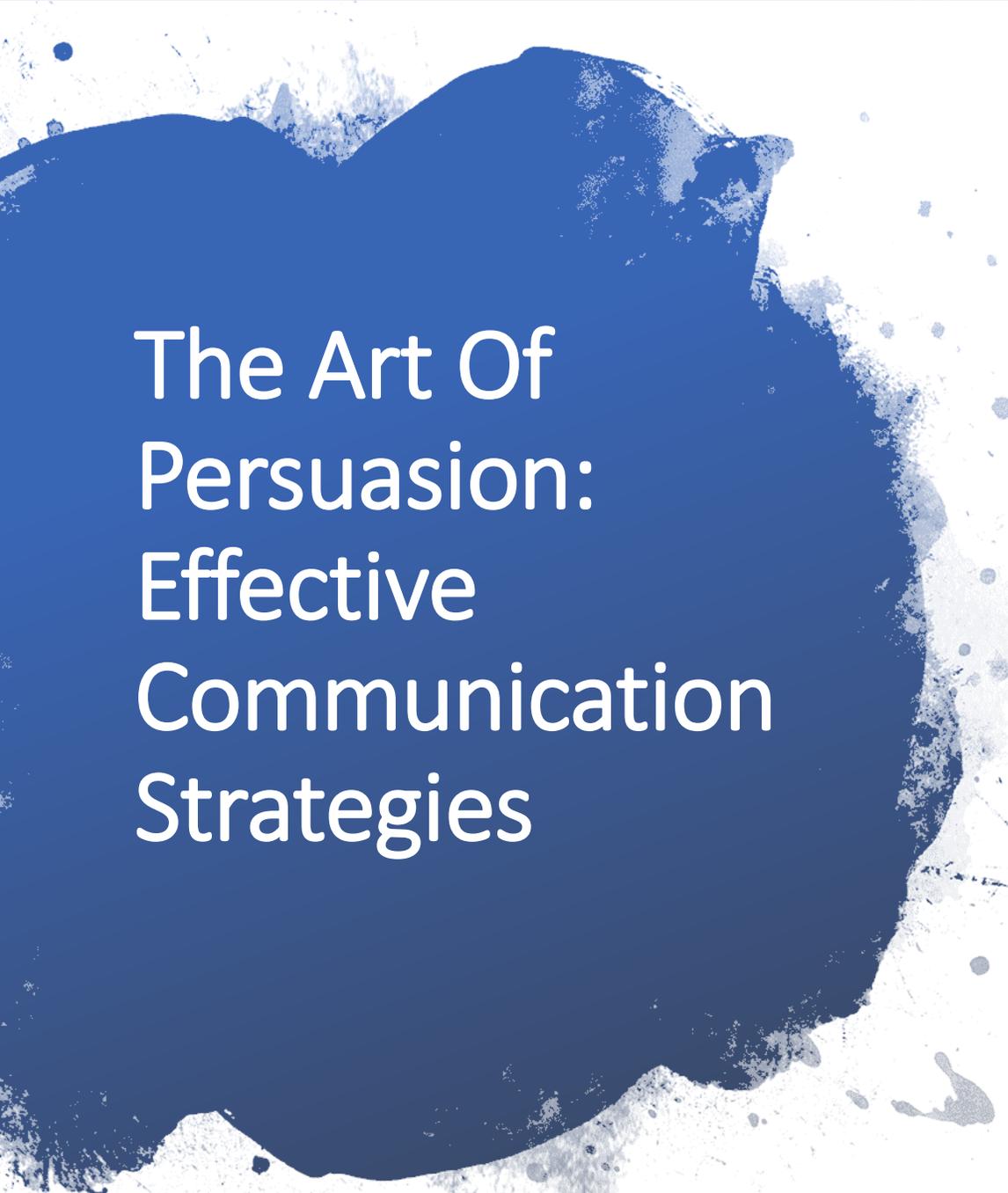
Helps tell the story, get people excited & gets buy in

Increases accountability with staff because projects are visible

Living document - useful tool that is often marked up as the team advances the strategic plan, keeping it alive far beyond the annual strategic planning meeting

Perform





The Art Of Persuasion: Effective Communication Strategies

- tell stories to make our ideas come to life.
- Effective communication and persuasion is essential in moving people to action and critical for any success

According to
a Harvard Business
School study, there
are two qualities
that form 90% of
others'
impressions of us
?





Warmth...



COMPETENCE

Warmth...When speaking publicly, we tend to pepper our speeches with logic and data to prove we are rational and knowledgeable.





First exude warmth and then over time show competence. Warmth appeals to people's emotions and makes us appear likeable and trustworthy.

Convey Big and Open Body Language



 Closed



 Open

Your vocal variety, the tone and energy we put in our voices must match the content of our talk.



How to use vocal variety when speaking in public?



How do leaders use communication to influence and persuade others?

- Leaders are effective communicators...
- by establishing credibility,
- build common goals,
- making their position compelling,
- and connecting emotionally with others

How they will personally benefit from the project?



Building goals on common ground

Communicate
through
symbols,
metaphors and
stories rather
than dry and
tedious data.





CHRYSLER

Robert Marcell, head of
Chrysler's small-car design
team in the 1990s

Very serious
communication
and morale
problem with his
team who doubted
Chrysler's ability to
manufacture and
market a
domestically made
small car.





Key Takeaways

- For the 2019 budget I will do the following 5P's:
- Determine Personal Learning Styles on my Council?
- Plan: Story or Theme for this years budget.....
- Prepare: Council training, road trip, Budget 101, Strategic Plan
- Present: use the 9 keys and empathy to explain financials
- Perform: use visuals to tell the story with enthusiasm

Thank you...Questions



Rob Adams CAO