

CORPORATE POLICY AND PROCEDURE



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| POLICY | New Project/Initiative Protocol |
| CATEGORY | Corporate |
| AUTHORITY | CAO Office |
| RELATED POLICIES | N/A |

INTRODUCTION

Time is valuable. Priorities and timelines should be respected, and changes to anticipated timelines should be well communicated. When staff are asked to complete a task, the timeline should always be clarified. Recognizing that priorities may need to shift at the Council level, discussion should take place if re-prioritization is necessary in order to accommodate a new project or initiative that is not identified in Council’s priorities.

PROTOCOL

The City’s annual planning cycle includes the following components:

- Departmental Work Plan Preparation– January/February
- Strategic Priorities– April/May
- Budget Planning - July/August/September
- Budget Deliberations and Approval – October/November/December (except in the first year of a Council term as mandated in the Municipal Act)

These steps are balanced throughout the year to allow for a natural progression that ensures that established priorities are re-assessed in light of any new and emerging issues. Once a budget is approved, City departments will then proceed to develop work plans to accomplish the currently identified priorities. In the spring, Council will review identified priorities for the upcoming year, and determine if any adjustments to priorities are necessary to accommodate a new project or initiative. Staff will then proceed to prepare budgets for the coming year based on Council’s established priorities. Through the budget approval process, Council will align appropriate resources and funding to the priority projects and initiatives. These budget decisions then form the basis of the on-going cycle for the upcoming year.

In recognition of the limitations placed on City resources (budget, time, identified priorities, day to day operational requirements, etc.), it is imperative that requests requiring a detailed inquiry into potential new projects or initiatives are directed to the appropriate step in the City’s planning cycle. A new project or initiative would be defined as a request where the effort required to respond will result in the need to reallocate one or more resources that are currently committed to either an operational function or a formally identified strategic priority. By referring new projects and initiatives to the strategic planning

process, Council can deliberate them, and balance their importance against established priorities and the availability of resources to achieve the desired outcomes.

While individual members of council will have their own personal views on what constitutes a priority project for the City, it is the formally adopted Council priorities that will determine how resources are to be aligned. Once Council's priorities are formally established during the annual planning cycle, new requests would be identified and brought forward to the whole of Council for formal consideration and direction. The ideal timing for this to occur is the strategic priority process. In this way, the whole of Council determines whether a previously unidentified project or initiative will take precedence over and use resources committed to an established priority project. Strategic priority deliberations are open to the public, and having new projects or initiatives introduced at this time, supports the concepts of accountability and transparency.