



**Program: Administrative Executive Management**

**Program Based Budget**

**2010 - 2012**

## Overview

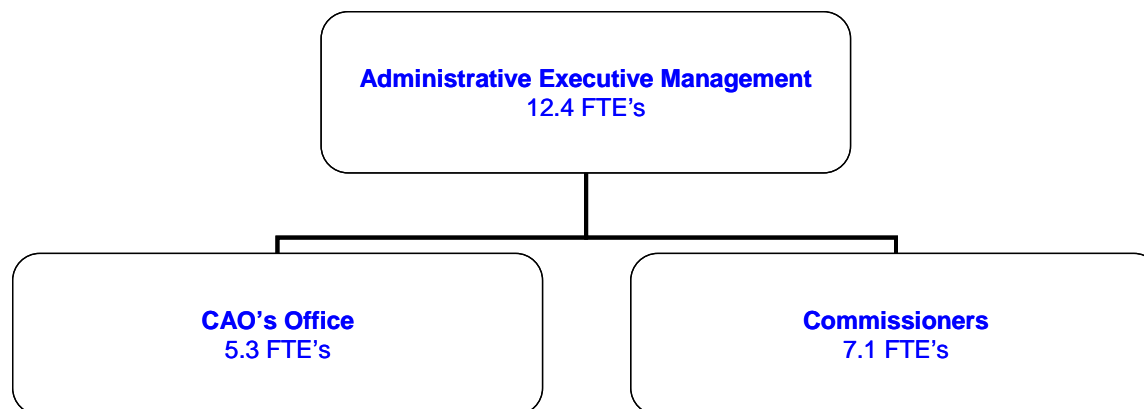
<b>Program: Administrative Executive Management</b>
<b>Vision Statement:</b> To demonstrate leadership and a commitment to excellence in the overall administration and management of the Corporation of the Town of Oakville.
<b>Mission Statement:</b> To provide professional advice to Council and direction to the corporation with a focus on results, leadership, accountability and organizational values.

## Introduction

The CAO is responsible for making sure the Town has the right leadership and culture to enable the organization to achieve the vision and goals of Council. One of the key roles of Council is to set the strategic direction for their term of office. This strategic direction then acts as a blueprint for the corporation's future business planning and budget decisions. The CAO manages the implementation of Council's strategic plan by providing professional advice to Council and works with the Town's executive team to ensure that departments develop the operational plans required to move the organization down the path toward implementation of Council's strategic goals.

## Program Services

The CAO Office provides services through the CAO/Executive Management Team.



## Major Accomplishments in 2009

### CAO job responsibilities and Initiatives:

- Worked with Council to review and update the corporation's 2008-2011 Strategic Plan
- Worked with Council to develop new strategic directions for Oakville Hydro
- Maintained open and effective relationship with Council, ensuring Council is kept informed of organizational issues
- Implemented voluntary fiscal constraints in March 2009 to adjust for declining planning and development revenues
- Established talent management program to support employee retention and succession planning
- Enhanced ServiceOakville project team to promote service excellence – implementation of front desk and telephone service enhancements, development of web and online service strategy underway
- Continued implementation of performance-based, program-based multi-year budgets
- Established strong linkages with region and area municipalities, school boards and provincial and federal government officials to promote Oakville initiatives and ensure Oakville's needs understood and addressed
- Established direct relationships with local community organizations including Chamber of Commerce, Halton Multicultural Society
- Began implementation of action plans to address issues raised by 2008 Employee Engagement Survey

### Major organizational accomplishments to achieve Council's 2009 areas of strategic focus were:

- Undertook 2009 Citizen Survey to measure progress in Council's key areas of focus
- Completed town's new official plan, Livable Oakville
- Business Continuity Planning completed to identify all departmental priority areas of business
- Completed town's first State of the Environment report
- Heritage Planning workplan approved by Council
- Repurposing of QEP into community centre offering both recreation and arts facilities approved; renovations underway
- Municipal cultural plan approved
- Obtained federal-provincial infrastructure funding to begin construction of new transit facility ahead of schedule
- Launched new Transit grid service to expand service to the community
- Bronte Youth Centre opened
- Implementation of Town's Accessibility Plan underway; Accessible Customer Service standard approve
- Council approved new 2009 Development Charges that more accurately reflect actual costs of growth
- Completed 10 year capital forecast
- Completed 2010 budget reflecting Council spending priorities identified as part of 2009 strategic planning exercise

## Program Area Significant Issues

Implementation of Council's strategic plan

Management of provincial population and intensification targets

Management of impacts of declining planning, building and development revenues caused by economic downturn

Management of tight time restrictions linked to federal-provincial infrastructure funding for transit garage

Meeting ongoing demands for new programs and services within current financial restraints

Provincial legislation and programs relating to accessibility, and provincial-municipal responsibilities may have significant impacts across the organization

## Strategic Objectives (Initiatives) for 2010 – 2012

Council's Strategic Goal/Area of Focus (If Applicable)	Program Strategic Objective	Guidelines for Deliverables	Expected Outcome/Timing	Program Service
To be accountable in everything we do	Assist Council to annually review 2010-2012 Strategic Plan and align Town business plans, budget and Corporate performance management systems (TOPS) with Council's strategic goals and report	Complete review of Council's strategic plan to determine progress on 2009 goals and identify 2011 areas of focus. Ensure Town business processes align with 2011 and 2012 areas of focus	Spring 2010, 2011, 2012  Fall 2010, 2011, 2012	Administrative Executive Management
To enhance our natural environment  To have programs and services that are environmentally-sustainable	Ensure continued implementation of programs and services that protect and enhance Oakville's ecological environment	Implement key environmental indicators and key policies to promote sustainability  Incorporate policy to protect and enhance natural environment into north Oakville development approval process	Report on indicators 2010, 2011, 2012  2010-2011	Administrative Executive Management
To enhance our economic environments	Develop and implement programs and services to promote local economy and create diversified economic base	Implement town's 10 year economic development strategy	2010, 2011, 2012	Administrative Executive Management

Council's Strategic Goal/Area of Focus (If Applicable)	Program Strategic Objective	Guidelines for Deliverables	Expected Outcome/Timing	Program Service
To have programs and services that are fiscally sustainable	Manage the resources/assets of the organization as a public trust, seeking efficiencies and proper return on investment	Defend the town's new development charges Continue to monitor and manage impacts of declining revenues Prepare and implement a ten-year financial forecast to identify Town's long-term capital and operating financial needs Ensure town meets ongoing requirements to maximize federal-provincial infrastructure funding	2010 2010-2011 Annually Winter 2011	Administrative Executive Management
To continuously improve our programs and services	Develop and implement new and innovative of programs and services to help make Oakville the most livable town in Canada	Identify web-based service enhancement priority projects  Implement organization-wide customer tracking solutions	2010, 2011  2011	
To ensure our staff receives the same level of respect, commitment and caring that they are expected to deliver to the community	Provide opportunities for employees at all levels to contribute to the organization and to learn and to grow in their performance	Implement key action plans to enhance employee engagement and support performance culture based on results of Employee Survey  Begin talent management and succession planning strategies for director-level positions	Re-survey in 2010, 2012  Winter 2011	Administrative Executive Management

## Administrative Executive Management 2010 Expenditure Summary by Program and Service

	2009	2009	2010	Base	2010	2010	2009 - 2010
	2009	YTD	2010	Base	2010	2010	2009 - 2010
	Budget	Actuals	Base	Budget	Requested	Requested	Change
			Budget	Change (%)	Adjustments	Budget	(%)
<b>EXPENDITURE BY PROGRAM</b>							
Administrative Executive Management							
CAO/Executive Management	1,733,300	1,244,129	1,762,100	1.7%	0	1,762,100	1.7%
<b>Total EXPENDITURE BY PROGRAM</b>	<b>1,733,300</b>	<b>1,244,129</b>	<b>1,762,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,762,100</b>	<b>1.7%</b>
<b>REVENUES</b>							
Other Revenue	60,000	40,000	60,000	0.0%	0	60,000	0.0%
<b>Total Revenues</b>	<b>60,000</b>	<b>40,000</b>	<b>60,000</b>	<b>0.0%</b>	<b>0</b>	<b>60,000</b>	<b>0.0%</b>
<b>Tax Levy Requirement</b>	<b>1,673,300</b>	<b>1,204,129</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,702,100</b>	<b>1.7%</b>
<b>TAX LEVY BY PROGRAM</b>							
Administrative Executive Management							
CAO/Executive Management	1,673,300	1,204,129	1,702,100	1.7%		1,702,100	1.7%
<b>Total TAX LEVY BY PROGRAM</b>	<b>1,673,300</b>	<b>1,204,129</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,702,100</b>	<b>1.7%</b>
<b>Gross Expenditures by Type</b>							
Salaries, Wages, Benefits	1,460,700	1,154,600	1,496,400	2.4%	0	1,496,400	2.4%
Materials & Supplies	9,200	2,884	7,500	(18.5%)	0	7,500	(18.5%)
Purchased Services	261,500	86,645	256,300	(2.0%)	0	256,300	(2.0%)
Minor Capital & Transfer to Reserves	1,900	0	1,900	0.0%	0	1,900	0.0%
<b>Gross Operating Expenditures</b>	<b>1,733,300</b>	<b>1,244,129</b>	<b>1,762,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,762,100</b>	<b>1.7%</b>

# Administrative Executive Management

## 2011 – 2012 Expenditure Summary by Program and Service

	2010 Requested Budget	2011 Preliminary Base Budget	Base Budget Change (%)	2011 Requested Adjustments	2011 Forecast Requested Budget	2010-2011 Change (%)	2012 Forecast Base Budget	2012 Requested Adjustments	2012 Forecast Requested Budget	2011-2012 Change (%)
<b>EXPENDITURE BY PROGRAM</b>										
Administrative Executive Management										
CAO/Executive Management	1,762,100	1,801,400	2.2%	0	1,801,400	2.2%	1,848,200	0	1,848,200	2.6%
<b>Total EXPENDITURE BY PROGRAM</b>	<b>1,762,100</b>	<b>1,801,400</b>	<b>2.2%</b>	<b>0</b>	<b>1,801,400</b>	<b>2.2%</b>	<b>1,848,200</b>	<b>0</b>	<b>1,848,200</b>	<b>2.6%</b>
<b>REVENUES</b>										
Other Revenue	60,000	60,000	0.0%	0	60,000	0.0%	60,000	0	60,000	0.0%
<b>Total Revenues</b>	<b>60,000</b>	<b>60,000</b>	<b>0.0%</b>	<b>0</b>	<b>60,000</b>	<b>0.0%</b>	<b>60,000</b>	<b>0</b>	<b>60,000</b>	<b>0.0%</b>
<b>Tax Levy Requirement</b>	<b>1,702,100</b>	<b>1,741,400</b>	<b>2.3%</b>	<b>0</b>	<b>1,741,400</b>	<b>2.3%</b>	<b>1,788,200</b>	<b>0</b>	<b>1,788,200</b>	<b>2.7%</b>
<b>TAX LEVY BY PROGRAM</b>										
Administrative Executive Management										
CAO/Executive Management	1,702,100	1,741,400	2.3%	0	1,741,400	2.3%	1,788,200	0	1,788,200	2.7%
<b>Total TAX LEVY BY PROGRAM</b>	<b>1,702,100</b>	<b>1,741,400</b>	<b>2.3%</b>	<b>0</b>	<b>1,741,400</b>	<b>2.3%</b>	<b>1,788,200</b>	<b>0</b>	<b>1,788,200</b>	<b>2.7%</b>
<b>Gross Expenditures by Type</b>										
Salaries, Wages, Benefits	1,496,400	1,534,900	2.6%	0	1,534,900	2.6%	1,580,800	0	1,580,800	3.0%
Materials & Supplies	7,500	7,600	1.3%	0	7,600	1.3%	7,700	0	7,700	1.3%
Purchased Services	256,300	257,000	0.3%	0	257,000	0.3%	257,800	0	257,800	0.3%
Minor Capital & Transfer to Reserves	1,900	1,900	0.0%	0	1,900	0.0%	1,900	0	1,900	0.0%
<b>Gross Operating Expenditures</b>	<b>1,762,100</b>	<b>1,801,400</b>	<b>2.2%</b>	<b>0</b>	<b>1,801,400</b>	<b>2.2%</b>	<b>1,848,200</b>	<b>0</b>	<b>1,848,200</b>	<b>2.6%</b>

## Service: CAO/Executive Management

### Purpose of Service:

The CAO and the Town's Executive Management Team ensure the efficient and effective operation of the corporation by:

- Managing the resources/assets of the organization as a public trust, seeking efficiencies and proper return on investment
- Developing effective working relationships with community partners, stakeholders and other levels of government
- Developing a widely shared vision for the organization that fosters a strong performance culture
- Provide opportunities for employees at all levels to contribute to the organization, and to learn and to grow in their performance

### Service: CAO/Executive Management

Activity	Responsibilities	Current Service Level
CAO/Executive Management	Liaison with Mayor and Council	Provide timely and effective policy and program advice to the Mayor and Members of Council on behalf of the Corporation Ensure open, transparent and responsive communications between the Mayor, Members of Council and the Town
CAO/Executive Management	Organizational leadership	Provide organizational leadership, direction and accountability to ensure programs and services provided by all Commissions respond to community needs and expectations Provide opportunities for employees at all level to contribute to the organization, and to learn and to grow in their performance
CAO/Executive Management	Stakeholder and government relations	Develop and support positive ongoing relationships with key Town stakeholders and encourage open, honest and transparent communication Develop and support ongoing effective strategic relationships and partnership opportunities between the Town and regional, provincial and federal governments
CAO/Executive Management	Effective management	Ensure effective management of resources short and long-term business processes, including strategic planning, annual business plans, budgets and capital forecast, Official Plan and Master Plans for key Town programs and services

**Key Performance Indicators**

<b>CUSTOMER BENEFITS/IMPACTS</b>	<b>INDICATORS</b>	<b>Target FY09</b>	<b>Actual/Projected FY 09</b>	<b>Target FY 10</b>
Council well-informed about the overall health of the corporation	<ul style="list-style-type: none"> <li>Quarterly key organizational indicators established</li> <li>Regular monthly CAO update to Council (includes July/Aug and Dec/Jan issues)</li> </ul>	n/a  10 times per year	TBD  10	TBD  10
Clear, measurable strategic plan that is integrated into town business planning and performance management processes	<ul style="list-style-type: none"> <li># of progress updates provided to Council annually</li> <li>% of departmental business plans aligned with strategic plan</li> <li>% of staff survey who understand how their department's objectives relate to overall corporate goals</li> </ul>	2  100%  n/a	2  100%  70%	2  100%  72%

<b>PROGRAM OUTCOMES</b>	<b>INDICATORS</b>	<b>Target FY09</b>	<b>Actual/Projected FY 09</b>	<b>Target FY 10</b>
Town is fiscally sustainable	<ul style="list-style-type: none"> <li>Competitive tax rates</li> <li>Stable and adequate reserve balances</li> <li>Reasonable and stable debt levels</li> <li>Unqualified external audit</li> </ul>	5% - 8%  5% of gross expenditures  Debt service levels below Council policy; ratio below \$1 debt to \$1 reserves Always	7.3%  3.9%  Achieved  Achieved	6.5%  5%  Achieved  Always
An informed and engaged workforce	<ul style="list-style-type: none"> <li>Stable employee turnover rate</li> <li>% of employees surveyed who indicate they clearly understand town vision and values</li> <li>% of employees wh believe town is committed to delivering good customer service</li> </ul>	n/a n/a  n/a	TBD 72%  81%	TBD 75%  85%

High citizen satisfaction with town	• % of citizens surveyed who are satisfied with town programs and services	n/a	88%	88%
	• % of citizens surveyed who are satisfied with the Town of Oakville government	n/a	78%	78%
	• % of citizens surveyed who are satisfied with town services	n/a	88%	88%

### CAO/Executive Management Budget Summary

	2009 Approved Budget	2009 YTD Actuals	2010 Base Budget	2009-2010 Base Budget Change (%)	2010 Recommended Adjustments	2010 2010 Budget	2009-2010 Change (%)	2011 Forecast Budget	2012 Forecast Budget
<b>By Expenditure Type</b>									
Salaries, Wages, Benefits	1,460,700	1,154,603	1,496,400	2.4%	0	1,496,400	2.4%	1,534,900	1,580,800
Materials & Supplies	9,200	3,008	7,500	(18.5%)	0	7,500	(18.5%)	7,600	7,700
Purchased Services	261,500	86,644	256,300	(2.0%)	0	256,300	(2.0%)	257,000	257,800
Minor Capital & Transfer to Reserves	1,900	0	1,900	0.0%	0	1,900	0.0%	1,900	1,900
<b>Gross Operating Expenditures</b>	<b>1,733,300</b>	<b>1,244,255</b>	<b>1,762,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,762,100</b>	<b>1.7%</b>	<b>1,801,400</b>	<b>1,848,200</b>
Other Revenue	60,000	45,000	60,000	0.0%	0	60,000	0.0%	60,000	60,000
<b>Tax Levy Requirement</b>	<b>1,673,300</b>	<b>1,199,255</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>1,741,400</b>	<b>1,788,200</b>
<b>By Service</b>									
Programs									
CAO/Executive Management	1,673,300	1,199,255	1,702,100	1.7%	0	1,702,100	1.7%	1,741,400	1,788,200
<b>Service Total</b>	<b>1,673,300</b>	<b>1,199,255</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>0</b>	<b>1,702,100</b>	<b>1.7%</b>	<b>1,741,400</b>	<b>1,788,200</b>

### Service Results Narrative:

The CAO and Executive Management team work closely with Council to implement Council's strategic directions. Key activities undertaken are implementation and monitoring of Council's strategic plan to set out the organization's work plan for this term of Council, development of a long-range forecast that sets out the Town's ten-year financial position and the implementation of an Interim Growth Strategy while the review of the Town's Official Plan is underway.

## 2010 Plan

### Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
CAO/Executive Management	Increase base budget for inflation and merit impact on salaries and benefits, materials and supplies, and purchased services	Maintain current service level	Ensure appropriate skilled staff and resources to administer current program services	\$39,100
CAO/Executive Management	Adjust base budget for reductions to temporary employment expenses, various purchased services and office supplies	Maintain current service level	To reduce overall tax levy	(\$10,300)

## 2011 Plan

### Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
CAO/Executive Management	Increase base budget for inflation and merit impact on salaries and benefits, materials and supplies, and purchased services	Maintain current service level	Ensure appropriate skilled staff and resources to administer current program services	\$39,300

## 2012 Plan

### Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
CAO/Executive Management	Increase base budget for inflation and merit impact on salaries and benefits, and purchased services	Maintain current service level	Ensure appropriate skilled staff to administer current program services	\$46,800