



Program: Planning Services

Program Based Budget

2010 - 2012

Overview

Program:
Vision Statement: To promote livable and sustainable development in order to enhance the natural, cultural, social and economic environments of the Town of Oakville.
Mission Statement: As a team, we strive for excellence in creating a livable community for present and future generations.

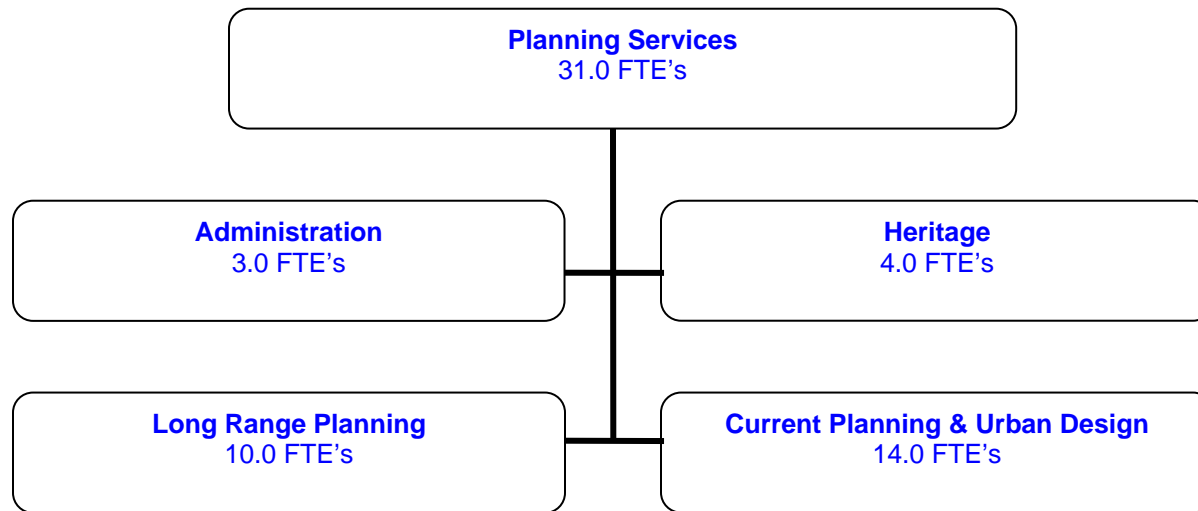
Introduction

The Planning Services program creates the policy framework and implementation tools required to shape the future of the community. The Long Range Planning service establishes long term planning policy through the creation and maintenance of the official plan and through associated studies and research. Through the Current Planning and Urban Design services, development applications are evaluated within a planning policy context and based upon good planning principles. The Heritage Planning service has been established to encompass the identification and designation of properties of heritage value on a more proactive basis as well as the ongoing administration of the permitting process.

Program Services

The Planning Program delivers the following services:

- Administration
- Long Range Planning
- Current Planning and Urban Design
- Heritage Planning



Major Accomplishments in 2009

The major accomplishments for Planning Services consist of:

- Completion and adoption by Council of the Town's new Official Plan – Livable Oakville within legislated time required
- Completion and adoption of the North Oakville West Secondary Plan
- Settlement of OMB hearings with respect to Citizen 6th Line, Creekbank Lyons Lane, Hush Homes, and Empire Developments
- Successful conclusion to OMB hearing regarding Creekbank Park Plaza – precedent setting case.
- Completion of North Oakville Implementation components
- Interim Control By-law studies undertaken and completed on Drive-Through Facilities and Power Generation Facilities
- Extensive public consultation and technical work on the Livable Oakville work program including the completion of the Kerr Street Revitalization Study and Kerr Street Area Traffic Study, Bronte Village Revitalization Study, Midtown Oakville Study, Residential

Intensification Study, Employment Land Needs Study, Uptown Core Review, Transportation and Financial Overview Studies and Policy Papers and Recommended General Policies

- Significant contributions to Sustainable Halton program and other Halton Region initiatives
- Update to the Heritage Registry with new properties listed and newly designated properties

Program Area Significant Issues

Heritage - As a result of changes to the Heritage Act there is a continued need to update all of the Town's existing heritage designations (Parts IV & V); complete research and establish new heritage designations and districts as well as institute enforcement procedures and protocols. Awareness, education and incentives continue to be explored as part of the heritage work program so that reliance on enforcement becomes less critical for the protection of heritage resources. The Heritage Manager and supporting staff now effectively and pro-actively manage the increased responsibilities and workload.

Livable Oakville (Official Plan Program) – The department has successfully completed the first comprehensive official plan update since 1983 within the legislative timeframe. Through Livable Oakville, the Town's Official Plan has now been brought into conformity with the new Provincial Policy Statement and Growth Plan. Livable Oakville is to be implemented through a number of additional studies and programs including an updated Zoning By-law, urban design guidelines and Community Improvement Plans for many of the Growth Areas in the Plan. The completion of Livable Oakville through the implementation work will ensure that the Town manages growth pressures in a manner which is consistent with Council's Strategic Plan. A number of the Livable Oakville implementation studies will be completed in-house with significant public consultation.

Implementation of North Oakville - With the completion of both the North Oakville East and West Secondary Plans and the Regional Servicing Allocation program, staff have now begun to deal with applications in the north concurrently with the completion of the Implementation Strategy for the north. No additional staff has been requested at this time as the requested allocation by developers continues to be lower than forecasted. There may be additional resourcing requests either in year 2011 or in 2012 should the update of servicing increase and the development application volumes increase again.

Development Applications – The department continues to see an increase in the number of infill and intensification applications in the existing urban area and is continuing to respond to increased numbers of technical site plan applications and a large volume of sign variance applications. These applications require extra time and effort due to the high degree of consultation with existing residents involved and resolution of more complex and competing interests.

Team Approach and Efficiency of the Department – In order to better co-ordinate the work of the current planning and long range planning sections of the department and due to the continued combination of policy and development work carried out by the north Oakville current planning group, the department has been restructured. This reorganization will provide for more opportunities for planners from long range and current planning to work together and will provide more balance to the current sections.

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
<p>To be innovative in everything we do To continuously improve programs and services</p> <p>To have programs and services that is fiscally sustainable</p> <p>To have programs and services that are environmentally sustainable</p>	<p>Complete North Oakville Implementation Guidelines</p>	<p>Implementation Guidelines will be completed and delivered to all stakeholders – developers, builders and future residents</p>	<p>Work to be completed by 2010</p>	<p>Long Range Planning</p>
<p>To be accountable in everything we do</p> <p>To be innovative in everything we do</p> <p>To enhance our natural environment</p> <p>To have programs and services that are fiscally sustainable</p> <p>To have programs and services that are environmentally sustainable</p> <p>To enhance our economic environment</p> <p>To enhance our social environment</p> <p>To enhance our culture environment</p>	<p>Complete Official Plan Implementation Program</p>	<p>Official Plan Implementation work programs including required conforming Zoning By-law, urban design guidelines for Growth Areas, Community Improvement Plans, Downtown Strategy, Places of Worship and Study, Transportation Master Plan Update</p>	<p>Plan was adopted by Council on June 22, 2009 and implementation including updated Zoning By-law must be completed by Q3 2012</p>	<p>Long Range Planning</p>
<p>To enhance our natural environment</p> <p>To continuously improve our programs and services</p>	<p>Enhance Urban Design Implementation</p>	<p>Comprehensive Urban Design Guidelines will be prepared</p> <p>With the guidelines in place, a review of the delegation of site plan approval will be undertaken</p> <p>Ongoing improvements to the manner in which site plan review is conducted and co-coordinated with internal departments and external agencies will be implemented</p>	<p>Guidelines to be completed by 2010</p> <p>Delegation By-law to be reviewed in 2010</p> <p>Process improvements ongoing</p>	<p>Current Planning and Urban Design</p>
<p>To continuously improve our programs and services</p>	<p>Enhance Evaluation of Development Applications</p>	<p>Ongoing improvements to the manner in which the evaluation of development applications is conducted and co-coordinated with internal departments and external agencies will be implemented</p> <p>Greater technical content and analysis in staff reports</p>	<p>Implementation to commence immediately with further assessment to be completed annually</p>	<p>Current Planning</p>

Council's Strategic Goal/Area of Focus (If Applicable)	Program Strategic Objective	Guidelines for Deliverables	Expected Outcome/Timing	Program Service
		Preparation of less complex amending documents		
To be accountable in everything we do To continuously improve our programs and services	Improve Public Consultation/ Participation Process	Alternate formats for informal public consultation will be investigated Workshops with staff and guidelines developed for consistency of process and approaches	Implementation ongoing	Current Planning and Long Range Planning
To continuously improve our programs and services	Complete a Criteria-Based Standard for the Evaluation of Variances to the Sign By-law	Preparation of a set of standardized criteria	Document completed Q4 2010	Urban Design
To continuously improve our programs and services To enhance our cultural environment	Enhance Heritage program	Improvements to policy and permit process, programs, and education	Ongoing	Heritage

Planning Services 2010 Expenditure Summary by Program

	2009 2009 Budget	2009 YTD Actuals	2010 Base Budget	Base Budget Change (%)	2010 Requested Adjustments	2010 Requested Budget	2009 - 2010 Change (%)
EXPENDITURE BY PROGRAM							
Planning Services							
Administration	858,400	542,687	676,900	(21.1%)	0	676,900	(21.1%)
Current Planning & Urban Design	2,774,500	1,836,251	3,048,500	9.9%	0	3,048,500	9.9%
Heritage Planning	468,100	296,633	411,000	(12.2%)	0	411,000	(12.2%)
Long Range Planning	1,272,500	879,045	1,070,400	(15.9%)	0	1,070,400	(15.9%)
Total EXPENDITURE BY PROGRAM	5,373,500	3,554,616	5,206,800	(3.1%)	0	5,206,800	(3.1%)
REVENUES							
Activity Revenue	1,756,200	1,102,046	1,700,000	(3.2%)	0	1,700,000	(3.2%)
Internal Recoveries	147,700	98,467	147,700	0.0%	0	147,700	0.0%
Other Revenue	829,600	553,066	867,600	4.6%	0	867,600	4.6%
Total Revenues	2,733,500	1,753,579	2,715,300	(0.7%)	0	2,715,300	(0.7%)
Tax Levy Requirement	2,640,000	1,801,037	2,491,500	(5.6%)	0	2,491,500	(5.6%)
TAX LEVY BY PROGRAM							
Planning Services							
Administration	39,000	(3,063)	(190,700)	(589.0%)	0	(190,700)	(589.0%)
Current Planning & Urban Design	871,400	636,408	1,200,800	37.8%	0	1,200,800	37.8%
Heritage Planning	457,100	289,300	411,000	(10.1%)	0	411,000	(10.1%)
Long Range Planning	1,272,500	878,392	1,070,400	(15.9%)	0	1,070,400	(15.9%)
Total TAX LEVY BY PROGRAM	2,640,000	1,801,037	2,491,500	(5.6%)	0	2,491,500	(5.6%)
Gross Expenditures by Type							
Salaries, Wages, Benefits	2,821,400	1,883,046	2,441,000	(13.5%)	0	2,441,000	(13.5%)
Materials & Supplies	31,000	22,578	23,000	(25.8%)	0	23,000	(25.8%)
Purchased Services	192,100	99,298	151,900	(20.9%)	0	151,900	(20.9%)
Internal Charges	2,307,800	1,538,658	2,582,700	11.9%	0	2,582,700	11.9%
Other Expenditures	10,200	9,579	8,200	(19.6%)	0	8,200	(19.6%)
Minor Capital & Transfer to Reserves	11,000	1,457	0	(100.0%)	0	0	(100.0%)
Gross Operating Expenditures	5,373,500	3,554,616	5,206,800	(3.1%)	0	5,206,800	(3.1%)

Planning Services 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 (%)
EXPENDITURE BY PROGRAM										
Planning Services										
Administration	676,900	804,200	18.8%	0	804,200	18.8%	560,300	0	560,300	(30.3%)
Current Planning & Urban Design	3,048,500	3,247,900	6.5%	0	3,247,900	6.5%	3,422,300	0	3,422,300	5.4%
Heritage Planning	411,000	490,400	19.3%	0	490,400	19.3%	502,200	0	502,200	2.4%
Long Range Planning	1,070,400	1,226,700	14.6%	0	1,226,700	14.6%	1,254,600	0	1,254,600	2.3%
Total EXPENDITURE BY PROGRAM	5,206,800	5,769,200	10.8%	0	5,769,200	10.8%	5,739,400	0	5,739,400	(0.5%)
REVENUES										
Activity Revenue	1,700,000	1,738,200	2.2%	0	1,738,200	2.2%	2,285,500	0	2,285,500	31.5%
Internal Recoveries	147,700	147,700	0.0%	0	147,700	0.0%	147,700	0	147,700	0.0%
Other Revenue	867,600	704,000	(18.9%)	0	704,000	(18.9%)	0	0	0	(100.0%)
Total Revenues	2,715,300	2,589,900	(4.6%)	0	2,589,900	(4.6%)	2,433,200	0	2,433,200	(6.1%)
Tax Levy Requirement	2,491,500	3,179,300	27.6%	0	3,179,300	27.6%	3,306,200	0	3,306,200	4.0%
TAX LEVY BY PROGRAM										
Planning Services										
Administration	(190,700)	100,200	152.5%	0	100,200	152.5%	560,300	0	560,300	459.2%
Current Planning & Urban Design	1,200,800	1,362,000	13.4%	0	1,362,000	13.4%	989,100	0	989,100	(27.4%)
Heritage Planning	411,000	490,400	19.3%	0	490,400	19.3%	502,200	0	502,200	2.4%
Long Range Planning	1,070,400	1,226,700	14.6%	0	1,226,700	14.6%	1,254,600	0	1,254,600	2.3%
Total TAX LEVY BY PROGRAM	2,491,500	3,179,300	27.6%	0	3,179,300	27.6%	3,306,200	0	3,306,200	4.0%
Gross Expenditures by Type										
Salaries, Wages, Benefits	2,441,000	2,803,000	14.8%	0	2,803,000	14.8%	2,888,800	0	2,888,800	3.1%
Materials & Supplies	23,000	31,800	38.3%	0	31,800	38.3%	32,300	0	32,300	1.6%
Purchased Services	151,900	188,400	24.0%	0	188,400	24.0%	188,800	0	188,800	0.2%
Internal Charges	2,582,700	2,735,800	5.9%	0	2,735,800	5.9%	2,619,300	0	2,619,300	(4.3%)
Other Expenditures	8,200	10,200	24.4%	0	10,200	24.4%	10,200	0	10,200	0.0%
Gross Operating Expenditures	5,206,800	5,769,200	10.8%	0	5,769,200	10.8%	5,739,400	0	5,739,400	(0.5%)

2010 Recommended Capital Budget

COMMISSION/PROGRAM	Gross Cost	PROGRAM SPECIFIC FINANCING					CORPORATE FINANCING				TOTAL
		Development Charges	Equipment Reserves	Gas Tax Funding	Other Reserves	Funding Grants and Other Revenues	Local Infrastructure Reserve	Capital Reserve	Operating Contribution	Long Term Financing	PROPOSED FINANCING
PLANNING, DEV & BLDNG SERVICES											
Planning Services											
63100301 North Oakville Secondary Plan	283,400	229,600						53,800			283,400
63100803 Land Use Planning Studies	75,000	18,700						56,300			75,000
63100904 Zoning Review	200,000	180,000						20,000			200,000
63101001 Land Development Model	100,000	25,000						75,000			100,000
TOTAL	\$ 658,400	\$ 453,300	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 205,100	\$ -	\$ -	\$ 658,400

Service: Administration

Purpose of Service:

The Administration section establishes overall departmental direction and provides leadership and guidance by defining goals and objectives, establishing policies and procedures and monitoring compliance. The service provides long term and day to day direction and advice to development industry, residents/rate payers, staff, Council and represents the Town at the Ontario Municipal Board. The Administration section establishes and monitors the department budget and provides direction and advice to internal and external customers. The Administration section also represents the Town's interests with respect to inter-municipal, Regional and Provincial planning matters.

Service: Administration

Activity	Responsibilities	Current Service Level
Administration	<p>Co-ordinates budget requests from managers and prepares Business Plan</p> <p>Implementation of Corporate and Commission strategic goals and objectives</p>	<p>Preparation and submission of budget documentation in a complete and timely manner; monitoring of variance reports</p> <p>Appropriate level of communication provided through staff meetings; monitoring of attendance</p>
Provision of Professional Planning Advice and Direction	<p>Accountable for professional planning advice provided by department staff both oral and written</p> <p>Co-ordination of response to planning inquiries</p> <p>Establishes overall planning philosophy and approach of the department</p> <p>Mentoring for professional staff and assist with staff development</p> <p>Provides leadership and direction for Livable Oakville Implementation work program</p> <p>Provides support for Management</p> <p>Co-ordinate planning responses to the Region and Province</p>	<p>Full accountability to Council, other staff, the development community and residents/ratepayers</p>

Administration Budget Summary

	2009 Approved Budget	2009 YTD Actuals	2010 Base Budget	2009-2010 Base Budget Change (%)	2010 Recommended Adjustments	2010 Budget	2009-2010 Change (%)	2011 Forecast Budget	2012 Forecast Budget
By Expenditure Type									
Salaries, Wages, Benefits	305,300	175,120	236,700	(22.5%)	0	236,700	(22.5%)	243,300	251,000
Materials & Supplies	31,000	23,038	23,000	(25.8%)	0	23,000	(25.8%)	31,800	32,300
Purchased Services	25,500	13,568	22,300	(12.5%)	0	22,300	(12.5%)	27,800	28,200
Internal Charges	496,600	331,067	394,900	(20.5%)	0	394,900	(20.5%)	501,300	248,800
Minor Capital & Transfer to Reserves	0	354	0	0.0%	0	0	0.0%	0	0
Gross Operating Expenditures	858,400	543,147	676,900	(21.1%)	0	676,900	(21.1%)	804,200	560,300
Activity Revenue	800	17	0	(100.0%)	0	0	(100.0%)	0	0
Other Revenue	818,600	613,950	867,600	6.0%	0	867,600	6.0%	704,000	0
Tax Levy Requirement	39,000	(70,820)	(190,700)	(589.0%)	0	(190,700)	(589.0%)	100,200	560,300
By Service									
Programs									
Administration	39,000	(70,820)	(190,700)	(589.0%)	0	(190,700)	(589.0%)	100,200	560,300
Service Total	39,000	(70,820)	(190,700)	(589.0%)	0	(190,700)	(589.0%)	100,200	560,300

Service Results Narrative:

The requested budget will support the provision of appropriate leadership and consistent direction in terms of the diverse range of planning matters that are before the Town in order to achieve the desired degree of accountability and transparency. This service will also ensure that the appropriate framework is in place to provide customers an appropriate level of service. The service will also include education and public consultation on planning matters and assistance for staff improving their skills and expertise to best serve the Corporation and the public. Finally, this service will ensure that a team approach to business and customer service is fostered and reflected in the delivery of our programs.

2010 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Administration – Inflation	Increase base budget for inflation and merit impact on salaries and benefits, purchased services and materials and supplies.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$9,700
Administration – Personnel	The department has adjusted the vacancy gapping to be consistent	Maintain current service level	Ensure skilled staff for the delivery of services	(\$75,900)

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
	with the anticipated economic outlook forecast for 2010.		and programs	
Administration – Interdepartmental Charges	The adjustment to budget is based on increases to internal charges.	Maintain current service level	Improve reporting accuracy for service costs	(\$101,700)
Administration – Reserve Transfer	A transfer from the Tax Stabilization reserve has been budgeted which is necessary to ensure ongoing service availability.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	(\$48,200)
Administration – 2% Reduction	The base budget has been reduced based on usage and current levels of spending. Areas reduced include: external reproductions, office supplies, professional development, mileage and professional dues.	Maintain current service level	To reduce overall tax levy.	(13,600)

2011 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Administration – Personnel	Budget adjusted to reflect inflationary impact and merit increases.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$6,600
Administration – Purchased Services, Materials and Supplies	The budget has been adjusted for the additional funds required to maintain standard levels of service.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$14,300
Administration – Interdepartmental Charges	Interdepartmental charges have been adjusted based on an anticipated increase in service	Maintain current service level	Ensure the delivery of quality services	\$106,400

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
	usage.			
Administration – Reserve Transfers	A transfer from the Tax Stabilization reserve is necessary to ensure ongoing service availability. The level of reserve transfer is reduced in 2011. This allows the Town to continue the assistance provided to the department during the economic recovery.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$163,600

2012 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Administration – Personnel	Budget adjusted to reflect inflationary impact and merit increases.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$7,700
Administration – Purchased Services, Material and Supplies	The budget reflects anticipated inflationary impacts on expenses.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$900
Administration – Interdepartmental Charges	Interdepartmental charges have been adjusted based on an anticipated decrease in service usage from Technical Services.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	(\$252,500)
Administration – Reserve Transfers	Funding from the tax stabilization reserve is eliminated in 2012 as revenue begins to return to normal levels.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$704,000

Service: Long Range Planning

Mission:

For the benefit of the public and Council, so that the Town of Oakville develops in an orderly, efficient and effective manner, we develop, implement and maintain a long term Town Official Plan for land use planning decision making, direction and guidance.

Purpose of Service:

The Long Range Planning service is responsible for the research and creation of the Official Plan, its implementation program and its ongoing maintenance and review. In addition, the program conducts special area policy studies, creates and maintains land use and demographic databases and maintains the Zoning By-law. Based on the restructuring of the department, the work will also include the preparation of the Implementation Guidelines for North Oakville. The Implementation Guidelines effectively translate the policy framework set out in the Secondary Plan into the measurable criteria to be achieved through individual development applications. The Guidelines will consist of a series of documents written to assist the development community and homeowners outlining the Town's expectation in terms of the integration of land uses and built form as well as the relationship between the public and private realms in North Oakville.

Service: Long Range Planning

Activity	Responsibilities	Current Service Level
Official Plan Implementation Program	Implementation of Livable Oakville through the completion of research and additional plans and studies primarily in-house including urban design guidelines for the Growth Areas, Community Improvement Plans, Downtown Strategy, Master Transportation Study and other studies.	Newly adopted Livable Oakville to be implemented to ensure conformity with Provincial policy
North Oakville Implementation Guidelines	Completion of the Implementation Guidelines for North Oakville	All work to be completed by 2010.
Land use and demographic databases	Research and compile land use and demographic information in databases for use in the development of long range planning policy Update databases on an ongoing basis	Databases are continually updated through census research, special studies, studies in co-operation with the Region and review of other research

Activity	Responsibilities	Current Service Level
Zoning By-law Update	Update of Zoning By-law required to ensure conformity of new Official Plan by 2012	Comprehensive review of the Zoning By-law will be phased and ongoing. A conforming Zoning By-law is required by 2012.
Official Plan Interpretation and OMB expert opinion	Provide support to current planning on Official Plan policies and interpretation and provide expert opinion at the OMB	Provision of input and review of development applications in relation to Livable Oakville

Key Performance Indicators

CUSTOMER BENEFITS/IMPACTS	INDICATORS	Target FY09	Actual FY 09	Target FY 10
An open, participatory long term planning process	<ul style="list-style-type: none"> • # and types of events open to citizens and participation rates • % of citizens surveyed who are satisfied with long term planning 	N/A	N/A	increase in participation rates
A comprehensive, current and defensible Town plan	<ul style="list-style-type: none"> • # of successful applications 	N/A	N/A	increase
A well planned, livable Town of Oakville	<ul style="list-style-type: none"> • % of citizens surveyed who are satisfied with long term planning 	N/A	N/A	increasing satisfaction

Long Range Planning Budget Summary

	2009 Approved Budget	2009 YTD Actuals	2010 Base Budget	2009-2010 Base Budget Change (%)	2010 Recommended Adjustments	2010 Budget	2009-2010 Change (%)	2011 Forecast Budget	2012 Forecast Budget
By Expenditure Type									
Salaries, Wages, Benefits	962,100	667,017	772,000	(19.8%)	0	772,000	(19.8%)	916,300	944,200
Purchased Services	47,300	36,498	35,300	(25.4%)	0	35,300	(25.4%)	47,300	47,300
Internal Charges	263,100	175,400	263,100	0.0%	0	263,100	0.0%	263,100	263,100
Gross Operating Expenditures	1,272,500	878,915	1,070,400	(15.9%)	0	1,070,400	(15.9%)	1,226,700	1,254,600
Activity Revenue	0	653	0	0.0%	0	0	0.0%	0	0
Tax Levy Requirement	1,272,500	878,262	1,070,400	(15.9%)	0	1,070,400	(15.9%)	1,226,700	1,254,600
By Service									
Programs									
Long Range Planning	1,272,500	878,262	1,070,400	(15.9%)	0	1,070,400	(15.9%)	1,226,700	1,254,600
Service Total	1,272,500	878,262	1,070,400	(15.9%)	0	1,070,400	(15.9%)	1,226,700	1,254,600

Service Results Narrative:

The requested budget will enable the continued required implementation of the new Official Plan.

2010 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Long Range Planning – Inflation	Budget adjusted to reflect inflationary impact and merit increases.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$29,800
Long Range Planning – Personnel	The department has adjusted the vacancy gapping to be consistent with the anticipated economic outlook forecast for 2010.	Maintain current service level	To improve the reporting accuracy of service costs	(\$219,900)
Long Range Planning – 2% Reduction	The base budget has been reduced based on usage and current levels of spending. Areas cut include: professional development, skills improvement,	Maintain current service level	To reduce overall tax levy.	(\$12,000)

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
	mileage, communications and professional dues.			

2011 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Long Range Planning – Personnel Services	Budget adjusted to reflect inflationary impact and merit increases. In addition, the vacancy budgeted has been reduced with the anticipated increased external revenue projected and this will require additional personnel support.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$144,300
Long Range Planning – Purchased Services	The budget has been adjusted to for the additional funds required to maintain standard levels of service.	Maintain current service level	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$12,000

2012 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Long Range Planning – Personnel Services	Budget adjusted to reflect inflationary impact and merit increases.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$27,900

Service: Current Planning & Urban Design

Mission:

For applicants, the public, the Committee of Adjustment and Town Council, we will review and process development applications and make recommendations to the respective approval authority, in order to meet legislative requirements and comply with Town policies and procedures.

Purpose of Service:

The purpose of this service is primarily to manage development proposals through the evaluation of applications received by the Town. The Current Planning function focuses predominantly on the review of land use applications (amendments to the Official Plan and Zoning By-law) and land division applications (subdivision, condominium and part lot control exemption). Urban Design function focuses on the review of site plan applications and requests for variances to the Sign By-law and prepares reports and presentations to the Site Plan Committee. The service also provides reports with comments to the Committee of Adjustment regarding minor variance and consent applications. Finally, the service responds to public and customer inquiries and conducts extensive public consultation with respect to development proposals.

Service: Current Planning & Urban Design

Activity	Responsibilities	Current Service Level
Evaluation and administration of development applications	Complete the technical and design evaluation of a full range of development applications in accordance with legislative requirements and sound planning principles and design; Co-ordinate and integrate technical and design comments received from internal departments and external agencies; Conduct public consultation with respect to development proposals Report to Council, providing recommendations, with respect to development applications.	Approximately 250 applications were evaluated over the course of 2008 in consultation with internal departments and external agencies and 196 have been processed as of Aug. 2009. Comments are provided to the Committee of Adjustment with respect to approximately 222 applications in 2008. Typical Planning application fees are reviewed annually and adjusted as required in order to achieve full cost recovery. Public consultation is accomplished formally through Public Information meetings and statutory Public Hearings as well as informally through counter, telephone and e-mail inquiries.
Administration of the Development Review Process	Review and update internal by-laws, policies, procedures and fees to effect the continuous improvement of programs and services, compliance with applicable legislation and to ensure cost-recovery targets are being achieved. Implement streamlining initiatives where appropriate.	Policies, procedures and fees are updated as a need is identified. There is not a current policy and procedures manual in place for this service but this is under development for 2010 completion. Opportunities to improve programs and services are implemented on an ongoing basis.

Key Performance Indicators

CUSTOMER BENEFITS/IMPACTS	INDICATORS	Target FY09	Actual FY 09	Target FY 10
Accessible information on requirements (regulations, guidelines, policies, codes and procedures)	<ul style="list-style-type: none"> • Correlation between pre-consultation and submissions and % of applications that meet requirements 	N/A	N/A	% increase
Timely, fair and consistent processing (application of Town's regulations, guidelines, policies, procedures and codes on development plans)	<ul style="list-style-type: none"> • average processing time, initiation to recommendation (by type of application) • # of appeals • % of applications meeting timeframes 	N/A	N/A	% increase
PROGRAM OUTCOMES	INDICATORS	Target FY09	Actual FY 09	Target FY 10
A well planned, livable Town of Oakville	<ul style="list-style-type: none"> • % of citizens surveyed who are satisfied with current planning 	N/A	N/A	increase in satisfaction

**Current Planning and Urban Design 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
By Expenditure Type									
Salaries, Wages, Benefits	1,192,300	779,190	1,113,600	(6.6%)	0	1,113,600	(6.6%)	1,248,400	1,286,800
Purchased Services	68,800	44,936	46,900	(31.8%)	0	46,900	(31.8%)	62,800	62,800
Internal Charges	1,503,200	1,002,258	1,879,800	25.1%	0	1,879,800	25.1%	1,926,500	2,062,500
Other Expenditures	10,200	10,417	8,200	(19.6%)	0	8,200	(19.6%)	10,200	10,200
Minor Capital & Transfer to Reserves	0	288	0	0.0%	0	0	0.0%	0	0
Gross Operating Expenditures	2,774,500	1,837,089	3,048,500	9.9%	0	3,048,500	9.9%	3,247,900	3,422,300
Activity Revenue	1,755,400	1,213,129	1,700,000	(3.2%)	0	1,700,000	(3.2%)	1,738,200	2,285,500
Internal Recoveries	147,700	98,467	147,700	0.0%	0	147,700	0.0%	147,700	147,700
Tax Levy Requirement	871,400	525,493	1,200,800	37.8%	0	1,200,800	37.8%	1,362,000	989,100
By Service Programs									
Current Planning & Urban Design	871,400	525,493	1,200,800	37.8%	0	1,200,800	37.8%	1,362,000	989,100
Service Total	871,400	525,493	1,200,800	37.8%	0	1,200,800	37.8%	1,362,000	989,100

Service Results Narrative:

The resources assigned to this service enable the evaluation of development proposals. The proposals located on lands south of Dundas are predominately located in established neighbourhoods and as a result, demand considerably greater staff time and resources. Due to the high degree of integration required for these projects with the existing neighbourhoods, greater emphasis must be placed on the evaluation of urban design and built form aspects of the projects. Additional resources will be requested for this service to manage the current level of development activity and service, maintenance of the current level of service further streamlining initiatives will continue to be pursued and implemented with a view to facilitating the development review process to achieve a better end product. Upon the implementation of additional streamlining initiatives, resources may be requested in order to continue to provide a consistently high level of customer service.

2010 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Current Planning and Urban Design - Inflation	Increase base budget for inflation and merit impact on salaries and benefits, purchased services and materials and supplies.	Maintain current level of service	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$8,300
Current Planning and Urban Design – Personnel	Gapping budgeted to provide temporary staff vacancy to accommodate current business conditions.	Maintain current level of service	Ensure efficient delivery of service requirement	(\$116,200)
Current Planning and Urban Design – Internal Charges	The budget has been adjusted based on projected use of internal services.	Maintain current level of service	To improve the reporting accuracy of service costs	\$376,600
Current Planning and Urban Design – Revenue	Based on current trends, the revenue has been decreased to reflect actual projected earned revenue.	Maintain current level of service	To improve the reporting accuracy of service costs	\$84,600
Current Planning and Urban Design – 2% Reduction	The base budget has been reduced based on usage and current levels of spending. Areas cut include: professional development, skills improvement, professional fees and advertising.	Maintain current level of service	To reduce overall tax levy.	(\$23,900)

2011 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Current Planning and Urban Design – Personnel Services	Budget adjusted to reflect inflationary impact and merit increases. In addition, the vacancy budgeted has been reduced with the anticipated increased external revenue projected and this will require additional personnel support.	Maintain current level of service	Ensure skilled staff for the delivery of services and programs	\$134,800
Current Planning and Urban Design – Purchased Services and Payments and Grants	The budget has been adjusted for the additional funds required to maintain standard levels of service.	Maintain current level of service	Ensure ongoing uninterrupted availability of service necessary for Town growth	\$17,900
Current Planning and Urban Design – Internal Charges	The budget has been adjusted based on projected use of internal services.	Maintain current level of service	To improve the reporting accuracy of service costs	\$46,700
Current Planning and Urban Design – External Revenue	Based on projected increased development activity, the revenue budget has been increased.	Maintain current level of service	Ensure ongoing uninterrupted availability of service necessary for Town growth	(\$38,200)

2012 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Current Planning and Urban Design – Personnel Services	Budget adjusted to reflect inflationary impact and merit increases.	Maintain current level of service	Ensure skilled staff for the delivery of services and programs	\$38,400
Current Planning and	The budget has been adjusted to	Maintain current	To improve the reporting	\$136,000

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Urban Design – Internal Charges	reflect changes resulting from internal reallocations.	level of service	accuracy of service costs	
Current Planning and Urban Design – External Revenue	Based on projected increased development activity, the revenue budget has been increased.	Maintain current level of service	Ensure ongoing uninterrupted availability of service necessary for Town growth	(\$547,300)

Service: Heritage Planning

Mission:

We advise and guide Heritage Oakville, heritage property owners and the community to facilitate the protection and enhancement of heritage resources in Oakville.

Purpose of Service:

The purpose of this service is to enhance the Town's cultural heritage through the identification and protection of buildings, structures and areas of interest within Oakville. The service also provides technical support to Heritage Oakville to assist the committee in fulfilling its mandate.

Service: Heritage Planning

Activity	Responsibilities	Current Service Level
Updating Current Policies and By-laws	Ensure policy and practices are created to implement the Heritage Act and reflect the Town's strategic direction to enhance its cultural heritage environment. Revise existing district plans and create new district plans as appropriate; Complete a review of the current legislation and update the administrative practices and the designation by-law as required.	The heritage policies and practices are being updated to effectively implement the revisions to the Heritage Act nor to reflect the importance of heritage resources as articulated by the Corporate Strategic Plan. Existing district plans are approximately ten years old and are required to be updated. No new district plans have been created.
On-going Review	Conduct research to identify properties of heritage merit to be listed and/or designated; Research, evaluation and administration of applications for permits to modify heritage properties; prepare and present reports to the Heritage Committee. Site inspections and enforcement to ensure that the work completed is in compliance	Heritage list is being updated. New properties/buildings have been designated and listed. Approximately 50 permit applications were processed in 2008 and 32 have been processed as of Aug. 2009. Site inspections continue through heritage inspection staff.

Activity	Responsibilities	Current Service Level
	.with the permit issued Ensure compliance with legislative requirements; identify issues early in the permit process; make more effective use of the expertise of Heritage Oakville and provide support in accordance with the Committee's mandate	
New Initiatives	Expansion of the current heritage program to include designation of new heritage districts; designation of additional heritage properties; and establishment of policies relating to the preservation of the Town's cultural landscape Education (Committee Symposium, external sessions) Investigation of financial incentives	Staff are now able to expand heritage research and the designation program; There are now increased opportunities for public education to increase awareness of heritage resources and preservation initiatives

Key Performance Indicators

CUSTOMER BENEFITS/IMPACTS	INDICATORS	Target FY09	Actual FY 09	Target FY 10
Accessible, accurate and relevant information and assistance	<ul style="list-style-type: none"> % of inquiries % of information recipients surveyed who saw improvements in heritage 			
Timely processing of, and commenting on applications	<ul style="list-style-type: none"> average time to process applications 	N/A	N/A	-50% within required timeframes
Consistent and defensible designations	<ul style="list-style-type: none"> # of designations 	N/A	N/A	-increase
Knowledge and understanding of the value of heritage preservation	<ul style="list-style-type: none"> % of citizens surveyed who report that they understand the value of, and support the preservation of heritage properties 			

PROGRAM OUTCOMES	INDICATORS	Target FY09	Actual FY 09	Target FY 10
Heritage resources are preserved	<ul style="list-style-type: none"> # of designation/preservation projects acted 	N/A	N/A	-increase

	<p>on # and % of heritage resource demolitions/de-listings</p> <ul style="list-style-type: none"> • % of citizens surveyed who report satisfaction with properties preserved • % of citizens surveyed who report dissatisfaction with heritage properties lost 			from 2009
Enhanced community image	% of citizens surveyed who believe that heritage designations enhance the image and value of their Town	N/A	N/A	-increase

Heritage Planning 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
By Expenditure Type									
Salaries, Wages, Benefits	361,700	261,589	318,700	(11.9%)	0	318,700	(11.9%)	395,000	406,800
Purchased Services	50,500	4,377	47,400	(6.1%)	0	47,400	(6.1%)	50,500	50,500
Internal Charges	44,900	29,933	44,900	0.0%	0	44,900	0.0%	44,900	44,900
Minor Capital & Transfer to Reserves	11,000	815	0	(100.0%)	0	0	(100.0%)	0	0
Gross Operating Expenditures	468,100	296,714	411,000	(12.2%)	0	411,000	-12.2%	490,400	502,200
Other Revenue	11,000	8,250	0	(100.0%)	0	0	(100.0%)	0	0
Tax Levy Requirement	457,100	288,464	411,000	(10.1%)	0	411,000	(10.1%)	490,400	502,200
By Service Programs									
Heritage Planning	457,100	288,464	411,000	(10.1%)	0	411,000	(10.1%)	490,400	502,200
Service Total	457,100	288,464	411,000	(10.1%)	0	411,000	(10.1%)	490,400	502,200

Service Results Narrative:

The resources assigned to this service support the work and mandate of Heritage Oakville through the provision of dedicated technical and administrative services. Improvements to the program delivery has facilitated the preservation and enhancement of the Town's cultural heritage environment and allowed a more pro-active and timely response to protection/preservation of heritage resources.

2010 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Heritage Planning - Inflation	Increase base budget for inflation and merit impact on salaries and benefits, purchased services and materials and supplies.	Maintain current level of service	Ensure skilled staff for the delivery of services and programs	\$11,700
Heritage Planning – Personnel	The department has adjusted the vacancy gapping to be consistent with the anticipated economic outlook forecast for 2010.	Maintain current level of service	To improve the reporting accuracy of service costs	(\$54,700)
Heritage Planning – 2% Reduction	The base budget has been reduced based on usage and current levels of spending. Areas cut include: professional development, skills improvement, and mileage.	Maintain current level of service	To reduce overall tax levy.	(\$3,100)

2011 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Heritage Planning – Personnel Services	Budget adjusted to reflect inflationary impact and merit increases. In addition, the vacancy budgeted has been reduced with the anticipated increased external revenue projected and this will require additional personnel support.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$76,300
Heritage Planning –	The budget has been adjusted to for the additional funds	Maintain current	Ensure ongoing uninterrupted availability	\$3,100

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Purchased Services	required to maintain standard levels of service.	service level	of service necessary for Town growth	

2012 Plan

Base Budget Adjustments to Service

Activity/Responsibility	Reason for Adjustment	Service Level	Program Objective	Cost
Heritage Planning – Personnel Services	Budget adjusted to reflect inflationary impact, merit increases.	Maintain current service level	Ensure skilled staff for the delivery of services and programs	\$11,800