

A GUIDE TO MUNICIPAL PROGRESS REPORTING

Meeting the Requirements of the
Community Charter



Ministry of Community, Aboriginal, and Women's Services

Fall 2003

Preface

This guide is the result of a collaborative effort by the Local Government Management Association, the British Columbia Government Finance Officer's Association and the Ministry of Community, Aboriginal and Women's Services.

The purpose of this guide is to assist municipalities with the new annual reporting requirements under the *Community Charter*. Under the Charter, municipal councils are now required to prepare an annual report regarding financial and operational information related to the municipality. As part of their reports, municipalities are also required to include a progress report respecting the previous year in relation to objectives and measures established for that year.

This guide is intended to provide local governments with a variety of tools that will assist them in setting up their individual reporting schemes. It includes a calendar of key dates for when progress reporting will be implemented, guidelines on setting objectives and measures, as well as sample annual reports. An extensive list of resources is also included for those local governments who may need further assistance in developing their reporting systems.

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Introduction

The *Community Charter* establishes the foundation for a new legislative framework for local governments. The Charter encourages municipalities to become more self-reliant and provides them with broad powers to provide local services, regulate activities and manage their organizations. One of the principles of the Charter is that with more local autonomy comes a focus on appropriate public accountability. As an essential component of the overall accountability of the municipal system, the Charter includes new requirements for annual reporting to citizens.

Annual reporting provides opportunities for public access to reporting mechanisms and helps meet the information needs of both local governments and the public by promoting greater understanding of municipal responsibilities and priorities. Implicit in this principle is that greater accountability will lead to the promotion of better services and continuous improvement in service delivery, as well as, improving taxpayer awareness and knowledge of municipal services.

Section 98 of the Charter requires municipal councils to prepare an annual report regarding financial and operational information related to the municipality. As part of this annual report, municipalities are required to include a progress report respecting the previous year in relation to objectives and measures established for that year. The report also sets out current and future year objectives and the measures that will be used in determining progress towards those objectives. See Appendix 1 for Charter provisions regarding annual reporting.

The philosophy behind the new annual reporting requirements is that providing citizens with better information makes for better government. Councils now have the opportunity to tell their citizens what they are planning to do, how they intend to do it and progress towards it. Consistent with the Charter principle that municipalities are accountable to the public, and not the Province, each municipality will have the flexibility to set its own objectives and then choose how they report on progress to its citizens. The legislation does not set out how municipal objectives are to be developed or how the attainment of those objectives must be measured and reported on. As a result, there is no one “correct” way to achieve compliance with the new annual reporting requirements under the Charter.

This guide is meant to be advisory in nature, and is not a directive. This guide explains some possible approaches to preparing a progress report, but is by no means an exhaustive work. The sample reports contained in this guidebook are intended to be illustrative and should only be used to steer the development of your annual reporting scheme.

Principles of Progress Reporting

Municipal progress reporting schemes should be developed based on the following eight broad principles:

1. **Flexibility** - Local interests and needs are varied across the province and must be allowed to flourish within respective jurisdictions. Diverse populations have created a range of cultures, each with their own distinctive needs, wants and aspirations. Any progress reporting scheme must allow for local influences. One size does not fit all.
2. **Capacity** - Some communities have a great deal of internal capacity while others have very little. The local government structure must balance the required information with their capacity to capture and report on it.
3. **Relevance** - The reporting system must be relevant to the local conditions. Such factors such as demographics, topography, climate and economic base all contribute to making communities unique. As a result, reporting should be tailored to local circumstances.
4. **Jurisdiction** - Reporting obligations are limited to those matters over which the local government has the legislative authority to influence.
5. **Simplicity** - Progress reports may be comprehensive or as simple as staff resources allow. Communities that wish to may develop comprehensive planning and reporting mechanisms, but there is no intent to place unrealistic burdens on smaller communities where staff resources are limited.
6. **Incremental** - Progress reporting can be a simple extension of existing reporting activities. If possible, reporting obligations can be combined and a system put in place that would allow monthly updates to be prepared easily, rather than having to undertake a major annual reporting task.
7. **Tailored to the Audience** - The level of interest and community involvement in developing objectives and reporting on performance measures will vary across the province. Accordingly, local governments can construct their own objectives and progress report consistent with the interests and expectations of local residents. It is up to each council and staff to determine the appropriate level of public participation.
8. **Brevity** - Consistent with community interests and available resources, a brief and concise progress report may be preferred to an exhaustive factual analysis that few will read.

Timetable for Implementation of Progress Reporting

January 2004	Municipalities begin setting goals and objectives.
June 30, 2004	First Annual Report - Municipalities are required to publish their first annual report. The only element of progress reporting that the report must contain is a statement of municipal objectives for 2005.
January 2005	Municipalities must develop and set measures in relation to the objectives established for 2005, which were published in the 2004 annual report.
June 30, 2005	Second Annual Report - Municipalities are required to publish their second annual report. This report contains a restatement of the objectives for 2005, along with measures to evaluate those objectives. The report also contains objectives and associated measures for the year 2006.
January 2006	Municipalities collect data in relation to the measures established for the year 2005 to determine their progress.
June 30, 2006	Third Annual Report - Municipalities are required to publish their third annual report, which will contain their first comprehensive progress report (for the year 2005). The annual report will also restate the 2006 objectives and measures, as well as a statement of objectives and associated measures for the year 2007.

Getting Started

The best way to get started in developing your reporting scheme is to ensure that your municipality is ready to measure its progress successfully. This section will help you determine some of the elements that are necessary to create this level of readiness.

Getting started includes:

- council recognizing the importance of the effort and making the commitment;
- administrative leadership that accepts the project as a challenge important to the organization;
- developing a trust between the administrative staff and the elected officials;
- gaining the support of employees and their associations; and
- the readiness on all parties, including citizens in some cases, to use this as an opportunity to develop a scheme that will evolve as part of its decision-making process, public reporting and goal setting in the future.

Setting Objectives

An effective progress reporting system gives a local government the opportunity to set expectations, targets and objectives for its operations and services. Objectives are a statement of results or outcomes that a municipality hopes to achieve. Objectives and targets should convey a clear sense of the purpose and direction of the municipality and enable those inside the community to assess its progress. For example:

Objective: Water is safe and meets local needs

Objective: To provide recreational opportunities for enjoyment, and skills development for all residents to contribute to a healthy community.

Objective: To improve collection of garbage and recycled materials.

See Appendix 2 for more sample objective statements.

Regardless of how objectives are set or the format chosen, it is useful to set objectives that are Specific, Measureable, Achievable, Relevant and Time-Related (SMART). It is important to be precise in what you are going to achieve and ensure there is a reliable system in place to measure progress towards the achievement of the objective. Local governments should also be realistic in developing their reporting scheme and set objectives and timelines that are capable of being reached. Finally, the objective being set should be meaningful to the community and something the municipality can actually influence or change. It is sometimes helpful to develop indicators or strategies for set objectives that describe the activities or demonstrate that the objectives are being met (see sample Annual Reports).

Establishing objectives will vary among municipalities and depend on the size of jurisdiction, availability of staff resources and the degree to which the citizens of the community will wish to be involved in the process. In some communities, administrative staff in collaboration with Council may develop objectives based on ongoing constituent feedback (“the ear to the ground” approach) without a formal community consultation structure being established. In other cases, direct citizen involvement in the development of objectives will be seen as an essential step in legitimizing the process, and may be part of a corporate-wide visioning process in which the long-term goals of the community have been articulated. Appendix 5 provides literature sources on a wide variety of approaches that can be taken to set community objectives.

Whereas some communities may choose to use existing staff resources to develop their objectives, others may choose to hire consultants with expertise in objective-setting to facilitate citizen, employee and elected official input.

Identifying Measures

Selecting measures is a critical step in developing a progress reporting system, and perhaps one of the most difficult. Units of measurement are the tools in which the assessment of goals and objectives are achieved. Measures are typically used to evaluate the efficiency and effectiveness of a particular service or program. Measures may be expressed as raw numbers, data or percentages.

Efficiency measures refer to the amount of resources used to produce a service and is usually expressed as unit costs – the operating costs per tonne of garbage recycled. Effectiveness measures refer to the extent to which a service or program is achieving its intended result. Percentages and ratios are often used to express effectiveness measures – number of water main breaks per 100 kilometers of water distribution pipe in a year.

Examples of Types of Measures

Quantity – number of police calls for service

Cost per unit -- park maintenance costs per park visitor

Units per day/week – water meters read per week

Impact – percent of streets rated “poor” that have been repaired

Public Acceptance – using surveys, the percent of responses indicating that a service is satisfactory or better

Speed – average response time for emergency response

Quality – percent of tax certificates issued in error

Safety – staff hours lost due to worker injury as a percent of total hours worked

For more sample measures, see Appendix 3.

How to measure objectives is a matter of judgment. On the one hand, programs should not be too few, so that only a tiny portion of services is covered or the information collected is insufficient. Alternatively, too much reporting can be excessively costly and impractical because it is not followed through, or does not add any value to the process.

Generally, it is best to concentrate on collecting limited, but essential information about basic programs that need managerial oversight and where accountability reporting is most important. Some municipalities may consider using fewer rather than more measures in the first years of progress reporting. This can lay the groundwork for later expansion of the number of measures collected, by demonstrating the feasibility and usefulness of measurement activities without overly taxing the resources of all parties involved. Over time, municipalities can add measures to reflect the full range of activities associated within municipal service areas. New service areas can also be added.

The following are points to consider in selecting measures¹:

1. The measurement unit should have relevancy and importance to the objective. For instance, measures should be based on program goals and objectives that tie to a statement of program purpose.
2. The unit of measurement should measure program outcomes.
3. The unit of measurement should be verifiable, understandable and easy to report and monitor.
4. Measures should be consistent over time. For example, the unit must be capable of being reported the same way by everyone who will be involved with the reporting process. Everyone must interpret the unit similarly in order for the data to be accurate.
5. The measure cannot be subject to increased production at the expense of quality unless other measured units will reflect this impact.
6. Measures should be used in decision-making processes, and results may, in turn, influence future goal-setting and planning efforts.
7. Measures should be designed in such a way to motivate staff at all levels to contribute to organizational improvement.

¹ League of California Cities, [A How-To Guide for Assessing Effective Service Levels in California Cities](#), 1994

Locate Sources of Data

The extent to which measurement will be undertaken and data collected will vary across municipalities. In some communities, the emphasis may be on collecting data only on the major program areas, while in others, the information gathering and reporting schemes available to the municipality may allow comprehensive statistics to be collected.

For many communities, the simplest source of measurement data is the set of records already maintained by the municipality, such as workload counts, complaint records and response times for various services. Many local governments also produce monthly reports, quarterly reports, and/or annual reports and such information can serve as the foundation of a progress reporting system. Additional methods of collecting data are²:

- Satisfaction or opinion surveys.
- Inspection reports.
- Test scores.
- Observer ratings.
- Time-recording devices and systems.
- Utilization statistics.
- Occurrence reports (e.g., property crime occurrence rates)
- Readouts from measuring and monitoring machines.

Reporting to Taxpayers

Charter requirements in relation to annual reporting are very flexible since the legislation does not prescribe the details of how a municipality must report to its citizens. Municipalities may choose how they report on progress to the public. When reporting to the public, municipal councils should keep the following points in mind³:

- Reports should focus on results, highlighting the value of the service.
- Information should be meaningful, clear and understandable.
- Numbers alone may be misleading; therefore, it is often good to include comments explaining the numbers.
- Comments should be concise and written in plain language.
- Keep comments simple. Operational detail may obscure the real story and cloud municipal transparency.

² Ministry of Municipal Affairs and Housing. Municipal Performance Measurement Program. Ontario Handbook, 2003

³ Ministry of Municipal Affairs and Housing. Municipal Performance Measurement Program. Ontario Handbook, 2003

Checklist For Annual Report

Process

- Must be prepared by June 30 each year.
- Must be available for public inspection.
- Must be considered annually at a council meeting or other public meeting at which the public has an opportunity to make submissions and ask questions.
- Must be available for public inspection at least 14 days before the report is considered by Council.
- Council must give notice of the date, time and place of the annual meeting in accordance with requirements for public notice.

Content

Each annual report must contain the following elements:

- Audited annual financial statements.
- Any permissive tax exemptions granted and the amount of property taxes that would have been imposed on the property if it were not exempt for that year.
- Report respecting municipal services and operations for the previous year.
- Progress report respecting the previous year in relation to the objectives and measures established for that year.
- Any declarations of disqualifications of Councillors made in the previous year.
- A statement of municipal objectives, and measures that will be used to determine progress respecting those objectives, for the current and following year.

Sample Annual Reports

Sample #1 (Small Community)

Annual Report for the Village of Smallville, as presented to Municipal Council on June 30, 2006

1. Audited Financial Statements

Note: Audited Financial Statements may be included as a component of or an attachment to the Annual Report

2. Statement of Property Tax Exemptions

In accordance with Section 98 (2)(b) of the *Community Charter*, the following properties in the Village of Smallville were provided permissive property tax exemptions by Council in 2005.

Legal Description	Civic Address	Organization	Value of Permissive Exemption
Lot 1, Section 61, Local Land District, Plan 12345	100 Main Street	Smallville Lion's Club	\$800
Lot A, Section 2, Local Land District, Plan VIP005	234 Riverside Road	Smallville Athletic and Rowing Club	\$1000

3. Report Respecting Municipal Services and Operations (Prior Year)

An Open Letter to the Citizens of Smallville from Mayor Jones

June 30, 2006

I am pleased to take this opportunity to provide this update to the citizens of Smallville regarding municipal services and operations in Smallville for the year 2005.

Over the past year, Council has worked with staff and citizen volunteers to provide residents of Smallville with the best possible municipal services. Last year marked the completion of our major road and sewer reconstruction projects as well as the completion of our Official Community Plan Review. At this time, I would like to thank all residents for their patience while the construction was underway and for their active participation in the Official Community Plan Review process.

As noted more specifically in the table below, the Village undertook a number of initiatives last year for which Council is hopeful would significantly benefit the community in the long term. Council welcomes input from residents on this progress report and would encourage you to submit your comments in writing to the Village office.

Council would like to remind residents of our concern about the ongoing problem of gravel and water being deposited from private driveways onto public roads. The accumulation of gravel and water increases our annual maintenance costs and has the potential of decreasing the life expectancy of the road surface while increasing the potential for road accidents. **Please help us keep our roads clear of potential hazards.**

As for this year (2006) and looking ahead to 2007, Council has established a list of objectives, which were developed following an open house at the Village office and through Council members' ongoing consultation with residents. These lists are shown below. Again, residents are welcome and encouraged to provide input on this list and to bring forward suggestions, which could be considered for future years.

Thank you for your ongoing support.

Mayor Jones

4. Progress Report for 2005

In 2004, Council set the following objectives for 2005. The objectives were set following a village hall meeting where members of the public were invited to provide input and the progress that has been made on those objectives.

Department	Objective	Measures/Strategies	Achievements/Outcomes
Administration/Council	Revision and updating of Official Community Plan (OCP)	OCP completed by year-end. Strategy: Undertake public consultation and draft amendments to Plan. If possible, adopt revised OCP.	Open House held April 2005; Public Hearing held on October 15, 2005; Updated Community Plan adopted on November 15, 2005
	Improve office efficiency	Purchase of office computer	Computer purchased at 99.4% of budget. (\$1567.00)
	Improve communications with the community	Establish Village Website	New website up and running www.smallville.com
Engineering	Minimize liability claims for sidewalk accidents; Maintain or lower Insurance premium costs	Percentage of liability claims on sidewalks Strategy: Institute risk management sidewalk inspection program	Monthly inspections of all sidewalks in village now being undertaken by Public Works supervisor.
Public Works	Improve condition of major transportation routes	Operating costs for paving of roads Strategy: Paving of Smallville Lake Road	Road was paved and completed at 97% of budget
	Reduce flooding of businesses along Main Street.	Percentage of businesses with no flooding Strategy: Installation of storm drain along Main Street	Work still in progress – on budget
	Upgrade of Public Works fleet	Total cost to purchase new truck Strategy: Purchase of new pickup truck	Deferred- Tendered prices exceeded budget

Department	Objective	Measures/Strategies	Achievements/Outcomes
Recreation	Expand public recreation opportunities available to village residents	Percentage of new recreation opportunities Strategy: Provide public swimming lessons at Smallville Lake	-Hired part-time summer student to teach swim lessons. -25 children enrolled in swimming lessons.
	Improve appearance of grass boulevards and park areas	Percentage of park areas landscaped and maintained Strategy: Purchase of new lawn mowers/ hire landscaper	-Purchased 2 Honda lawnmowers at 102% of budget. -3 of 5 of Smallville's park areas were landscaped this summer.
Finance	Improve fire protection services to Smallville River Indian Band while covering costs borne by Village in providing this service.	Negotiate service agreement with Smallville River Indian Band for provision of Volunteer Fire Department Services	Negotiations ongoing.

5. Declaration and Identification of Disqualified Council Members

None.

6. Statement of Municipal Objectives and Progress Measures for Current (2006) and Next (2007) Year

Current Year (2006)

In 2005, Council set the following objectives, which it hoped to accomplish in 2006. As in the past, Council and staff prepared these objectives following consultation with members of the community at a public meeting held at the village hall and from feedback received by Councillors from constituents throughout the year.

Department	Objective	Strategies	Measures
Administration/Council	Efficient municipal government	Coordination across departments	Operating costs for administration as a percentage of total municipal operating costs.
Engineering	Enhance intersection safety at intersection of Main Street and Trans Canada Highway	Installation of traffic control signals	Percentage of accidents at intersection of Main Street and Trans Canada Highway – compared to number of accidents in previous year.

Department	Objective	Strategies	Measures
Public Works	Reduce number backups and flooding attributable to sewer backups	Installation of new sewer line	Percentage of flooding occurrences attributable to sewer backups.
Land-Use Planning	Preservation of agricultural land	Sustain percentage of agricultural land	Percentage of land designated for agricultural purposes, which was not re-designated for other uses.
Recreation	Improve aesthetics of public parks and recreation facilities	Paint picnic benches in Community park	Percentage of benches painted.
Finance	Improve fire protection services to Smallville River Indian Band while covering costs borne by Village in providing this service	Negotiate service agreement with Smallville River Indian Band for provision of Volunteer Fire Department Services	Operating costs for providing fire department services.

Next Year (2007)

Looking ahead to 2007, Council hopes to accomplish a wide range of initiatives. Council and staff prepared these objectives following consultation with members of the community at a public meeting held at the village hall and feedback received by Councillors from constituents throughout the year.

Department	Objective	Strategies	Measures
Solid Waste Management	Efficient municipal garbage collection services	Monitor adherence to collection schedule.	Operating costs for garbage collection per tonne per household.
Recreation	To improve aesthetics of public parks and recreation facilities	Introduce planting program at Civic Arena.	- Planting programs completed at designated times. - Introduction of hanging baskets at Arena
Public Works	Efficient municipal water system (integrated system)	Divide operating costs for water by litres of water treated.	Operating costs for the treatment and distribution of drinking water per mega litre.
	Water is safe and meets local needs	Monitor water quality/provide boil water advisories	# of days when a boil water advisory applicable to a municipal water supply was in effect.

Department	Objective	Strategies	Measures
Finance	Improve fire protection services to Smallville River Indian Band while covering costs borne by Village in providing this service	Negotiate service agreement with Smallville River Indian Band for provision of Volunteer Fire Department Services	Signed Agreement
Facilities	Upgrade of District Fire Hall - replace roof - install air conditioning	- Hire contractor to install new roof on fire hall. - Arrange to have air conditioning installed.	- New roof installed by September 2007. - Air conditioner installed in Fire Hall by May 2007.

7. Other Information.

N/A

Sample #2(Larger Community)

Annual Report for the District of Somewhere, as presented to Municipal Council on June 30, 2006

1. Audited Financial Statements

Note: Audited Financial Statements may be included as a component of or an attachment to the Annual Report.

2. Statement of Property Tax Exemptions

In accordance with Section 98 (2)(b) of the *Community Charter*, the following properties in the District of Somewhere were provided permissive property tax exemptions by Council in 2005.

Legal Description	Civic Address	Organization	Value of Permissive Exemption
Lot 1, Section 61, Local Land District, Plan 12345	100 Main Street	Somewhere Lion's Club	\$800
Lot A, Section 2, Local Land District, Plan VIP005	234 Riverside Road	Somewhere Arts Club	\$1000

3 Report Respecting Municipal Services and Operations (Prior Year) Progress Report for Prior Year, Objectives, Reporting Measures for Current, and Next Year

The following is the District of Somewhere's Progress Report on municipal services and operations for 2005, as well as its objectives and measures for 2006 and 2007. Municipal Council has developed a vision for the community following an extensive consultation process using a method called the "Balanced Scorecard Approach". From this vision, which can be found on the Municipal Website (www.district.somewhere.bc.ca), Council has developed a mission statement for each department and a series of objectives that it is hoped will help us realize our vision.

(Note: Only Public Works Department shown in sample)

Mission Statement, Department of Public Works

To maintain and upgrade the District's infrastructure to a standard that supports the preservation and enhancement of a safe, livable and attractive community.

Value Statement, Department of Public Works

The Department will take responsibility and be accountable for the effective stewardship of the District's infrastructure and physical assets. We will manage these assets with vigilance, and in an efficient and effective manner. We will take a proprietary interest in our areas of responsibility. As managers, we will be open to constructive suggestions for improvements from customers and employees. We will confront change as an opportunity for organizational and personal growth. We will provide a safe and supportive workplace. We will treat our customers with respect and dignity and will strive to provide quick and effective service.

Public Works Department Customers

The Public Works Department serves or responds to the following customers:

- District of Somewhere Engineering Department – as a contractor tasked with carrying out infrastructure construction and renewal projects large and small.
- Municipal operating departments (e.g., Fire, Police, Administration) – as a consultant, contract manager and contractor on building maintenance and renovation; and as a vehicle fleet manager.
- District of Somewhere citizens – as a direct provider of a wide range of public services.
- District of Somewhere businesses – as a supporting partner in community events sanctioned by Council. In cooperation with the Parks Department, as the principal agency responsible for the upkeep and maintenance of public property in business areas.

Public Works Department Services

The Public Works Department is responsible for the provision of service in the following areas:

New Construction

- Carry out capital works projects approved by Council. For example, installation, rehabilitation and renewal of storm drains, sanitary sewers and water mains; sidewalk construction and replacement; road rebuilding and resurfacing; roadwork related to traffic and pedestrian safety.

Infrastructure Maintenance

- Sewers: Keep clear and generally maintain storm and sanitary sewer mains so that they function at or close to their design capacity, in accordance with a systematic schedule based on historical field data.

- Roads: Preserve road base through timely maintenance measures; enhance public safety by continuous inspection and hazard repair; replace deteriorated road base as maintenance budget allows.
- Sidewalks: Maintain sidewalks in accordance with risk management policy.
- Water: Maintain all system components in good working order; service all fire hydrants in accordance with a systematic schedule; maintain and repair meters to ensure accurate readings.
- Fleet: Maintain and repair all vehicles in municipal fleet; track operating costs and make provision for full life cycle cost coverage.
- Traffic: Install, repair and maintain all traffic control devices such as traffic signals, parking restriction signs and markings, crosswalks, traffic islands and motorist signs.
- Street Lighting: Maintain, repair and upgrade street lighting in residential and business areas.
- Public Amenities: Install and maintain street furniture and other public amenities such as bus shelters, lamp standards, bicycle racks, litter containers, benches, davit poles, railings and street signs; remediate all vandalism.

Administrative Support

- Prepare, administer and take responsibility for Public Works Department budget and financial management.
- Provide for staff training as part of the departmental safety program and to maintain skill levels in specialized functions.
- Maintain payroll and general personnel records.
- Provide staff liaison to labour-management committee.
- Maintain accurate inventory and asset records.
- Oversee the work of the Public Works/Parks occupational health and safety committee.
- Assist Engineering Department with intermunicipal public works issues.
- Maintain accurate records for direct sales to the public and associated wholesale purchases.
- Administer building repair and other contracts.
- Maintain inspection records in connection with risk management program.

Direct Service to the Public

- Collect and dispose of solid waste and recyclable material in accordance with Council policy.
- Operate drop-off depot for garden waste, general waste and recyclable material.
- Conduct sales of garbage/recycle totes and containers.
- Conduct sales of topsoil.
- Facilitate community events through the provision of road barricades, signs and assistance with traffic plan development.
- Provide information to the public on a wide variety of municipal services; respond to calls for service.

Significant Issues and Trends

- Integration of municipal Geographic Information System data into day-to-day operations of the Department; replacement or supplementing of traditional sources of information on municipal infrastructure.
- Dealing with more rigorous environmental standards in the areas of storm water runoff and sanitary sewer overflows.
- Diversion of resources attributable to heightened public focus on traffic management issues.
- Aging workforce is placing pressure on attendance management; increasing incidence of longer term disability in key positions is affecting the Department's ability to deliver consistent service in some areas.
- Cost of materials continues to exceed the general inflation rate, which is a benchmark for tax increases, so that decreasing amounts of work can be accomplished with constant or even moderately increasing funding.
- The lack of capital expenditure on the municipal road system leaves the District with a highway infrastructure that cannot be adequately maintained within existing operating budgets.
- Increasing use of technology requires ongoing employee training and culture shifts.

Departmental Achievements in 2005 (Highlights)

- Managed contract for improvements to District of Somewhere Municipal Hall entranceway.
- Constructed new handicapped-accessible washroom for public use at District of Somewhere Marina.

- Equipped key public works vehicles with computer terminals providing access to GIS database.
- Cleared backlog of curb line and crosswalk painting requirements.
- Re-trained employees in confined space work and carried out other safety-related training and recertification.
- Retrofitted street lights throughout the Municipality to achieve electrical energy and cost savings.
- Flushed and cleaned [#] kilometres of storm and sanitary sewer mains.
- Installed decorative litter containers in business areas.
- Coordinated District of Somewhere Village Christmas light-up program; provided technical and set-up support for District of Somewhere Historical Society Annual Picnic.
- Replaced deteriorated storm drains on Main Street, Secluded Place, Busy Road and Circle Crescent.
- Cleaned and lined [#] metres of water mains.
- Replaced [#] metres of undersized water mains.
- Replaced [#] water meters; [#] fire hydrants.
- Installed new water pump station to increase pressure and flow in Upper Somewhere area.
- Resurfaced and straightened Busy Road to prevent further base deterioration.
- Decrease in number of WCB claims and days lost due to injury.

4. Departmental Progress Report for 2005 (Detailed)

Council developed the following specific objectives for 2005 for the Public Works Department. The table below indicates the measures used to assess progress and the status of each objective as of December 31, 2005.

Operations/ Services	Objective	Strategy	Measures	Progress for the Past Year
Solid Waste	Minimize “missed pickup” call-backs.	Ensure that relief drivers receive instruction on any unusual calls	Percentage of call-backs per month.	Average number of call-backs per month unchanged from 2004
	Reduce contamination of recyclables in solid waste stream	Public education program; refusal to accept or collect solid waste containing recyclable materials	Dollar value of fines from Regional District Landfill for deposit of solid waste containing recyclables	Dollar value of fines reduced from \$1,500 to \$300
Storm Drains and Sanitary Sewers	Eliminate backup and flooding attributable to main obstructions.	Rigorous adherence to flushing schedule.	Percentage of flooding/backup occurrences per year.	Number of floods reduced by 30%
Roads	Eliminate claims from “pot hole” incidents.	Make all Public Works employees “risk managers” for reporting pot holes and other maintenance-related road hazards.	(1) Percentage of pot hole-related claims. (2) Average time between pot hole report and remediation	5 pothole claims in 2005. Claims reduced by 70%.
Roads	Enhance intersection safety.	Implement a system for the reporting of faded, obstructed or missing road signs.	(1) Percentage of “obstructed or missing road sign” claims. (2) Average time between sign report and remediation.	Installed/Replaced 35 signs; No Claims in 2005
Water Distribution System	Ensure that all fire hydrants are in good working condition for emergency use whenever required.	Develop annual schedule for servicing hydrants.	(1) Percentage of all hydrants serviced per year. (2) Operating cost per hydrant serviced.	50% of Hydrants serviced. Average cost of hydrant services was \$250.00.
Workplace Safety	Reduce disruption to maintenance programs caused by preventable workplace injury-related time loss.	Analyze WCB incident reports over past three years; identify injury patterns and focus training accordingly	Number of work days lost per year due to workplace injury.	Number of work days lost: 2004- 125; 2005: 102

Operations/ Services	Objective	Strategy	Measures	Progress for the Past Year
Sidewalks	Eliminate “sidewalk trip” claims	Emphasize with staff the importance of reporting sidewalk trip hazards; assign a high priority to the review of risk management reports and the carrying out of remedial work.	(1) Number of “sidewalk trip” claims. (2) Average time between trip hazard report and remediation.	36 Minor Repairs completed; Percentage of claims dropped by 50%.
Public Amenities/ Municipal Housekeeping	Promote community pride by maintaining public amenities in excellent condition.	Provide immediate response to reports of vandalism and graffiti; implement an internal system for reporting and recording requirements for painting and/or cleaning.	Number of complaints per year from public and Council members regarding railings, litter barrels, benches etc. in need of maintenance.	3 complaints received (10 in 2004)

5. Declaration and Identification of Disqualified Council Members

Pursuant to section 111 of the *Community Charter*, 20 electors of the District of Somewhere made an application on July 1, 2005 to the Supreme Court to have Councillor Machiavelli disqualified from holding office as a Councillor on the basis that the Councillor had used insider information to further his personal economic interest. The Court considered this matter and declared that Councillor Machiavelli was disqualified from holding office. A by-election was held to fill the vacancy.

6. Objectives for the Current (2006) and Next Year (2007)

Note: Objectives and measures may be similar from year to year.

Operations/ Services	Objective	Strategy	Measures
Solid Waste	Improve collection of garbage and recycled materials	-Monitor collection schedules. -Ensure pick-up schedules are adhered to.	Number of complaints received in a year concerning the collection of garbage per 1,000 households.
Storm Drains and Sanitary Sewers	Eliminate backup and flooding attributable to main obstructions.	Rigorous adherence to flushing schedule.	Number of flooding/backup occurrences per year.

Operations/ Services	Objective	Strategy	Measures
Roads	Eliminate claims from “pot hole” incidents.	Make all Public Works employees “risk managers” for reporting pot holes and other maintenance-related road hazards.	(1) Number of pot hole-related claims. (2) Average time between pot hole report and remediation
	Enhance intersection safety.	Implement a system for the reporting of faded, obstructed or missing road signs.	(1) Number of “obstructed or missing road sign” claims. (2) Average time between sign report and remediation.
Water Distribution System	Ensure that all fire hydrants are in good working condition for emergency use whenever required.	Ensure hydrant service schedules are adhered to.	(1) Percentage of all hydrants serviced per year. (2) Average cost per hydrant serviced.
Police	Reduction in violent crime rate	Work with interested organizations to promote safer communities	Violent crime rate per 1,000 persons.
Administration/Council	Increase voter turnout	Provide timely information about elections/ Hold public forums	Percentage of voter turnout for a municipal election.
Workplace Safety	Reduce disruption to maintenance programs caused by preventable workplace injury-related time loss.	Analyze WCB incident reports over past three years; identify injury patterns and focus training accordingly	Number of work days lost per year due to workplace injury.
Public Amenities/ Municipal Housekeeping	Promote community pride by maintaining public amenities in excellent condition.	Provide immediate response to reports of vandalism and graffiti; implement an internal system for reporting and recording requirements for painting and/or cleaning.	Number of complaints per year from public and Council members regarding railings, litter barrels, benches etc. in need of maintenance.

7. Other Information

In 2005, the District of Somewhere divested its ownership in the Historic Toad Hollow House to a private citizen. However, a heritage designation was placed on the title of the property before it was sold ensuring that its heritage merits will be protected in the future.

Appendices

Appendix 1- Excerpt from the *Community Charter*

Division 5 - Reporting

Annual municipal report

98 (1) Before June 30 in each year, a council must

- (a) prepare an annual report,
- (b) make the report available for public inspection under section 97, and
- (c) have the report available for public inspection at the meeting required under section 99.

(2) The annual report must include the following:

- (a) the audited annual financial statements referred to in section 167 (4) for the previous year;
- (b) for each tax exemption provided by a council under Division 7 [*Permissive Tax Exemptions*] of Part 7 [*Municipal Revenue*], the amount of property taxes that would have been imposed on the property in the previous year if it were not exempt for that year;
- (c) a report respecting municipal services and operations for the previous year;
- (d) a progress report respecting the previous year in relation to the objectives and measures established for that year under paragraph (f);
- (e) any declarations of disqualification made under section 111 [*application to court for declaration of disqualification*] in the previous year, including identification of the council member or former council member involved and the nature of the disqualification;
- (f) a statement of municipal objectives, and the measures that will be used to determine progress respecting those objectives, for the current and next year;
- (g) any other information the council considers advisable.

Annual meeting on report

99 (1) The council must annually consider, at a council meeting or other public meeting,

- (a) the annual report prepared under section 98, and
- (b) submissions and questions from the public.

(2) The annual meeting must occur at least 14 days after the annual report is made available for public inspection under section 97.

(3) The council must give notice of the date, time and place of the annual meeting in accordance with section 94 [*public notice*].

Appendix 2 - Sample Goal and Objectives Statements⁴

Sample Goal Statements

Refuse Collection: Contribute to a clean and healthy environment through regular collection of refuse and leaves from properties within the city, with improved collection practices.

Fire: Minimize loss to life and property by helping to prevent the occurrence of fire and by limiting losses from fires that do occur.

Police: Reduce opportunities for committing crimes, protect persons and property from criminal acts and reduce the effect of crime and traffic accidents through a comprehensive and judicious law enforcement program, which apprehends offenders and brings them to trial.

Parks and Recreation: Provide safe, enjoyable, physically attractive parks and recreation opportunities that meet the residents' diverse needs on a year-round basis.

Sample Objective Statements

- Resolve 80% of zone change requests without appeal to city council.
- Respond within three minutes to 98% of all emergency calls.
- Reduce traffic accidents involving school children enroute to or from school by 5% from last year's figures.
- Prioritize infrastructure spending from available funds.
- Ensure municipal sewage management practices prevent environmental and human health hazards.
- Prevent costly and inconvenient service disruptions due to asset failures.
- Ensure that 85% of golfers are satisfied with the playable condition of the golf course.
- Provide revenue and expenditure projections within a 5% range of accuracy.
- Efficient maintenance of paved roads.

⁴ Performance Measurement for Local Government Services. John Matzer, Jr. Bureau of Governmental Research and Services, Graduate Centre for Public Policy and Administration, California State University, January 1989.

Appendix 3 - Local Government Progress Measures

The following table illustrates measures that have been used by local governments throughout North America.⁵

Department	Item to be measured	Measurement (Annually)
Administration	Administrative costs	Cost as a% of total budget
Employees	Employee safety program	Number of annual WCB claims; number of days lost per year to injury
	Employee Health	Number of days lost to employee sickness
	Employee professional development	Percentage of employees enrolled in skills upgrading/professional development programs
Engineering	Solid waste collection/ disposal costs	Operating costs per tonne or per household
	Solid waste collection operations –complaints, missed calls	Percentage of call-backs per month
	Solid Waste Collection- Recycling	% of residential solid waste diverted for recycling
	Roads- Operating Costs	Operating costs per kilometre
	Roads- Snow Removal Costs	Operating costs for winter maintenance per kilometre
	Roads- Road Conditions	Number of pot-hole related liability claims; % of kilometres where the condition is rated good to very good
	Roads- Intersection safety	Number of intersection accidents
	Sidewalks -Trip hazards	Percentage of sidewalk trip claims; average time between sidewalk trip hazard report and remediation
	Storm water /wastewater treatment	Operating costs per mega litre
	Storm water flooding/ backups	Number of flooding occurrences/ year
	Watermain breaks	Number of breaks per 100 km

⁵ Canadian Taxpayers Federation, Municipal Performance Measures (Ontario), July 2003

Department	Item to be measured	Measurement (Annually)
Fire Department	Overall costs	Operating costs per \$1,000 of assessed value
Finance/Taxation	Tax Revenues	Property tax revenues as a percentage of total city revenues
Heritage Preservation	Designated/protected Heritage properties	Number of designated properties
Parks and Recreation	Recreation centre financial efficiency	User pay ratio
	Recreation programs participation	Number of participants in recreation programs as a percentage of population
Police Department	Operating costs	Operating costs per household
	Crime	Crime rate per 1,000 of population measured by offence category as defined by Statistics Canada
	Youth crime	Number of youths charged per 1,000 youths
	Calls for service	# of calls for service
Transit	Usage/ridership	Trips per person
	Financial performance	\$/trip
Overall Service Delivery	Municipal service delivery	Service delivery rating by citizens as reported in surveys
	Public amenities	Number of complaints per year from public

Appendix 4 - Assistance for Local Governments

University of Victoria - School of Public Administration

Through its Cooperative Education Program and the Centre for Public Sector Studies, the University of Victoria's School of Public Administration is available to provide assistance to municipalities who may need some extra help with their first attempt at developing statements of objectives, selecting measures and preparing progress reports.

Through a targeted coop opportunity or short-term contract, graduate students from the School would be available to assist local governments in these tasks.

Further information may be obtained by contacting:

Professor James McDavid
University of Victoria
School of Public Administration
University of Victoria
P.O. Box 1700, Stn CSC
Victoria, B.C.
V8W 2y2

Telephone: (250) 472-4293
Email: jmcdavid@uvic.ca

TeamWorks Program

TeamWorks is an innovative program that provides British Columbia local governments access to specialized resources, adding a new level of service to the long-standing tradition of information sharing. Designed to enhance the informal partnership programs that exist today, TeamWorks allows local governments to seek and provide assistance, and share resources with each other.

How does TeamWorks work?

TeamWorks is easy to access in all BC communities. Following is the basic process to become involved:

- A local government has a challenge that requires assistance (e.g., developing a statement of objectives and preparing a reporting document);

- That local government "user" of the service makes an on-line request on the TeamWorks Website, regardless of where they may be geographically located in BC;
- Working with Human Resource Department professionals from potential "resource" providers, the LGMA (Local Government Management Association) will match the user with the most appropriate participating resource provider in another local government;
- The user and resource providers enter into an agreement and carry out the project. The user would only be responsible for direct costs associated with the project such as travel, accommodation and materials. The assessed costs may be adjusted as the project evolves to reflect administrative workloads;
- The user will be billed an administration fee of \$200 (+gst) for each TeamWorks request.

The Municipal Finance Authority may provide financial assistance on a case-by-case basis. Further information may be found on the TeamWorks Website at:

www.lgma-teamworks.ca/

Consultants

A number of private consultants have identified themselves as having experience in guiding Councils and local government staff in the development of objectives and measures. Information on these consultants may be found at the CivicInfo Website (www.civicinfo.bc.ca), by clicking on "Suppliers", or in the Union of British Columbia Municipalities Network Book.

Ministry of Community, Aboriginal and Women's Services

Don Sutherland, Director, Advisory Services Branch

Telephone: (250) 387-4025

Email: don.sutherland@gems3.gov.bc.ca

Local Government Infrastructure and Finance

- See Ministry Website to contact financial analyst in your region
<http://www.mcaaws.gov.bc.ca/lgd/infra/index.htm>
- General Inquiries
Telephone: (250) 387-4060
Fax: (250) 356-1873

Local Government Management Association

737 Fort Street
Victoria, B.C.
V8W 2V1

Telephone: (250) 383-7032
Fax: (250) 383-4879
Email: lgma@lgma.ca
Website: www.lgma.ca





















Government Finance Officers Association














737 Fort Street
Victoria, B.C.
V8W 2V1


Telephone: (250) 383-7032
Fax: (250) 383-4879
Email: tmacdonald@lgma.ca
Website: www.gfoabc.ca



Appendix 5 - Resource Documents

CivicInfo B.C. has developed the following resource library of documents pertaining to local government performance management. This can be accessed via the CivicInfo Website at: www.civicinfo.bc.ca and clicking on “Municipal Performance Measurement”.

1. [Report Card on Municipal Performance Measures \(Canadian Taxpayers Federation\)](#)
2. [Municipal Performance Measurement Program Transition Table \(Ontario Ministry of Municipal Affairs\)](#) [Details]
27-JUN-2003
View Document: [HTML](#)  
3. [Municipal Performance Measurement Program - Frequently Asked Questions \(Ontario Ministry of Municipal Affairs\)](#) [Details]
27-JUN-2003
View Document: [HTML](#)  
4. [Performance Measurement in Government \(City of Grande Prairie, Alberta\)](#) [Details]
26-JUN-2003
View Document: [HTM](#)  
5. [Implementing Results-Based Management: Lessons From the Literature \(Office of the Auditor General of Canada\)](#) [Details]
26-JUN-2003
View Document: [HTML](#)  
6. [Performance Measurement Training Tool \(Commonwealth Performance Management Training\)](#) [Details]
26-JUN-2003
View Document: [HTML](#)  
7. [Developing Indicators and Benchmarks: A Best Practices Guide to Municipal Infrastructure \(National Guide to Sustainable Infrastructure\)](#) [Details]
01-DEC-2002
View Document: [PDF](#)  
8. [List of Municipal Performance Measurement Program Measures for 2002 Reporting Year \(Ontario Ministry of Municipal Affairs\)](#) [Details]
12-NOV-2002
View Document: [PDF](#)  
9. [Ontario Municipal Performance Measurement Program - Report Template \(Ontario Ministry of Municipal Affairs\)](#) [Details]
23-AUG-2002
View Document: [DOC](#)  
10. [Performance Measurement Resources for Local Governments \(ICMA\)](#) [Details]
21-AUG-2002
View Document: [PDF](#)  
11. [Citizen Participation: Legitimizing Performance Measurement as a Decision Tool \(Alfred Tat-Kei Ho & Paul Coates\)](#) [Details]
01-APR-2002
View Document: [PDF](#)  
12. [Practitioner's Guide to Measuring the Performance of Public Programs \(Institute on Governance\)](#) [Details]

- 01-JAN-2002
View Document: [PDF](#) 
13. [The Challenge of Applying Results-Based Thinking to Policy \(Institute on Governance\)](#) [Details]
01-JAN-2002
View Document: [PDF](#) 
 14. [News Release - Province and Municipalities Work Together to Increase Accountability to Taxpayers \(Ontario Ministry of Municipal Affairs\)](#) [Details]
18-JUN-2001
View Document: [HTML](#) 
 15. [Handbook - Municipal Performance Measurement Program \(Ontario Ministry of Municipal Affairs\)](#) [Details]
01-JAN-2001
View Document: [PDF](#) 
 16. [Manual for Data Collection for Performance Measurement \(Fairfax County, Virginia\)](#) [Details]
01-JAN-2001
View Document: [PDF](#) 
 17. [Basic Manual for Performance Measurement \(Fairfax County, Virginia\)](#) [Details]
01-JAN-2001
View Document: [PDF](#) 
 18. [Municipal Performance Measurement Fact Sheet \(Ontario Ministry of Municipal Affairs\)](#) [Details]
03-OCT-2000
View Document: [HTML](#) 
 19. [Implementing Performance Measures \(American City & County\)](#) [Details]
01-SEP-2000
View Document: [HTM](#) 
 20. [Transforming Cities into Outcome Enterprises...and Beyond: Achieving Quality Governance and Management \(John W. Thomas, Harvard University\)](#) [Details]
01-JAN-2000
View Document: [PDF](#) 
 21. [Benchmarking as a Means of Improving Municipal Service Delivery \(Naved Hamid, World Bank Development Institute\)](#) [Details]
01-JAN-2000
View Document: [PDF](#) 
 22. [Performance Measurement: A Tool for Managing County Governments \(National Association of Counties\)](#) [Details]
02-JUL-1999
View Document: [HTML](#) 
 23. [Policy Brief - Means, Ends, Indicators: Performance Measurement in the Public Sector \(Institute on Governance\)](#) [Details]
01-APR-1999
View Document: [PDF](#) 
 24. [Benchmarking Local Government Services in Canadian Municipalities \(James C. McDavid\)](#) [Details]
01-JUN-1998
View Document: [HTM](#) 
 25. [Performance Measurement \(Harry Hatry and Scott Bryant, Urban Institute\)](#) [Details]
01 JAN 1998

View Document: [PDF](#) 

26. [A Brief Guide to Performance Measurement in Local Government \(National Centre for Public Productivity, Rutgers University\)](#) [Details]
01-JAN-1997. View Document: [HTM](#) 
27. [An Overview of Performance Measurement \(ICMA National\)](#) [Details]
01-SEP-1994
View Document: [MHT](#) 
28. [Public Sector Benchmarking: A Practical Approach \(ICMA National\)](#) [Details]
01-SEP-1994
View Document: [MHT](#) 