

Overview of service planning process improvements since 2013

2013-2015: Staff developed three-year Service Plans to align timeframes with the Financial Plan. Each service had a standardized Service Plan that included:

1. Overview: scope, organization chart, trends and issues, annual expenditures and capital.
2. Services: core services list, planned service levels adjustments, workforce considerations, customers and governance, delivery strategy, assumptions and risks.
3. Divisional Initiatives: initiatives supporting core service and CRD Strategic Priorities.
4. Performance Monitoring.

The Service Plans were developed in the first year, and staff prepared a Service Plan Update Summary in each subsequent year that provided information about:

1. Changes in assumptions, trends and other issues.
2. Overall budget performance.
3. Updates to/new division initiatives.
4. Service adjustments and staffing levels.
5. Key performance indicators.

The standing committee or commission overseeing the service approved the Service Plan, while the CRD Board, through the Committee of the Whole, approved the Financial Plan.

2016-2019: The Service Plan timeframe was extended to four years to align with the CRD Board term. The Service Plan templates were updated, and the following changes were made:

- Division and Service Summary replaced Scope.
- Links to Board Strategic Priorities were added.
- Core Services and Service Level Adjustments were combined.
- Removed: Summary of Expenditures and Capital, Customers & Governance, Delivery Strategy, Assumptions & Risks.

Starting in 2016, the standing committees and commissions reviewed the Service Plans and recommended their approval to the CRD Board, through the Committee of the Whole. The Committee of the Whole received a report to accept all recommendations.

Starting in 2017, internal process improvements were made including better guidance for staff to improve the quality and standardization of the Service Plans, and a centralized location to easily locate, update, and save all Service Plans.

In 2018, the CRD Board approved the first annual Service and Financial Planning Guidelines which provided staff with direction on how to prepare the draft service and financial plans.

Due to the B.C. General Local Election, standing committees and commissions did not review Service Plans in 2018. The Committee of the Whole received a for-information report with all Service Plans and continued to recommend approval of the Financial Plan to the CRD Board.

2019-2022: The Service Plan format was simplified and renamed Community Need Summary, aligning with the revised CRD Corporate Plan. Community Need Summaries grouped services together with similar goals to improve oversight and visibility of like-services.

The Community Need Summary template provided the following information:

1. Target outcome
2. Related strategies
3. Core service levels
4. Initiatives
5. Business Model, including value proposition and who contributes
6. Performance metrics

Additional improvements were made to the internal process including:

- Development of a multi-criteria prioritization framework to guide decisions.
- The introduction of the Initiative Business Case; this internal document is developed by staff to capture all relevant information, including internal dependencies, about future initiative and supports the assessment of initiatives by the Executive Leadership Team.

Standing committees and commissions continued to review the Service Plans and recommend approval to the CRD Board, through the Committee of the Whole. Due to the grouping of similar services within a single Community Need Summary, several standing committees and/or commissions sometimes reviewed and recommended approval of the same Community Need Summary¹. The Committee of the Whole continued to recommend approval of the Financial Plan to the CRD Board.

Starting in 2020, further internal process improvements were made, including:

- Refinements on timing, roles and responsibilities, guidance for staff, and assessment of internal dependencies.
- Enhanced information in Initiative Business Cases.
- Annual workshops for in-depth discussion on each initiative's strategic and financial implications for the Executive Leadership Team and Senior Managers.

Further, improvements were made to the Community Need Summary including new sections for trends, risks and issues, governance, and a list of previously approved initiatives.

Also in 2020 was the first Board Priorities strategic check-in. This annual discussion confirms the strategic direction for the following year. This direction, along with direction from committees about

¹ For example, recreation contained both SEAPARC and Panorama Recreation services, which are overseen by two distinct commissions.

advancing corporate priorities, informs the recommendations brought forward by staff for new initiatives, resourcing and core service delivery adjustments.

Starting in 2021, the Executive Leadership Team introduced the service planning parameters which provide staff with clearer guidance on planning for the future. This direction supplements the CRD Board Service and Financial Planning Guidelines.

In 2022, due to the General Election, standing committees and commissions did not review Service Plans. The Committee of the Whole received a for-information report with all Service Plans and continued to recommend approval of the Financial Plan to the CRD Board.

2023-2026: Service planning documents were refreshed to align with the new CRD Board Priorities and Corporate Plan, and enhance the information captured.

The Community Need Summary template was updated to include:

1. Achievements in previous year.
2. Additional operational data
3. Enhanced core service information, including budget and workforce references, and enhanced service level descriptions.
4. Improved performance measures aligned with the goals listed in the Corporate Plan.

The internal Initiative Business Case template was also enhanced to include:

1. An assessment of the Board-directed lenses (Climate Action, First Nations Reconciliation, and Equity, Diversity and Inclusion)
2. Additional information about assumptions, constraints, dependencies, previously approved resources, options analysis, and an implementation plan

Standing committees and commissions continued to review the Service Plans and recommend approval to the CRD Board, through the Committee of the Whole. The Committee of the Whole continued to recommend approval of the Financial Plan to the CRD Board.

Starting in 2024, the Community Need Summaries were presented directly to the Committee of the Whole to address governance overlaps and gaps at standing committee and commission level.

Staff created multi-year roadmaps of future initiatives, grouped thematically, for an improved view of upcoming activities and changes.