

# CITY OF COURTENAY

## 3-Year Engagement Plan (2025-2027)

Dec 2023

*This document outlines a three-year engagement plan for the City of Courtenay. The strategies employed in this document will guide the engagement activities for city staff. The plan emphasizes Courtenay's internal and external engagement efforts as the City builds a culture of engagement with the public and staff.*

### 3-YEAR ENGAGEMENT GOALS

1. **ENGAGE** - Increase community engagement in the budget process.
  - a. Increase number of residents engaging in the budget.
  - b. Increase the diversity of respondents (age, housing status, etc.) to include underrepresented residents.
2. **EDUCATE** – Increase comprehension of the city budget and city investments.
  - a. Focus on the transparency and access to information.
  - b. Increase understanding of city decisions and the tradeoffs under consideration.
3. **LISTEN** - Understand from our residents what we are doing well, where we can improve, as well as expectations on service levels.
  - a. Foster interdepartmental communication on the budget and awareness of organizational needs.

### STAKEHOLDERS

Four levels of stakeholders are key to Courtenay's community engagement success: Staff, City Administration, City Council and the Public. Each group currently has different intersection points with the budget and in organizational decision-making. To achieve the identified engagement goals over the next three years, various strategies are presented to **ENGAGE** and **EDUCATE** community members on the budget and **LISTEN** to their values, feedback, and ideas to improve operational plans and the wellbeing of Courtenay.



## TIMELINE

<b>Budget Year</b>	Y1: 2025	Y2: 2026	Y3: 2027
<b>Engagement Impact</b>	IMPLEMENT	INTEGRATE	CONSULT
<b>Stakeholder Focus</b>	City Administration Public	City Council Staff Public	Staff Public

## ENGAGEMENT STRATEGIES



### YEAR 1: IMPLEMENT

*Public engagement is a journey not a destination*

**Objective:** Continue implementing community engagement strategies while building a culture of community engagement.

**Internal Focus:** Finance continues to introduce the organization to engagement tools and practices. City Manager to support engagement values and process changes.

**External Focus:** Online budget engagement with residents.

Strategies	Expected Outcomes	Considerations
<ul style="list-style-type: none"> <li>Engage Courtenay residents through a budget simulation (SIMULATE) of the City's 2024 Financial Plan</li> </ul>	<ul style="list-style-type: none"> <li>Increase community engagement in the budget process</li> </ul>	<ul style="list-style-type: none"> <li>Focus on the demographic variables to understand multiple resident perspectives on the budget</li> <li>Incorporate scenario questions to gauge expectations for service levels</li> </ul>
<ul style="list-style-type: none"> <li>Provide residents a Taxpayer Receipt for the City's Adopted budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase awareness of the value of City services</li> </ul>	<ul style="list-style-type: none"> <li>Utilize the property tax estimator to demonstrate value per property tax investment</li> </ul>
<ul style="list-style-type: none"> <li>Build a simulation (SIMULATE) of the Adopted budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase resident awareness of the City adopted budget</li> </ul>	





**YEAR 2: INTEGRATE**

*Bring more chairs to the table*

**Objective:** Realign the budgeting process to integrate community engagement strategies.

**Internal Focus:** City Manager and Finance continue cultivating the value of engagement in the organization by including City Council and staff in the process.

**External Focus:** Online and in-person budget engagement with residents.

Strategies	Expected Outcomes	Considerations
<ul style="list-style-type: none"> <li>When developing the FY 26 budget calendar, schedule community and Council engagements</li> </ul>	<ul style="list-style-type: none"> <li>Institutionalize new budget engagement touchpoints.</li> <li>Increase discussion of service delivery budget allocations.</li> </ul>	<ul style="list-style-type: none"> <li>Set aside sufficient time to engage stakeholders, analyze and communicate findings</li> </ul>
<ul style="list-style-type: none"> <li>Engage Courtenay residents on community priorities with PRIORITIZE</li> </ul>	<ul style="list-style-type: none"> <li>Continue to practice of surveying the community on service prioritization</li> </ul>	<ul style="list-style-type: none"> <li>Hybrid data collection on responses: (1) online and/or (2) meeting mode</li> <li>Strategic planning sets the priorities for consideration</li> <li>Plan for how departments can gather these data year-round</li> </ul>
<ul style="list-style-type: none"> <li>Engage City Council on budget priorities with PRIORITIZE</li> </ul>	<ul style="list-style-type: none"> <li>Develop consensus on City priorities.</li> </ul>	
<ul style="list-style-type: none"> <li>Have staff provide options for service enhancements</li> </ul>	<ul style="list-style-type: none"> <li>Have data available on expected cost and perceived benefit for service level changes</li> </ul>	<ul style="list-style-type: none"> <li>Include in scenario questions in SIMULATE budgets</li> </ul>
<ul style="list-style-type: none"> <li>Engage Courtenay residents through a budget simulation (SIMULATE) of the City's 2025 Financial Plan or the 2026 proposed budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase community engagement in the budget process</li> </ul>	<ul style="list-style-type: none"> <li>Meeting mode engagements build empathy and a shared notion of public interest</li> <li>Utilize scenario questions to determine expected levels of service and value for services provided</li> </ul>
<ul style="list-style-type: none"> <li>Provide residents a TAXPAYER RECEIPT for the City's Adopted budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase awareness of the value of City services</li> </ul>	<ul style="list-style-type: none"> <li>Utilize the property tax estimator to demonstrate value per property tax investment</li> </ul>
<ul style="list-style-type: none"> <li>Build a simulation (SIMULATE) of the Adopted budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase resident awareness of the City adopted budget</li> </ul>	





**YEAR 3: CONSULT**

*If you want to go fast, go alone. If you want to go far, go together.*

**Objective:** Design the budget process to consult staff, City Council and the Community in developing the annual budget.

**Internal Focus:** City Manager and Budgeting and Reporting continue cultivating the value of engagement in the organization by including City Council and staff in the process.

**External Focus:** Online and in-person budget engagement with residents.

Strategies	Expected Outcomes	Considerations
<ul style="list-style-type: none"> <li>Engage Courtenay residents on community priorities with PRIORITIZE</li> </ul>	<ul style="list-style-type: none"> <li>Continue to practice of surveying the community on service prioritization</li> </ul>	<ul style="list-style-type: none"> <li>Hybrid data collection on responses: (1) online and (2) meeting mode</li> </ul>
<ul style="list-style-type: none"> <li>Engage City Council on budget priorities with PRIORITIZE</li> </ul>	<ul style="list-style-type: none"> <li>Develop consensus on City priorities</li> </ul>	
<ul style="list-style-type: none"> <li>Have staff provide options for service enhancements</li> </ul>	<ul style="list-style-type: none"> <li>Have data available on expected cost and perceived benefit for service level changes</li> </ul>	<ul style="list-style-type: none"> <li>Include in scenario questions in SIMULATE budgets</li> <li>Evaluate department measures for ROI</li> </ul>
<ul style="list-style-type: none"> <li>Engage Staff through a budget simulation (SIMULATE) on potential City investments prior to the Preliminary Budget</li> </ul>	<ul style="list-style-type: none"> <li>Cultivate organizational empathy</li> <li>Explore cross-departmental solutions (innovative vs. incremental budgeting)</li> <li>Increase budget awareness and internal consensus</li> </ul>	<ul style="list-style-type: none"> <li>Listening is a cornerstone of engagement. Cultivate this value in all decision-making systems.</li> <li>Address root and systemic issues and explore inter-agency collaborations</li> <li>Public engagement starts and ends with line staff</li> </ul>
<ul style="list-style-type: none"> <li>Engage Courtenay residents through a budget simulation (SIMULATE) of the City's 2026 Financial Plan or the 2027 proposed budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase community engagement in the budget process</li> </ul>	<ul style="list-style-type: none"> <li>Meeting mode engagements build empathy and a shared notion of public interest</li> <li>Utilize scenario questions to determine expected levels of service and value for services provided</li> </ul>
<ul style="list-style-type: none"> <li>Provide residents a TAXPAYER RECEIPT for the City's Adopted budget</li> </ul>	<ul style="list-style-type: none"> <li>Increase awareness of the value of City services</li> </ul>	<ul style="list-style-type: none"> <li>Utilize the property tax estimator to demonstrate value per property tax investment</li> </ul>
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