

**Practice Name:****Date Created:** 26-May-09**Author:****Last Updated:****Abstract:****GENERAL INFORMATION**

Name of Practice	Using Customer Information for Best Results: The City of Calgary Recreation and IT Data Warehouse and Business Intelligence Project (2004-2007)
Date	3-July-08
Name of Municipality	<a href="#">City of Calgary</a>
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**THE ISSUE****Abstract:**

What is the practice you developed or are developing (brief abstract)?

Please briefly describe the final practice developed. (e.g. if you developed a new Council agenda, list the agenda

items, or if a new communications plan was created, provide a summary of the plan's goals, objectives and highlights.)

**Need:**

Please describe (just a couple of sentences or bullet points) why you needed to create this practice (policy or process).

What issue made it necessary? (e.g. "We needed a comprehensive plan to deal with...", or "We needed an annual forecasting tool because...")

City of Calgary Recreation has developed a series of business intelligence tools and reports that enable staff and management to access information for decision making that is state of the art and not found elsewhere in Canada. Our goal was to develop a strategic system that provides a competitive advantage for recreation.

City of Calgary Recreation had access to huge amounts of customer transactional data but limited capacity to understand business trends. Managers and supervisors needed business tools that would enable them to see the high level performance in major lines of business, as well as be able to drill down to examine specific facilities and service offerings. This data warehouse/business intelligence (BI) project was developed to deliver this information in order to effectively manage and allocate limited resources in an environment of exceptional growth and demand for service.

## CREATING YOUR PRACTICE

**Research:**

How did you obtain information to help design your practice (including consultation with stakeholders, formal and informal research)?

Please include any research documentation you can share, or give us a source reference (e.g. Web site, literature, "We reviewed the bylaws from other municipalities in the area...").

The need for better information and methods of analyzing was evident, but the tools to create the reporting did not exist. Recreation and IT met over the course of several months to examine options and possible software and operational alternatives. Conversations with the existing software vendor confirmed that no solutions were currently available from them. However, other third party software was available that could assist in being able to utilize the data available in the Recreation business unit.

**Process:**

How did you go about designing your practice? For instance, did you create a team, hire a consultant, borrow something ready-made from another jurisdiction?

Describe briefly who did the design work and what process they followed.

A project team was established that included representation from the Recreation and IT business units. Within Recreation, key operational staff were selected who could articulate the business needs for good information.

## GETTING APPROVAL FOR YOUR PRACTICE

**Authority:**

Whose/what approval did you need to create and implement the practice?

**Reporting:**

How did you inform the decision-maker(s) about the practice and your need for their approval?

Please note the name of any documents provided to the decision-makers that you would be willing to share.

**Consultation:**

Did you consult with stakeholders as part of your approval process?

If so, how? If possible, attach a copy of templates, surveys or other documents you used as part of your consultation.

Funding was required and this was solicited through a pool of development funds available in IT. Each phase of the project required a separate application for funding. Analyst resources were secured from this funding.

Business cases were developed for all phases of the project that included timeframes, deliverables and budgets. Successive phases of the project built upon learnings from the previous phases.

Consultation with stakeholders occurred throughout the development process. Stakeholders identified business needs at the outset, draft reports were brought back during the development phases for testing and tweaking, and the final products were shared.

**IMPLEMENTING YOUR PRACTICE****Plan:**

Describe the process you went through to implement the practice. If you used an implementation plan, please note it here.

Each phase of the project had a developmental as well as implementation stage. The developmental stage involved a small number of Recreation and IT staff, while the implementation stage rolled out the solution for testing amongst staff.

**Policy:**

What changes to bylaws, regulations or procedures were needed to implement this practice and how did you deal with them?

None.

Please attach a copy of the change in bylaw, policy or procedure.

**When:**

When did your municipality begin to use the practice?  
Was it implemented all at once or in stages?

Phase 1 (Passes and Admissions)  
 Time (from approval to initial roll out)  
 Start Date: February 2004  
 End Date: November 2004  
 Cost (including Hardware, Software, Services, Labour): \$100,000

Phase 2 (Courses and Registrations)  
 Time (from approval to initial roll out)  
 Start Date: January 2005  
 End Date: October 2005  
 Cost (including Hardware, Software, Services, Labour): \$100,000

Phase 3 (Rentals, Bookings, and Facility Usage)  
 Time (from approval to initial roll out):  
 24 months (8 months of effort)  
 Start Date: November 2005  
 End Date: November 2007  
 Cost (including Hardware, Software, Services, Labour): \$120,000

**Who:**

Who was responsible for implementing the practice?

If someone else is responsible for ongoing management, who is it?

The Data Warehouse was delivered as a solution for business reporting, performance management and strategic alignment under the leadership of Barry Strangward, Manager of Business Services (this Division oversees the various business systems used in Recreation), on behalf of the Recreation business unit and included Erik Van den Eynden, Business Information Analyst and John Bowron, Class System Administrator.

**RESOURCES REQUIRED****Budget:**

How much did it cost you to design and implement your practice (i.e. We saved/spent \$XX per year)?

What are your ongoing operational and capital costs, if any?

See above for budget and timing. We estimate one year for financial payback. Overall, the project has resulted in significant cost avoidance. The Recreation business unit can now perform analysis and decision making that was not feasible before. In addition, The City of Calgary operates using the Triple Bottom Line process, which considers social, environmental, as well as financial benefits of a project. The Data Warehouse enables decision makers to improve recreational services with significant social and environmental benefits.

**Staff:**

What human resources did you need to design, implement

and manage your practice? (e.g. “It took X staff member (s) X months on this” or “This is part of normal staff duties.”)

Staff from the Recreation and IT business units worked collaboratively on this project during its life. Analyst time was the largest budget expense, and direction was provided by a team that included staff and management from both business units.

**Infrastructure:**

What “capital costs” (such as information technology, other equipment or building assets) did you need to design, implement, manage, and/or evaluate your practice?

The only capital costs encountered were for new server space for data storage.

**EVALUATING YOUR PRACTICE**

**Formal:**

If you did a formal evaluation (e.g. user satisfaction survey, analysis of annual expenditures or number of rate payers served) for your practice, please describe the evaluation tool and the process used.

While no formal evaluation tool was used, progress reports were made to the IT Committee, and future funding was based on achievement of goals from a previous phase.

Tell us who was involved.

**Informal:**

If you did an informal evaluation, describe what you did (such as discussing the practice with people in the office or on the street, or letters/comments received).

There are approximately 200 users of the various reporting tools. On a day to day basis, the reports are used by staff, while summary reports are used by management to evaluate business performance. Business targets are embedded within the reports which makes evaluation easier.

**Performance measures:**

Please list the performance measures for this practice (i.e. reduced number of complaints, money saved, or change in equipment life expectancy.)

Please list the process you used for measuring performance, (i.e. We do annual surveys on...) examples include:

- collecting data
- establishing a baseline
- applying the measures
- results
- follow up

### Business Impact

#### Time/Cost Savings

- Reports developed through this Business Intelligence (BI) initiative have saved significant time and resources. For example, the End of Session Program Summary (overall analysis report for our program line of business) took roughly 40 hours to develop. This is in comparison to the previous business process which would take approximately 1 year of full time staff time to produce the equivalent information. This time would be required every year, whereas the BI-based report takes less than 30 seconds to refresh for any given year requested. This one report has achieved a great return on the initial investment for the more than 75 program staff.

#### Unknown Information

- Previously, the Recreation business unit was truly only analyzing its business based on the financial reporting. This only showed one part of the situation, whereas the BI initiative has allowed us to put volume and financial information side by side for a thorough and complete picture. This analysis has allowed staff to make better informed decisions about marketing initiatives and service/product mix at each facility. Along with this information, we are now able to clearly recognize the different customer groups and trends between our Aquatic and Fitness facilities (12), and Leisure Centres (2), and even differences between each of the Leisure Centres themselves. This unprecedented information has allowed better alignment of the strengths and challenges faced by each Division and facility to meet the overall goals of the Recreation business unit.

#### Improved Decision Making

- There have been tremendous impacts on the business as the solution has helped Recreation integrate the information into the planning for the 2009-2011 business plan and budget cycle process. Users have also become more sophisticated in their reporting and analysis requirements, and have developed new ways of looking at the data. Currently, there are over 50 public reports with about 200 staff accessing these reports. Additionally,

**Changes:**

(a) Based on the evaluation (formal or informal), describe any changes you have made, or would like to make, to your practice as a result. (e.g. "After implementing this practice, we decided that it would be better if...")

-or-

(b) Has your practice met your expectations and if so, how?

The development of these tools and processes has probably exceeded expectations. The sophistication of some of the analysis is beyond what was originally hoped for. Calgary was asked to present at an international Recreation and Parks software conference in April of 2008 on the work done to date (Active Software Conference, Monterrey, California).

**LESSONS LEARNED / BENEFITS RECEIVED****Benefits:**

What are the benefits of this practice to your municipality? (eg. Preparation of Council agenda packages now requires less time, etc.)

In addition to time savings identified above, the biggest benefit that has been observed is that we have timely access to accurate and integrated performance of the Recreation business unit's major lines of business. See dashboards and reports that are appended for examples.

**Key Lessons:**

What key lessons have you/your municipality learned through the process of:

- designing;
- obtaining approval;
- implementing; and
- evaluating your practice?

One of the key lessons that was learned was the difficulty of representing some of the complexity of the recreation business in a simplified means. A second learning was the need to ensure consistent understanding of terminology and meaning. Finally, the sheer volume of transactions in the recreation business was made apparent by the need to reduce the level of detail expected from reports at points during the Facility Rentals phase of the project.

Include any problems, surprises, and unanticipated benefits. (e.g. "We realized that we needed to spend more time...")

**Advice to Municipal Peers:**

What advice would you give to another municipality that is considering adopting your practice? Is there anything you might have done differently?

The business unit was anxious to avoid having this project seen as a technology project, and for this reason every attempt was made to include operational staff and Managers in the development process. It was essential that up front communication occur to ensure that staff understood the potential benefits to be delivered. Also, by involving operational staff, the final product was more likely to meet their business needs.

**PRACTICE UPDATES****New Information:**

None.

There may be some new information to add since this practice was first posted. This is especially true if:

- a new process has been implemented in your municipality;
- there are new practice evaluation results; or
- there has been a change affecting organizational

direction. For example, explain how new economic conditions or a new vision/strategy affect the practice.

Please indicate those changes here. Don't forget to list any new documents that may be useful to your peers. Then go to "Other Information" to attach the new documents.

## OTHER INFORMATION

### Suggestions:

Please list relevant information sources that others might use or you would be willing to share (courses, Web sites, literature, experts).

The City of Calgary can provide the names of experts from the recreation software vendor that can attest to the leading edge nature of these reporting tools.

The following information complements the attachments provided. There was no other section where this information could be added:

See samples of Recreation dashboards and summary reports. Unfortunately for the reader, it is impossible to see and understand the full effects of the dashboards since they are interactive. Many of the reports respond to the movement of the mouse cursor (something that is impossible to replicate in a static attachment). The reader should understand that, for the dashboard example provided, a click of the mouse on one of the facilities listed on the left (15 facilities listed), will produce the statistical data for that facility. Hovering the mouse over the month and year will produce the values for that period. Clicking on one of the four buttons (admissions, pass scans, programs and bookings) will provide the data specific to that line of business. More info will provide additional background for the reader and clicking on Infoview will take the readers back to the Infoview software. Different dashboards have been created for different users.

### Documents & Attachments:

Please attach (using the "Browse" button below) any documents you would be willing to share with others interested in your practice (e.g. a bylaw, a policy, approval documents, templates).

Dashboard Pics

Report Pics

Time and Cost Saving Examples Documented

\* Note: If you do not have an electronic copy of a document, please send Municipal Excellence a paper copy for scanning to:

Alberta Municipal Affairs  
Municipal Excellence Network  
17th Floor, Commerce Place  
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**Nominations:**

No

Do you have any suggestions of other individuals or municipalities with municipal practices that we should add to the Municipal Excellence network? Please list their practice, municipality, and contact information.

Or, e-mail [menet@gov.ab.ca](mailto:menet@gov.ab.ca) and let us know about a municipal colleague that has a really good way of doing things.

**COMMENTS**

Have we missed something; anything you'd like to add to the areas we have touched on, or an area we have not mentioned? This submission is made in the INNOVATION category.