

File Information and Saving Instructions:



This file is read only

Macros This file does not contain macros.

Save info Save your file in the appropriate strategy folder on the s:drive:

[S:\2006 Budget\Forms\Submissions\Major Capital](#)

Form Instructions:

There are two worksheets to complete:

[Budget Component](#)
[W2020Assessment](#)

****Tip** - Each question in the budget component is [hyperlinked](#) to its instructions for easy navigating.

1. Budget Component (2 pages)

General Information: The Budget Component is two pages on one worksheet.
-Page one identifies your project and describes your project in detail.
-Page two is where you input your capital budget information (including previous Five-Year Plan's budget, if applicable), ongoing operating costs (if any) and provide funding details.



Important!

Grey areas or cells in the Budget Component are either information or auto-calculating, containing formulas.

Don't overwrite these cells by typing into them.

****Tip**

Major capital projects are being organized by *Whistler 2020 Strategies*. The *Whistler 2020* section of the Budget Manual can assist you in determining which strategy best supports your project.

2. Whistler 2020 Strategic Assessment (1 page)

General Information: The Whistler 2020 Strategic Assessment is one page on one worksheet.
The purpose behind the strategic assessment is to provide you with tools to determine if, and how, your project is moving toward Whistler 2020 Vision.

****Tip**

In section 1, there are buttons which link to each strategy's "Description of Success" (DOS). Use these links to determine which statements best support the implementation of your project.

In section 2, there are buttons which link to each Sustainability example. Use these links to help you decide how your project is moving toward sustainability objectives.

Ted Battiston from the Whistler 2020 Team is your contact if you have questions about the Whistler 2020 Assessment section of the form (ext. 8205)

Question Specific Help

[Question 1a & 1b:](#) We'll use this information to set up your project in Agresso PCB. Type in your response(s) in the space provided.

[Question 2:](#) We'll use your description from Question 2 to publish your project in the Five-Year Financial Plan. We've provided a sample for your reference. We would like you to write your description using between 40 - 100 words. [Please consider the audience of this information, which is primarily Council and the public and try not to use terms unfamiliar to these groups \(particularly: jargon, acronyms and technical language\).](#)

In your write up, we are specifically looking for:

- General purpose of project
- Work to be completed in 2006
- Overall project budget
- Project budget for 2006
- Ongoing operating costs (if applicable)

[Question 3:](#) Use this area to supply (type) additional information, such as budget costs extending beyond five years. You may also provide additional information separately. [You are confined to the space provided for your details or you'll deconstruct the layout of the form.](#)

[Question 4:](#) Indicate (type) budget amounts approved in Five-Year Financial Plan 2005 - 2009. This helps us to identify if your project is new or being carried forward from the previous year.

[Question 5:](#) Indicate the capital costs for your project over years 2006 - 2010. Choose your expenses using the drop-down list, then type the budget amounts in the cells beside it.

The totals in the "total" row will autocalculate (grey areas are either information or autocalculating).

[Question 6:](#) Indicate (select) which item from the drop-down list is the closest in describing your capital budget cost estimates.

[Question 7:](#) Indicate the ongoing operating costs for your project over years 2006 - 2010. Choose your expenses using the drop-down list, then type in the Agresso Program it applies to under the "Program" column, then add the budget in the cells in the "Annual Amount" column.

There are two blank rows in the "Account Expense" column for you to type in any Agresso accounts that aren't available in the drop-down list.

The totals in the "Total" row will autocalculate (grey areas are either information or autocalculating).

[Question 8:](#) Choose whether you'll be funding new operating costs by either: your existing net position, or by requesting a net position supplemental increase (which requires submitting a supplemental request form. Click on the appropriate tick box to select.

[Question 9a:](#) Choose which funding source(s) from the drop-down list will be used to pay for your project, then type the percentage of the budget each fund will cover in the "Percent" column. The total in the Total row should equal 100%.

[Question 9b:](#) Provide the type external funding source(s) (if any) used to pay for your project in the "Source" column, then type the percentage of the budget covered by this source in the "Percent" column.

Project Name: <Insert project name>

Budget: \$

WHISTLER2020 Strategic Question Assessment

1. Does the project move Whistler toward our shared Descriptions of Success (DOS)?

Indicate which Description of Success statements **most strongly support** the implementation of your proposed project:

Economic 1st Statement

Whistler has a diversified and year-round tourism economy

Built Environment 3rd Statement

Continuous encroachment on nature is avoided

Finance 2nd Statement

The resort community effectively and efficiently balances its costs and expenditures

Indicate which Description of Success statements **potentially conflict** with the implementation of your proposed project:

none 1st Statement

Economic 1st Statement

Whistler has a diversified and year-round tourism economy

none 1st Statement

Arts, Culture & Heritage	<input type="checkbox"/> DOS	Natural Areas	<input type="checkbox"/> DOS
Built Environment	<input type="checkbox"/> DOS	Partnership	<input type="checkbox"/> DOS
Economic	<input type="checkbox"/> DOS	Recreation & Leisure	<input type="checkbox"/> DOS
Energy	<input type="checkbox"/> DOS	Resident Affordability	<input type="checkbox"/> DOS
Finance	<input type="checkbox"/> DOS	Resident Housing	<input type="checkbox"/> DOS
Health & Social	<input type="checkbox"/> DOS	Transportation	<input type="checkbox"/> DOS
Learning	<input type="checkbox"/> DOS	Visitor Experience	<input type="checkbox"/> DOS
Materials & Solid Waste	<input type="checkbox"/> DOS	Water	<input type="checkbox"/> DOS

Click associated buttons to review Strategy Description of Success

Is there a potential **mitigation** for these apparent conflicts? YES NO

type here

2. Does the project move Whistler toward our shared Sustainability Objectives?

- To reduce, and eventually eliminate Whistler's contribution to a systematic increase in the **build up of substances taken from the earth's crust.** toward quickly
- To reduce, and eventually eliminate Whistler's contribution to a systematic increase in the **build up of substances produced by society.** toward slowly
- To reduce, and eventually eliminate Whistler's contribution to a systematic **degradation of natural systems by physical means.**
- To reduce, and eventually eliminate Whistler's contribution to systematically increasing **barriers that undermine people's capacity** to meet their needs.

3. Is the action a good financial investment?

Does this proposed project **reduce long-term operating expenses**? YES NO

✓ If so, what is the approximate associated **pay-back period** for this investment?

Specifically, what is the **service(s)** that this project provides?

Have other **alternative means** of providing this service been considered and assessed? YES NO

Have **non-market costs** been considered in your financial assessment? YES NO

Given the potential benefits of this project and your assessment of its long-term costs, **is this project a good long term investment?** YES NO



4. Does the project present a flexible platform, or stepping stone, for further movement toward WHISTLER2020 in the future?

To demonstrate this proposed project's long-term thinking and inherent flexibility, **please indicate two subsequent steps that would continue to move this project toward WHISTLER2020 in the future.**

First step afterwards...

type here...

Second step afterwards...

type here...

- ✓ Local and regional heritage, culture and community spirit are shared locally and beyond Whistler
- ✓ A range of arts, cultural and heritage opportunities are meaningful, accessible and financially affordable
- ✓ Arts, cultural and heritage opportunities attract visitors and contribute to the experience and local economy
- ✓ Whistler is a magnet for international artists who come here to perform, create, teach and be inspired
- ✓ Ecologically harmful substances and practices are replaced with more sustainable alternatives



 *Description Of Success* **Built Environment**

In 2020, Whistler's built environment is vibrant, reflects the community's character, contributes to individual health and well being, and is moving toward its identified sustainability objectives. By this time:

- ✓ Limits to growth are understood and respected
- ✓ The built environment anticipates and accommodates the needs of the resident community while also satisfying the expectations of guests
- ✓ Continuous encroachment on nature is avoided
- ✓ Residents live, work and play in relatively compact, mixed-use neighborhoods that reflect Whistler's character and are close to appropriate green space, transit, trails, amenities and services
- ✓ Community spaces encourage personal interaction and shared activities
- ✓ Building design, construction and operation is characterized by efficiency, durability and flexibility for changing and long-term uses
- ✓ The new and renovated built environment has transitioned towards sustainable management of energy and materials
- ✓ Landscaped areas consist of native plant species that eliminate the need for watering and chemical use
- ✓ Smart growth policies and initiatives contribute to the financial health of the community
- ✓ Whistler's green building sector contributes to the local economy
- ✓ To maintain vibrancy, Whistler Village is the core of the resort community
- ✓ Streamlined policies, regulations and programs have helped to efficiently and effectively achieve green development
- ✓ Building ownership is structured to continually encourage transition toward a flexible and improved built environment over time
- ✓ Whistler is globally recognized as a centre of excellence in sustainable community development



 *Description Of Success* **Economic**

File Information and Saving Instructions:



This file is read only

Macros This file does not contain macros.

Save info Save your file in the appropriate strategy folder on the s:drive:

[S:\2006 Budget\Forms\Submissions\Major Capital](#)

Form Instructions:

There are two worksheets to complete:

[Budget Component](#)
[W2020Assessment](#)

****Tip** - Each question in the budget component is [hyperlinked](#) to its instructions for easy navigating.

1. Budget Component (2 pages)

General Information: The Budget Component is two pages on one worksheet.
-Page one identifies your project and describes your project in detail.
-Page two is where you input your capital budget information (including previous Five-Year Plan's budget, if applicable), ongoing operating costs (if any) and provide funding details.



Important!

Grey areas or cells in the Budget Component are either information or auto-calculating, containing formulas.

Don't overwrite these cells by typing into them.

****Tip**

Major capital projects are being organized by *Whistler 2020 Strategies*. The *Whistler 2020* section of the Budget Manual can assist you in determining which strategy best supports your project.

2. Whistler 2020 Strategic Assessment (1 page)

General Information: The Whistler 2020 Strategic Assessment is one page on one worksheet.
The purpose behind the strategic assessment is to provide you with tools to determine if, and how, your project is moving toward Whistler 2020 Vision.

****Tip**

In section 1, there are buttons which link to each strategy's "Description of Success" (DOS). Use these links to determine which statements best support the implementation of your project.

In section 2, there are buttons which link to each Sustainability example. Use these links to help you decide how your project is moving toward sustainability objectives.

Ted Battiston from the Whistler 2020 Team is your contact if you have questions about the Whistler 2020 Assessment section of the form (ext. 8205)

Question Specific Help

[Question 1a & 1b:](#) We'll use this information to set up your project in Agresso PCB. Type in your response(s) in the space provided.

[Question 2:](#) We'll use your description from Question 2 to publish your project in the Five-Year Financial Plan. We've provided a sample for your reference. We would like you to write your description using between 40 - 100 words. [Please consider the audience of this information, which is primarily Council and the public and try not to use terms unfamiliar to these groups \(particularly: jargon, acronyms and technical language\).](#)

In your write up, we are specifically looking for:

- General purpose of project
- Work to be completed in 2006
- Overall project budget
- Project budget for 2006
- Ongoing operating costs (if applicable)

[Question 3:](#) Use this area to supply (type) additional information, such as budget costs extending beyond five years. You may also provide additional information separately. [You are confined to the space provided for your details or you'll deconstruct the layout of the form.](#)

[Question 4:](#) Indicate (type) budget amounts approved in Five-Year Financial Plan 2005 - 2009. This helps us to identify if your project is new or being carried forward from the previous year.

[Question 5:](#) Indicate the capital costs for your project over years 2006 - 2010. Choose your expenses using the drop-down list, then type the budget amounts in the cells beside it.

The totals in the "total" row will autocalculate (grey areas are either information or autocalculating).

[Question 6:](#) Indicate (select) which item from the drop-down list is the closest in describing your capital budget cost estimates.

[Question 7:](#) Indicate the ongoing operating costs for your project over years 2006 - 2010. Choose your expenses using the drop-down list, then type in the Agresso Program it applies to under the "Program" column, then add the budget in the cells in the "Annual Amount" column.

There are two blank rows in the "Account Expense" column for you to type in any Agresso accounts that aren't available in the drop-down list.

The totals in the "Total" row will autocalculate (grey areas are either information or autocalculating).

[Question 8:](#) Choose whether you'll be funding new operating costs by either: your existing net position, or by requesting a net position supplemental increase (which requires submitting a supplemental request form. Click on the appropriate tick box to select.

[Question 9a:](#) Choose which funding source(s) from the drop-down list will be used to pay for your project, then type the percentage of the budget each fund will cover in the "Percent" column. The total in the Total row should equal 100%.

[Question 9b:](#) Provide the type external funding source(s) (if any) used to pay for your project in the "Source" column, then type the percentage of the budget covered by this source in the "Percent" column.