# Major City Goal Work Programs

## Staff Briefing

*January 29, 2013*

The HSM Team

# Looking Back

Challenges identified by staff at the project "kick-off" meeting on September 24, 2012

# Challenges

- **Things we've achieved**
  - Establishing two-way communication
  - Ensuring that (few) vocal minority does not dominate the process
  - Establishing trust that we are listening
  - Getting valuable input

- **Still to do (mostly Council's job)**
  - Getting community support; recognize constraints; set proper priorities
  - Majority buy-in

# Challenges: Still to do …

- that work programs can impact
  - Overcoming fiscal constraints
  - Matching what we want with what we can afford
  - Recognizing that trade-offs are necessary
  - Maintaining level of service w/minimal resources
  - Gaining widespread buy-in to fiscal reality
  - Making it workable (real)
  - Gaining employee understanding and buy-in
  - Lack of resources for high profile projects

# Looking Forward

## Preparing Major City Goal Work Programs

# Key Tasks Ahead

- Council Study Session          1-29-13
  - What's Already on the City's Plate?
  - Fiscal Outlook
  - Results of Community Outreach
  - Review of Upcoming Council Workshop
- Council Goal-Setting Workshop      2-9-13
- **Work Programs/Draft Strategic Plan**    **3-26-13**
- Strategic Plan Adoption          4-16-13
- Preliminary Budget          May 2013

# Major City Goal Work Programs

- **Purpose**
  - Ensure agreement on what the goals set by the Council on February 9 mean in terms of
    - Workscope
    - Time frame
    - Resources (including possible trade-offs)
  - Measure progress

# ❶ The Council said they wanted a swing ...

**How the City Engineer saw it**

**Community Services Directors' take**

**Finance Director's hope**

**All the Council wanted**

# ❷ Measuring Progress

- Work programs help measure goal progress
  - *But only if work scope and action steps are clearly defined*

- Action and progress must be tracked, internally discussed and publicly reported
  - *Periodic internal meetings to review progress*
  - *Ongoing reporting on status in public*
  - *If progress is lagging, explain why and reset the schedule (managing expectations throughout)*

# Sample "Report Card"



Report Card: 2007-09 Major City Goals

Percent Complete as of February 1, 2009 Per Plan Tasks
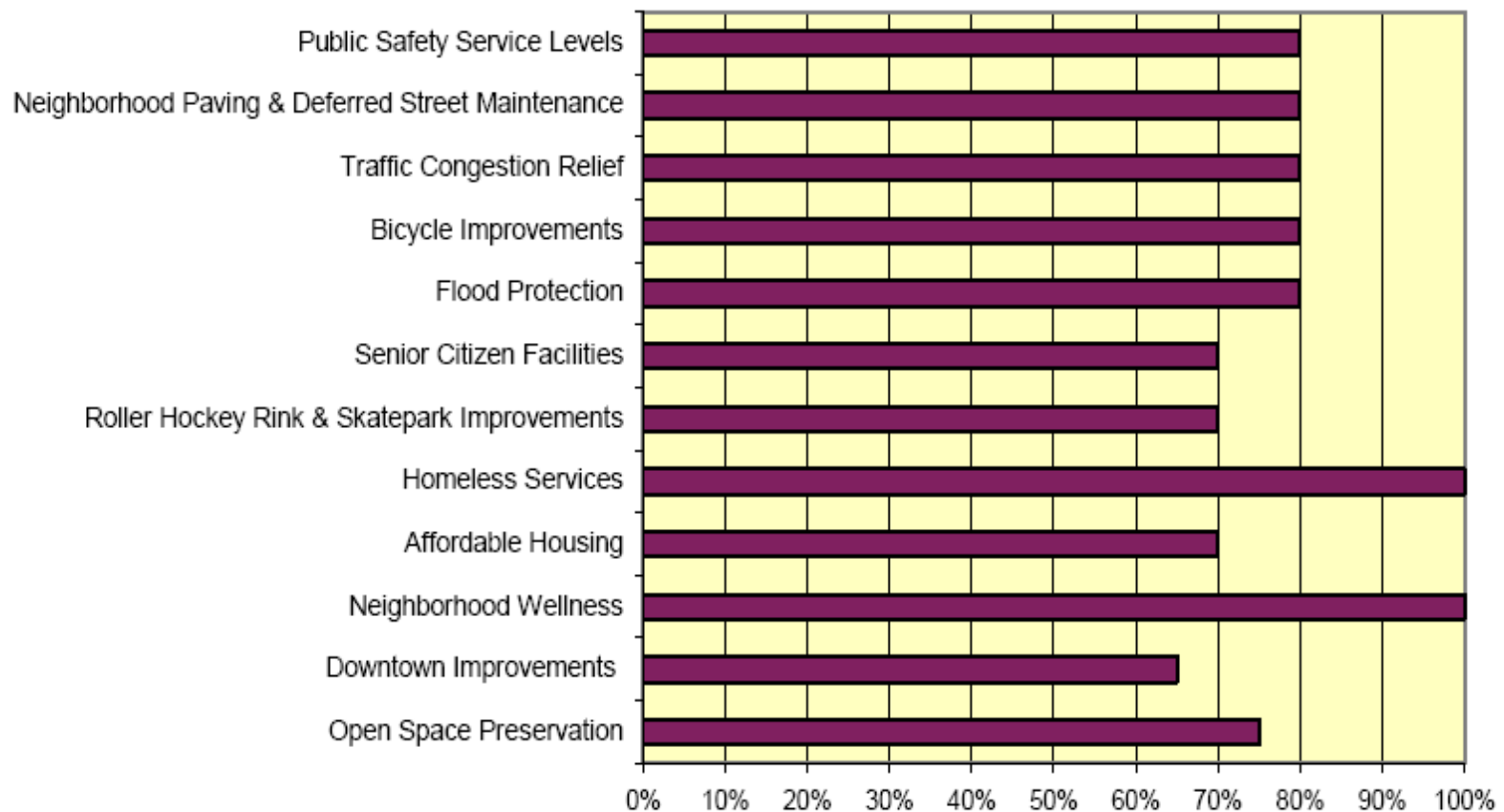
# Likely Goal-Setting Result: 3 Priority Tiers



Major City Goals

Other important objectives

Address as resources permit

# Major City Goals

**❶ Major City Goals**

- Most important, highest priority goals for City to achieve over next 5 years

- **Detailed "Work Programs" developed for review on March 26**

- Major goal to be included in City Manager's Preliminary Budget (unless good explanation for why not)

# Other Tiers

**❷ Other Important Objectives**

Important for City to accomplish and resources included in 2013-15 Budget if at all possible

**❸ Address as Resources Permit**

While desirable to achieve this goal, doing so is subject to current resource availability

# Work Programs

- Title
- Objective
- Discussion
  - Workscope summary
  - Existing situation
  - Work completed
  - Constraints/limitations
  - Stakeholders
  - Key assumptions
- Action Plan
- Responsible Department
- Resources
- Outcome

**MAJOR CITY GOAL WORK PROGRAM**

GOAL TITLE

**OBJECTIVE**

Action statement adopted by the Council (some modest word-smithing okay for clarity and brevity).

**DISCUSSION**

Workscope Summary
Existing Situation
Work Completed
Constraints/Limitations
Stakeholders
Key Assumptions

**ACTION PLAN**

| Task | Date |
|------|------|
| 1. | |
| 2. | |
| 3. | |

**RESPONSIBLE DEPARTMENT**

Who is the lead department in accomplishing the work program?

**FINANCIAL AND STAFF RESOURCES REQUIRED TO ACHIEVE THE GOAL**

| 2013-16 Cost Summary | Operating Budget | | Capital Improvement Program | |
|---|---|---|---|---|
| | 2013-14 | 2014-15 | 2013-14 | 2014-15 |
| Cost Item | | | | |
| Cost Item | | | | |
| Cost Item | | | | |
| Total | $0 | $0 | $0 | $0 |

| 2013-16 Funding Source | Operating Budget | | Capital Improvement Program | |
|---|---|---|---|---|
| | 2013-14 | 2014-15 | 2013-14 | 2014-15 |
| Funding Source | | | | |
| Funding Source | | | | |
| Funding Source | | | | |
| Total | $0 | $0 | $0 | $0 |

Discuss "out-year" resource requirements

**OUTCOME—FINAL WORK PRODUCT**

What will we get if we achieve the goal, and why is this important?

# Some Tips
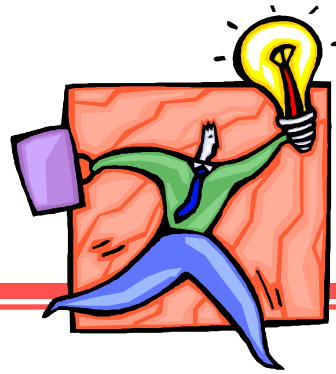
- **Title and Objective.** Some word-smithing for clarity/brevity is okay, but …

- **Stakeholders.** Who's gonna like this? Who's gonna hate it? Build this into Action Plan

- **Constraints and Limitations**. Be real

- **Action Plan.** Be real (not hopeful: see *constraints* above)
  - Don't create schedules that are unlikely to be met

- **Required Resources.** Be real

# On Being Real

- Staff defines the "breadbox."
  - What it is.
  - How big it is.
  - When it's supposed to happen.
- Staff defines the resource needs.
  - Take credit for things you are already doing, where funding has been allocated in the past and is likely to continue
  - Liberally use as an intro: "Continue to …"

# Being Real: The "Action Plan"

- How long will this _really_ take?
  - Other governmental agencies?
  - Environmental issues?
  - Public review process?  Stakeholders?
  - Internal review?
  - <u>When are you really going to get started?
    What else is on your plate?</u>
  - Only show tasks thru June 30, 2015
    - _Address out-years in narrative_

# Being Real: The "Action Plan"

- What's likely to be a tough hurdle? (identify it under "constraints and limitations")
  - *Predictable, preventable*
- If there are "go/no-go" stages, identify them (getting to an identified possible "no" is success)
- Why plan for failure?
  - *Not achieving the tasks as presented is either failing to plan adequately or failing to execute the plan*

# Framing the Task for Success

- Four ways of stating similar objectives relating to a revenue ballot measure:
  - Implement added revenue sources via a revenue ballot measure
  - Hold a revenue ballot measure
    - *Consider placing revenue measure on ballot*
  - Prepare for a revenue ballot measure
  - Evaluate the feasibility of a revenue ballot measure

# Being Real: Resources

- Do you need added resources to accomplish the action plan?
  - *If not, what's the consequence of your spending time or money on this instead of what you'd otherwise be doing?*
- If yes, how does this fit into the City's fiscal situation?
  - *This is a key City process issue: kind of a pre-preliminary budget*
- Are there potential resource trade-offs that can help support the goal?

# Embedded Excel Worksheets

| 2013-15 Cost Summary | Operating Budget | | Capital Improvement Program | |
|---|---|---|---|---|
| | 2013-14 | 2014-15 | 2013-14 | 2014-15 |
| Cost Item | | | | |
| Cost Item | | | | |
| Cost Item | | | | |
| **Total** | S0 | S0 | S0 | S0 |
| **2013-15 Funding Source** | Operating Budget | | Capital Improvement Program | |
| | 2013-14 | 2014-15 | 2013-14 | 2014-15 |
| Funding Source | | | | |
| Funding Source | | | | |
| Funding Source | | | | |
| **Total** | S0 | S0 | S0 | S0 |

**1st two years only;
address out-years in narrative**

# Why getting this right is so important

- Council goals/strategic plan will drive the budget process

- Limited resources

- Have to make major City goal work program decisions (March 2013) before completing preparation of the Preliminary Budget Financial Plan (May 2013)

# Not just work programs …

- While important, strategic plan is more than just work programs
  - Organization and Content
    - Purpose
    - Process
      - Community outreach
      - Council goal-setting
    - Fiscal Outlook
    - What's Already on the City's Plate?)
    - Mission Statement, Values/Vision?
    - 2009 Quality of Life Survey
    - Work Programs

# Our Suggested Approach

- Strategic plan outline/"swiss cheese" draft                2-5
- "Usual suspects" briefing                                   2-13
  - Bring likely preparers together
  - Identify lead departments & other team members
  - Finalize due dates/process
  - Ensure understanding of "who, what, why, when where, how"
- City Manager/principals briefing                            2-28
  - Brief City Manager on conceptual approaches
- Departments submit draft work programs                      3-11
- Draft strategic plan review                                 3-18
- Finalize strategic plan (work programs?)                    3-22

# What's it mean to be a lead department?

- You're "it" in making sure the work program is fully coordinated and completed on time.

  - This is especially important for multi-departmental ones

  - This doesn't necessarily mean you have the full preparation responsibility – others may have lead responsibility for drafting part of the work program – just that you're accountable (it's a navigating vs rowing thing)

# Practice Tip
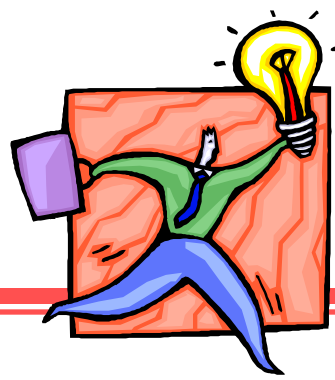
- Bill Daniel's, Management Guru, belief about meetings …
  - Start thinking about internal strategies for getting this done now …

# Questions?

# Community Outreach Results
## The Very Short Story

- **Top Seven Priorities**
  - Public Safety (especially police protection)
  - Economic Development
  - Gold Line Development and Connectivity
  - Youth Services
  - Infrastructure Maintenance (especially street paving)
  - Environmental Protection/Open Space
  - Parks & Recreation

# Community Outreach Results
## The Very Short Story

■ Other Areas of Significant Community Interest
- Balanced Budget/Fiscal Responsibility
- Increased Use of Citizens/Volunteerism
- Old Town Vitality
- Code Enforcement/Community Appearance
- Traffic Safety/Congestion
- Historic Preservation
- Foothill Boulevard Upgrades
- Friday Night Family Festival

# Community Outreach Results
## The Very Short Story

- **Other Items of Note**
  - Animal control
  - Trees
  - Residential parking
  - Library services
  - Tax/fee reductions
  - Calvary Chapel