Major City Goal Work Programs

Staff Briefing
January 29, 2013
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 with 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
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
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

- Public Safety Service Levels
- Neighborhood Paving & Deferred Street Maintenance
- Traffic Congestion Relief
- Bicycle Improvements
- Flood Protection
- Senior Citizen Facilities
- Roller Hockey Rink & Skatepark Improvements
- Homeless Services
- Affordable Housing
- Neighborhood Wellness
- Downtown Improvements
- Open Space Preservation
Likely Goal–Setting Result: 3 Priority Tiers

- Major City Goals
- Other important objectives
- Address as resources permit
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

2 Other Important Objectives

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

3 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**

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<th>Task</th>
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**RESPONSIBLE DEPARTMENT**

Who is the lead department in accomplishing the work program?

**FINANCIAL AND STAFF RESOURCESREQUIRED TO ACHIEVE THE GOAL**

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<thead>
<tr>
<th>2013-16 Cost Summary</th>
<th>Operating Budget</th>
<th>Capital Improvement Program</th>
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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?
  - *When are you really going to get started?*
    *What else is on your plate?*
  - 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

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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)
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