



LELA 301: Strategic Planning: Linking Strategies to Results

Julie Brenman, Adjunct Instructor
September 17, 2021



UNC
SCHOOL OF GOVERNMENT



Local Government
**BOARD
BUILDERS**

Strategic Planning for Elected Officials: Setting Priorities

Lydian Altman
Margaret Henderson
Vaughn Mamlin Upshaw



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Objectives

- Learn the principles and processes of strategic planning.
- Learn how to use your local government budget as a planning tool to execute your vision over a multi-year period.
- Explore leadership behaviors that are important elements of success.



*"Cheshire Puss,...Would you tell me, please,
which way I ought to go from here?"*

*"That depends a good deal on where you want
to get to," said the Cat.*

"I don't much care where--" said Alice.

*"Then it doesn't matter which way you go," said
the Cat.*

*"--so long as I get SOMEWHERE," Alice added
as an explanation.*



- Alice in Wonderland by Lewis Carroll

Agenda

1. Introductions
2. Strategic Planning 101
3. The Strategic Public Leadership Cycle
 - Envision-Enact-Evaluate
4. Linking Strategies to Results
 - Implementation and Accountability Tools
5. Leadership Behaviors
 - Sticking to the Plan and Keeping it Relevant



01

INTRODUCTIONS



Introductions

- Name
- Role/position you hold
- Community you are from
- Favorite activity in your community



Poll 1A

My level of experience with strategic planning
(whether as an elected official or elsewhere)

- I am a strategic planning expert
- I have some experience with strategic planning, but want to up my game
- I am familiar with strategic planning, but have not personally worked with one
- Strategic planning is new to me



Poll 1B

My community has an adopted strategic plan

- My community sets annual goals
- My community does not have a strategic plan or set annual goals



02

STRATEGIC
PLANNING 101



WHAT IS STRATEGIC PLANNING?

Strategic planning is an organizational management activity that is used to...

- Set priorities
- Focus energy and resources
- Strengthen operations
- Ensure that employees and other stakeholders are working toward common goals
- Establish agreement around intended outcomes/results
- Assess and adjust the organization's direction in response to a changing environment

WHAT IS A STRATEGIC PLAN?

A strategic plan is a document used to communicate with the organization the...

- Organization goals
- Actions needed to achieve those goals
- All other critical elements developed during the planning exercise

Why Plan?

Strategic Planning describes a process through which people first agree on a desired future and then organize their resources and efforts toward meeting those long-term goals



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This all sounds great, but how will we use the plan?

- ☐ To inform decision-making related to capital investments and operational initiatives.
- ☐ To inform development of the annual budget and Capital Improvement Plan
- ☐ To align staff and board around the Community's goals



Poll 2

As an elected official, I spend more of my time addressing

- Pressing or short-term problems
- Setting the vision for my community

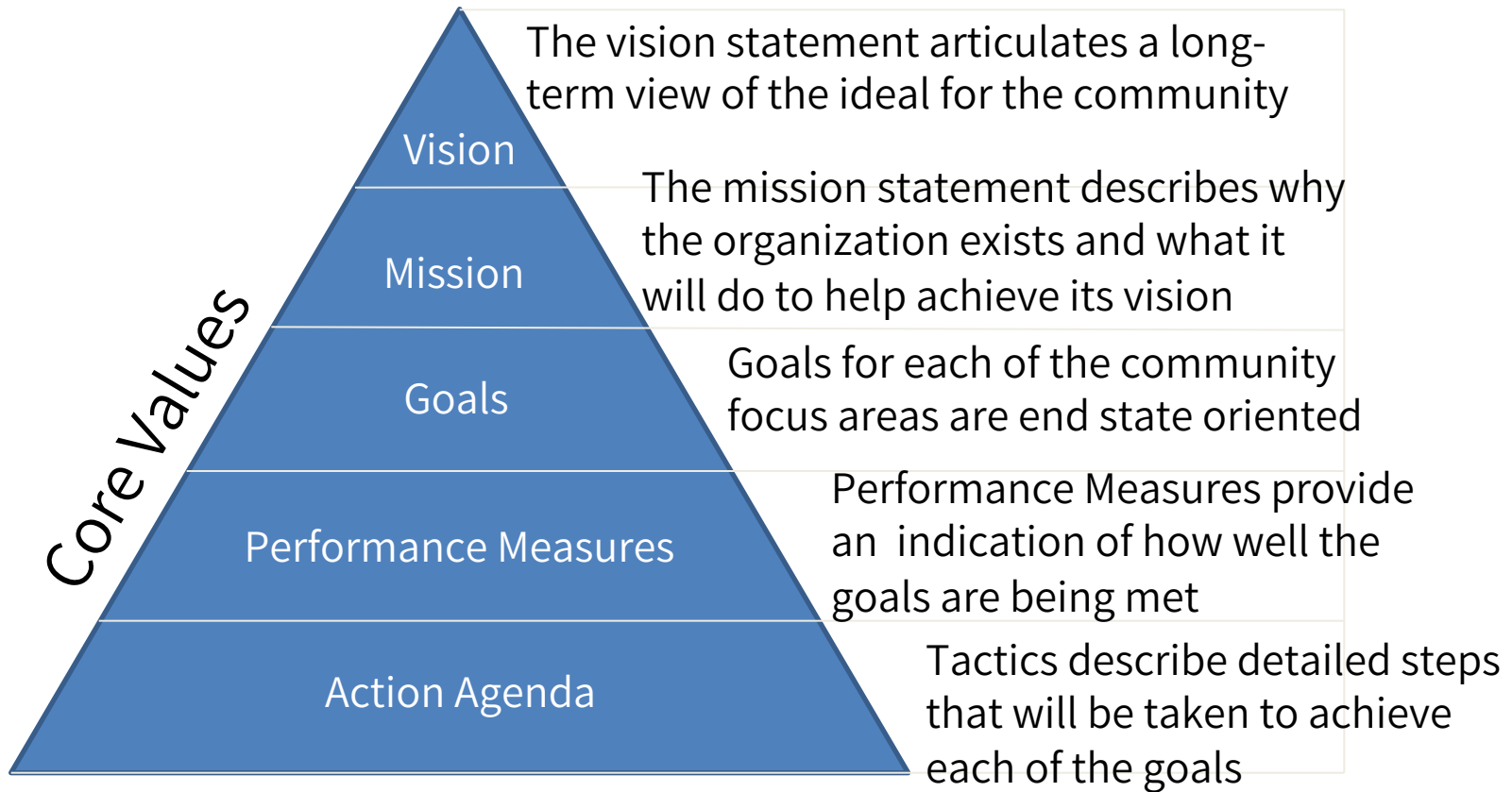


Benefits of Strategic Planning

- Plans Provide a Path to Success
- Plans Save Time
- Plans Anchor Priorities
- Plans Reduce Conflict
- Plans Save Money
- Plans Increase Efficiency
- Plans Offer Stability



STRATEGIC PLAN ELEMENTS



PLANNING IS TIED TO RESULTS

Planning should be seen as the first step of an organization's broader management framework



Planning sets the stage for what follows:

- ✓ Budgeting
- ✓ Other resource allocation
- ✓ Delivery of services
- ✓ Measurement
- ✓ Evaluation

Different types of planning

Community Visioning

- Broader than 1 organization
- Envisions the future of an entire community

Comprehensive Plan

- Focuses primarily on Land Use
- Usually very long term (20-30 years)

Strategic Plan

- Focuses on one organization
- Usually mid-long-term (5-10 years)

Business Plan

- Focuses on one organization or sub-unit
- More focused on implementation
- Usually shorter term (3-5 years)



STRATEGIC PLANNING

**Sets the ‘big’
organizational
direction**

**Elected
officials play a
role**

**Should
provide focus,
not too macro
or micro**

**Is not just an
exercise, need
to keep alive**

**Guides the
staff’s workplan
and budget
development
process**



BUSINESS PLANNING

Moves from the
“big” vision to
the plan for
execution

Must include
measures to
monitor
process

Should identify
resources to
achieve plan

Capital Improvement
Plan, Facilities
Maintenance
Program, Economic
Development Plan,
or Departmental
plans are examples
of business planning



Activity 1: Why Plan

- In breakout rooms, share your top motivations for bringing strategic planning to your community.
- Use the collaborative “Google Doc” to take notes



Coffee break...

05:00

We will reconvene shortly

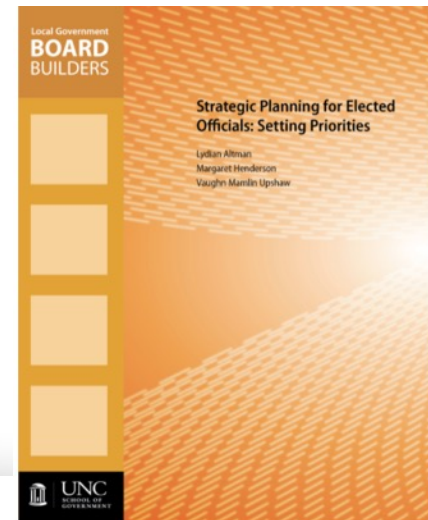
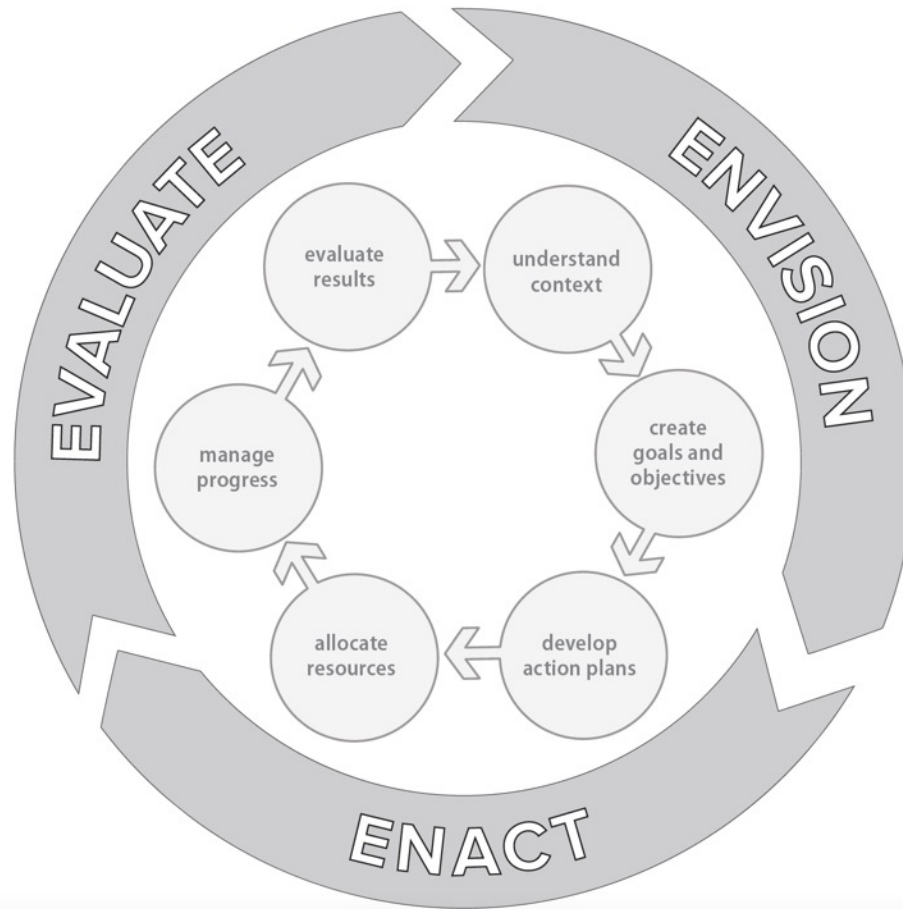
Participants are encouraged to

- Turn your camera/mic off
- Step away from the computer
- Stretch
- Get some fresh air

03 STRATEGIC PUBLIC LEADERSHIP MODEL

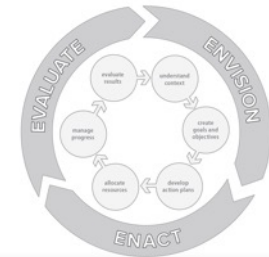


Strategic Public Leadership Cycle



“Nobody succeeds beyond his or her wildest expectations unless he or she begins with some wild expectations.”
-Ralph Charell





ENVISION

Key Process

Activities

Products

Understand context

- Imagining the future
- How we work
- Agree on important words
- Review history and trends
- Organizational readiness

- Vision statement
- Mission and values
- Glossary
- Impact time line
- SOAR

Create goals and objectives

- Lumping and splitting
- Goal setting

- Labeled “buckets”
- Strategic goals

Understand the context



"We are a national security and law enforcement agency that uses, collects, and shares intelligence in everything we do."

- Director Comey

Vision

Ahead of the threat through leadership, agility, and integration

Mission

The mission of the FBI is to protect the American People and uphold the Constitution of the United States

Mission Priorities

1. Protect the US from terrorist attack
2. Protect the US against foreign intelligence operations and espionage
3. Protect the US against cyber-based attacks and high-technology crimes
4. Combat public corruption at all levels
5. Protect civil rights
6. Combat transnational/national criminal organizations and enterprises
7. Combat major white-collar crime
8. Combat significant violent crime

Strategic Objectives



Capability

- Leadership
- Intelligence
- Cyber
- Agility
- Partnerships



Technology

- Information Technology
- Innovation



Talent

- Accountability & Transparency
- Recruitment & Hiring
- Workforce Development



Stewardship

- Stewardship of Resources

Core Values

Respect



Fairness



Compassion



Accountability



Integrity

Leadership



Rigorous Obedience to the Constitution



Diversity

Our Vision



An attractive, culturally diverse, and inclusive city that is safe, prosperous, innovative, and unified.

The City of Fayetteville FY 2021 Strategic Operating Plan (SOP)

TFA= Council Policy Item, New Program Initiative or CIP Project, Program Improvement Effort.

OPS= Current Operation Performance Reporting

FY 2026 Goals	Obj. #	Strategic Objective	TFA/ OPS #	FY 2021 SOP Items	Category	Vote
Goal 4: Desirable Place to Live, Work and Recreate.	4.1	Maintain public transportation investments with high quality transit and airport services	OPS 4.1.1	Airport Terminal Projects	Current Operations Performance	N/A
			OPS 4.1.2	Cashless Transit fare collection	Current Operations Performance	
	4.2	Enhance diverse recreation, leisure and cultural opportunities	TFA 4.2.1	Investigate dog parks as a part of the overall Parks and Recreation Master Plan	Council Policy Item	1
			OPS 4.2.2	MLK Park Master Plan	Current Operations Performance	N/A
			OPS 4.2.3	Complete Parks Bonds- Multiuse Sports Complex, Skate Park, Tennis Center, Senior Centers East & West, Cape Fear River Park	Current Operations Performance	N/A
	4.3	Improve mobility and connectivity through sidewalk, trail and bike lane investments				



Activity 2: Strategic Goals



Activity: Drafting a Strategic Goal

Strategic Goal: The Desired Situation

Clearly state the priority to be achieved: an attainable direction, change, or achievement. The desired change resulting from a focus on the priority.

To help stimulate your thinking, consider the following *before* you start writing your goals:

- To remain relevant, address emerging issues, overcome current challenges we need to . . .
 - In order to successfully meet the needs, opportunities, and challenges of the next five years, we aspire to . . .
-

Sentence Structure and Key Terms

- Now describe the desired change you wish to see in broad terms to write your goal(s).

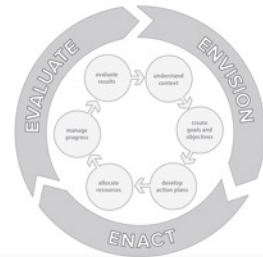
Example:

- *Newcomers will easily access the services and information they need to begin their new lives in our town.*

Activity 2: Strategic Goals

- Working in teams, you will develop a strategic goal statement for one of the focus areas for the fictional community of Ramses.
 1. Safety
 2. Health
 3. Economic Development
 4. Good Government
 5. Environment
- Use the collaborative “Google Doc” to take notes





ENACT

Key Process	Activities	Products
<i>Develop action plans</i>	<ul style="list-style-type: none"> • Moving from goals to objectives • Assigning responsibilities 	<ul style="list-style-type: none"> • SMART objectives • Action and responsibility plans
<i>Allocate resources</i>	<ul style="list-style-type: none"> • Budgeting for results 	<ul style="list-style-type: none"> • Annual and long-term, capital budgets



Strategic Planning Goals - FY2021



Safe & Healthy Community

Growth & Infrastructure

Business Operations

Quality of Life & Place

Education

GOALS BY FOCUS AREA

- Improve public safety relations with the community
- Ensure optimal response times for public safety
- Improve abuse / neglect prevention efforts for children and adults
- Improve access to physical and behavioral health care for indigent populations
- Maintain optimal environmental health services
- Improve health outcomes for vulnerable children
- Enhance employee wellness
- Improve healthy lifestyles and nutrition access and programming for county residents
- Promote jail diversion efforts
- Strengthen disaster preparedness efforts
- Explore social determinants of health initiatives that increase access to healthcare, preventative care and disease management and efforts to address drug misuse and prevention
- Completion of Fire / Rescue Services report

- Provide uniformity among local government regulations, ordinances, and codes
- Improve community relations and outreach
- Prioritize projects through a Capital Improvement Plan
- Develop a plan for county-wide pedestrian/ greenway/trail way/ bicycle master plan
- Management of county construction projects
- Develop and maintain county-wide fleet management system
- Strategically manage future growth and development of public utilities
- Implement a multi-year public utility rate structure and associated policies
- Ensure optimal recording of documents
- Improve efficiencies through governmental collaborations
- Ensure efficiency in tax administration, collections, and revaluations
- Enhance procurement advertisement, solicitations and surplus processes

- Create a culture focused on results with Performance Based Budgeting
- Engage young professional citizen action groups to assist with process improvements
- Harness technology to increase communication and outreach to engage citizens and businesses
- Implement a process improvement program across departments
- Maintain updated county policies and contracts
- Improve professional development and training needs of staff
- Improve employee satisfaction and retention
- Facilitate business operations through secure and current automation
- Improved accountability and fiscal outcomes
- Reduce risk in the workplace and improve safety of employees
- Ensure optimal hardware performance and maintenance of technology to ensure efficient and effective network
- Ensure strategic alignment with community issues when applicable

- Highlight economic impact of agriculture
- Promote and improve access to healthy local foods
- Promote citizenship
- Invest in and promote public and community gathering spaces
- Promote quality recreational activities and programming
- Improve active lifestyles for Senior Citizens
- Promote services for Veterans
- Strengthen the County's green and energy-efficiency initiatives
- Use attractive marketing strategies to increase awareness and to engage with citizens
- Promote local arts and tourism
- Identify/Create/Promote programming that identifies and nurture future leaders
- Support agricultural education and training (including youth education, support to farmers, and farm to table initiatives)

- Support Workforce Development Plan by collaboration between County Government, Schools, DCCC, Economic Development Commission and Chamber of Commerce.
- Align partnerships for initiatives supporting educational outcomes for students
- Grow the talent pipeline by increasing career pathways from middle school to post-secondary education
- Promote early childhood education
- Ensure affordable quality tutoring and mentoring programs

TOWN OF MOORESVILLE

Goal 1. Customer Service, Transparency and Citizen Engagement

The Town of Mooresville will be a customer-focused organization that encourages residents to be informed and engaged in the matters of government community.

OBJECTIVE	PRIORITY	TACTICAL ACTION
1.1 Seek opportunities to enhance public trust by sharing information in an accessible, convenient manner.	TOWN	Finance 1.1.1. Demonstrate financial transparency by posting Town General Ledger online.
1.2. Expand effective and equitable customer service that engages all stakeholders through transparency, cooperation and feedback.	DEPARTMENT	Manager's Office 2.1.1. Market the Mooresville Business Park to increase commercial development.
1.3. Improve public outreach and citizen involvement through open communication and the development of community relationships and partnerships	TOWN	Fire 1.3.1. Develop an all-hazard neighborhood awareness program. Police 1.3.1. Schedule quarterly open forums at various locations within MPACT zones to discuss crime and quality of life issues.

Activity 3: SMART Objectives

Return to your teams and write an objective to help you achieve your goal

Specific

Measurable

Aggressive (but attainable)

Results-oriented

Time Bound

SMARTIE

I: Inclusive

E: Equitable

Objective Statement Template:

To improve/reduce/maintain (accomplishment) by (a number or percent), (from X to Y) toward a target of (a number) in (timeframe)



Activity 3: SMART Objective



Activity: Developing SMART Objectives

Sample Sentence Structure for Developing SMART Objectives

To [change]	[what]	By [#]	By [when]
<ul style="list-style-type: none">• Increase• Decrease• Find a solution	<ul style="list-style-type: none">• Might have to add "where" or "who" to be specific	<ul style="list-style-type: none">• % change• # count• Might have to use best available proxy indicator	<ul style="list-style-type: none">• Some future date

How to draft the sentence:

1. Identify the specific "what" you want to change.
2. Describe how you want to change it: Increase the "good" things that happen OR decrease the "bad" things that happen.
 - Try to express the change positively, if that is possible.
3. Establish a standard by which to measure and evaluate the amount of change.
4. Set a date by which the change will be evident.



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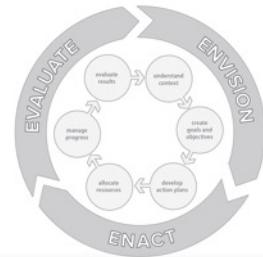
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Planning and operating at the same time

<https://www.youtube.com/watch?v=L2zqTYgcpg>





EVALUATE

Key Processes

Activities

Products

Monitor and manage performance

- Milestones
- Measures of success

- Annual calendar
- Project reports

Evaluate results

- What did we do?
- How well did we do?
- How can we improve?

- Annual reports
- Performance reviews
- Gap analysis

CONNECTED & INCLUSIVE



Knightdale actively pursues balanced growth with exceptional design to maintain its small town feel and appearance. Through the creation of unique community spaces and a welcoming environment for entrepreneurs and small businesses, we are creating a connected and inclusive town.

Objectives

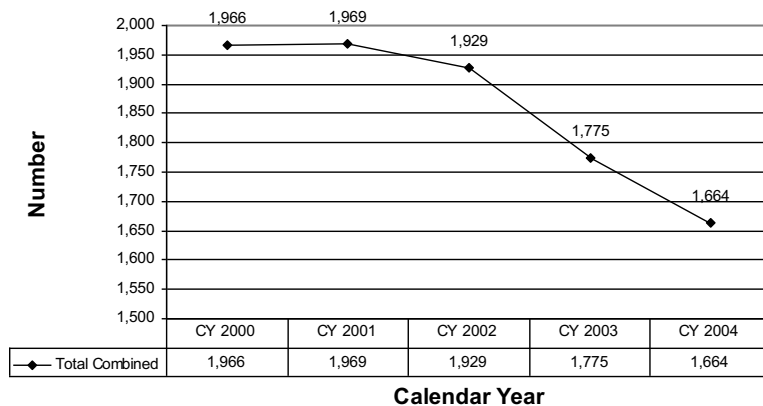
- Build on our “Start Something” identity
- Communicate important Town information to residents in a timely and informative manner
- Put on high quality community events
- Create the infrastructure necessary for the small business community
- Embrace opportunities for physical connectivity through the transportation network
- Ensure a diversity of housing
- Advocate for quality educational opportunities

Performance Measures

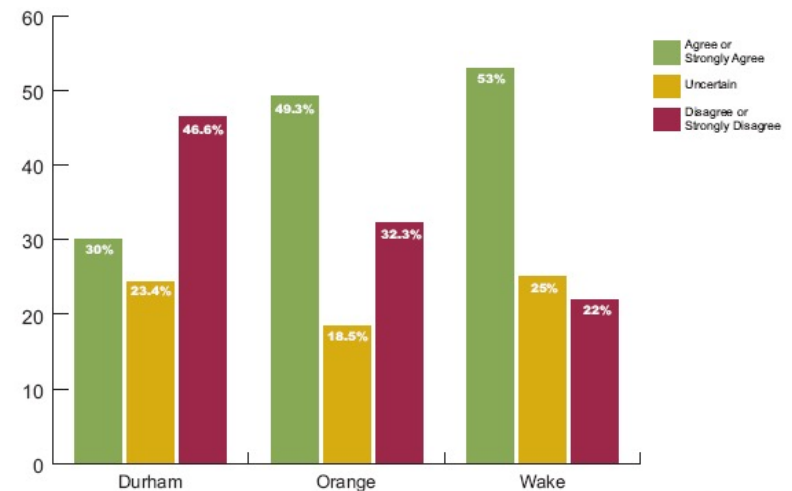
Measure	Department	FY20	FY21
Achieve at least 90% overall satisfaction response from citizen survey	Police	N/A	
Return 90% of Development Plan Reviews within 10 Business Days	Development Services	30%	
Attend at least 90% of all available HOA meetings in Town Limits	Development Services	71%	
Average 8 days or less for Commercial Building Permits	Development Services	6.07	
Average 3 days or less for Residential Building Permit Issuance	Development Services	2.96	
Return 90% of Zoning Compliance Permits and Sign Permits within 5 Business Days	Development Services	72.7%	

Measuring the outcome

**Part I Violent Crimes -
All Local Law Enforcement Agencies (Line Trend)**



I feel safe in my own community.



Source: Dignity Public Opinion Poll; plus or minus 3% Durham all

DURHAM
Convention & Visitors Bureau
101 East Morgan Street
Durham, North Carolina 27701 USA
(919) 440-1000 FAX (919) 440-1001
www.durhamnc.com



04

LINKING STRATEGIES TO RESULTS



**HOW DO COACHES
KNOW IF THEY ARE
SUCCESSFUL?**



HOW DOES YOUR COMMUNITY KNOW IF IT IS SUCCESSFUL?

Is essential water
and wastewater
infrastructure in
place throughout
the community?

Do economic
development
efforts represent all
agencies interested
in development?

How many small
business/industry
start-ups or
expansion are
underway?

Is the
incidence of
crime
declining?

Are
residents
satisfied
with your
services
?



- <https://strategicplan.raleighnc.gov/>



Arts & Cultural
Resources

Economic
Development and
Innovation

Growth & Natural
Resources

Organizational
Excellence

Safe, Vibrant and
Healthy Community

Transportation &
Transit

Raleigh's [Strategic Plan](#) is a formal document adopted by City Council that translates vision and goals into an actionable strategy that guides the organization's focus, work, and resource alignment. It is a collaborative effort that is led by City Council's vision and leadership, influenced by resident feedback obtained from the biennial Community Survey, reflective of staff contributions, and appropriately aligned with other important efforts such as the [2030 Comprehensive Plan](#).

The Strategic Plan's six overarching key focus areas and underlying objectives, initiatives, and performance measures allow the City to be transparent about its goals, focused in its efforts, and aware of its results.



Arts & Cultural
Resources



Economic
Development &
Innovation



Growth & Natural
Resources

Performance Management

- Strengthens strategic planning
- Allocates resources based on priorities and results
- Identifies and builds strategies for continuous improvement
- Communicates results of programs and services
- Strengthens accountability
- Provides vital information for effective decision making and management oversight
- Increases the utility of information



Activity 4: Measuring Results

Return to your teams and identify how you will measure success.

Identify 2-3 performance measures related to the goal/objective you have written.



Organizational Tools to Promote Accountability for the Plan

Benchmarking

Program Design

Performance
Measurement

Performance
Evaluations

Budgeting/Resource
Allocation

Internal/External
Communications

Citizen Engagement
and Education

Employee
Orientation

Disciplined Attention



Poll 3

Which tools do you think would be most effective?

- Benchmarking
- Program Design
- Performance Measurement
- Performance Evaluations
- Budgeting/Resource Allocation
- Internal/External Communications
- Citizen Engagement and Education
- Employee Orientation
- Disciplined Attention



6. Consent Agenda (15 min)

21-0487 Budget Ordinance Amendment No. 22BCC00013 Public Health to Recognize \$733,355 from the NC DHHS Division of Public Health Women’s and Children’s Health Section/Immunization Branch for Covid-19 Activities

Agenda Text: The Board is requested to approve Budget Ordinance Amendment No. 22BCC00013 Public Health to recognize funds in the amount of \$733,355 from the North Carolina Department of Health and Human Services Division of Public Health, Women’s and Children’s Health Section/Immunization Branch.

This grant provides funding to the Local Health Department (LHD) to continue supporting activities associated with COVID-19 mass vaccination planning and implementation.

Alignment with Strategic Plan: This grant aligns with Strategic Goal 2: Health & Well-being for All by providing more resources for COVID-19 vaccination services.

Recommendations: Rodney Jenkins, MHA, Public Health Director
The Board recommends that the Board approve Budget Ordinance Amendment No. 22BCC00013 Public Health to recognize funds in the amount of \$733,355 from the North Carolina Department of Health and Human Services Division of Public Health, Women’s and Children’s Health Section/Immunization Branch.

BEST PRACTICES



Establishment of Strategic Plans

GFOA recommends that all governmental entities use some form of strategic planning to provide a long-term perspective for service delivery and budgeting, thus establishing logical links between authorized spending and broad organizational goals.



Different types of planning

Community Visioning

- Broader than 1 organization
- Envisions the future of an entire community

Comprehensive Plan

- Focuses primarily on Land Use
- Usually very long term (20-30 years)

Strategic Plan

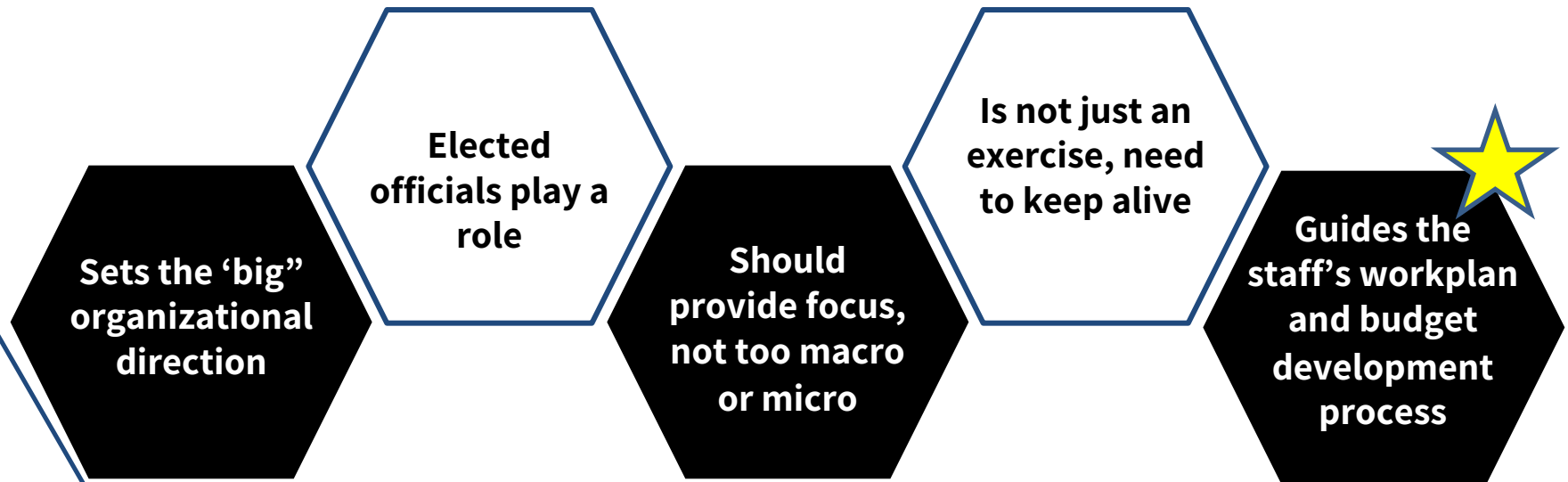
- Focuses on one organization
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Business Plan

- Focuses on one organization or sub-unit
- More focused on implementation
- Usually shorter term (3-5 years)



STRATEGIC PLANNING



BUSINESS PLANNING

Moves from the “big” vision to the plan for execution

Must include measures to monitor process

Should identify resources to achieve plan

Capital Improvement Plan, Facilities Maintenance Program, Economic Development Plan, or Departmental plans are examples of business planning



Budget Implements Strategic Plan



- Ties to community mission and Board's vision
- Should reflect community values
- Provides resources to strategic goals/objectives
- Distinguish “wants” from “needs”
- Cannot be all things to all people

Linking Strategy to the Budget

- A Budget disconnected from the Long-Range Plan is like a modern day driver disconnected from his GPS.
- Identify strategies and impact.
- Develop tactics and high-level operational budgets.



Fiscal Year 2021-22 Manager's Budget Message

May 11, 2021

To the Honorable Mayor and Town Council Members:

On behalf of the entire organization, it is my pleasure to recommend to you the Fiscal Year (FY) 2021-22 Operating Budget and Community Investment Plan (CIP).

The recommended budget totals \$73,600,974 a 5.8% increase from the adopted FY 2020-21 budget. Of this, the General Fund represents \$41,991,477 a 5.4% increase from the prior year. Budget growth reflects strong economic vitality and updated budget projections due to less severe COVID-19 economic impact to Town revenues than was originally anticipated. The recommended property tax rate remains unchanged at 42.16 cents per \$100 valuation. Thirty-eight (38) new positions are recommended, the majority of which are to service population growth and other development related work demand, with the balance to enhance public safety, organizational efficiencies and other strategic initiatives.

Key Budget Drivers

Strategic Plan – The budget was developed using your five strategic priorities as the foundation for creating positive community impact and value to tax and rate payers. Updates to the Strategic Plan include new economic development initiatives related to the Downtown Village District, expanding community engagement, increasing focus on sustainability and resiliency, and enhancing focus on public safety to maintain our status as one of the safest communities in North Carolina.

Population Growth – The Town's population growth has averaged 6% annually over the past 5 years, which has been fueled by quality housing options, strong schools, parks and recreation amenities, low crime, job opportunities, and an overall high quality of life. The 2021 population is projected at 42,209 with the Town likely to exceed 50,000 in population by 2024. This growth requires investments in personnel, equipment, and infrastructure to provide quality services and prepare for future growth.



Board Budget Priorities

During the annual retreat held January 27-29, 2021 the Board of County Commissioners set budget priorities to serve as guidelines for developing the FY2022 Budget. The top five priorities are identified below, with Reduce Racial Disparities serving as a cross-cutting priority.

FY2022 Priority Descriptions

Affordable Housing: Evaluate new housing opportunities that are affordable to residents in need.

Education Attainment Gaps: Link existing allocations to strategies and targets to improve college and career readiness outcomes for all students.

Environmental Leadership: Implement the Environmental Leadership Action Plan.

Meck Pre-K: Continue implementation of voluntary, universal public pre-k for all eligible 4-year-old children.

Workforce Development: Provide leadership and align communication with jobseekers and employers.

Racial Disparities: Ensure that investments by the County focus on closing racial and ethnic gaps so that race does not predict one's success, while also improving outcomes for all. Race will be interwoven into the Board Priorities through policies, practices, and procedures that seek to analyze and eliminate the root causes of racial disparities with the hope that all people in Mecklenburg County will have an equitable opportunity to thrive in the community. *Cross-Cutting*

The Adopted Budget includes \$51.4 million in new funding that aligns to the five priorities. This funding is detailed in the following table.

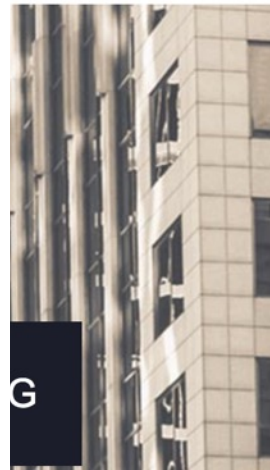
Board Budget Priorities	Total Dollars	County Dollars
Affordable Housing	\$12,623,400	\$4,373,400
Education Attainment Gaps	<i>See below</i>	<i>See below</i>
Environment	23,532,164	12,782,164
MECK Pre-K	2,015,872	2,015,872
Workforce Development	1,777,624	1,677,624
Racial Disparities	11,464,398	4,397,391
Total*	\$51,413,458	\$25,246,451

*Refer to *Other Related* section for detail of new funding by Board priority.

Mecklenburg County strives every day to ensure that the County Manager's Office works for the County. The following section provides quantifiable performance data to



as so, the Strategic Plan for the community, as well as the County's philosophy to employ a



Total Appropriations	\$ 3,270,91
Full Time Employees	
Part Time	
Revenues	
Discretionary Program	\$ 2,942,54
Total General Fund	\$ 2,942,54
Risk Claims Fund	214,04
Employee Insurance Fund	114,33
Total Revenues	\$ 3,270,91

BUDGET

- Delivering expanded services to City employees. Department plans to use temporary staff to a

ACCOMPLISHMENTS

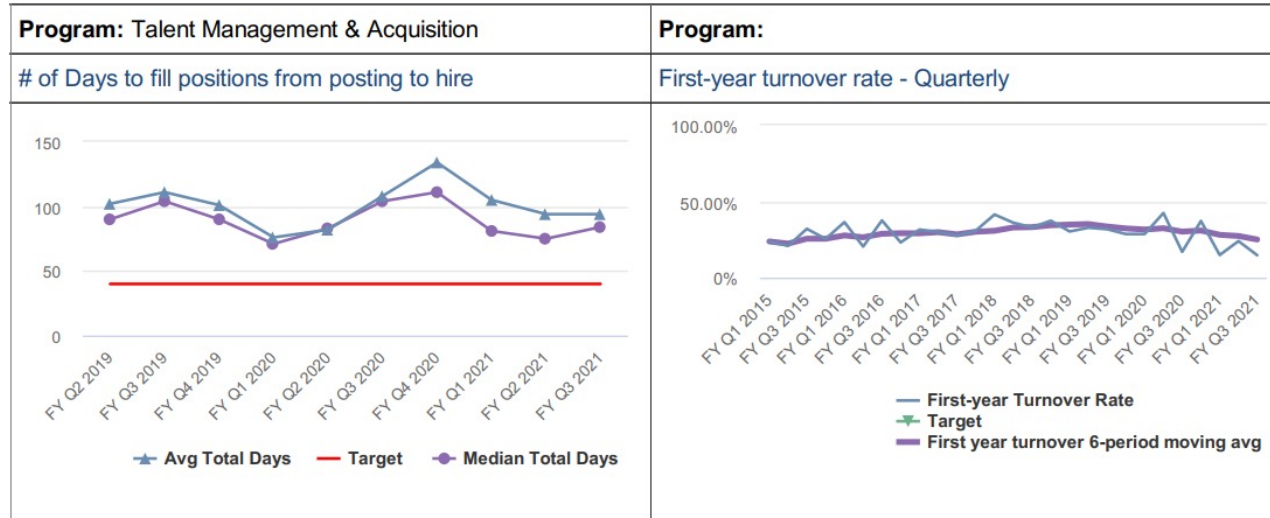
- Developed temporary policies to keep the org
- Created new engagement tactics to keep City
- Successfully guided move to remote or hybrid
- Created and implemented new quarantine ar

ANTICIPATED ACCOMPLISHMENTS

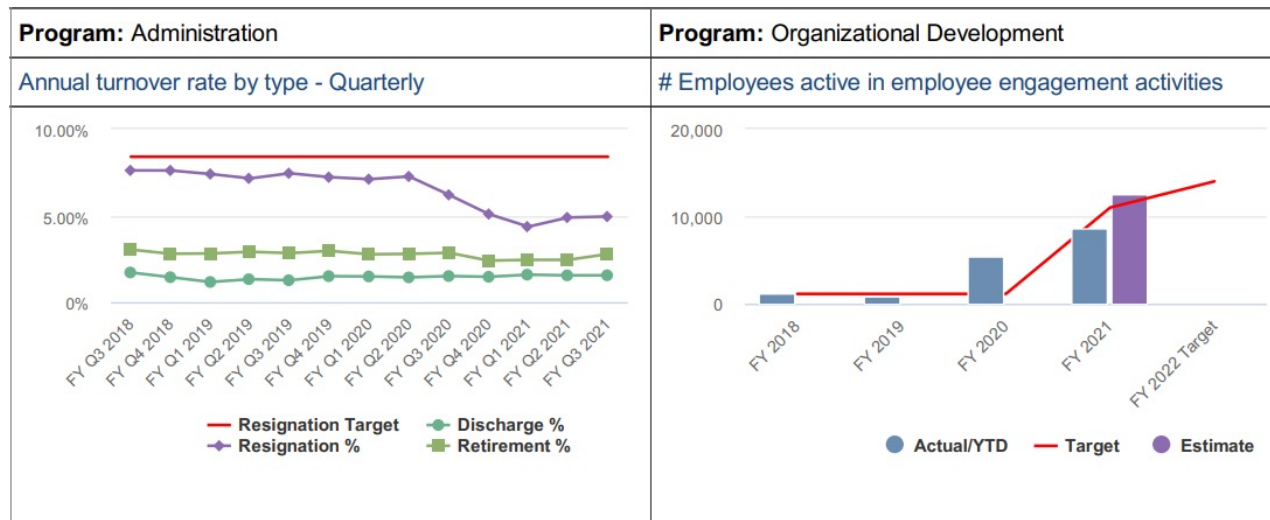
- Develop policies to handle a hybrid workforce
- Strategize for recruiting and retention in a ne
- Roll out executive level HR dashboards to m
- Complete initiatives related to the City's racia
- Provide targeted training to supervisors on E

DEPARTMENT PERFORMANCE SUMMARY

Objective: Make the City of Durham a nationally-recognized employer of choice



Objective: Establish human capital leadership across the organization



Using the Plan as the Budget Framework

[Government](#)[Departments](#)[Discover Our Town](#)[For Businesses](#)



[Report a Concern](#)[Contact Us](#)

[Discover Our Town](#)

[Calendars](#)[Coronavirus/COVID-19 Information](#)[Strategic Plan](#)[Walk Zebulon](#)[Adopted Budget 2021-2022](#)

Strategic Plan



ZEBULON'S STRATEGIC PLAN

Zebulon adopted a strategic plan as part of the 2018-2019 budget process. The plan will have three focus areas that came from the survey, focus groups, staff and the Board of Commissioners. The three areas are:

- Vibrant Downtown
- Small Town Life
- Growing Smart

Each year the projects in the strategic plan will be updated to align with the goals set by the Board of Commissioners during the budget process.

[Vibrant Downtown](#)



Alignment to Budget

BUDGET MESSAGE Fiscal Year 2021 - 2022



ZEBULON
NORTH CAROLINA

1003 North Arendell Avenue
Zebulon, North Carolina 27597
(919) 269-7455
www.townofzebulon.org

In accordance with the Local Government Budget and Fiscal Control Act (North Carolina General Statute 159), herein lies a concise explanation of the Town of Zebulon's goals fixed by the budget for fiscal year 2021-2022.

INTOWN

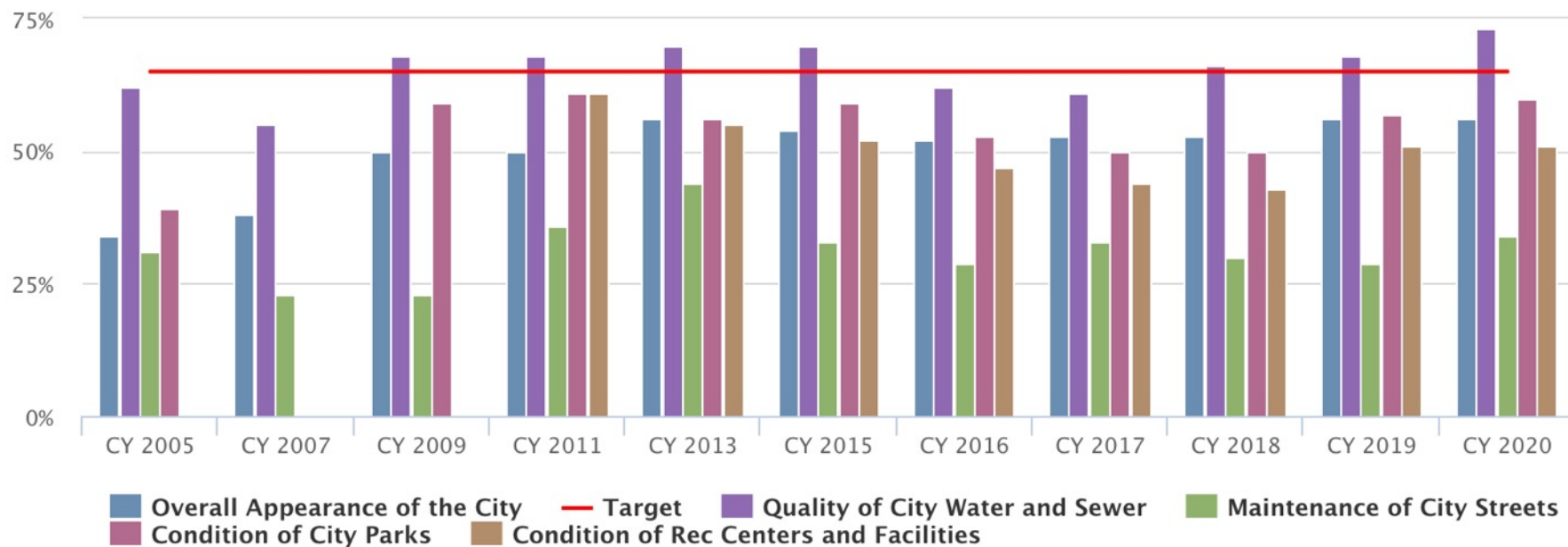
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Target



Analysis

This measure takes into account a variety of City assets including parks, streets, sewer, and water. While most infrastructure performance measures increased - critical services such as sewer and water continue to meet or exceed performance expectations for all safety standards as well as permits they must acquire.

Next Steps



Budget with Performance Measures

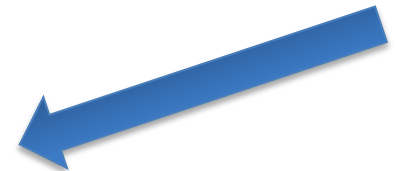


General Fund Planning and Zoning Department (10-417)

FY 2018-19 Major Accomplishments

- Completed the scanning of all historic Planning Board, Board of Adjustment and Technical Review Committee meeting minutes
- 75% of historic approved plans have been converted to electronic format
- Completed 74 Zoning Courtesy Inspections
- Investigated 157 Zoning Complaints / closed 90
- Completed 1,187 planning inspections related to building code
- GPS'd 709 newly planted street trees
- Created On-Line Interactive Development Map - revised layout and design, added additional information links and coordinated with Engineering to add infrastructure construction project information.
- Two staff passed their North Carolina Association of Zoning Officials (NCAZO) exams becoming the first Holly Springs staff members to hold this certification
- Completed installation of Phase 1 and Phase 2 wayfinding signs
- Held 12 Summer Farmers Market events and 5 Winter events
- Farmer's Market Award Winner: American Farmland Trust Farmers Market Celebration:
 - #1 in North Carolina
 - #8 Nationwide

Performance Information					
	2014	2015	2016	2017	2018
Total Development Applications	180	227	282	249	262
Total Building Permit Reviews	837	1097	1264	1175	1261
Total UCC Permits	302	229	271	262	333
Total Inspections	756	959	1246	1718	1678



Reporting on Accomplishments

General Fund Parks and Recreation Department (10-425)



Budget Highlights

- Added a new Park Planner Position
- Increases dedicated funding for greenway repair and maintenance
- Includes capital funding for a 12-2 bus to expand the ability to provide programming for all town residents
- Provides for equipment replacement in athletic programming
- Increased Farmer's Market hours to cover year round events and added a part-time Assistant Farmer's Market Manager to reduce the need for full-time staff overtime
- Includes funding for phase 1 of HVAC replacement at Town Hall

FY 2018-19 Major Accomplishments

- Updated several sections of greenways to fix drainage issues, specifically along the Arbor Creek Greenway and along the Carrington Greenway
- Launched partnership with Fuquay Arts Center to share a community theatre troupe. First production debuted in March 2019
- Took over management of the Holly Springs Farmers Market in May 2019
- Converted lights at Town Hall, Bass Lake Park, Hunt Center and park restrooms to LED
- Completed significant repairs to Town Hall gutters, Co-Working Station roof, and Fire Station #3
- Completed the last two holes on the disc golf course at Veteran Park with tee pads and landscaping
- All recreational baseball fields were refurbished with laser grade and new field mix
- Two parks staff members successfully passed the Pesticide Applicators Test for licensure
- Implemented a portable artificial turf pitching mound at Ting Stadium to allow for more multi-sport events
- Updated the exercise room at the Hunt Center with a drop ceiling and new HVAC system for the purposes of improving and regulating air and noise quality within the room and throughout the building

Performance Information

- Summer Day Camp participation reached maximum enrollment within two days of open registration (1092 participants)
- The Before School and After School Program has maintained maximum enrollment for the majority of the year serving over 1400 participants
- The Youth Soccer leagues increased participation by 12% this year serving 2,061 participants
- Increased specialty and school group programs at Bass Lake, 400% over last year
- Hosted numerous sporting events at area athletic fields bringing in more than \$650,000 in economic impact



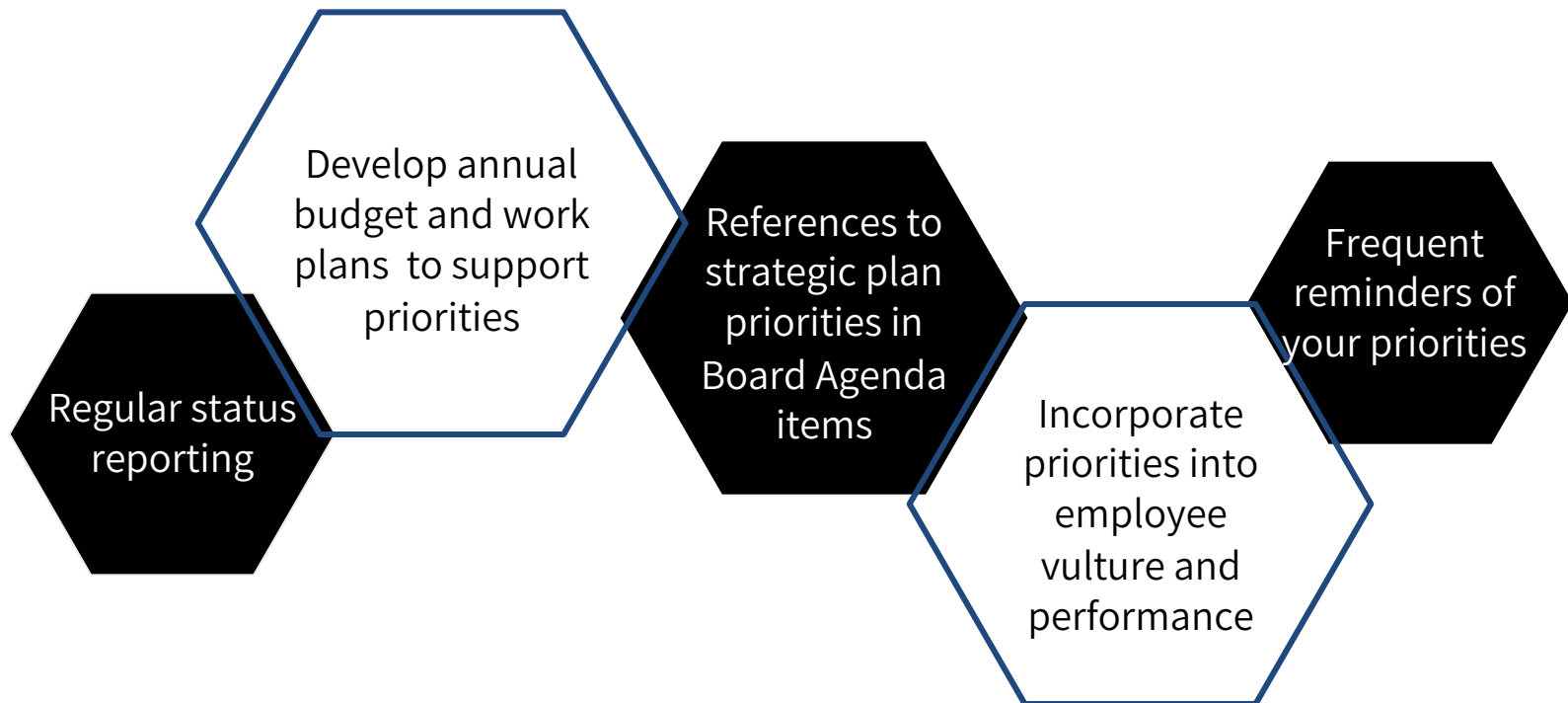


“Let our advance
worrying become
advance thinking
and planning”
-Winston Churchill

Sticking to the Plan and Keeping the Plan Relevant



STICK WITH YOUR ESTABLISHED PRIORITIES



Stick with your established priorities, but **be prepared for emergent issues**

Annual review of priorities

- *Most new ideas can be referred here*
- Opportunity to update and amend
- Allows for changes to annual budget and work plan

Anticipate how you will address new ideas or opportunities that arise off-cycle

Develop Decision Filter Criteria

- Use to guide off-cycle decisions
- Not set in stone, but used as a guide

Sample Decision Filter Criteria

- Alignment with Community's vision, mission, focus areas and objectives
- Cost to implement
- Staff time required
- Return on Investment



Activity 5: Linking Strategies to Results

Return to your teams and discuss how you will ensure that the strategic plan is tied to results? What reinforcing activities do you want staff and the board to pursue to ensure that the plan does not just “sit on the shelf”?



Coffee break...

05:00

We will reconvene shortly

Participants are encouraged to

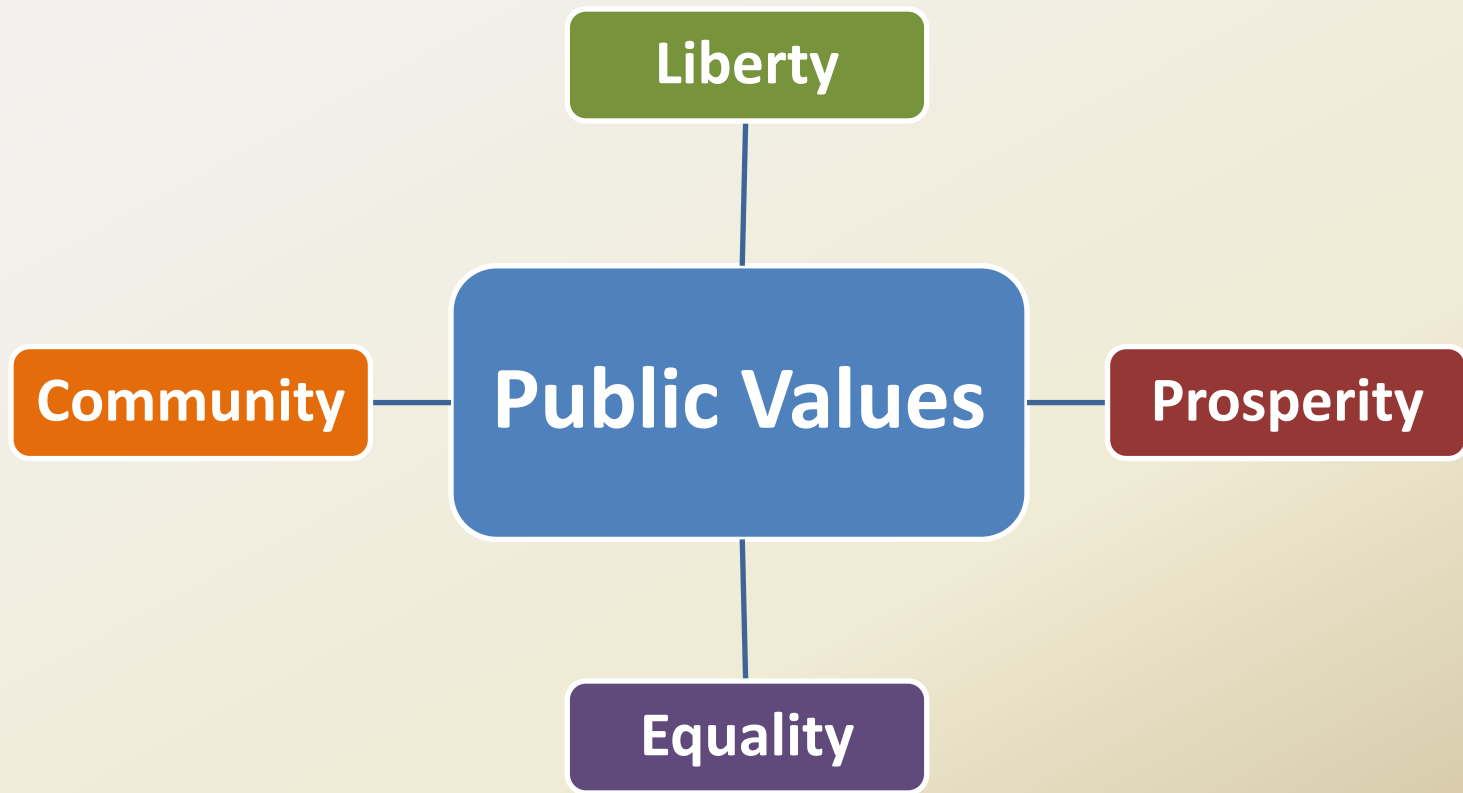
- Turn your camera/mic off
- Step away from the computer
- Stretch
- Get some fresh air

05

LEADERSHIP BEHAVIORS



Public Issues



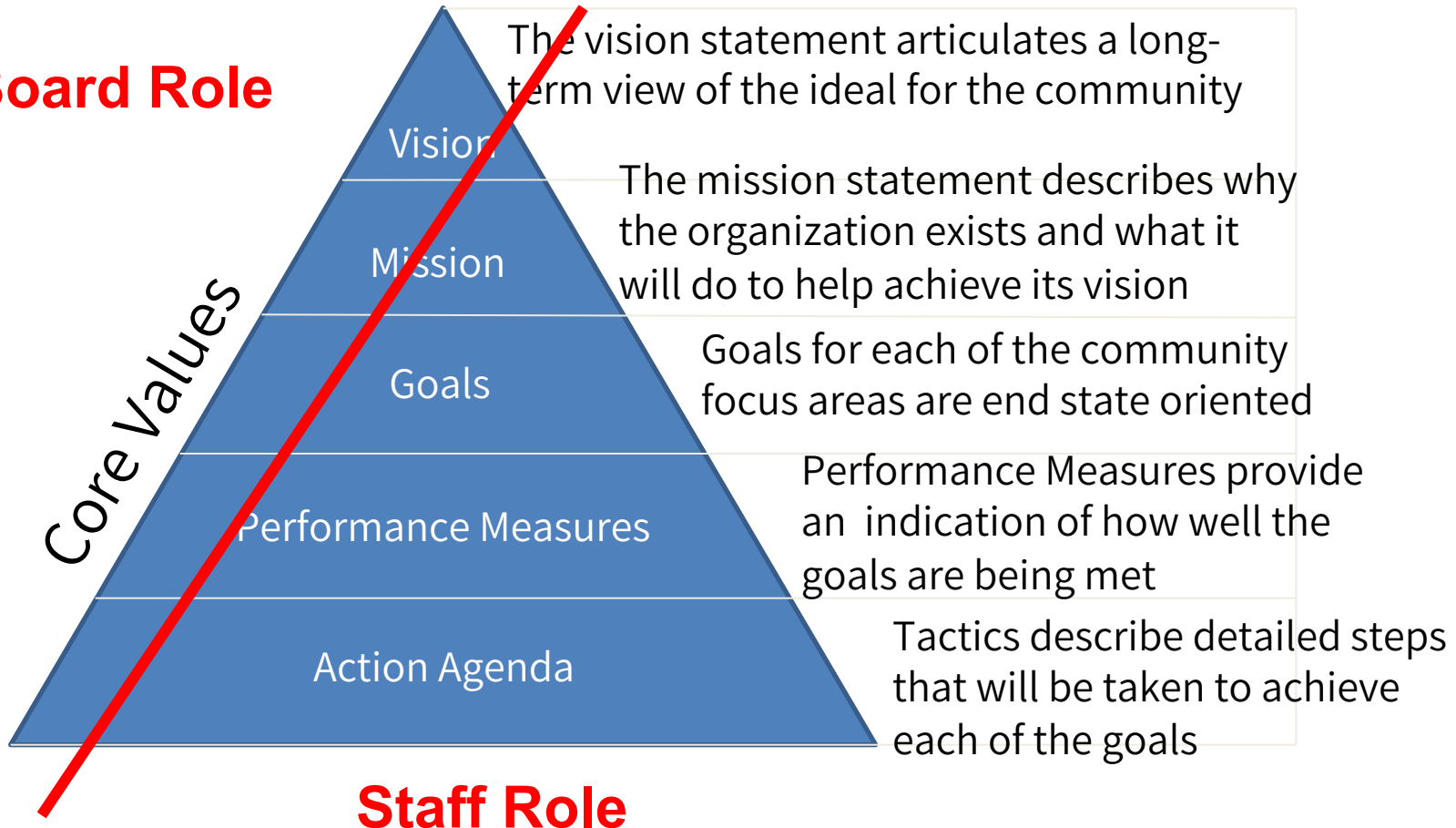
Role of Elected Officials

- Decide to engage in planning
- Set the overall vision
- Hold themselves and staff accountable
- Understand the context and trends impacting the organization
- Engage stakeholders and partners
- Align resources with goals
- Act with intention to achieve desired future



STRATEGIC PLAN ELEMENTS

Board Role



Staff Role

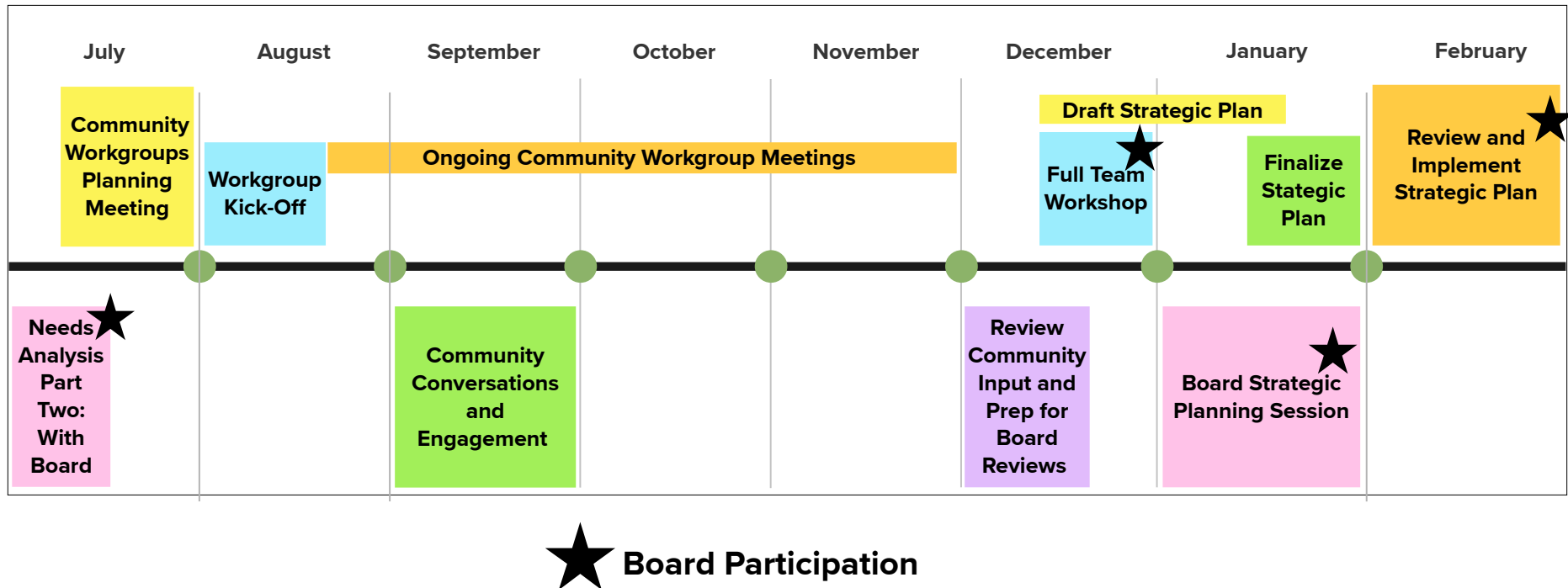
Leadership Behaviors

Behaviors that are important elements of success, including:

- Engaging people who will be impacted.
- Evaluating progress towards your goals over time.
- Adapting to changing circumstances when needed.
- Allocating resources to achieve your vision and goals.
- Holding yourself and others accountable for making progress.

Sample Engagement Timeline

July 2021- February 2022 Project Timeline



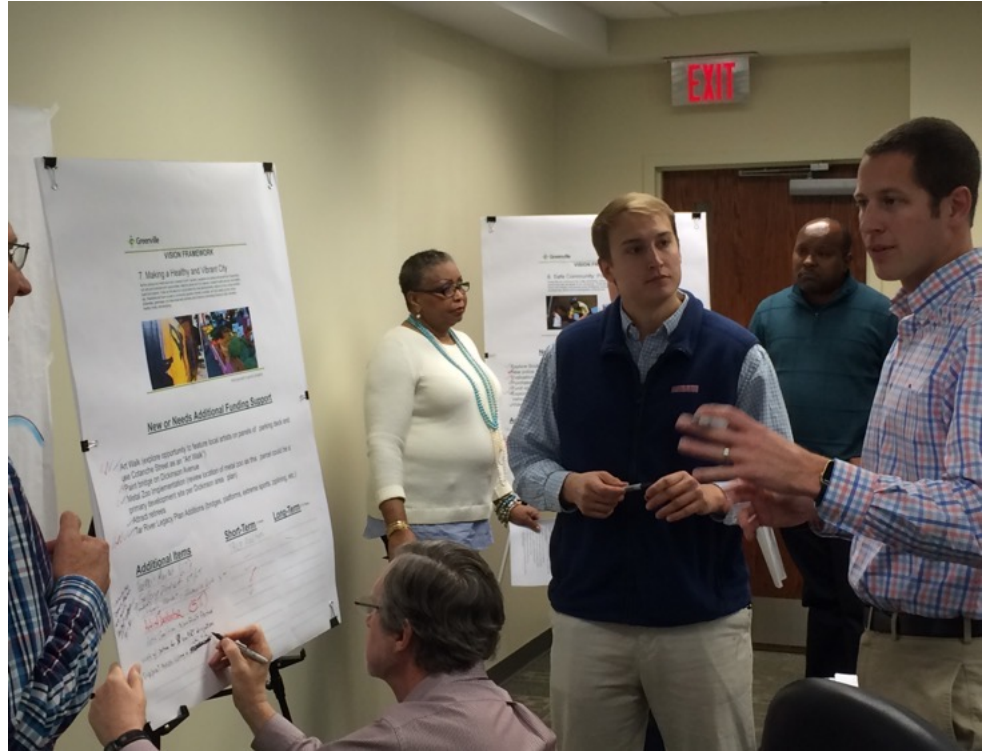
Activity 6: Stakeholder Engagement

Return to your teams and identify what type of stakeholder engagement you want in your strategic planning effort



06

Wrapping Up



Recommended Best Practices for Successful Strategic Plans

- Significant, meaningful engagement.
- Facilitative leadership that promotes the leader as facilitator and convener.
- Shared learning—a co-equal approach to framing the questions to help the organization.
- Flexibility in responding to emerging needs or unexpected opportunities.
- Demonstrate accountability and transparency.



Why Engage in Strategic Planning?

What Are the Goals of Strategic Planning?

- To be clear about priorities.
- To allocate resources toward those priorities.
- To manage performance to carry out the funded programs.
- To evaluate performance in terms of objectives.

What Is Strategic Public Leadership?

- A way for elected leaders and public managers to plan for and work toward a desired vision of the future.

Why Use the SPL Process?

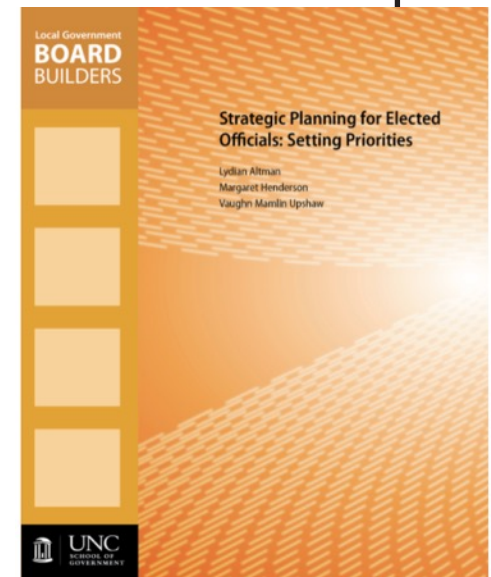
SPL produces a *plan* with *legs* that . . .

- provides guidance on where we are going, what we will do to get there, and how we will do the work;
- reflects shared values;
- transforms dreams to into actions;
- aligns resources to achieve goals;
- tracks progress and learns to improve;
- adapts to short-term realities while pursuing long-term goals.

What Must Leaders Do to Carry Out the SPL Process?

SPL is carried out by *leaders* who . . .

- practice what they preach;
- inspire vivid, positive possibilities;
- seek opportunities, seize the initiative;
- engage others inside and outside the organization in their work;
- celebrate accomplishments toward strategic goals.



Workshop Wrap-up

1. What was the single most important lesson learned?
2. What was your “ah-ha” moment?
3. What will you take home from today?



For more information

Patrice Roesler

*Manager of Elected Official Programming,
Center for Public Leadership and Governance*

proesler@sog.unc.edu

Julie Brenman

Adjunct Instructor

jbrenman@sog.unc.edu

919-593-4850

