



ASSESSMENT OF STRATEGIC PLANNING SERVICES
EXECUTIVE SUMMARY
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Submitted by:
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Executive Summary

In November 2018, the Town of Chapel Hill management reached out to Insight Performance Management Group, LLC to request an assessment of the strategic planning services conducted by the Town of Chapel Hill management to-date. The following was proposed by the consulting firm as the body and focus of work for the engagement:

- **Phase I:** Initial Consultation and Development of Scope of Work. Included an initial phone call and design of survey questions and the corresponding messages to the Town Council.
- **Phase II:** Evaluation and Assessment of Strategic Plan Progress. Included administering a survey and holding telephone interviews with the Town Council, as well as a review of strategic planning materials provided by the Town staff.
- **Phase III:** Report Development. Includes findings and recommendations.

In Phase I, the intent was to survey and interview members of the Town Council. In December 2018, the consultant partnered with the Town of Chapel Hill staff to develop a 13-item survey to be administered to the Town Council. The intent of the survey was: to assess the Town's perceptions of strategic planning efforts, to gauge effectiveness of setting strategic goals for the Town, and to identify opportunity for improvement with strategic planning services. Additionally, an overview and timeline of the project and an email message for the Town Manager to send to Town Council was provided.

In January 2019, the "Town of Chapel Hill – Strategic Planning Consulting Services Survey" was sent to nine Councilmembers of which all nine responded to the survey. Additionally, interviews took place shortly after each Councilmember responded to the survey. The goal for the interviews was to ask additional questions of the Councilmembers based on their responses. Nine follow-up interviews were completed between January 14 and January 22. A summary of responses to the survey and interview questions are included in this report. Although to protect anonymity, responses are not broken down by individual Councilmembers and no names are attached to the responses.

In addition to the survey and interviews, the consultant reviewed several documents provided by staff. The documents focused on already performed and current strategic planning efforts. A summary of what the consultant reviewed is included in this report.

Summary of Council feedback included, but not limited to:

- Councilmembers would like clarity in the strategic goals for the Town and have specific measurable goals. Some believe the goals are too vague and could present confusion for other outside entities in terms of what the Town is focusing on e.g., developers may not have a clear understanding of the desired community the Town wants to have
- Councilmembers respect the role of staff but would like additional clarity on the roles of Councilmembers as that may help level-set the Council as many of the members have various tenures on the Council
- Most Councilmembers want to have a mid-level engagement with staff
- The top four goals that emerged (not in order of priority but by vote) are: Goal 6: Environmental Stewardship, Goal 4: Affordable Housing, Goal 2: Economic & Financial Sustainability, and Goal 1: Connected Community.

- Staff should consider how to best tell the story through data and other information so that there is clarity on the interrelationships amongst goals. More use of data and information on the front end and that the Councilmembers can go deep on is desired
- Overall, there is a positive perception of the Town staff and that Council should give staff the room needed to do staff work and strategic planning well
- Additionally, based on a review of responses by the “junior” members of Council i.e., less than 2 years, there seems to be a need for more specificity and engagement on strategic planning. Individuals that have been included in the process for awhile have had a hand in setting the existing strategic goals, whereas, the “junior” members did not as much. And, one individual mentioned they are not as familiar with the processes used in the past. Therefore, they were not able to give insight on past engagements with the Town Council
- As it relates to the review of staff documents, the strategic planning framework is a good start but could be streamlined to identify the differences between a strategic plan and annual action-oriented/tactical workplans at the department and project level. Overall what has been presented to Council looks great, however there are opportunities to improve information presented. Recommendations include, changing actions into strategies, pushing actions to the department annual workplans or strategic business plans, identifying costs to achieve goals and objectives, and aligning measures to be specific to the strategies, goals and/or objectives. An additional recommendation is to revisit the notion of “desired outcomes” which may be confusing for some reviewers.

In general, specific findings included:

- Finding 1: The strategic goal statements may be too vague and not specific or measurable
- Finding 2: The Town Council lacks some clarity on strategic planning, roles and responsibilities
- Finding 3: There does not seem to be a robust environmental scanning methodology that includes information and data from the external/internal environment. Some Councilmembers mentioned they are not clear on the current state of the environment (internal/external) and would like information they can “dive deep” into prior to setting or redefining strategic goals.
- Finding 4: There are too many goal statements
- Finding 5: There were positive perceptions of the process used to set the Affordable Housing goal, however there were opportunities or considerations identified by a few Councilmembers
- Finding 6: The strategic planning framework is sufficient although it can be refined and clarified with a defined time period for which to achieve the “goals.”
- Finding 7: The department strategic business plans (Library example) are loaded with information that may make it difficult to assess what should be accomplished and by when

The recommendations were as follow:

- Recommendation 1: Educate the Council on what is strategic planning and what is the staff recommended process
- Recommendation 2: Redefine the framework for strategic planning to have clear insight for others on the framework relating to vision, mission, values, goals, objectives, actions that align to best practices

- Recommendation 3: Incorporate more data and other inputs into the strategic planning process that will help level-set the public and Council on the current state of the environment and the organization
- Recommendation 4: Create a clear timeline for work and activity on the corporate strategic planning and department strategic planning efforts. Redefine the strategic planning implementation approach so that there are two clear (yet related) timelines for corporate strategic planning and department strategic planning work
- Recommendation 5: Shift the strategic planning timeline to a June through December timeframe whereby the department strategic plans are created prior to the budget process. Then, after the budget process, right size both the corporate and department plans
- Recommendation 6: Be very clear on the long-term goals for the Town versus the short-term goals for the Town
- Recommendation 7: Continue leveraging the public facing performance dashboards to share information as those are a great transparent and accountability way to inform the public on the good work by the Town of Chapel Hill.

Details for the methodology, findings and recommendations are outline in the full staff report.

All-in-all, the Town of Council is on the right track with strategic planning. As a result of previous experiences with strategic planning, the Town Council is open and desires more refined strategic planning approaches. The Town Council has been praise worthy of the staff's efforts but the staff should consider more direct ways to take the Town Council through a formal and well defined process for developing not only the corporate strategic plan but also using information to adequately inform the departments' strategic planning work. By taking the recommendations into consideration and matching up with staff's experiences, the Town of Chapel Hill is well positioned to moving forward efficiently and effectively in its strategic planning efforts.