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Town of Chapel Hill
Strategic Planning
Council Work Session

LED BY: INSIGHT PERFORMANCE MANAGEMENT GROUP, LLC

JUNE 5, 2019

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Topic	Time
Expectations for our work session	2 mins
Consultant Background	2 mins
Recap: Winter 2018/2019 Town Council engagement	2 mins
Recap: April 3 Council work session	2 mins
Findings: Spring 2019 Town Council engagement	5 mins
Level Setting: Strategic Planning for Local Government vs. Others	7 mins
Review of goal areas and objectives (1. org. proposed and 2. modified w/Town Council feedback)	60 mins
Other Considerations by Town Council	5 mins
Next Steps	5 mins

Overview

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Expectations for our work session

◦ Specifically focus on finalizing the Strategic Goal Areas and Objectives
  - ◦ Review each goal area and associated objective statements (includes previously provided edits)
  - ◦ Get consensus and agreement on the statements using the "thumbs up" model (thumbs up, thumbs down, thumbs sideways i.e., not sure and still have questions and/or edits)
  - ◦ Town staff will assist in modifying statements accordingly

◦ After today's session, Town Council staff to provide specific measures of success for each objective

◦ Consultant will provide a report for Town Council that includes a summary of all Council engagement work to-date

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Consultant Background

Company: Insight Performance Management Group, LLC

- Been in business since 2004, but formally here in Charlotte, NC since 20xx

- client focus primarily small businesses, local governments and non-profits

- services offered:
  ◦ Strategic planning and strategy execution
  ◦ Performance management and measurement
  ◦ Program evaluation
  ◦ Budget development

Mecklenburg County: County Manager's Office – Director of Strategic Planning & Evaluation

- Lead corporate and departmental strategic business planning efforts, manage the performance management and measurement work for the County, and lead service (program) evaluations to assess efficiency and effectiveness of government programs and services

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Recap: Winter 2018/2019 Town Council Engagement

Consultant work:

◦ Step 1: Sent survey to each councilmember requesting participation in survey to provide feedback on existing goal statements

◦ Step 2: Followed-up with each councilmember via phone to discuss further the individual submissions

◦ Step 3: Drafted report for Town staff to review. The report included several findings and recommendations

Council recommendations included, but were not limited to:

◦ Having goals and objectives that are more specific and measurable

◦ Allowing time for the Council to weigh in on the top-line strategic goals and objectives

◦ Requesting staff tracking information on a regular basis (ex: Affordable Housing dashboard)

◦ Newer councilmembers want to have greater voice in the goal setting process as the goals provided were determined prior to their election to the Council

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Recap: April 3 Council Work Session

Received demographic and economic data and information from the UNC

Rebecca Tippett Presentation Highlights:
- Chapel Hill is a growing community yet slightly slower than other areas of the State of NC
- Projected 364 more people here each year (potential demand for 149 new housing units/year)
- Majority of population is within the 20-24 age group (as of 2010)
- Increasing diversity across the Hispanic, Asian and other groups
- Increasing immigrant population from Latina America and Asia
- Slight decline in home ownership in Chapel Hill
- Town workers more likely to walk, use transit, and work at home (largest commute in from Durham)
- 26% of individuals are in or near poverty
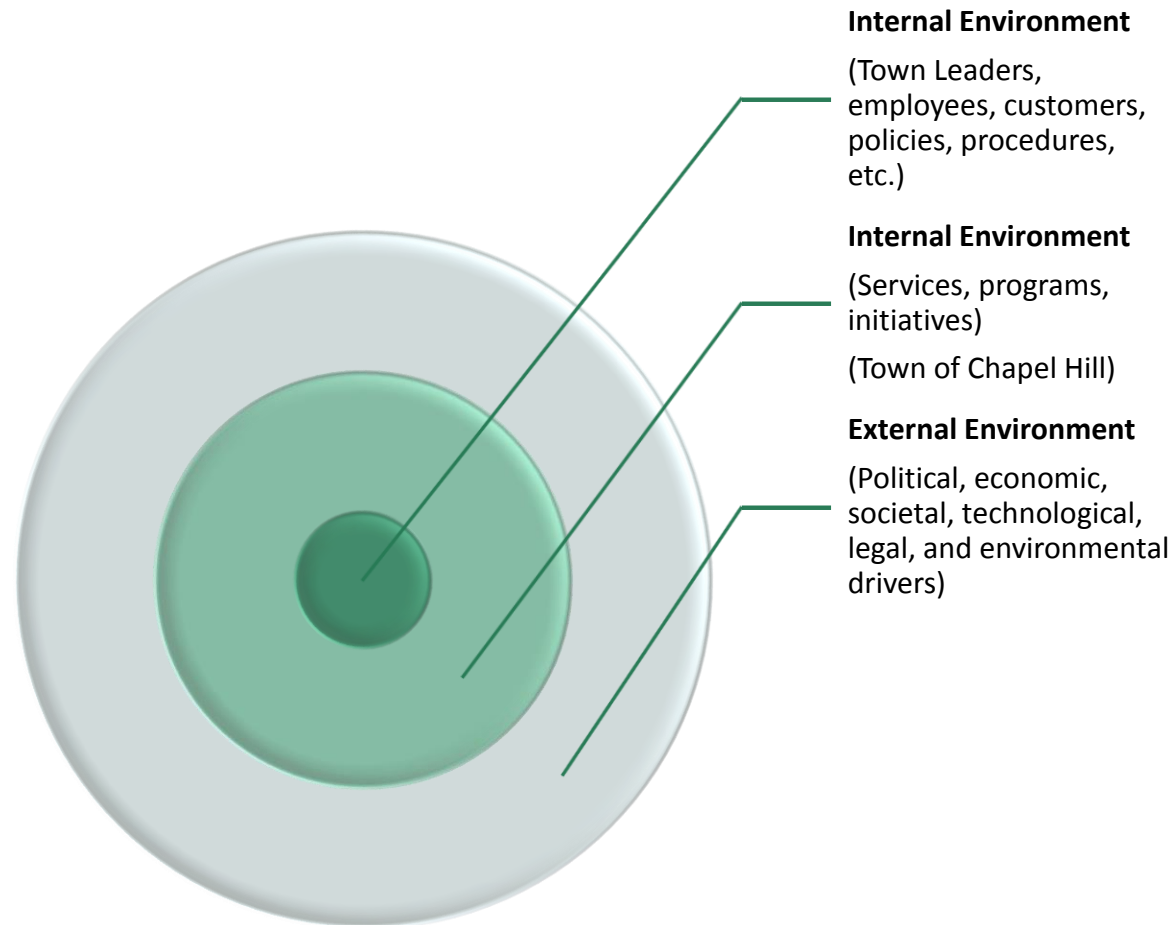
Questions about the data

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Findings: Spring 2019 Council Engagement (surveys, interviews)

Will add more information here once the survey results come in and are paired with the information received from the interviews

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Strategic Planning for Local Governments

Internal Environment

(Town Leaders, employees, customers, policies, procedures, etc.)

Internal Environment

(Services, programs, initiatives)

(Town of Chapel Hill)

External Environment

(Political, economic, societal, technological, legal, and environmental drivers)

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Need for Strategic Planning?
Public Sector Compared to Private Sector

Public Sector	Private Sector
Multiple constraints to developing and executing strategy	Limited constraints to executing strategy. Can have greater control on executing strategy
Need to be more nimble than less compared to private sector given "stakeholder" responsibility	Need to also be nimble but usually to a lesser degree such as with "shareholders"
Apply both art and science philosophy	Apply more science than art to impact bottom line
More difficult to get "rid of" areas of interest because of shift in demands	Easier to dissolve a function or unit when shifts occur
Broad accountability is required yet based on voter, resident, customer and visitor preferences	Niched accountability is required and usually based on consumer preferences
Tends to be more reactive (not always) than proactive to voter, resident, customer and visitor preferences	Tends to be more proactive to consumer changes and demands

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Strategic Planning for Local Governments

Headline: Local governments more recently caught on to the notion of strategic planning.

- Traditional government structure has primarily focused on budget

- In the 1990's there was the introduction of performance management

- In early 2000's, strategic planning begin to come online although still limited in practice for many local governments

- Modern day practices now incorporate all four components in ensuring efficiency and effectiveness in government

Strategic Planning for Local Governments

Recommended for the Town of Chapel Hill to develop a strategic plan

1 year tactical plan

3 year strategic plan

Long-range plan (capital)

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Goal 1: Connected Community

Goal 2: Economic Financial Sustainability

Goal 3: Safe Community

Goal 4: Affordable Housing

Goal 5: Vibrant & Inclusive Community

Goal 6: Environmental Stewardship

Goal 7: Collaborative & Innovative Organization

Seven Goal Areas

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Goal 1: Connected Community (Org. Proposed)

Description: To create a highly connected community where bicycling, walking, and transit are convenient, everyday choices for our neighborhoods, businesses, and public spaces.

Objective 1: Improve resident satisfaction with management of traffic flow

Objective 2: Increase connectivity between walking, bicycling, and multi-modal networks

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Goal 1: Connected Community (Modified w/Council Feedback)

…information to be added later

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Goal 2: Economic & Financial Sustainability (Org. Proposed)

Description: To steward public assets and support a vibrant economy where there is opportunity for jobs and entrepreneurship that positions Chapel Hill for the future.

Objective 1: Attract and retain companies that create jobs in Chapel Hill

Objective 2: Make Downtown Chapel Hill a destination

Objective 3: Increase Downtown parking capacity

Objective 4: Create a sustainable budget strategy

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Goal 2: Economic & Financial Sustainability (Modified w/Council Feedback)

...information to be added later

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Goal 3: Safe Community (Org. Proposed)

Description: To preserve and protect life and property through the fair and effective delivery of Town services.

Objective 1: Invest in public facilities and infrastructure

Objective 2: Keep Chapel Hill Safe

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Goal 3: Safe Community (Modified w/Council Feedback)

...information to be added later

Goal 4: Affordable Housing (Org. Proposed)

Description: To increase access to housing for individuals across a range of incomes, and to constantly strive for more equitable outcomes and opportunities for historically underserved populations.

Objective 1: Increase availability of housing for all incomes

Objective 2: Preserve existing affordable housing stock

Objective 3: Strengthen transparency and collaboration

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Goal 4: Affordable Housing (Modified w/Council Feedback)

…information to be added later

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Goal 5: Vibrant & Inclusive Community (Org. Proposed)

Description: To enrich the lives of those who live, work, and visit Chapel Hill by building community and creating a place for everyone.

Objective 1: Inspire creativity and celebrate community

Objective 2: Improve connections and partnerships with historically disengaged and marginalized populations

Objective 3: Preserve what we love and add what we need

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Goal 5: Vibrant & Inclusive Community (Modified w/Council Feedback)

…information to be added later

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Goal 6: Environmental Stewardship (Org. Proposed)

Description: To strategically manage the Town's infrastructure and natural environment by promoting resiliency and sustainability.

Objective 1: Reduce carbon footprint

Objective 2: Heal local waterways and conserve biological ecosystems

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Goal 6: Environmental Stewardship (Modified w/Council Feedback)

…information to be added later

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Goal 7: Collaborative & Innovative Organization (Org. Proposed)

Description: To create an organization that works collaboratively from a mutual learning mindset, leads innovation, and produces effective outcomes for the betterment of the organization and community.

Objective 1: Increase collaboration, innovation, and learning

Objective 2: Attract and retain diverse and talented employees

Objective 3: Increase transparency and information sharing

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Goal 7: Collaborative & Innovative Organization
(Modified w/Council Feedback)

…information to be added later

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Other Considerations by Council

Next Steps

- Staff and consultant refine the objectives and measures of success

- Staff share with the Town of Chapel Hill and then draft formal strategic plan for the Town

- Staff begin tracking information formally during FY2020 through FY2022 and will align to the five year budget strategy

- The Town Council receives a formal report from consultant.

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