Town of Chapel Hill
Strategic Planning
Council Work Session

BY: INSIGHT PERFORMANCE MANAGEMENT GROUP, LLC

JUNE 5, 2019

Topic	Time
Expectations for our work session	2 mins
Consultant background	3 mins
Recap: Winter 2018/2019 Town Council engagement	2 mins
Recap: April 3 Town Council work session	2 mins
Findings: Spring 2019 Town Council engagement	5 mins
Level Setting: Strategic Planning for Local Government vs. Others	6 mins
Review of goal, objectives and strategic work plan items	60 mins
Other considerations by Town Council	5 mins
Next Steps	5 mins

Overview

Expectations for our work session

- Specifically focus on finalizing the Goals, Objectives and Strategic Work Plan Items
  - Review feedback for each goal, objective and strategic work plan item
  - 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 make additional modifications to the statements, and provide specific measures of success for each objective and/or strategic work plan items

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

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

Recap: April 3 Council Work Session

Received demographic and economic data and information from the UNC
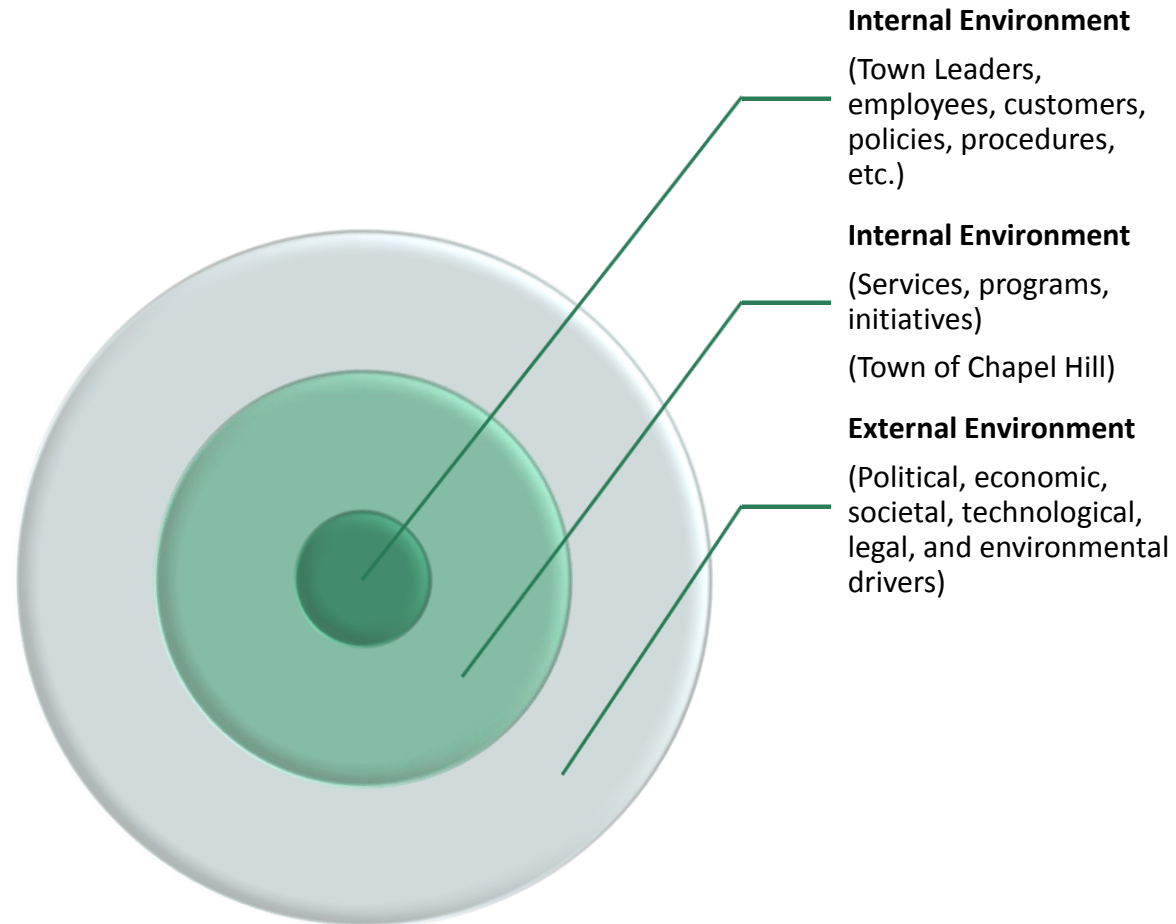
Rebecca Tippett Presentation Highlights:
◦ Chapel Hill is a growing community yet slightly slower than other areas of the State of NC
◦ Projected 364 more people here each year (potential demand for 149 new housing units/year)
◦ Majority of population is within the 20-24 age group (as of 2010)
◦ Increasing 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

Findings: Spring 2019 Council Engagement (surveys, interviews)

◦ Eight Councilmembers responded to the survey

◦ Consultant conducted phone calls/interviews with eight councilmembers

◦ Council made general comments on the need to make minor edits to the goals/objectives/strategic work plan items

◦ Many members of the Council indicated the Environmental Stewardship goal area should be a priority of the Council

◦ Continue a need a focus on how will success be measured (quant. and qual.)

◦ The Council should consider prioritizing the goals/objectives and strategic work plan items post June 5 Work Session

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)

Need for Strategic Planning?
Public Sector Compared to Private Sector

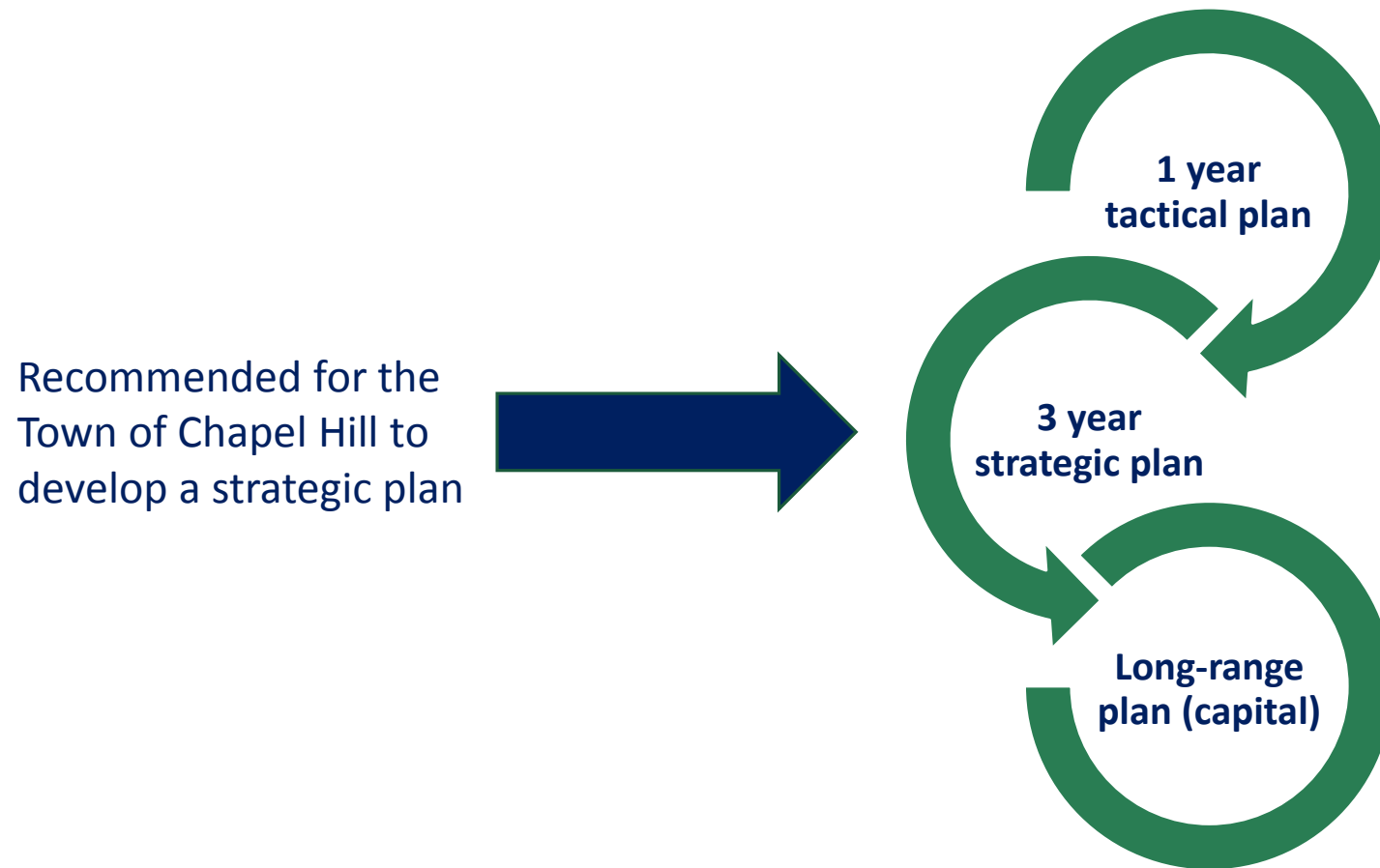| Public Sector	Private Sector
Multiple constraints to developing and executing strategy	Limited constraints to executing strategy. Can have greater control on executing strategy
Need to be more nimble than less compared to private sector given "stakeholder" responsibility	Need to also be nimble but 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

Strategic Planning for Local Governments

Step 1: Strategic Planning

Step 2: Budget

Step 3: Performance Management

Step 4: Evaluation

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)

Goal 1: Environmental Stewardship

Goal 2: Economic Financial Sustainability

Goal 3: Affordable Housing

Goal 4: Connected Community

Goal 5: Vibrant & Inclusive Community

Goal 6: Safe Community

Goal 7: Collaborative & Innovative Organization

Seven Goal Areas (Existing)

Goal 1: 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: Improve local waterways and conserve biological ecosystems

Objective 3: Invest in green infrastructure and build resiliency

Goal 1: Environmental Stewardship (Modified w/Council Feedback)

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

Original Statements	Objective 1: **Reduce carbon footprint** Strategic Work Plan **1.1 Create Climate Action Plan** **1.2 Conduct Carbon Reduction Outreach** **1.3 Strengthen Tree Protection**	Objective 2: **Improve local waterways and conserve biological ecosystems** Strategic Work Plan **2.1 Build Elliott Road Flood Storage** **2.2 Conduct Eastwood Lake Subwatershed Study** **2.3 Create a Stormwater Capital Improvement funding plan**	Objective 3: **Invest in green infrastructure and build resiliency** Strategic Work Plan **3.1 Continue electric vehicle infrastructure investment** **3.2 Begin Coal Ash Remediation** **3.3 Increase Solar Infrastructure** **3.4 Increase electric fleet investment** **3.5 Increase community and operational resilience** **3.6 Conduct Energy Efficiency upgrades in Town facilities** **3.7 Update Council's Energy policy** **3.8 Evaluate new regulations for green infrastructure**
Modified Statements	Obj. 1 Mitigate the effects of climate change in the Town of Chapel Hill 1.2 Reduce carbon footprint. Then add the existing 1.2 statement i.e., conduct carbon reduction outreach to the refined strategic work plan statement		(add-on) 3.9 Increase resident commitment and involvement in strategies implemented to reduce effects of climate change in the community

14

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

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

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
Original Statements	Strategic Work Plan 1.1 Strengthen UNC Town Gown Economic Development Partnerships 1.2 Conduct Recruitment and Marketing for Chapel Hill 1.3 Pursue Community Technology Solutions	Strategic Work Plan 2.1 Support Downtown Market Drivers 2.2 Invest in Downtown Infrastructure 2.3 Clean and Beautify Downtown	Strategic Work Plan 3.1 Conduct Downtown Parking Analysis and Policy Development 3.2 Construct Wallace Deck Expansion	Strategic Work Plan 4.1 Develop Five-year Budget Strategy Project 4.2 Implement Facility Maintenance Plan 4.3 Implement Capital Improvement Plan
Modified Statements	1.3 Obtain new and innovative technology solutions to attract and retain businesses that create jobs in Chapel Hill (?) (add-on) 1.4 Partner with Durham Tech Community College or other vocational schools to develop local talent attractive to businesses interested in Chapel Hill	Obj 2: Make Downtown Chapel Hill a destination with diverse options for work, live and play 2.1 Support Downtown Market Drivers (i.e., free public events, etc.) (?)	Consideration: Could be moved to the Connected Community Goal (add-on) 3.3 Enhance wayfinding signage in Downtown to provide for more visibility to visitors and residents	4.1: Develop five-year budget and expense strategy to have greater alignment between the two areas

16

Goal 3: 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 collaboration

Goal 3: Affordable Housing (Modified w/Council Feedback)

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.

Original Statements	Objective 1: Increase availability of housing for all incomes	Objective 2: Preserve existing affordable housing stock	Objective 3: Strengthen Collaboration
	Strategic Work Plan 1.1 Manage Bond and other local affordable housing funding resources 1.2 Develop affordable housing on Town-owned properties 1.3 Reduce regulatory barriers and create incentives for affordable housing	Strategic Work Plan 2.1 Implement Public Housing Master Plan 2.2 Consider options for Public Housing Redevelopment 2.3 Implement Manufactured Home Strategy 2.4 Implement Affordable Housing Preservation Strategy	Strategic Work Plan 3.1 Continue Performance Measurement and Reporting System 3.2 Support Northside Neighborhood Initiative 3.3 Convene Local Government Affordable Housing Collaborative
Modified Statements	(add-on) 1.4 Using a racial equity lens, identify and implement solutions to mitigate the root causes of the affordable housing crisis		Rec: Eliminate objective and incorporate the components throughout the other two objectives. Consider 3.1, 3.2 and 3.3 as elements within Objectives 1 and 2.

Goal 4: 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

Goal 4: Connected Community (Modified w/Council Feedback)

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

Original Statements	Goal Statement 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 Strategic Work Plan 1.1: Conduct Town-wide Traffic Analysis 1.2: Influence Regional Transportation Planning	Objective 2 Increase connectivity between walking, bicycling, and multi-modal networks Strategic Work Plan 2.1 Establish Transit Financial Sustainability 2.2 Manage Downtown Parking 2.3 Plan Multi-modal Infrastructure 2.4 Construct Estes Drive Bike/Pedestrian Infrastructure 2.5 Construct Elliott Road Extension 2.6 Design North-South Bus Rapid Transit
Modified Statements	N/A	Obj. 1: Improve resident satisfaction with management of traffic flow during peak times of day and night across Chapel Hill (add-on) 1.3 Continuously monitor and address road infrastructure utilization throughout the town of Chapel Hill.	Obj. 2: Enhance physical connectivity amongst persons walking, bicycling, and using multi-modal networks to reduce amount of driving needed to navigate throughout Chapel Hill. 2.2: Increase downtown parking options

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

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

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

Original Statements	Objective 1: Inspire creativity and celebrate community Strategic Work Plan 1.1 Improve Festivals and Events 1.2 Build Community History and Enrichment 1.3 Build Public Art & Arts Programs	Objective 2: Improve connections and partnerships with historically disengaged and marginalized populations Strategic Work Plan 2.1 Advance Youth Initiatives 2.2 Conduct People's Academy 2.3 Implement Building Integrated Communities Action Plan 2.4 Implement Community Connections Strategy 2.5 Increase Recreation Programming Access	Objective 3: Preserve what we love and add what we need Strategic Work Plan 3.1 Strengthen Urban Design Focus 3.2 Advance Charting our Future 3.3 Implement Rogers Road Community First Plan 3.4 Conduct Blue Hill Code Refinements 3.5 Conduct Eastowne Master Planning
Modified Statements	Obj. 1 (Option 1) Inspire creativity and celebrate the Town through community development and engagement with arts and culture community (Option 2) Be a leader in the cultural arts community	Obj. 2 Improve partnerships with underserved populations 2.5 Consider after-school programming and summer camps (add-on) 2.6 Increase (or Diversify) age and gender on Council appointed board and advisory committees	Obj. 3 Preserve the history of Chapel Hill and embrace the future needs of the community 3.5 Influence and shape the Eastowne Master Planning Project

22

Goal 6: 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

Goal 6: Safe Community (Modified w/Council Feedback)

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

Original Statements	Objective 1: **Invest in public facilities and infrastructure** Strategic Work Plan **1.1 Design and Construct Municipal Services Center** **1.2 Develop Fire Department Facilities Plan**	Objective 2: **Keep Chapel Hill safe** Strategic Work Plan **2.1 Grow Emergency Management Program** **2.2 Pursue Data-driven safety initiatives** **2.3 Create Road to Zero Plan (Pedestrian Safety)** **2.4 Improve Permitting and Inspections Process**
Modified Statements	(add-on) 1.3 Develop plan to assess, manage and improve road infrastructure	Obj 2: Keep Chapel Hill safe using equitable policing practices 2.2 Identify public safety initiatives that utilize evidence-based data (add-on) 2.5 Reduce potential implicit biases in policing through learning and development practices (add-on) 2.6 Conduct community engagement sessions to increase understanding of police practices within various communities around Chapel Hill

24

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

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

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.

Original Statements	Objective 1: Increase collaboration, innovation, and learning Strategic Work Plan 1.1 Conduct facilitation training to improve outreach and internal efficiency 1.2 Conduct capital project management training to increase project management capacity 1.3 Utilize LEAN methodology and other process improvement tools to identify options for increasing efficiency and effectiveness	Objective 2: Attract and retain diverse and talented employees Strategic Work Plan 2.1 Conduct compensation study to improve recruitment and retention 2.2 Implement Town-wide Equity and Inclusion Program to create a diverse and welcoming workforce 2.3 Increase innovation and learning opportunities to build a nimble and adaptable workforce	Objective 3: Increase transparency and information sharing Strategic Work Plan 3.1 Increase employee satisfaction with internal communication 3.2 Build performance management program to increase data-driven management and decision-making 3.3 Increase the level of cyber security inside the Town's information systems
Modified Statements	Rec. Incorporate the objective and strategic work plan items throughout the other goals and objectives	Rec. Retain in this goal but rename to "Accountable Organization" (or something similar) to embrace the need for work in Human Resources but throughout the other goal areas. If the desire is to eliminate then this will not become a goal for the organization but rather a normal "Business as Usual" item that needs a little more time and attention to it over the next three years.	Rec. Incorporate the objective and strategic work plan items throughout the other goals and objectives

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

◦ Consultant will provide a report for Town Council on all Council engagement work to-date.

Town of Chapel Hill
Strategic Planning
Council Work Session

BY: INSIGHT PERFORMANCE MANAGEMENT GROUP, LLC

JUNE 5, 2019