

2018-2022 DISTRICT OF HOUSTON COUNCIL ORIENTATION

Setting Priorities, Delivering Outcomes

November 2018



Council Orientation Agenda

TIME	MONDAY	TUESDAY	WEDNESDAY
8:30 – 10:00	Local Government 101	Administering a Local Government	Risk Management & Dispute Resolution
10:00 – 10:15	Refreshment Break	Refreshment Break	Refreshment Break
10:15 – 12:00	Your Guide to Good Governance	Budgeting, Taxation, and Financial Affairs	Community Planning & Development
12:00 – 1:00	Lunch (Provided)	Lunch (Provided)	Lunch (Provided)
1:00 – 2:30	Setting Priorities, Delivering Outcomes	Municipal Service Delivery & Planning	Asset Management & Community Stewardship
2:30 – 2:45	Refreshment Break	Refreshment Break	Refreshment Break
2:45 – 4:00	Communications for Everyone	Human Resource Management	Putting it Together – It's up to You!



Overview

- Setting Goals & Objectives
- Allocating Resources
- Checking In
- When it Goes Sideways...
- Q&A



Strategic Planning

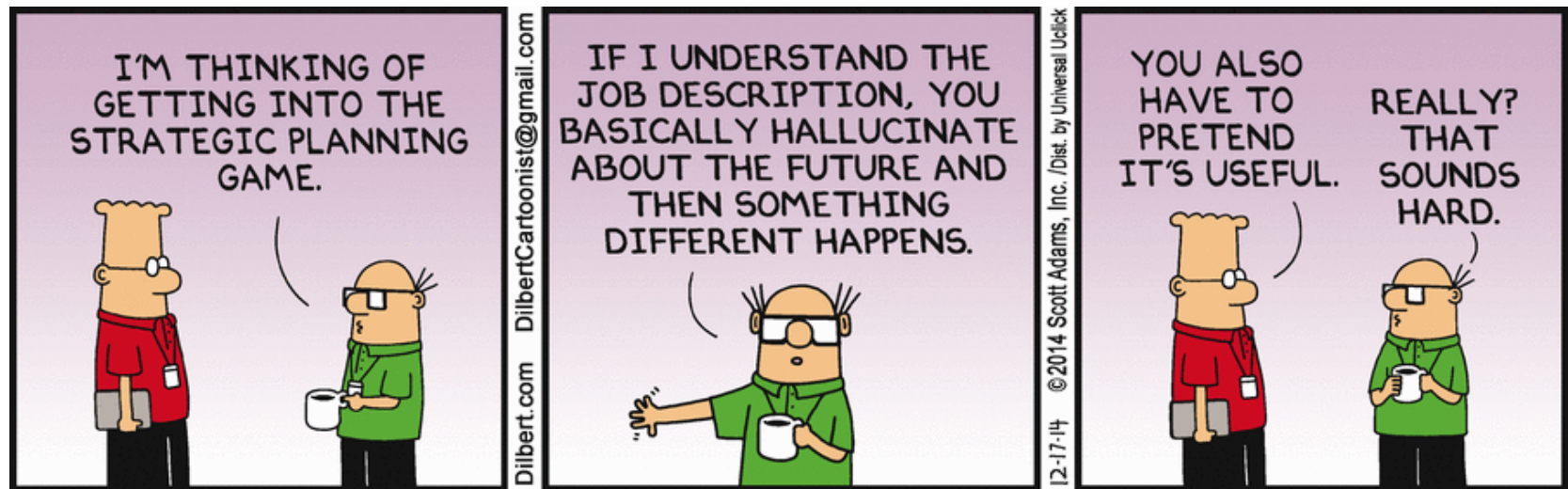
The Basics

- So now you're elected...
- Unlimited Dreams
- Limited Resources
- “The Big Crunch”
- Council's Role
- Staff's Role



Strategic Planning

Why Bother?



Strategic Planning

The Case for Effective Planning

- Not a “To Do List”
- The Big Picture v. Minute Details
- Governance v. Administration
- Clarity, Clarity, Clarity



Strategic Planning Priorities

- “20,000 ft. View” – Focus on Broad concepts
- Don’t focus on symptoms/causes/indicators
- What is the core issue?
- Tying in the Day to Day Solutions



Strategic Planning Objectives

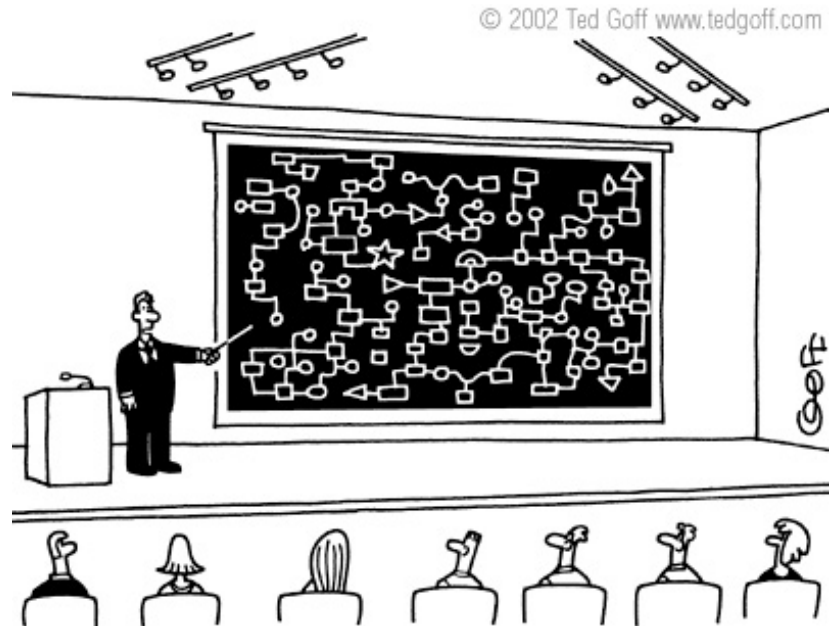
- Indicators of Success
- Narrowing in on the Prize
- Commitments & Expectations
- Resourcing Consideration
- “The Meat and Potatoes”



“Great plan. Could we get some more details?”

Strategic Planning Tasks

- Specific, narrow, defined
- Tactics v. Strategy
- *Establishes Expectations*
- Timeframe?
- Resources, resources, resources
- Not the Actual Plan!!!

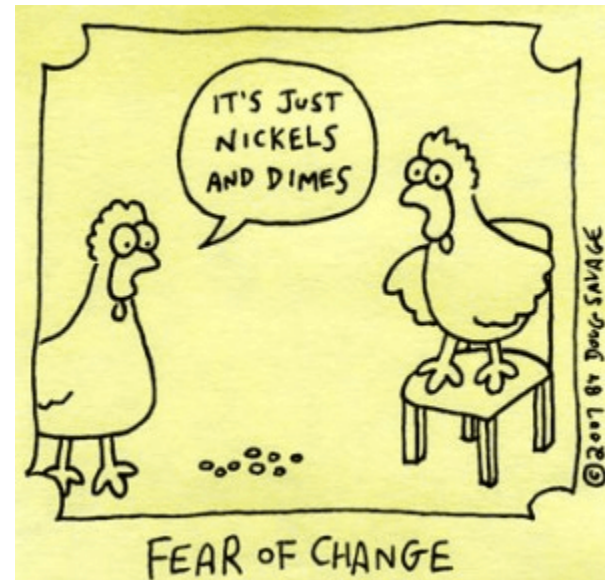


"This is our plan for
the next 1,000 years."

Strategic Plan

What's New?

- Change Management
 - Impact?
 - Communication of Plan?
 - Current Projects?
- Vision, Mission, Values
 - Need for Plan
 - Include all team members
 - No secrets!



Resourcing the Plan

- Ask Questions before Committing to it!
 - Is this in our mandate / jurisdiction?
 - Staff Resources & Capability
 - Willingness to Pay & Complete
 - Workload, workload, workload
 - Realistically...

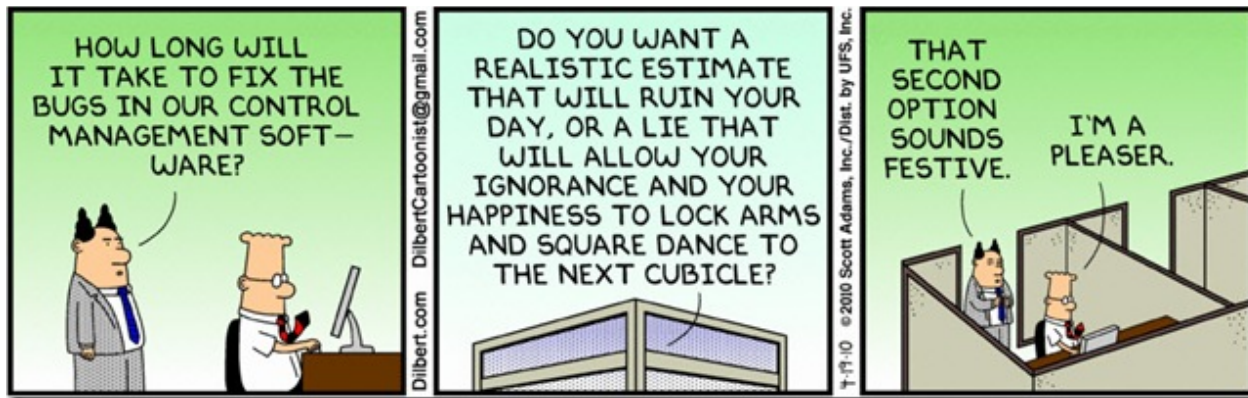


"It's time to restore the cuts to our strategic planning budget."

Resourcing the Plan

Even More Questions...

- Duplication of Work?
- Exposure to new risks?
- Are you forgetting something?



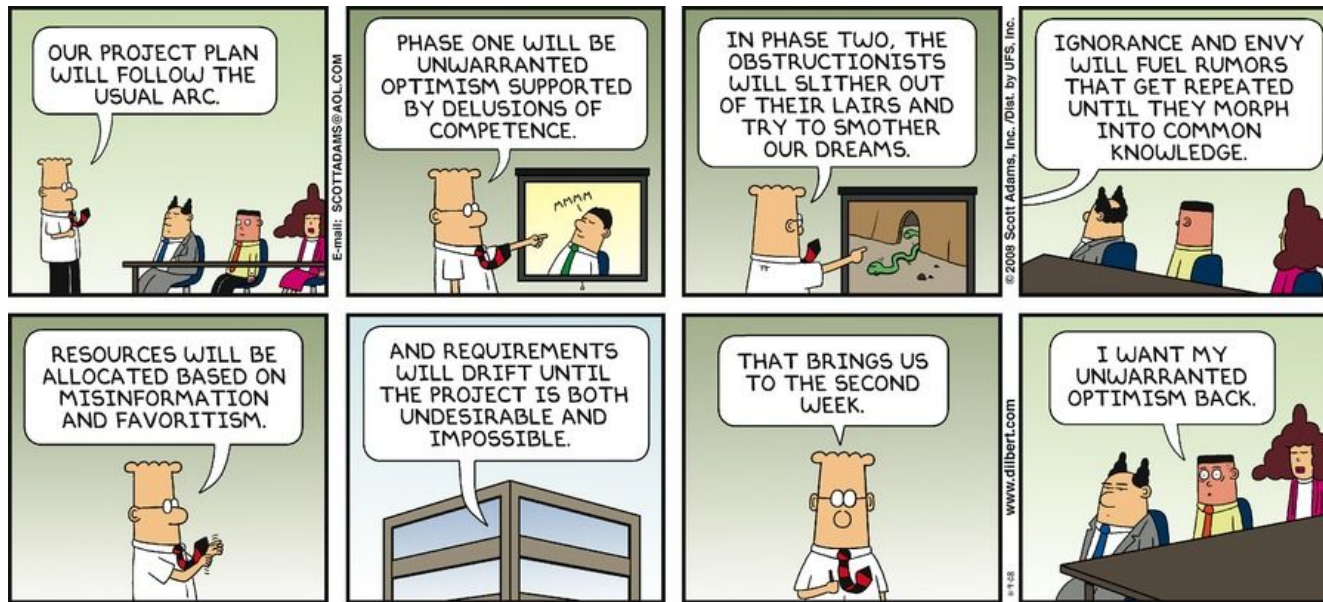
Resourcing the Plan

Commitment, Action, Completion



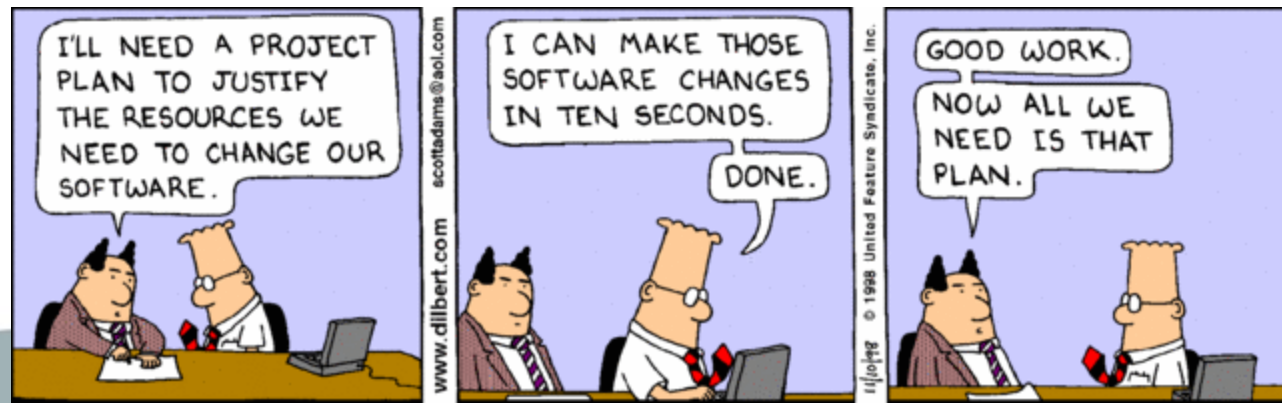
Resourcing the Plan

Commitment, Action, Completion



Resourcing the Plan Financial Planning

- Revenue Requirements?
- Plan Expenses *well* in advance
- “Shovel Ready” v. Ad Hoc
- Not just about having the will
- Finding the Way



Other Forms of Planning

- Corporate Action Plans (3-5 yrs)
- Capital Investment Planning (5-10 yrs)
- Community Plans (10-50 yrs)
- Official Community Plans (10-25 yrs)
- Regional Growth Strategies (20-50 yrs)
- Asset Management Plan (50+ yrs)



Performance Management

Why Bother?



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Delivering Outcomes

Report Types

- Monthly Department / Business Unit Reports
- Quarterly Financial Report
- Quarterly Strategic Priorities Report
- Annual Report
- Financial Statements
- Staff Reports / Briefing Notes



Performance Reviews

- Can be carried out by Administration or Contractor
- Answers question “are we achieving objectives, and if not, why?”
- Focuses on several factors. Few simple answers.
- Can focus on individual services, departments, or whole organization
- Communication, communication, communication



Performance Reviews

What are you Reviewing?

- Identify objectives for reviewer – i.e. “find cost-savings”, “identify resource needs”, etc.
- Objectives = Outcomes
- Data is Key!



Performance Reviews

Communication is Critical

- Key Challenge: Dispelling Rumours
- Communicate objectives in transparent manner, especially during holistic reviews.
- Communicate need for staff cooperation, and engage staff early.
- Communicate results clearly. Avoid mischaracterizing results.



Performance Reviews

When its Completed

- Communicate the results to those most impacted (i.e. staff)
- Review the recommendations – what are they?
- Decide *if* any change is required
 - “Desired” change is not always good change
 - Will the change impact the core business objectives?



Delivering Outcomes When to Revisit the Plan

- Review Often
- What were the objectives & priorities?
- Accomplishments?
- Set Backs?
- SWOT?
- Revise Intermittently



“It’s a simple two-part strategy. First, locate the hills. Then head for them.”

Questions?

Up Next:

Procedure on the Fly!

