

The strategic planning workshop is held annually, and is attended by the City Council, City Manager, Assistant City Manager, and the City Secretary.

The strategic planning process is focused primarily on **what** the City needs to accomplish to achieve success, rather than the day-to-day **how** of municipal operations and service delivery. Good strategic planning addresses the issues that challenge the community today and, more importantly, issues that will present challenges and opportunities tomorrow. Accordingly, the strategic planning workshop is an exercise in collective foresight, as the participants work together to clarify what success looks like for the City of Forney in light of expected future conditions and where Council wants to take the community and the organization.

Strategic planning is a product of strategic thinking resulting in a defined direction that guides the decisions and resource allocation of an organization. It should occur not only at periodic planning sessions, but on a continuous basis. Strategic thinking and planning should occur at the highest levels of the organization, but should not stop there. It must cascade to lower levels of the organization, and should directly drive decision making. Strategic planning involves the gathering, sorting and prioritizing of the best thinking of Forney's policy leaders and executive managers, focused on the core purposes of the organization and the most important attributes of success.

For Fiscal Year 2013, leadership chose to take a new approach to the strategic planning process.

#### *The Seven Strategic Objectives*

- *Implement Transportation Improvements*
- *Develop the Municipal Organization*
- *Foster Strategic Relationships*
- *Revitalize and Expand Downtown*
- *Become a Regional Center*
- *Enhance the Quality of Life*
- *Actively Engage the Community*

#### Timing

This new approach started with beginning the entire strategic planning process in April rather than June, allowing for the strategic plan to directly guide the budget process from the start.

#### Process

Moving forward with the same seven strategic objectives in place, Council and staff applied a system of strategic planning called an *Investment Portfolio* developed by The Grove Consultants International. The new process is a simple, life cycle model that helps council and staff to decide where to allocate critical resources within the organization.

With the Investment Portfolio, leadership is able to clarify, analyze, and prioritize investments and develop criteria for allocating resources, clarify and prioritize resource investments based on citizen needs, balance investments between new and mature activities, reinforce a process-oriented approach to investment and test vision against realities.

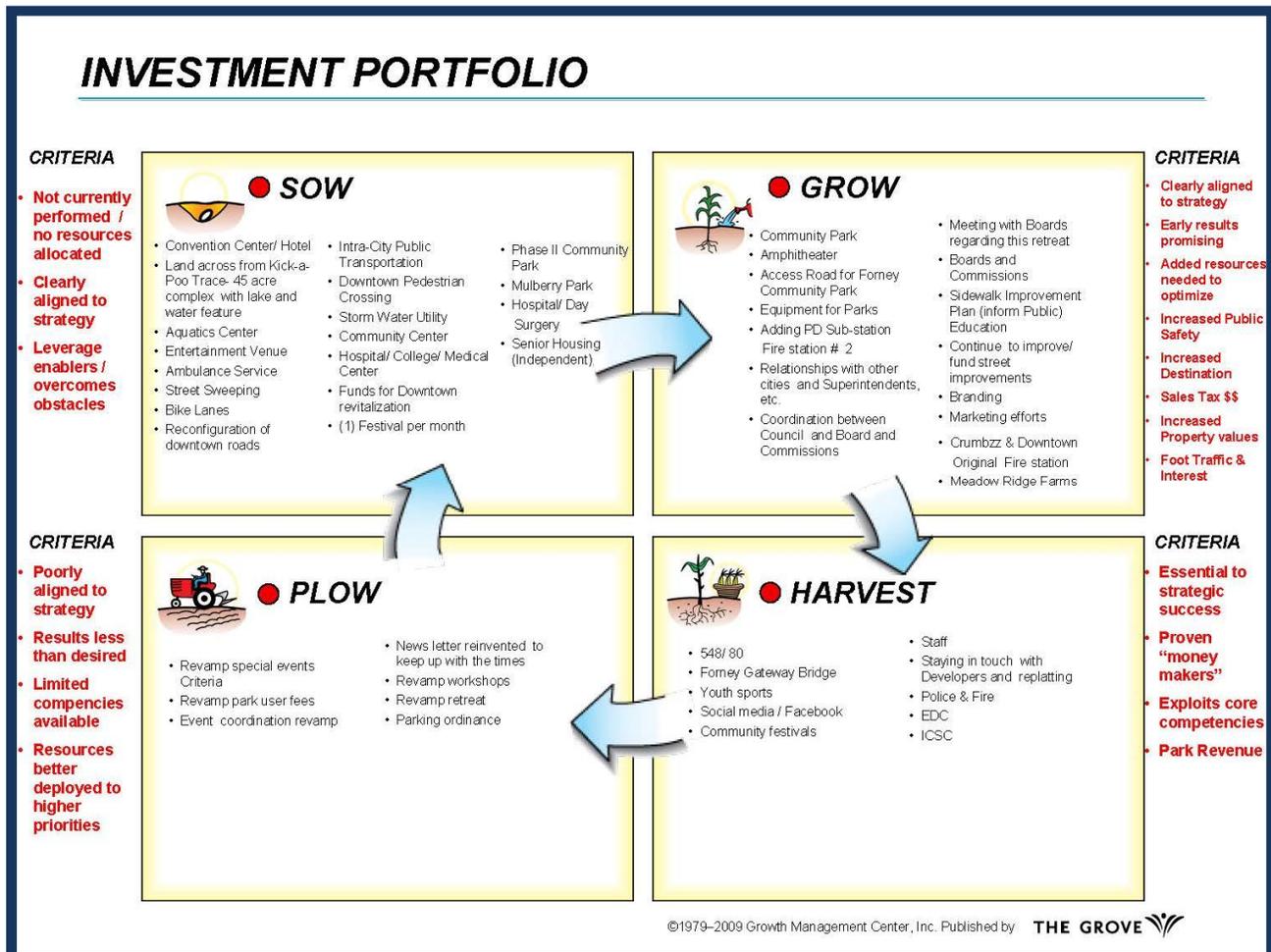
The Investment Portfolio follows a life cycle metaphor. Using the concept of a life cycle helps everyone to understand how the predictable pattern of growth, maturation, and decline affect return on investment. The pattern is divided into four phases described as:

- ✓ Sow (seeding phase) – something needs to be started
- ✓ Grow (growth phase) – a program or service is showing lots of promise and needs resources and investment
- ✓ Harvest (mature, fruit bearing phase) – a program or service is proven and needs to be clearly focused to yield results soon
- ✓ Plow (declining, recycling phase) – a program or service needs to be revamped and its resources realigned or reassigned

By categorizing new and existing action items in this manner, Council and staff are easily able to see where available resources will have the most impact in working towards the seven strategic objectives.

## Results

The following chart is the end result of the new process. Each quadrant shows one of the four categories defined above and the criteria used to determine if an item should be listed within that category.



## Strategic Plan Implementation Teams (SPITS)

Elements of the investment portfolio requiring further research or action were easily categorized into five broader categories. In most cases, elements in each category fell under the functional responsibility of multiple City departments. To facilitate implementation and coordination of the strategic plan, cross-functional teams were formed to research and recommend specific actions.

The teams and their missions are:

- ✓ **Marketing:** Coordinate marketing efforts directed at audiences both internal and external to the community. Emphasis should be placed on implementation of the new City brand and logo adopted by the City Council in April 2012. *Addresses Strategic Plan Objective(s): Become a Regional Center; Actively Engage the Community*

### Expected Outcomes:

- Develop a plan for full implementation across all City departments of the new City brand and logo including time schedules and cost.
- Develop a media plan and overall philosophy for the website and Facebook with a focus on content, ownership and regular, consistent updates.
- Revamp the monthly newsletter by evaluating frequency of distribution, format and content.

### Budget Decision Package:

- Determine necessary additions to operating budgets for full implementation of the new brand and logo.
- Determine additional costs for any changes to the newsletter and website.

- ✓ **Development Coordination:** Coordinate development related activities with emphasis on the Meadow Ridge Farm Development site and the downtown area. *Addresses Strategic Plan Objective(s): Become a Regional Center; Revitalize and Expand Downtown*

### Expected Outcomes:

- Coordinate all aspects of the development of the Meadow Ridge Farm retail development site.
- Develop an inventory of downtown properties including size, value, owners, building challenges, etc.
- Review inactive Planned Developments to identify future development opportunities.
- Research funding options for downtown development including a dedicated funding mechanism, a bond program and grant opportunities.
- Research requirements and overall feasibility for the installation of a railroad quiet zone.

### Budget Decision Package:

- Explore alternatives for a permanent funding mechanism for downtown infrastructure and development.
- Determine necessary funding level for the installation of a railroad quiet zone.

- ✓ **Council Coordination:** Develop a program to promote regular, ongoing communication between the City Council and advisory Boards and Commissions. The

team is also charged with reviewing current procedures for monthly City Council workshops and the annual City Council retreat. *Addresses Strategic Plan Objective(s): Develop the Municipal Organization*

Expected Outcomes:

- Develop a format and schedule for regular joint meetings with the Council and each Board and Commission.
- Recommend a system for the assignment of Council Member liaisons to each Board and Commission.
- Develop an in-house training program for Board and Commission members
- Review current procedures for monthly City Council workshops and make recommendations regarding format changes, topics, etc.
- Review current procedures for annual City Council retreat and make recommendations regarding format changes, topics, etc.

Budget Decision Package:

- None

- ✓ **Special Events:** Examine current opportunities and constraints to expanding the Special Events Program (capacity, staffing, local interest, etc.) and present the City Council with options for types of events that could be successfully produced. Also, determine needed resources to increase the number of special events held each year. *Addresses Strategic Plan Objective(s): Enhance the quality of life*

Expected Outcomes:

- Prepare a job description for a Special Events Coordinator and prepare a budget proposal for the addition of this position
- Prepare a decision matrix for the City Council to determine the types of events that will be added to the Special Events Program.
- Recommend a special event permit application process that utilizes collaborative web based technology to promote efficient coordination and response from the Special Events Response Team (SERT).
- Recommend a policy for a special event permit fee and other charges related to the provision of public services during events not sponsored by the City.

Budget Decision Package:

- Determine funding levels for the implementation of a Special Events Coordinator position and office.
- Determine funding amount and sources for additional special events and/or expansion of existing events.
- Determine special events permit fees and other charges for the public services provided for events not sponsored by the City.

- ✓ **Hometown Christmas:** Develop a project scope detailing event criteria and City contributions. *Addresses Strategic Plan Objective(s): Enhance the quality of life*

Expected Outcomes:

- Review the Hometown Christmas event with specific emphasis on total City contributions (financial and in-kind services)
- Recommend project criteria for the Hometown Christmas (i.e. themes for event components, size of event, public safety requirements, etc.)

Budget Decision Package:

- Determine appropriate level of City financial contribution and in-kind services

The teams met continuously over several months to present their findings and recommendations for the Strategic Budget Workshop held in June.

### **Strategic Budget Workshop**

In June, the City Council and staff held a strategic budget workshop to coordinate strategic plan implementation with desired budget outcomes. The timing of the workshop allowed staff to provide Council with a high level overview of the current budget environment including projected revenues and estimated base budgets.

The strategic plan implementation teams presented Council additional research and proposals for implementation in each focus area. All proposals developed by the teams were presented regardless of whether or not there is a budget impact. This allowed the Council to consider and provide feedback on implementation in its entirety.

Staff initiated proposals related to the seven strategic objectives were also presented to Council at this time. Though these items were not specifically discussed at the strategic retreat, staff felt that they also merited priority consideration based on operational needs.

As a result of the workshop, Council was able to finalize the action plan for implementation of the strategic plan and provide staff with clear direction on the incorporation of the plan into the proposed budget.