



ORGANIZATIONAL & STRATEGIC INITIATIVES  
BUSINESS PLAN

2020

JULY 1, 2019 – JUNE 30, 2020  
TOWN OF CHAPEL HILL



# Letter from the Director



The Department of Organizational and Strategic Initiatives sits inside the Manager’s Office and is responsible for leading and managing special projects initiated by the Town Manager. The organizational and strategic initiatives range from 18-month to four years in duration and yield new systems, infrastructure or plans that are implemented throughout the organization. Examples of this work include the Downtown 2020 Work Plan and Downtown Portfolio Team as well as creating a leadership program focused on innovation and collaboration. The Department was created to establish a peer status with other departments but is staffed using internal teams and position sharing as well as external consultants to accomplish its goals.

A summary of FY 19 accomplishments and FY 20 Strategic Initiatives is provided below.

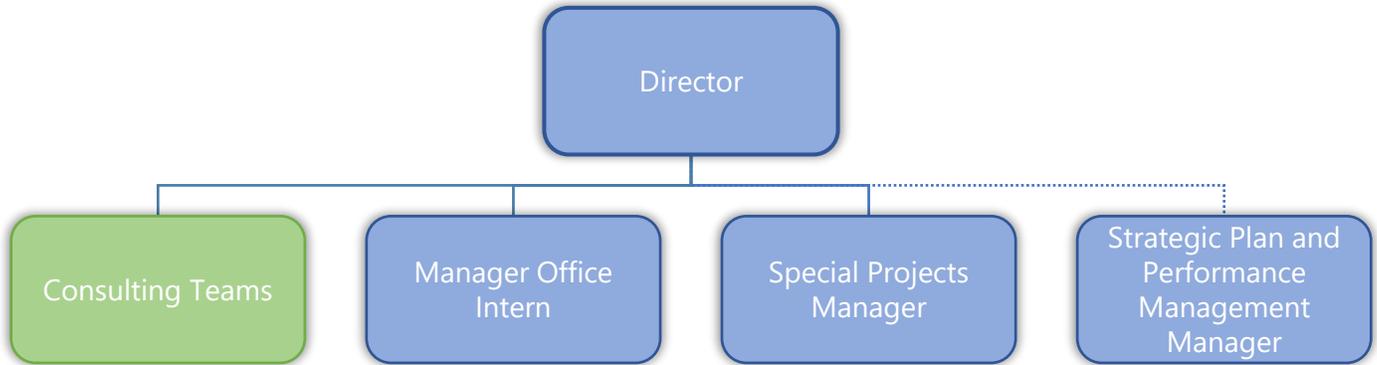
	<b>FY 19 Accomplishments</b>	<b>FY 20 Initiatives</b>
<b>Strategic Planning</b>	<ul style="list-style-type: none"> <li>• Council approval of strategic goals and objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate progress</li> <li>• Incorporate to 5-year budget strategy</li> </ul>
<b>Performance Management</b>	<ul style="list-style-type: none"> <li>• ICMA and What Works Cities Assessments</li> </ul>	<ul style="list-style-type: none"> <li>• Data informed decision making</li> <li>• Build community data set</li> </ul>
<b>Innovation Leadership</b>	<ul style="list-style-type: none"> <li>• Alliance for Innovation Ambassador Program</li> </ul>	<ul style="list-style-type: none"> <li>• Convene and celebrate innovation</li> </ul>
<b>Organizational Development</b>	<ul style="list-style-type: none"> <li>• Diversity, Equity and Inclusion Organizational Assessment</li> </ul>	<ul style="list-style-type: none"> <li>• Training and Development Program around Workplace Safety</li> <li>• Launch GARE Program</li> </ul>
<b>Leading from wherever you are...</b>	<ul style="list-style-type: none"> <li>• People’s Academy Development and Facilitation Training Program</li> </ul>	<ul style="list-style-type: none"> <li>• Support 2<sup>nd</sup> People’s Academy</li> <li>• Build Facilitation Program</li> <li>• Smart Leaders Smarter Teams</li> </ul>
<b>Process Improvement</b>	<ul style="list-style-type: none"> <li>• Building and Development Services Lean training and Kaizen event for permitting</li> </ul>	<ul style="list-style-type: none"> <li>• Design of Navigator Role</li> <li>• Process Improvement for Inspections</li> </ul>
<b>Downtown Capital Project Coordination</b>	<ul style="list-style-type: none"> <li>• Bid and contracted Alleyway project</li> <li>• Stakeholder outreach for streetscape projects</li> </ul>	<ul style="list-style-type: none"> <li>• Complete Alleyway Project</li> <li>• Focus on North Alley</li> <li>• Public Bathroom Project</li> <li>• Loading zone management</li> </ul>

– Rae Buckley, Director of Organizational & Strategic Initiatives

## Our Guiding & Governing Documents

- Council Strategic Goals and Initiatives FY 2020-22
- Diversity, Equity and Inclusion Organizational Assessment
- ICMA and What Works Cities Performance Management Evaluations
- Downtown Work Plan FY 2018-20

## Our Department



DEPARTMENTAL  
STRATEGIC INITIATIVES



**Initiative 1: Develop and execute a strategic planning process for the Town and continue to demonstrate how that process affects all that the Town does**

Project Manager(s): David Finley

**Strategic Alignment**

*Strategic Plan*- This initiative addresses: Collaborative & Innovative Organization, Objective 3, Initiative 2

**Actions**

**Action 1.1:** Data Informed Decision Making: Providing data to inform policy decision making. Environmental Stewardship and Economic & Financial Sustainability performance measures and quarterly reports to Council. Traffic Management public engagement and recommendations to Council. State of the Community report and ongoing shared community data model.

Action 1.1 will begin in FY2020 and anticipated to end in FY2020

**Action 1.2:** Organize and Prioritize Strategic Initiatives and Communicate Progress: Continue to adapt and modify the business plan cycle to support Council goals and objectives and the development of the 5 year budget plan. Develop Communication Plan for strategic goals and objectives including a graphic document, poster and website design. Create and publish performance management dashboards and reports. Public engagement and education on local government topics. Develop partnerships with higher education and community resource groups.

Action 1.2 will begin in FY2020 and anticipated to end in FY2020

**Action 1.3:** Build Community Data set with Orange County, Hillsborough, Carrboro and Chamber of Commerce and OWASA.

**Performance** (add more performance measures if needed)

Performance Measure 1:	Three year cost estimate for strategic goals and objectives
Performance Measure 2:	Complete quarterly reports for Environmental Stewardship and Economic & Financial Sustainability

**Resources**

Account Name	FY20 Budget	FY21 Estimate	FY22 Estimate
Staff Resources Only	\$0		
<b>Total</b>	-	-	-

**Significant Organizational Support)**

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input checked="" type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20	<input checked="" type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative (Project Management and Strategic Plan software request)	<input checked="" type="checkbox"/>

## Initiative 2: Leadership Development – Diversity and Inclusion Assessment

Project Manager(s): Celisa Lehew, Rae Buckley, Tom Clark

### Strategic Alignment (if applicable)

*Strategic Plan-* This initiative addresses: Collaborative & Innovative Organization, Objective 2, Initiative 2

### Actions (add more actions if needed)

**Action 2.1:** Training and Development Program: Conduct RFP process to solicit models and approaches to offering organizational Diversity Equity and Inclusion programs. Select program and begin implementation in Spring, 2020. The goal is to provide the program for every employee so this action may take several years to complete.

Action 2.1 will begin in FY2020 and anticipated to end in FY2022

**Action 2.2:** Equity review of recruitment, promotion processes. Establish baseline data and set goals for building a diverse leadership pipeline.

Action 2.2 will begin in FY2020 and anticipated to end in FY2020

**Action 2.3:** Re-affirm organizational expectations for workplace inclusiveness and safety. Includes holding forums, establishing resource groups and additional training about workplace safety.

Action 2.3 will begin in FY2020 and anticipated to end in FY2020

### Performance (add more performance measures if needed)

Performance Measure 1:	Leadership pipeline diversity metrics
Performance Measure 2:	Percentage of employees taken DEI program

### Resources

Account Name	FY20 Budget	FY21 Estimate	FY22 Estimate
10140-60055	141,309		
<b>Total</b>	-	-	-

**Significant Organizational Support** (by marking this checkbox, the business plan team will notify the relevant department(s) of this significant need after your FY20 Business Plan has been submitted)

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20	<input type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative	<input type="checkbox"/>

### Initiative 3: Leading from wherever you are

Project Manager(s): Rae Buckley

#### Strategic Alignment (if applicable)

*Strategic Plan-* This initiative addresses: Collaborative & Innovative Organization, Objective 2, Initiative 3

#### Actions (add more actions if needed)

**Action 3.1:** Leadership Development (with HRD): Building a leadership culture that empowers employees to lead from wherever they are using a collaborative and innovative mindset to build a community where people thrive. Provide Smart Leaders Smarter Teams yearly to cohort of 24 emerging leaders in the organization and any new members to the Senior Leadership Team who have not yet had the opportunity.

Action 3.1 will begin in FY2020 and anticipated to end in FY2020

**Action 3.2:** Innovation Leadership (team): The Alliance for Innovation Ambassador mission is to create safe, supportive opportunities for employees to innovate and collaborate to advance the mission of the organization. This will be accomplished by convening employees to support and encourage innovation and celebrating the innovative approaches taken by employees.

Action 3.2 will begin in FY2020 and anticipated to end in FY2020

**Action 3.3:** Facilitation Program (Sarah Poulton): Continue to build out the capacity of the meeting facilitation team both internally and externally to improve the design and outcome of meetings. Now that the cohort is trained the next step is to utilize the facilitators and track improvements.

Action 3.3 will begin in FY2020 and anticipated to end in >FY2022

#### Performance (add more performance measures if needed)

Performance Measure 1:	Turnover Rate, Internal Promotions Rate
Performance Measure 2:	Employee engagement "voice" and "empowerment" feedback
Performance Measure 3:	Facilitation Program Utilization

#### Resources

10128-60100 FY20 Budget    FY21 Estimate    FY22 Estimate

	FY20 Budget	FY21 Estimate	FY22 Estimate
Smart Leaders Smart Teams	\$40,000	\$40,000	\$40,000
<b>Total</b>	-	-	-

**Significant Organizational Support** (by marking this checkbox, the business plan team will notify the relevant department(s) of this significant need after your FY20 Business Plan has been submitted)

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20	<input type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative	<input type="checkbox"/>

## Initiative 4: Employee Engagement

Project Manager(s): Rae Buckley and Jim Huegerich

### Strategic Alignment (if applicable)

*Strategic Plan-* This initiative addresses: Collaborative & Innovative Organization, Objective 3, Initiative 1

### Actions (add more actions if needed)

**Action 4.1:** Communication Deep Dive: this project asks the question, how might we understand employees' expectations who are dissatisfied with Town communication?

Action 4.1 will begin in FY2020 and anticipated to end in FY2020

**Action 4.2:** Prepare for 2020 Employee Engagement Survey

Action 4.2 will begin in FY2020 and anticipated to end in FY2020

### Performance (add more performance measures if needed)

Performance Measure 1:	Communication improvement
Performance Measure 2:	[Insert performance measure here]

### Resources

Account Name	FY20 Budget	FY21 Estimate	FY22 Estimate
10140-60055	\$5,000		
<b>Total</b>	-	-	-

**Significant Organizational Support** (by marking this checkbox, the business plan team will notify the relevant department(s) of this significant need after your FY20 Business Plan has been submitted)

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20	<input type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative	<input type="checkbox"/>

## Initiative 5: Downtown Municipal Infrastructure

Project Manager(s): Sarah Poulton

### Strategic Alignment

*Strategic Plan-* This initiative addresses: [Economic & Financial Sustainability](#), Objective 2, Initiative 2

### Actions

**Action 6.1:** Community and Business Liaison for Streetscape and North Alleyway Improvement Projects. Manage the community and business interactions necessary for comprehensive and thoughtful improvements to both the N. Roberson St. and N. Graham St. streetscape and North Alley.

Action 6.1 will begin in [FY2020](#) and anticipated to end in [FY2022](#)

**Action 6.2:** Public Bathroom Usage: Develop policy and program to provide more public bathroom options in Downtown.

Action 6.2 will begin in [FY2020](#) and anticipated to end in [>FY2022](#)

**Action 6.3:** Loading Zone Management: Develop policy and program to manage the use of loading zones and municipal right-of-way for commercial deliveries. This project may need consulting resources if there is consensus on an approach.

Action 6.3 will begin in [FY2020](#) and anticipated to end in [FY2020](#)

### Performance

Performance Measure 1:	Community Survey
Performance Measure 2:	[Insert performance measure here]

### Resources

Account Name	FY20 Budget	FY21 Estimate	FY22 Estimate
Staff Resources Only	\$0		
<b>Total</b>	-	-	-

**Significant Organizational Support** (by marking this checkbox, the business plan team will notify the relevant department(s) of this significant need after your FY20 Business Plan has been submitted)

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20	<input type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative	<input type="checkbox"/>

## Initiative 6: Process Improvement

Project Manager(s): Rae Buckley

### Strategic Alignment

*Strategic Plan*- This initiative addresses: Collaborative & Innovative Organization, Objective 1, Initiative 3

### Actions

**Action 6.1:** Support process improvements in Building and Development Services using the Lean methodology. Initial focus on application intake process to integrate zoning and building process. Compare TOCH zoning for single family residential to other municipalities. Subsequent focus will be on application review and project inspections.

Action 6.1 will begin in FY2020 and anticipated to end in >FY2022

**Action 6.2:** Apply Lean methodology to smaller, internal processes to build skills and shared understanding of process improvements.

Action 6.1 will begin in FY2020 and anticipated to end in >FY2022

### Performance (add more performance measures if needed)

Performance Measure 1:	Application submittal time
Performance Measure 2:	Application review time
Performance Measure 3:	Customer feedback

### Resources

Account Name	FY20 Budget	FY21 Estimate	FY22 Estimate
Staff Resources Only	\$0		
<b>Total</b>	-	-	-

**Significant Organizational Support** (by marking this checkbox, the business plan team will notify the relevant department(s) of this significant need after your FY20 Business Plan has been submitted)

This initiative will need significant communications support from Communications & Public Affairs in FY20	<input type="checkbox"/>
This initiative will need significant guidance/support from Technology Solutions in FY20 (Permit and Inspections Software)	<input checked="" type="checkbox"/>
We anticipate requesting <b>new</b> funding/resources in next year's budget to complete this initiative	<input checked="" type="checkbox"/>