

Strategic Planning & **PERFORMANCE MANAGEMENT**

CALL FOR PROJECTS

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Overview

The UNC School of Government invites North Carolina local and state governments to participate in the Strategic Planning and Performance Management program (SPPM), which assists local and state governments in creating a comprehensive strategic and performance management plan. This program:

- Empowers local governments to develop their own strategic and performance management plans
- Integrates performance measurement and decision-making routines with strategic planning for holistic performance management
- Builds organizational capacity to implement, monitor, and evaluate the strategic and performance management plan beyond the facilitation process

The School will support participating local and state governments to develop a comprehensive strategic and performance management plan that will guide their work for the next five years and beyond. The program will help governments align programs and services with stakeholder expectations and needs, improve organizational outcomes, and demonstrate their impact and value to the community. In addition, the School will aide participating governments in building the internal capacity needed to implement the plan, monitor progress, and make evidence-informed decisions. Plans created through this program will:

- Reflect the mission, vision, and values of the government and its stakeholders.
- Identify the current and future key issues, opportunities, and challenges facing the government.
- Establish clear and measurable goals, objectives, and strategies for the government to achieve its desired outcomes.
- Define the roles and responsibilities of staff, leadership, and stakeholders in implementing and monitoring the plan.
- Develop a performance measurement system that will track and report service department progress and results.
- Provide a framework for continuous improvement and learning.

Project Cost: Costs are variable and depend on the type of organization, its complexity, and the population size served. Contact us to confirm a pricing range.

Key Project Actors and Responsibilities

Project Facilitators

Who: School of Government staff

Responsibilities:

- Guiding the overall process and methodology
- Designing, facilitating, and documenting workshops, focus groups, interviews, and surveys
- Providing project management and support

Resources: 20 hours per month

Project Lead

Who: A member of the leadership team of the participating government entity

Responsibilities:

- Provide feedback to the project facilitators
- Assist the project facilitators in framing issues and questions
- Designate members of the planning committee and other groups that will be engaged in the process
- Communicate the process and expectations to employees and stakeholders
- Provide relevant data and information to employees, stakeholders, and facilitators
- Arrange meeting logistics (e.g., scheduling, platform, venue)
- Review and providing feedback on draft and final plan documents
- Lead the development of the plan

Resources: 30 hours per month

Planning Committee

Who: The project lead, two board members, two external stakeholders (e.g., advisory council members, chamber of commerce representatives, community members), and three organizational employees (ideally from different services and levels). The project lead will designate the members of the committee.

Responsibilities:

- Provide feedback to the project facilitators
- Prepare plan documents and materials
- Oversee the process

- Participate in the facilitation sessions
- Meet monthly

Resources: 5 hours per month

Data Synthesis Group (DSG)

Who: This group is a subset of the planning committee. It comprises the project lead, three town employees, and one additional frontline employee. The project lead will designate the members of the DSG. The DSG must operate within the guidelines established by the planning committee and bring any additional insights to the planning committee for discussion.

Responsibilities:

- Analyze data and synthesize findings within the guidelines established by the planning committee
- Provide synthesized information to project facilitators at least one week before the planning committee meeting
- Meet twice a month (once as part of the planning committee)

Resources: 20 hours per month

Other Stakeholders and their Expectations

Board Members

- Provide overall process guidance to the project lead
- Communicate the policy vision
- Respond to the vision, mission, and values survey
- Review draft mission, vision, values, and goals
- Approve the strategic plan

Advisory Bodies

- Provide overall process feedback to the planning committee
- Respond to the vision, mission, and values survey
- Participate in a focus group to discuss draft mission, vision, values, and goals
- Review the strategic plan

Program Partners (nonprofits, contractors, civic organizations, and other governments)

- Provide overall process feedback to the planning committee
- Respond to surveys

- Participate in a focus group to discuss draft mission, vision, values, and goals
- Review the strategic and performance management plans

Staff

- Provide ongoing feedback to the planning committee
- Respond to the context survey
- Respond to the mission and vision survey
- Respond to the values survey
- Respond to the goals survey
- Provide feedback to draft mission, vision, values, and goals
- Provide feedback to draft goals and objectives
- Review the strategic and performance management plans
- Help the DSG develop objectives
- Help the DSG develop actions
- Help the DSG develop the implementation plan

Timeline and Deliverable Summary

The program entails a 12-month facilitated process (flexible to circumstances and organizational context). The facilitated process has two phases: Phase One focuses on developing the strategic plan components, and Phase Two focuses on operationalizing the plan through performance measurement and decision-making.

Phases	Time Period	Deliverables
Phase One: Strategic Planning	Month 1	<ul style="list-style-type: none"> • Alert the board, advisory council, and staff • Pre-project surveys • Establish a planning committee • Establish a DSG
	Months 2 and 3	<ul style="list-style-type: none"> • Develop and share the draft mission, vision, and values with the board and staff members for feedback • Full-day retreat with the board • Full-day retreat with staff • Full-day retreat session with the planning committee
	Months 4 and 5	<ul style="list-style-type: none"> • Discuss goals with the planning committee, managers, and supervisors • Full-day sessions with the planning committee • Share the revised goals with the board for feedback
	Months 6 and 7	<ul style="list-style-type: none"> • Full-day sessions with the planning committee to revise the mission, vision, values, and goals
Phase Two: Performance Measurement and Decision-Making	Months 8 and 9	<ul style="list-style-type: none"> • Develop objectives with the planning committee, DSG, and staff • Full-day sessions with the planning committee, DSG, and staff
	Months 10 and 11	<ul style="list-style-type: none"> • Develop actions with staff
	Month 12	<ul style="list-style-type: none"> • Develop an implementation and management plan with staff