

Looking Forward FY 25 Wins Through *Transition*



Day 2

City of Richmond, City Council Advance

Robert L. Dortch, Jr. | Principal

July 26, 2024

Jordan/Sydnor
Innovation Group

Opening Session

Day 2



Opening Session

The Recap



UNSCRAMBLE

1. **tmcoumniy regesmtaen**
2. **eaehdprlsi**
3. **tveisgaliel**
4. **oaprtiarcipty gbtgnudei**
5. **gncaeh**
6. **paicmt**
7. **otnovinain**
8. **stutr**



Community Agreements

What will be our agreements be for the Advance ?



Council Staff Collaborative “Real World” Example

Honor the Process

Be mindful of
yourself and others

Be present

Assume best
intentions

Create spaces for
other ideas and
perspectives

Don't be afraid to say
“I don't know”

Speak your truth

Make space/Take
space

Don't make
assumptions

Don't use acronyms
or jargon

Acknowledge
different cultural
perspectives

Correct gently, but
do correct Ouch,
Oops, Whoa

Invite to
co-create

Deep Listening:
Listening to
understand vs.
Listening to respond



Embracing Change

See Change

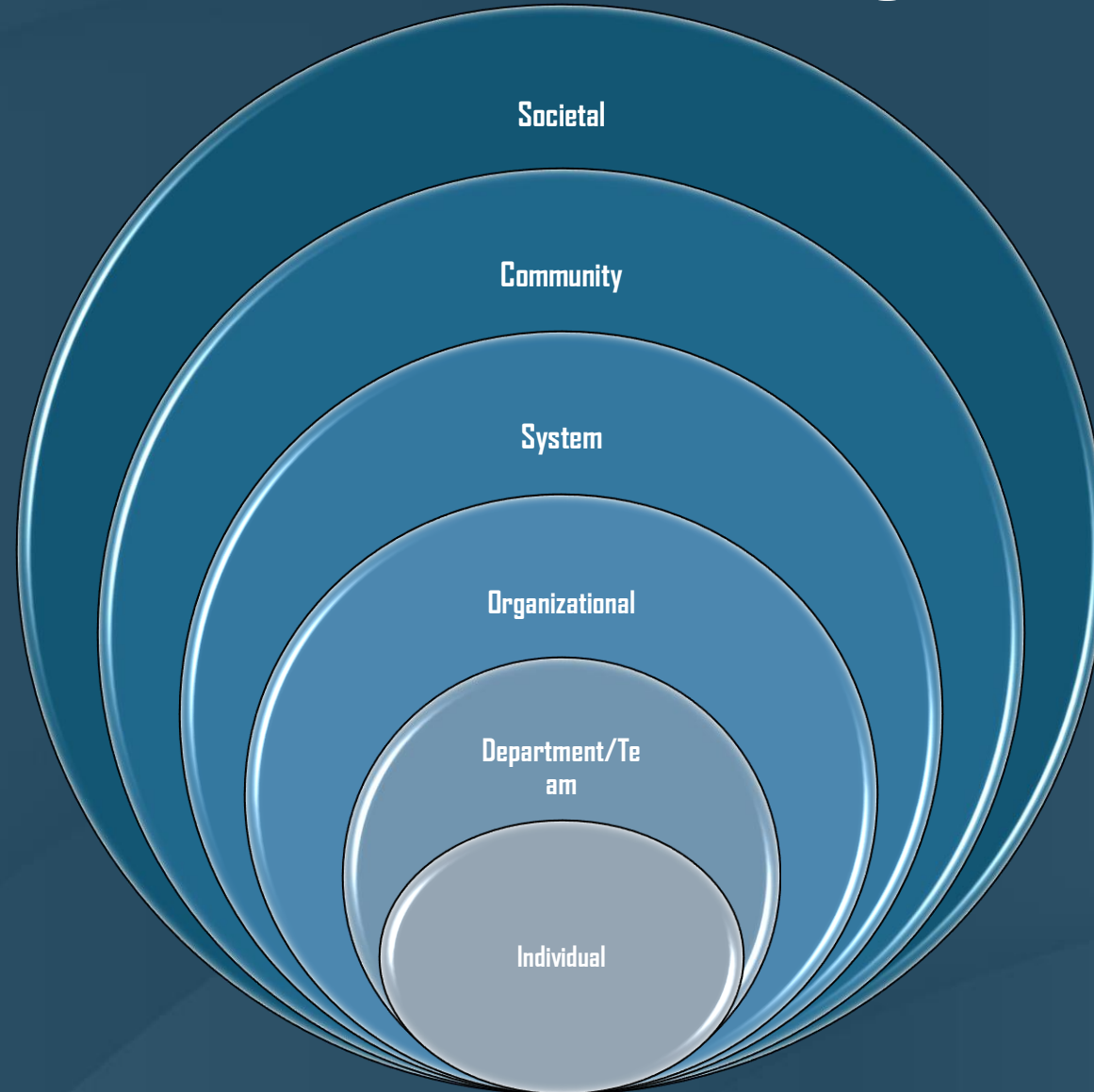
Lead Change

Adapt to Change

Don't Get Left Behind by Change



Level of Impact



innovation

5 Stages of Innovation

Ideation	Start-up	Incubate	Scale	Sustain
Operations				
<ul style="list-style-type: none">➤ Generate BIG ideas.➤ Brainstorming➤ Create a culture of creativity,➤ Explore diverse perspectives.➤ Market Research	<ul style="list-style-type: none">➤ Secure initial funding.➤ Pilot/proof of concept.➤ Gather feedback,➤ Iterative development.	<ul style="list-style-type: none">➤ Build infrastructure➤ Develop organization capacity & processes	<ul style="list-style-type: none">➤ Growing operations and customer base➤ Implement scalable systems➤ Manage growth	<ul style="list-style-type: none">➤ Long-term sustainability➤ Systems change.



4 Types of Trust

Competence

What are your skills, strengths, expertise, and/or experience(s) that others can count on?

Care

How do you show care for others in your current positions?

Character

What values guide your decisions and behavior?

Consistency

How do you show consistency in your current role?



Success



what people think
it looks like

Success



what it really
looks like



Courage

What are the issues,
questions and decisions
that will require
courage?



Courageous Conversations

How do you have **courageous**
conversations?



Courageous Conversation in Action

Step 1: Set the Stage

- What agreements should we establish to maintain a safe and constructive conversation?

Step 2: Define the Purpose

- Why are we having this conversation?
- What specific outcomes are we hoping to achieve?

Step 3: Share Perspectives

- What are your thoughts, feelings and concerns regarding this situation?

Step 4: Be Curious and Ask Questions

- What would you like to see happen? Why is this important to you?
- How can we overcome our differences?



Courageous Conversation in Action

Step 5: Practice Active Listening

- Can you summarize what you heard the other person say to ensure you understand their perspective?
- What new insights have you gained from listening to others?

Step 6: Identify Common Ground and Differences

- Where do we agree? What common goals or values do we share regarding this issue?
- Where do our perspectives diverge, and why?

Step 7: Explore Options and Solutions

- What are some potential solutions to address this issue?
- What are the pros and cons of each solution?

Step 8: Make a Decision and Plan Next Steps

- What decision have we collectively reached?
- What are the next steps, and who is responsible for each action?



Session 1

Strategic Planning

Legislative



One Richmond: Building on Our Shared Priorities/ Preparing for the 2025 General Assembly Session

Richmond City Council Advance Day 2

July 26, 2024

Flipping Richmond's Narrative

- Legislative priorities that are based on our unique City and its History
- Recognizing and acknowledging Richmond as Virginia's Seat of Government
- Courageously acknowledging the continuing impact racism plays in many of our state policies and state funding decisions
- Highlighting the greatness of our City

One Richmond: Shared Priorities

- Affordable Housing
 - Building systems of support and infrastructure
- Early Childhood/K-12 Funding and Additional Supports for High-Need Students
 - Investing in the neighborhoods that support our schools
- Protection of Constitutional and Civil Rights
 - Acknowledging the role racism plays in many of these issues

One Richmond: Shared Priorities

- Public Safety
 - Creating systems of safety and mental health supports
- Building a Greener Future
 - Focusing on the James River (CSO) and the City's environmental goals
- Community Wealth Building
 - Creating pathways that improve the economic outcomes of the City and people who live here

Next Steps for Consideration

- Preparing for the 2025 Session
 - Legislative Program Development
 - Outreach to Council Members and Delegation
 - Communication Strategies
 - Timeline

Questions

Session 1

Strategic Planning

Budget



FY25 Richmond City Council Budget Cycle

At-a-glance



PRIORITY SETTING

Council Priority Setting & Individual Council Member District Priority Alignments

2024

Jan



COMMUNICATION & BUDGET DEVELOPMENT

Communication and analysis of Council Member District Priorities

2024

Feb - Mar



PLANNING & PROPOSED BUDGET INTRODUCTION

Budget Timeline, Identification of Budget Presentations, Early Questions and Discussions

2024

Mar



REVIEW & ANALYSIS

Budget Work Session Execution; Public Hearings & Budget Amendments

2024

Mar - Apr



ADOPTION

Budget adoption by **May 13, 2024**

2024

May



Preparation



Development



Review & Analysis



Adoption

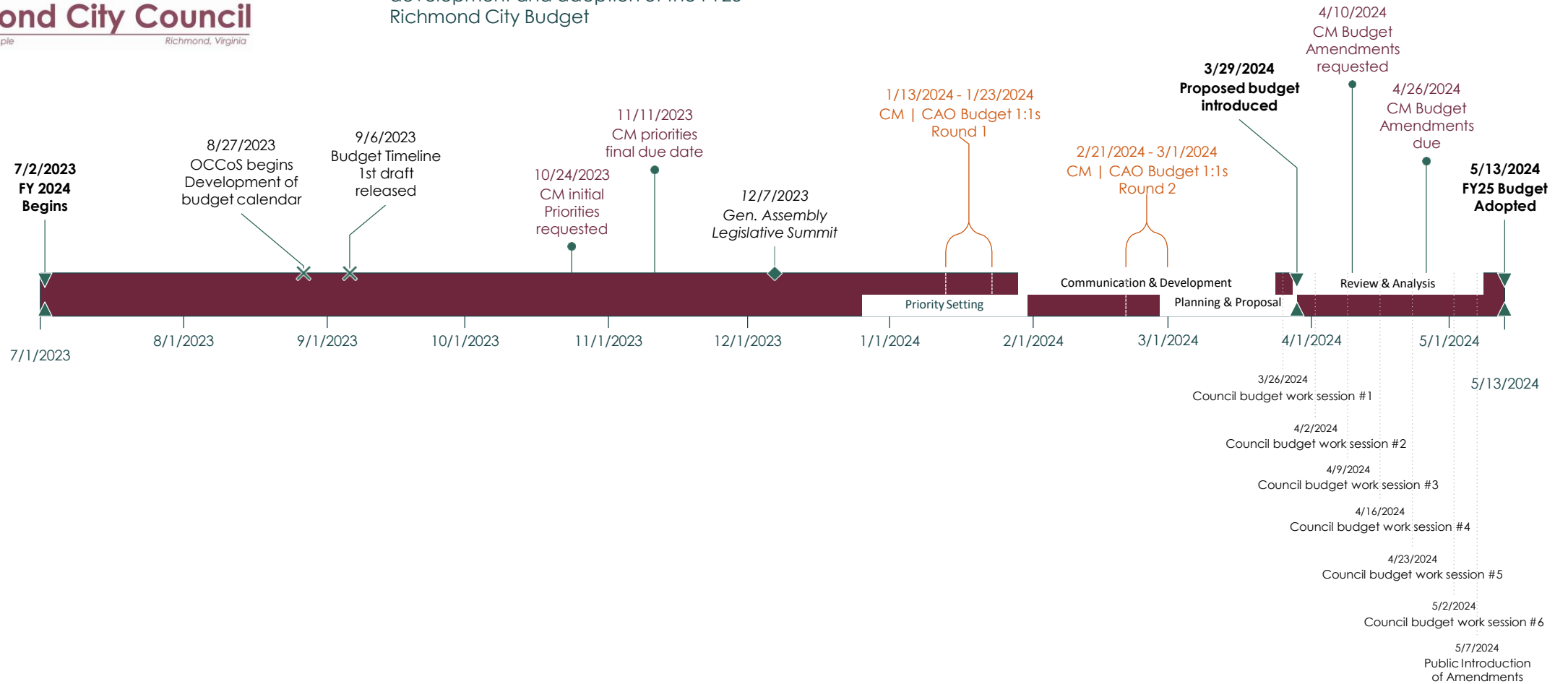


Richmond City Council

The Voice of the People

Richmond, Virginia

Please find a basic overview of the development and adoption of the FY25 Richmond City Budget



FY25 Budget Process: General Lessons Learned



What are the top 3 things we learned from the FY25 Budget Process?	
Responses (from OCCoS, Liaisons)	Votes
Council may need to set and adhere to community agreement for budget	12
Structure is important	11
That we need to implement better tools to receive info from administration	11
Assigned Council staff and liaisons need to collaborate more in advance	10
We need to pay councilors for full time work, because it is.	9
Stay focused	9
Keep calm	9
Liaisons are excellent collaborators on behalf of their Members' priorities	9
Technology has to be explained and utilized correctly to be helpful.	8
Adam is an excellent and detail-oriented leader	8
How to do the closing documents for submission to City Attorney	7
How to better create needed forms and questions	7
Lack of data	7
Expect the unexpected	7
Collaboration, Teamwork, and Patience	7

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Expect the unexpected	7
Collaboration, Teamwork, and Patience	7

FY25 Budget Process: General Lessons Learned



What went well in the FY25 Budget Process?	
Responses (from OCCoS, Liaisons)	Votes
Integration of council priorities into the mayor's budget	8
Final Outcome	8
Ended	8
Teamwork	8
Getting to know colleagues more deeply to help future collaboration	8
Teamwork across the 3rd floor	8
Collaboration among team under pressure	8
Effectiveness of team	8
Completed	8
Teamwork	8
Togetherness, dedication,	8
Collaboration	8
Providing feedback to administration	7
Staff opportunity for growth	7
The final product was sound	7
Working with the assigned budget analyst	5
Funds allocation to new projects	4
Vision for the Streamlining of processes for future cycles	4
Forms	4
SharePoint	4
Planning	4

FY25 Budget Process: General Lessons Learned



What were areas of improvement for the FY25 Budget Process?	
Responses (from OCCoS, Liaisons)	Votes
The amendment process with new items	11
Last minute amendments	11
Amendments	11
Following the rules of amendments	11
Conflicts with competing priorities like Intra-City.	10
Need for more detailed presentations from Departments and admin on mayors' budget	9
Late submissions	9
Quality control of edits and amendments	8
SharePoint	8
Timeline compression too extreme	8
Last minute changes	8
Scarcity (deficit) framing by admin	8
Receiving documented business justifications from administration	8
CM attendance was sometime lacking	8
Submission of too many items	7
The rush during the last few days	7
CAO meetings with councilmembers	7
Communication	7
Collaboration	7
Possibly many amendments, Understanding	7
Uneventful communications with admin staff	7
Communication	7
Instructions to council members regarding data submission	5

FY25 Richmond City Council Budget Cycle

At-a-glance



PRIORITY SETTING

Council Priority Setting & Individual Council Member District Priority Alignments

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2024

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Preparation



Development



Review & Analysis



Adoption



2024
Jan



	What were we trying to accomplish?	Where did we hit or miss our objectives?		What caused our results?	What should we start, stop, or, continue doing?		
		Hit	Miss		Start	Stop	Continue
Priority Setting	<ul style="list-style-type: none"> • Success Early • Planned consensus • Increased chance for inclusion of CM objectives • Enhanced understanding of priorities and of budget 	<ul style="list-style-type: none"> • Good inclusion of CM priorities • Great teamwork by staff • 1:1 with CAO, move far forward this year 	<ul style="list-style-type: none"> • CM interaction with stakeholders • Follow-up from last years' budget 	<ul style="list-style-type: none"> • Teamwork and collaboration 		<ul style="list-style-type: none"> • Cut down on individual one-on-one meetings 	

Council Priority Setting & Individual Council Member District Priority Alignments





2024

Feb -
Mar



	What were we trying to accomplish?	Where did we hit or miss our objectives?		What caused our results?	What should we start, stop, or, continue doing?		
		Hit	Miss		Start	Stop	Continue
Communication & Development	<ul style="list-style-type: none"> • Consensus on shared priorities ahead of time 	<ul style="list-style-type: none"> • Weekly updates to all • Electronic system created efficiencies and eliminated paper 	<ul style="list-style-type: none"> • Timeline/flow needs to be more detailed • Disseminate priorities to CMs earlier 	<ul style="list-style-type: none"> • Teamwork and collaboration 	<ul style="list-style-type: none"> • Start earlier for FY26 		

Communication and Analysis of Council Member District Priorities





2024
Mar



	What were we trying to accomplish?	Where did we hit or miss our objectives?		What caused our results?	What should we start, stop, or, continue doing?		
		Hit	Miss		Start	Stop	Continue
Planning & Proposed Introduction	<ul style="list-style-type: none"> Develop and implement a detailed plan from beginning to end 		<ul style="list-style-type: none"> Delays and not following instructions Layout/following /communication of plan 	<ul style="list-style-type: none"> Everyone working together Layout/following /communication of plan 	<ul style="list-style-type: none"> Eval meetings needs and agendas Details with request to/from CMs 	<ul style="list-style-type: none"> Allowing compromise ; if due date is established stay to time frame 	<ul style="list-style-type: none"> To structure/refine the plan

Budget Timeline, Identification of Budget Presentations, Early Questions and Discussions





2024
Mar - Apr



	What were we trying to accomplish?	Where did we hit or miss our objectives?		What caused our results?	What should we start, stop, or, continue doing?		
		Hit	Miss		Start	Stop	Continue
Review & Analysis			<ul style="list-style-type: none"> Compressed timeline may have prevented deeper dives 		<ul style="list-style-type: none"> Start process earlier for review and analysis Also allows more time for Admin to answer questions and requests Having tools to verify/confirm information 		

Budget Work Session Execution; Public Hearings & Budget Amendments





2024
May



	What were we trying to accomplish?	Where did we hit or miss our objectives?		What caused our results?	What should we start, stop, or, continue doing?		
		Hit	Miss		Start	Stop	Continue
Adoption	<ul style="list-style-type: none"> • Council member priorities and amendments to be funded • Achieve a balanced budget that met the needs of CoR 	<ul style="list-style-type: none"> • Most objectives were met 	<ul style="list-style-type: none"> • Some priorities not funded, or only partially funded • Unclear on some of priorities that were partially funded 	<ul style="list-style-type: none"> • Working as a team and overcame obstacles • Demonstrating that we can work under pressure 	<ul style="list-style-type: none"> • Earlier collaboration with Liaisons, Members, and OCCoS staff 	<ul style="list-style-type: none"> • Overly compressed timeline 	

Budget adoption by May 13, 2024



Time-out --- Break



Session 2

Strategic Planning

S.O.A.R



Strategic Planning - SOAR

SOAR Analysis Template

Capitalizing on Strengths, Opportunities, Aspirations, and Results for Strategic Growth

Strengths

Recognize and leverage inherent assets and advantages.



Opportunities

Identify and seize external chances for growth and improvement.



Aspirations

Define the organization's desired future and set ambitious goals.

Results

Measure outcomes and achievements to ensure alignment with strategic objectives.

StrategyPunk.com



SOAR ANALYSIS

Strengths:	Opportunities:
<ol style="list-style-type: none"> 1. What are our current strengths in budget management that we can leverage for future fiscal planning? 2. Which legislative initiatives have we successfully implemented, and what factors contributed to their success? 3. How have we effectively engaged with the community, and what are our strongest community relationships? 	<ol style="list-style-type: none"> 1. What opportunities exist for improving our budget processes to better align with community needs and priorities? 2. Are there emerging legislative trends or issues that we can proactively address to benefit our constituents? 3. How can we enhance our community engagement efforts to foster greater trust and collaboration?
Aspirations	Results
<ol style="list-style-type: none"> 1. What are our long-term aspirations for the city's financial health and sustainability, and how can we achieve them? 2. What legislative goals do we aspire to accomplish in the next term, and what steps are needed to reach them? 3. How can we create a more inclusive and participatory approach to community engagement to ensure all voices are heard? 	<ol style="list-style-type: none"> 1. How can we measure the effectiveness of our budget allocations in achieving desired community outcomes? 2. What metrics will we use to evaluate the success of our legislative initiatives and their impact on the community? 3. What specific outcomes do we aim to achieve through enhanced community engagement, and how will we track our progress?



Session 2

Strategic Planning

S.M.A.R.T GOALS



S.M.A.R.T GOALS

Specific: Clearly define the goal.

Measurable: Establish criteria to measure progress.

Achievable: Ensure the goal is realistic and attainable.

Relevant: Make sure the goal aligns with broader objectives.

Time-bound: Set a deadline for achieving the goal.



Working Lunch



Session 2

Collaboration & Engagement



Collaboration & Engagement

Building a Collaborative Governance Framework

1 Establishing Clear Objectives and Roles

4 Implementing Performance Evaluation Mechanisms

2 Cultivating Open Communication Channels

5 Nurturing a Culture of Adaptability and Innovation

3 Integrating Stakeholder Participation

6 Ensuring Compliance with Regulatory Standards



Collaboration & Engagement

A Puzzling Collaboration



Commitment(s)

What's your individual commitment?
What's the "we" commitment?



Closing Reflection

Gratitude & Lessons Learned



What's Next?





Richmond City Council

The Voice of the People

Richmond, Virginia

Thank you!

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Closing Remarks

