



# Field Services Manager Goal Setting Facilitation

## Preparing for the meeting

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- Municipal Association staff ask council to be prepared to share their goals for the coming year so that these goals can be developed into an overall set that councilmembers can agree should be addressed during the year. There are no bad ideas. Examples include:
  - Projects
  - New services or service upgrades
  - Revenue sources
  - Capital expenditures
  - Service eliminations
  - Relationships
- The timing of the meeting is typically held to identified goals and incorporate them into an upcoming budget.
- Local municipal staff should distribute the agenda and give proper notice to the media.
- Prepare meeting space with tables and chairs in a horseshoe arrangement. Have items such as pens or pads available on the tables. Name plates can be helpful, but assigned seating is not necessary. Consider providing snacks and drinks as well.



## Starting the meeting

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- The facilitator will provide an introduction.
- The facilitator will also outline the meeting process and ask council to agree to the planning process before starting.

## Compiling ideas

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- The facilitator will go around the room asking each councilmember to identify one idea or goal the councilmember would like to pursue in the coming year. This is a one-on-one exchange between the councilmember and facilitator. The facilitator may ask the councilmember questions to clarify the goal and how to best record the goal on the flip chart.
- This process will continue until all items appear to be documented on the flip chart. Typically, councilmembers begin “passing” at their turn or propose items that have already been expressed.
- Each task should be clear, concise and measurable — either a “yes” or “no” item, or quantifiable so that council and staff can determine if the item is achieved — and assigned to an individual, department, agency or organization with a timeline for completion.



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### Ranking ideas

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- Once the idea development is complete, the facilitator will ask council to privately rank the ideas. Councilmembers will likely need to move from their chair and walk up to review the flip chart sheets.
- The facilitator's first request will be that each councilmember write down their three "must do" items in order. Once complete, the facilitator will go around the room and ask for each member's "must do" items. Each member's first "must do" will receive three points, each second "must do" will receive two points, and each third "must do" will receive one point.
- The three items receiving the highest number of points will become the goals that the city "must" accomplish for the upcoming year.
- The three top items are taken off the board and the facilitator will ask council to use a similar process to identify three "should do" items. These will be three things the municipality should do next year if it first accomplishes what it "must do."
- The final stage of the ranking process will be to then identify three "could do" ideas.
- Council may end up with more than nine total items on the work plan because of voting ties.

### Adopting the goals

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- Municipal staff take the flip chart sheets and combine the "must do," "should do" and "could do" items into a work plan consisting of tasks that are clear, specific and concise. Again, each item should be expressed in a manner that is measurable, will be delegated to an individual or department of the municipality for implementation and will be assigned a time line for completion.
- The work plan should be presented before council for adoption by resolution. At the end of the resolution, consider documenting the goals that did not make the must, should and could list. They can be listed as honorable mentions.

### Contacting a Field Services Manager

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Assigned a specific region in the state, the field services managers visit municipal officials to help address issues of local concern.

