**Center for Local Government
2017-2022 Strategic Plan**

2017 Progress Report

Table of Contents

Section 1: Strengths, Weaknesses, Opportunities and Threats

- **Strengths**
    - For a small staff, we do what we do well
    - We provide good value to members
    - Members appear to like the programs we offer
    - We are responsive when members request assistance
    - We stay out of the legislative process
    - New office space makes us more credible as an organization
- **Weaknesses**
    - Small staff limits the ability to pursue larger projects
    - We need to keep data more current
        - We provide data given to us, but need to get better participation in order to keep the data current
    - More engagement in information sharing is needed (spot surveys, etc.)
    - More engagement from the members in program development is needed
- **Opportunities**
    - We have an opportunity to be a better advocate for members
    - We have an opportunity to expand the scope of our existing programs
    - We have an opportunity to aid members in smaller projects (e.g. grants or special projects)
    - We have an opportunity to promote efficiencies through e-mail blasts
    - Thing to perhaps consider: Is CLG better off with fewer, but higher paying, members?
- **Threats**
    - Growth: Are we growing too rapidly or too slowly? Survey input appeared to say that members are split on this question.
    - Competing entities with bigger scale.
    - Conflicts that come from contrasting member priorities (e.g. different priorities for the performance metrics group, conflicts between members that may spill over to CLG).
    - CLG must strike a balance between building consensus between member communities and moving a new program's development forward.

Section 2: CLG Goals and Strategies: Implementation Step Updates

Goal 1: The Center for Local Government is the premier information hub for local governments in the Cincinnati and Dayton region. It is the first place that local governments look to when they need information.

Implementation Steps

- Develop a code bank. This is a web resource where governments can download or view relevant policies and procedures from other governments.
  - A Code Bank link has been added to the CLG homepage. Codes are collected through spot surveys. Current codes in the bank include
    - Compensatory Time Policies (updated 2017)
    - Employee Evaluations (updated 2016)
    - Investment Policies (updated 2014)
    - Leave Policies (updated 2016)
    - Mayor's Court Fee Schedules (updated 2016)
    - Personnel Manuals (updated 2017)
    - Planning & Zoning Fee Policies (updated 2017)
    - Social Media Policies (updated 2014)
    - Uniform Policies (updated 2009)

- Strengthen the Spot Survey program to be as effective as possible.
  - Assess whether CLG's current spot survey software (Surveymonkey) is the best option for disseminating and analyzing spot surveys.
    - A number of survey options were researched. Survey monkey remains the most cost effective and user-friendly of the options currently available.
  - Ask if a spot survey applies to the community filling it out.
    - After review, this option seems to take care of itself. Since each community isn't required to respond to every survey, it can be deduced that only relevant surveys to the surveyee are being responded to. However, CLG has tailored spot survey contact lists to ensure that surveys are being sent to appropriate staff from each jurisdiction. For example specific spot survey lists include HR professionals, townships, and cities.
  - Provide additional staff consultation to governments requesting spot surveys, to ensure that they are clear and efficiently designed.
    - When a spot survey request comes in, CLG has instituted the practice of following up with each requestor prior to sending out the spot survey. This practice ensures that the questions to be asked are directly of interest to the requestor and are clearly worded. Also CLG has instituted format changes to the spot surveys. This includes inserting more multiple choice and "yes/no" questions where appropriate.

- Ensure that CLG's surveys focus on accurate information that is relevant to the CLG. Membership

- o Form an Annual Survey review committee, to review and recommend updates to the CLG Annual Survey every two years. This would include identifying information that CLG is not collecting that would have utility to members, as well as eliminating information that CLG IS collecting, that does not have utility to members.
    - Not addressed in 2017
- o Highlight communities that have provided pay data in the previous quarter in the CLG Newsletter.
    - Will be addressed in CLG newsletter staring with Fourth Quarter 2017
- o Audit the Membership Directory to focus on information that is relevant to our members.
    - Will be addressed for 2018 Membership Directory
- o Establish a protocol for removing outdated information.
    - Although CLG removes outdated information regularly, an official protocol has not been developed. This will be an internal staff goal for 2018.

- Establish a CLG Service Delivery Metrics program
    - o Continue to refine existing metrics.
        - Since the strategic plan, CLG has made a number of refinements to this program. The refinements include the introduction of scroll bars, updating the color scheme to enhance the visual component of the survey, inserting a "go to" feature, as well as stream-lining the database.
    - o Identify and create new metrics applicable to each participating jurisdiction.
        - CLG has added a planning and zoning metric and a parks and recreation metric in 2017.
    - o Identify and recruit new members so that each current participating jurisdiction has at least one similar jurisdiction to compare metric information to.
        - CLG has discussed the metrics program at outreach visits. Monroe is the newest member of the consortium, joining at the end of 2016.
    - o Research new database platforms to determine if a transition to a new platform would be prudent.
        - CLG staff is working to set up a meeting with the City of Cincinnati, who budgeted to create their own internal data analytics division. There may be partnership opportunities that will enhance the CLG program. This meeting is tentatively scheduled for January, 2018.

Goal 2: The Center for Local Government is the focal point for engagement between local governments in the Cincinnati and Dayton region, especially amongst our diverse member communities.

Implementation Steps
- Identify opportunities for members to build relationships with each other.
    - o Establish CLG CAO forums, to build relationships between CAOs and to provide an informal information sharing apparatus. These could be held 2-4 times per year.
        - Three CAO forums have been held. The first took place in November of 2016 at Washington Township. The second took place in February of 2017 at Fairfield. The third took place in November of 2017 at Indian Hill. During the third forum, the primary discussion topic was how to address policy changes by Greater Cincinnati Waterworks (GCWW) related to lead pipe

5

replacement. The end result of this is a meeting between any interested CAO and GCWW, which will take place in January of 2018.

- o Establish a community spotlight in the CLG Newsletter.
  - In the three CLG Newsletters that have been published since the implementation of the Strategic Plan, Sharonville, Greenhills, Montgomery, Amberley Village and Liberty Township have been spotlighted in our Newsletter.
- o Conduct an engagement survey: "What strategies should CLG use to enhance inter-member engagement?"
  - This survey will be conducted in 2018

- Enhance communication between the Dayton and Cincinnati areas.
  - o Host a Dayton / Cincinnati CAO Idea Exchange
    - This has not been addressed so far in CLG's Strategic Plan implementation efforts.
  - o Identify CLG services that could benefit Dayton area governments, especially ones that cannot participate in MVCC.
    - The CLG Leadership Academy was expanded to MVRMA governments, as the MVCC Academy has been focused only on MVCC members. CLG marketed the SWORRE program to the Dayton area- West Carrollton expressed interest but did not join; however Brookville did join. Horan continues marketing CLGBP. As the secret shopper program evolves in 2018, there may be opportunities presented.
- Study the establishment of a social media presence.
  - This has not been addressed so far in CLG's Strategic Plan implementation efforts.
- Increase engagement of member communities in identifying and developing potential programs.
  - o Establish taskforces built around programmatic goals
    - This is standard procedure for CLG. Examples include the Leadership Academy Taskforce, the Service Delivery Metrics Taskforce, etc.

Goal 3: The Center for Local Government has a diverse membership base, and will grow that base in sustainable fashion in order to enhance efficiencies between local governments.

<u>Implementation Steps</u>
- Identify and reach out to potential CLG member communities in the Dayton area: Identify unique Dayton-area needs that may drive CLG membership. (Shared service that exists in Cincinnati but not Dayton / Township involvement / small community involvement)
  - o Study areas where CLG's strengths can address need areas for Dayton area governments, especially townships.
    - As mentioned in the previous goal, CLG identified SWORRE as a potential area for expansion into the Dayton region. CLG reached out to West Carrollton, Brookville and Moraine. West Carrollton participated in the bid process but not the contract. Brookeville fully participated and joined CLG.
    - For 2018, CLG will host a Cincy / Dayton idea exchange (see goal 2). This will hopefully identify additional Dayton area services.

- Increase CLG membership within the 10-county service area in a general sense
  - Brookville and Colerain Township joined CLG in 2018.
- Pursue a peer based recruitment strategy led by Board members (e.g. Board members or other CAOs assist ED in recruitment by providing peer to peer education on the benefits of CLG membership)
  - Although no formal strategy has been developed, board members have helped identify potential CLG member communitied.
- Identify non CLG member communities who may benefit from existing programs.
  - This is a continuing process

Goal 4: The Center for Local Government identifies new opportunities for governments to work together, and works to enhance its current programs.

Implementation Steps
- Increase CLG's utilization of grant resources to fund program development (e.g. LGIF, LGIP, Program Development Fund, private foundations)
  - No projects were identified in 2017 where grant funding was necessary. However, CLG is again applying for a grant for the 2018 CLG Leadership Academy. Additionally, the City of Hamilton has expressed interest in utilizing CLG to assist them in grant writing.
- Continue to identify commonalities between governments, either in terms of challenges or opportunities, and work with those governments to identify solutions that can be achieved together.
  - This is a continuing process. Spot surveys, outreach visits, and other interactions such as CAMA meetings are utilized.
- Establish CLG as an option for governments looking to conduct special research studies or similar projects.
  - o Hire a special projects coordinator to manage grants and other projects for combinations of 1-3 governments.
    - This is a long term goal for CLG. It is not yet an appropriate time to hire new staff.

Goal 5: The Center for Local Government is a respected advocate for local government interests, and will work to maintain and build upon our reputation and public image.

Implementation Steps
- Identify areas of collaboration between local governments and school districts
  - This has not been addressed so far in CLG's Strategic Plan implementation efforts.
- Continue to partner on regional initiatives that align with CLG's mission
  - o Identify CLG's strengths and how they can be utilized in relation to regional initiatives (e.g. CLG's facilitation strengths, dissemination strengths, etc.)
    - This is a continuing goal. Andrew Lanser connected CLG to Great Oaks in 2017, and this hopefully will help with training moving forward.

> Additionally, T.J. White completed the Cincinnati USA Regional Chamber C-Change program. This led to a potential connection to the City of Cincinnati Data Analytics office.

- o Continue to work with the Much in Common Initiative and other similar initiatives.
  - Much in Common has not been active in 2017, although there have been discussions about folding it back in with the Cincinnati USA Regional Chamber. CLG would remain involved.

- Establish strategic partnerships with other appropriate service organizations (e.g. regional chambers of commerce, Ohio Kentucky Indiana Regional Council of Government (OKI), etc.)
  - This is a continuing goal.

- Actively seek recognition for CLG accomplishments, as well as the accomplishments of our member governments
  - CLG has added a section to the newsletter to recognize the accomplishments of member communities. We have also added an awards component to the Annual Meeting to recognize new or retiring managers.
  - o Submit CLG initiatives for consideration for awards and national publications
    - Not accomplished in 2017.
  - o More press releases- either pertaining to CLG or to local government accomplishments.
    - Not accomplished in 2017.
  - o Also use our influence to defend local governments in the press.
    - CLG has historically written letters to the editor or submitted guest editorials relating to local government. The last occurrence was in 2015. CLG will look for opportunities to do this moving forward.

Goal 6: Ensure CLG is prepared to withstand contingencies.

Implementation Steps
- An aggressive recruitment program should make up for any revenue shortfall up to $15,000. This gap can be closed in one of two ways:
  1. Recruit four new governments at the $3,825 level OR
  2. Recruit the City of Cincinnati at the $15,000 level. Each of these two scenarios will require the concerted effort at all levels (staff and board) to identify and recruit new governments.
     - CLG will attempt to recruit the City of Cincinnati in 2018. This will tie in with a potential regional data forum proposed by the Cincinnati City Manager. Luckily, CLG has controlled its expenses and has experienced moderate growth in 2017. As such, we are in a financially stable position.
- Establish a branding and marketing plan.
  - o CLG will modernize the appearance of its printed marketing materials and Annual Report.
    - Andrew Lanser redesigned CLG's marketing materials and updated our copy. CLG is now utilizing these materials. CLG has also modernized the Annual Report and will continue to do so.

- o The CLG Annual Report will become a cornerstone tool in the CLG marketing strategy to potential members.
    - New or potential members receive a CLG Annual Report, CLG's new marketing brochure, a CLGBP one-pager developed by Horan, and a copy of the CLG Strategic Plan
- CLG will also review membership dues levels. Membership dues were last updated in 2008.
    - o CLG should annually assess membership dues levels, and determine whether they reflect the current economic conditions to help close any potential revenue shortfall or growth opportunity.
        - CLG reviewed membership dues levels as part of the 2018 budget process, and decided to keep them the same in 2018. The CLG Board discussed and agreed upon a policy for what would trigger a dues increase discussion at the November Board meeting.