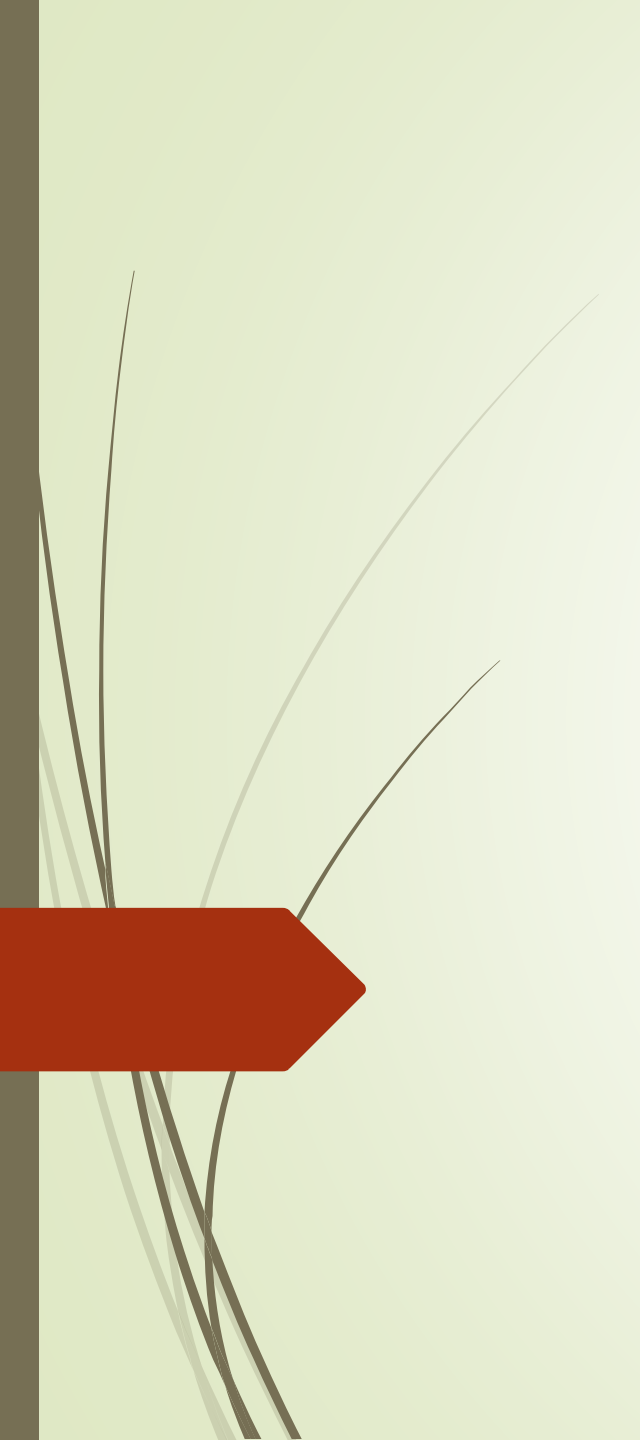




Using Goal Setting to Improve your City Budget

Iowa League of Cities Annual Conference – 2025

Presenter:

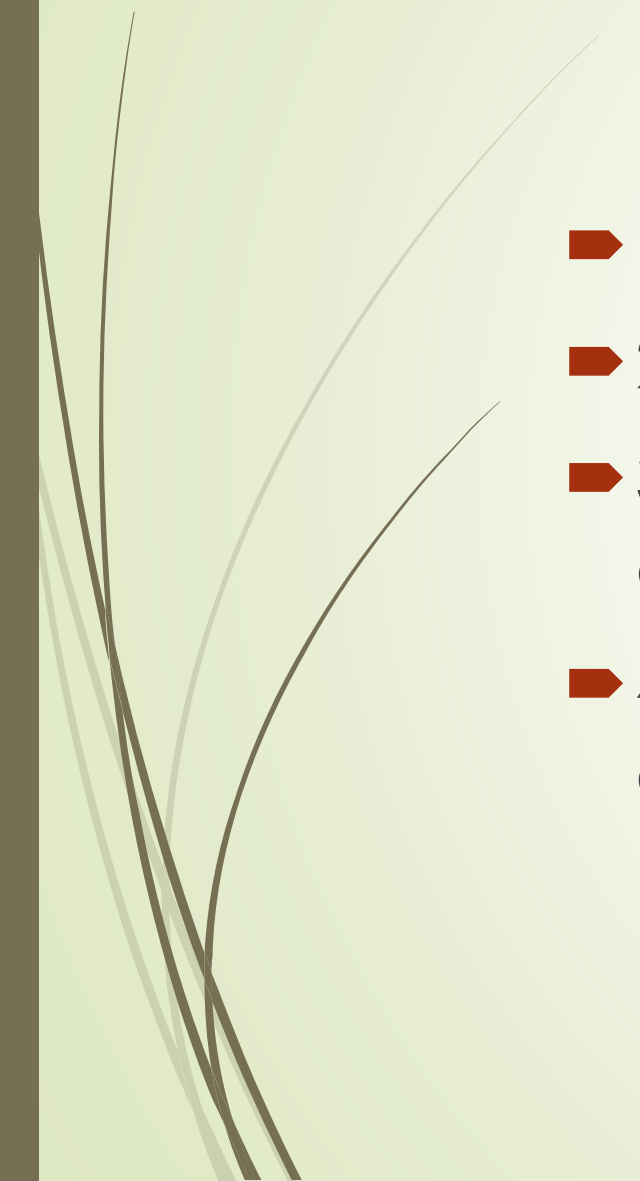
Patrick Callahan, “Retired Municipal Consultant”

563-599-3708 callahan.cmc@gmail.com

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- **“If you don’t know where to go, any road will get you there” - Lewis Carroll**
 - **“If you do not know what you want to be, then you have no control over what you will end up becoming.”**
- Earl Nightingale (1921-1989)

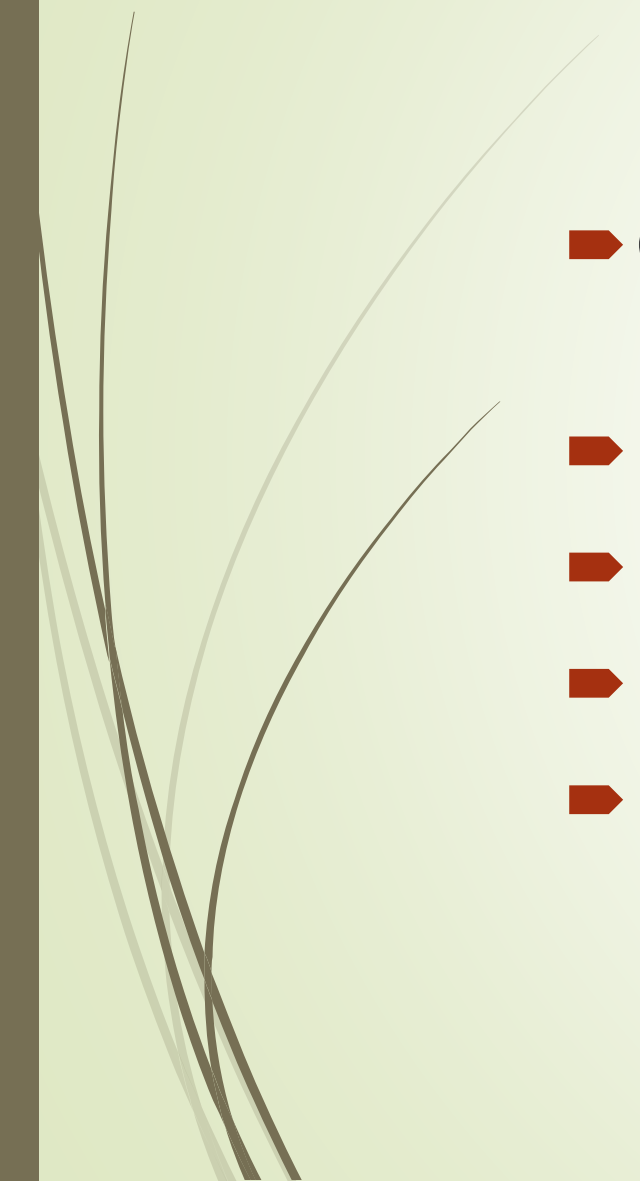


Goal of today's workshop

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- 1. How goal setting helps budget process
 - 2. The basics of goal setting
 - 3. How to conduct a goal setting session so you don't need me
 - 4. Learn about the goal setting experiences of other cities

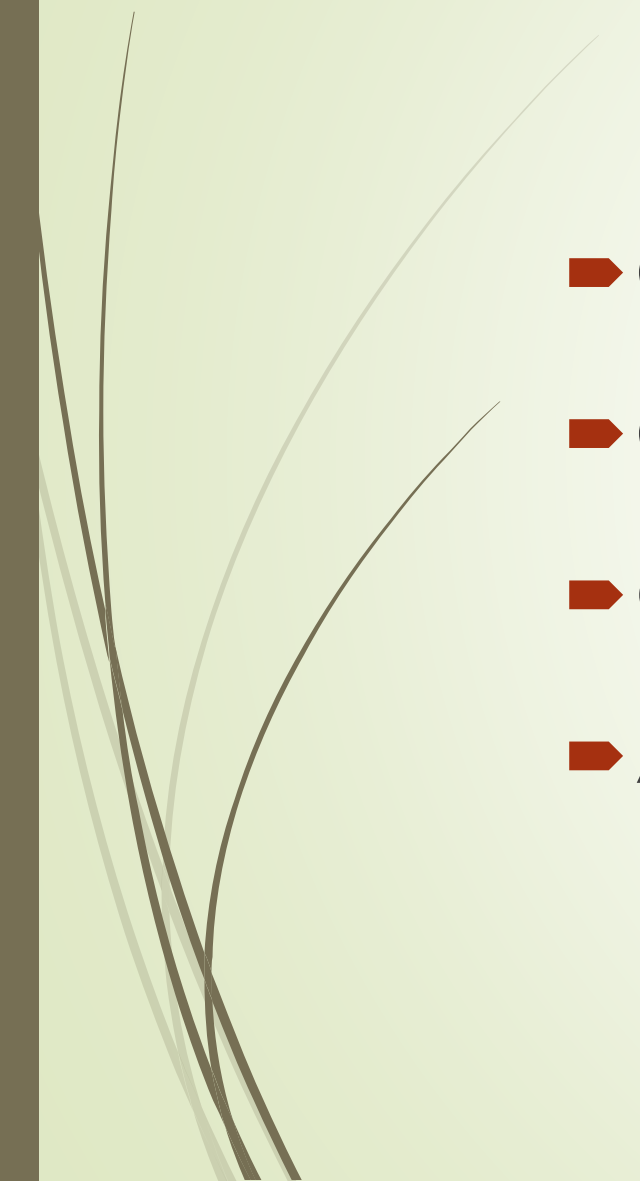


What is City Council Goal Setting?

- Comprehensive and organized planning process
 - Brainstorm potential programs and projects
 - Identify and prioritize goals and objectives
 - Benefit the city and community
 - Enhance budget preparation process
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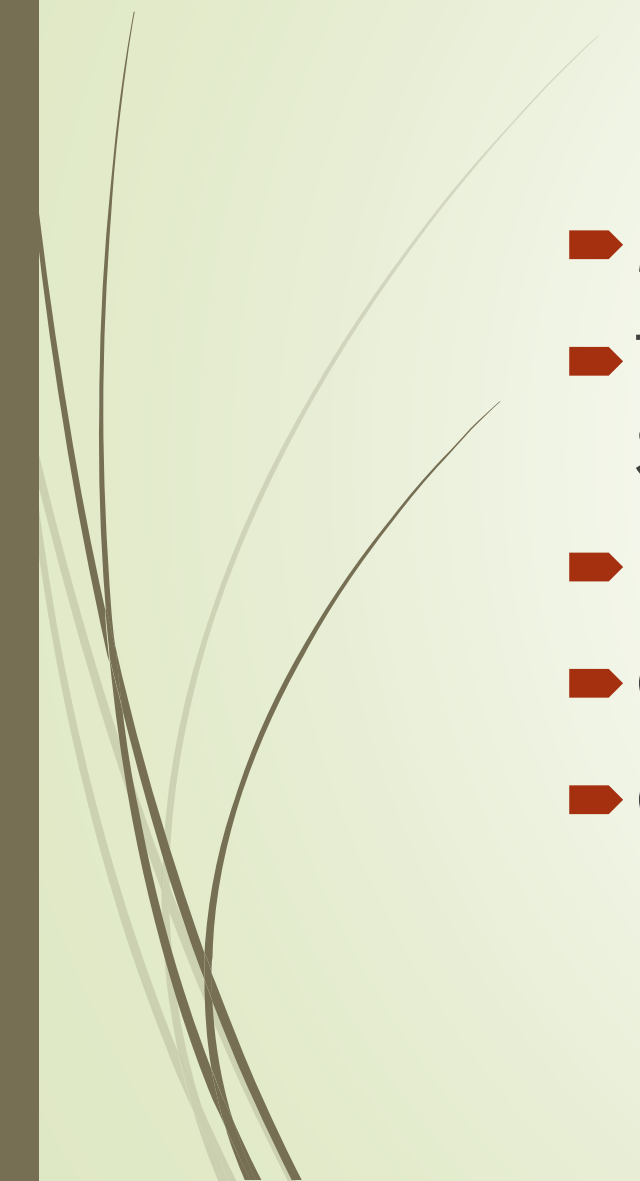


Where does Goal Setting fit in?

- Comprehensive Plan – 10 to 15 years
 - Capital Improvements Plan (CIP) – 3 to 5 years
 - Goal Setting Session – 2 years
 - Annual City Budget – 1 year
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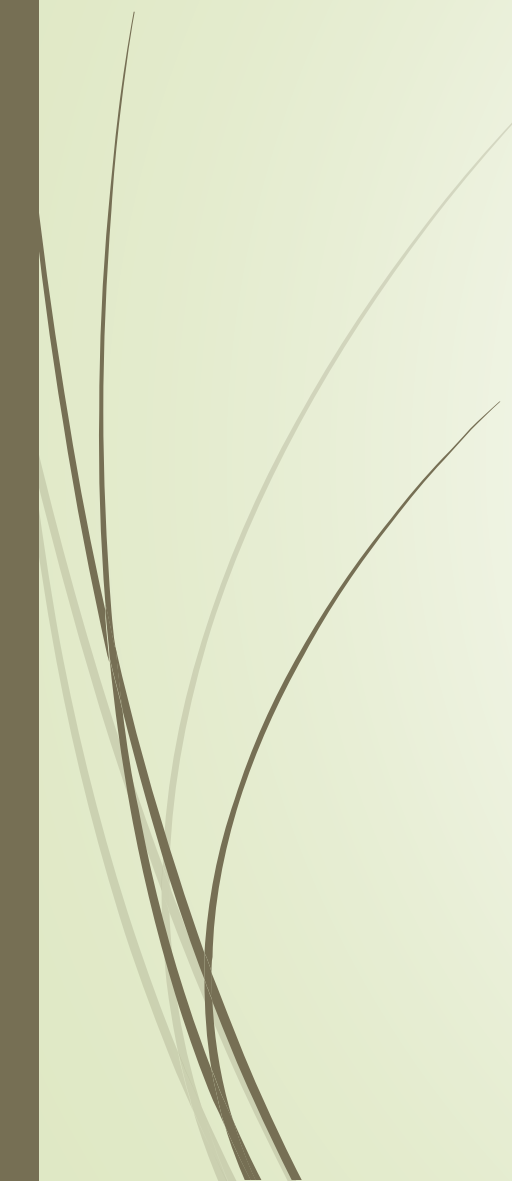
Callahan's Goal Setting Background

- Maquoketa Goal Setting sessions 1980's & 1990's
 - Trained by Tim Shields – The Iowa Expert on Goal Setting
 - Institute of Public Affairs – 1993-2005
 - City of Anamosa – “Five City Consortium”
 - Callahan Municipal Consultants – 2010-2025 with 75 or more sessions
- 



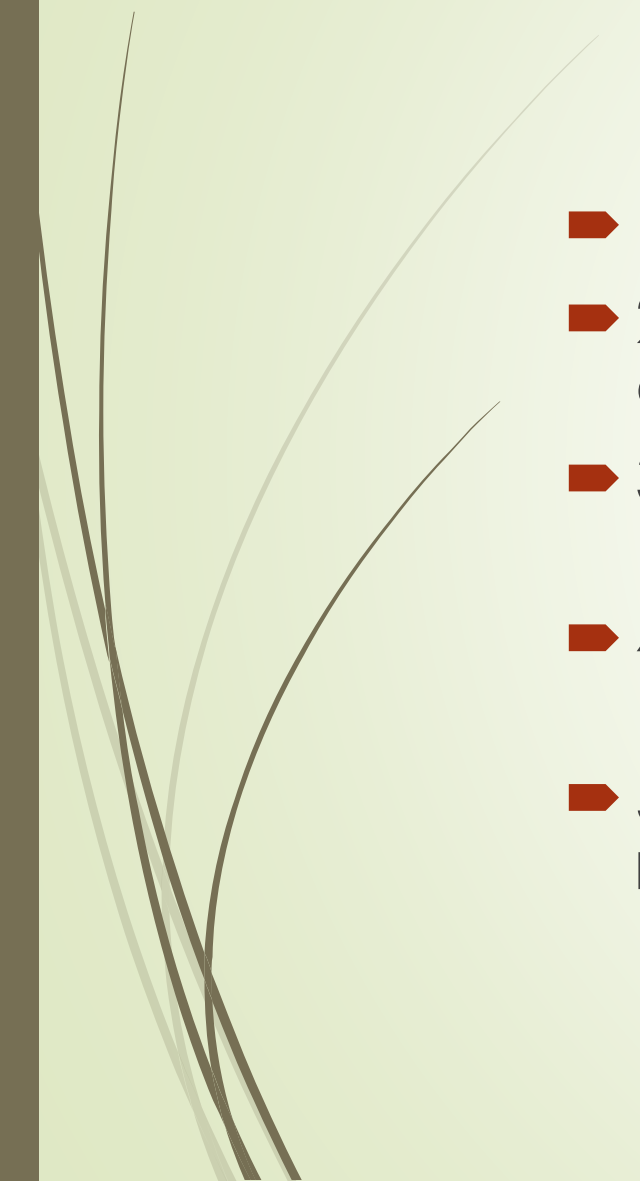
The Legacy Question:

Your Legacy – Personal, Professional and City Council Role?

- 1. What are my goals and objectives for the City?
 - 2. How can these goals and objectives be accomplished?
 - 3. How will I and my fellow council members be remembered by future generations in our community?
 - 4. What will the legacy be for the current city council?
- 

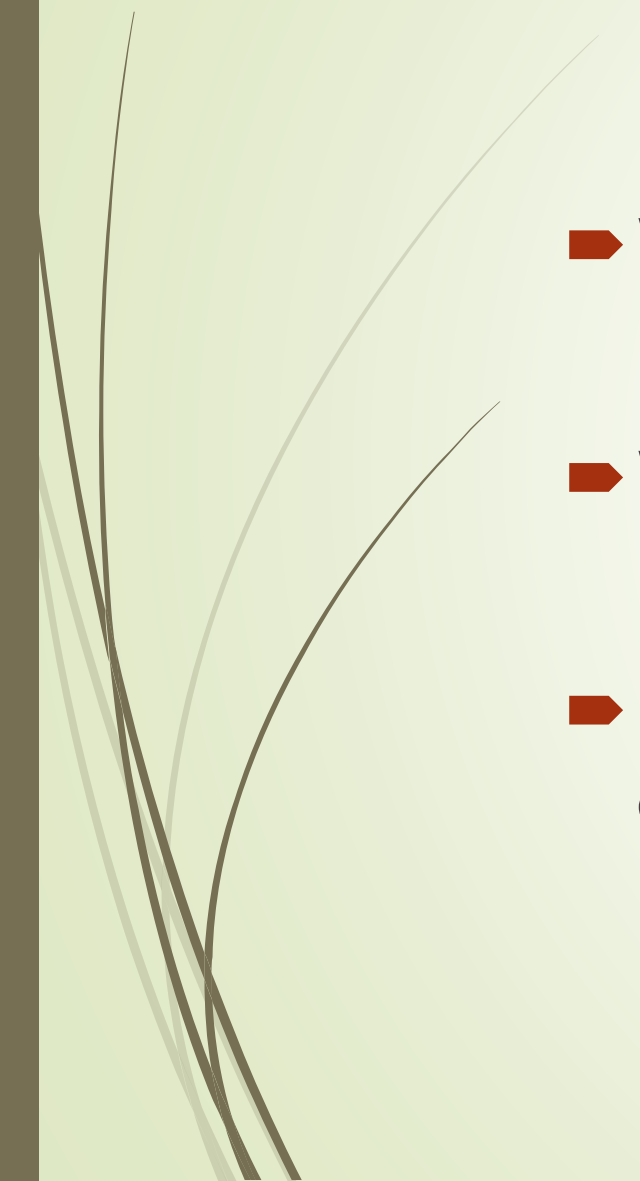


Purpose of Goal Setting Sessions

- 
- 1. Opportunity to propose and discuss new ideas
 - 2. Rank and prioritize city council goals and objectives
 - 3. Serve as the “framework” for the next city budget process
 - 4. Provide direction to City Staff regarding council priorities
 - 5. Communication to citizens and community regarding future direction of the city



Goal Setting – Who, When, & How

- Who – Mayor, Council and Department heads
 - When – Prior to Budget process or anytime
 - How – Varies by City – Multiple ways – usually city council work sessions
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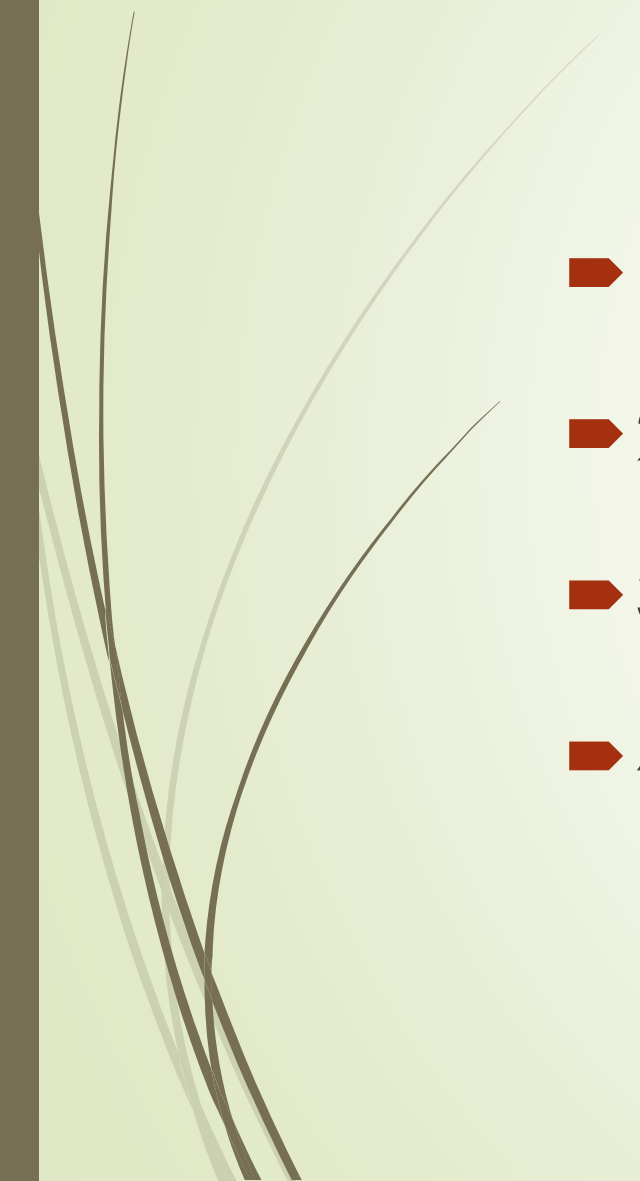


Legal Side of Goal Setting

- Public Meeting – open meetings law
- Open Records – all documents
- However, not public hearing or citizen comment time



Role of Goal Setting Facilitator

- 
- 1. Organize the process
 - 2. Prepare the packets and materials
 - 3. Facilitate the goal setting meeting
 - 4. Prepare final report summarizing the results

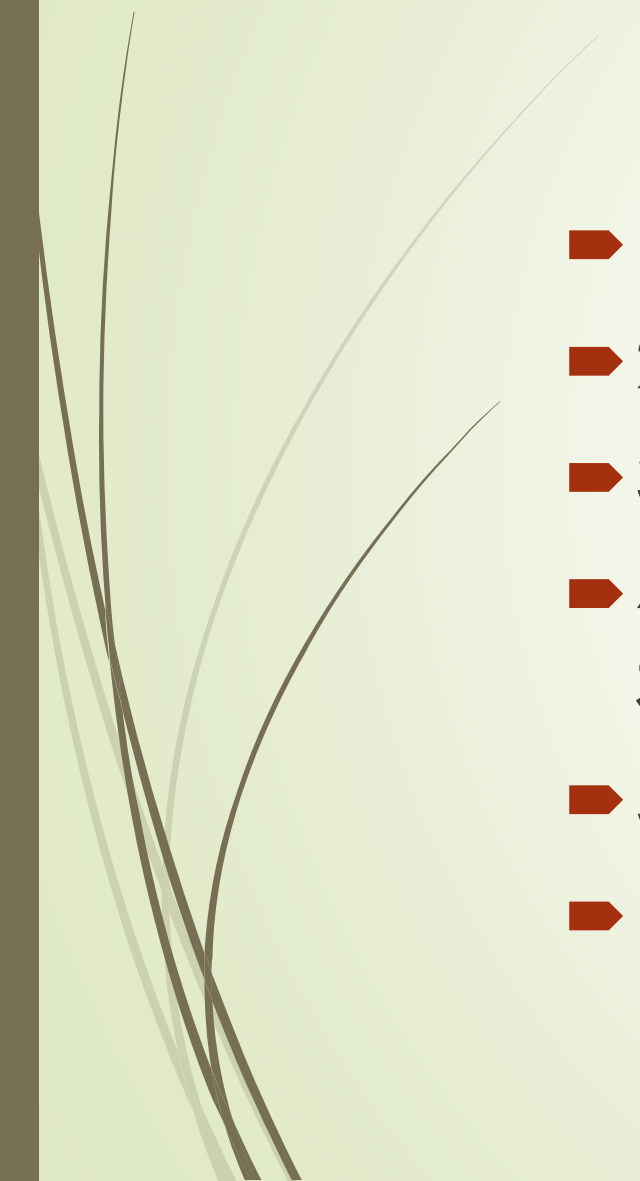


The Facilitator Options

- 1. City staff members
- 2. City consultant – hired by City
- 3. Community volunteer or leader
- 4. Nearby city administrator – “exchange program”

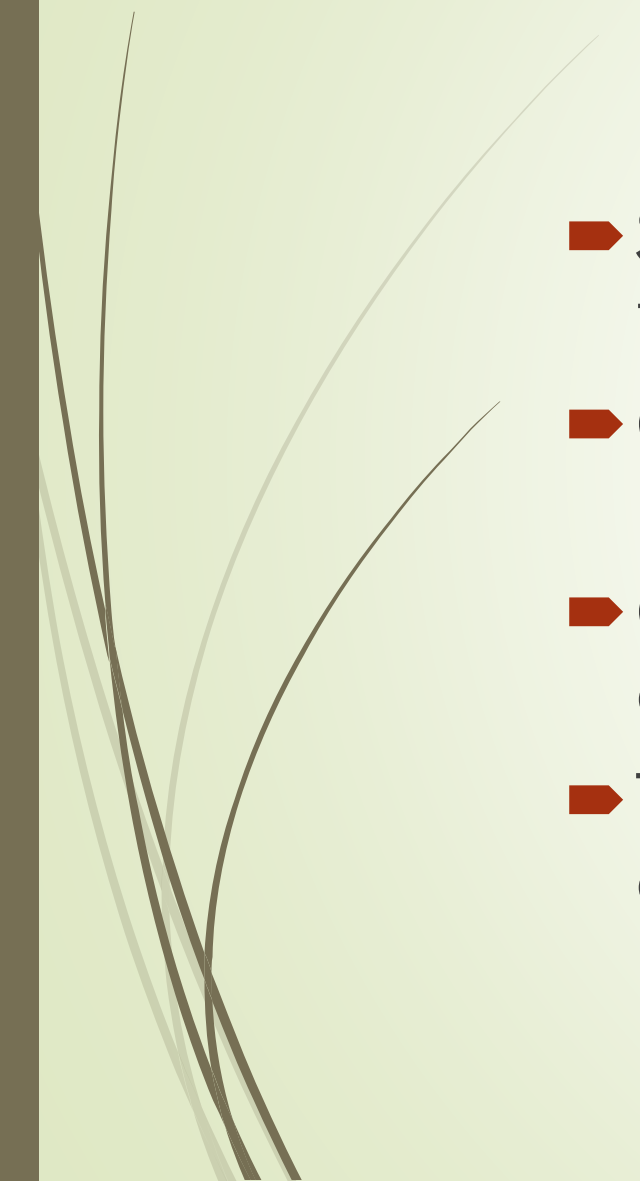


Preparations prior to Goal Setting

- 
- 1. Newly elected orientation sessions
 - 2. Read most recent goal setting report
 - 3. Get update on current goals and objectives
 - 4. Attend ILC Municipal Leadership Academy - Session 1
 - 5. Read City Policy Leaders Handbook
 - 6. Review current city budget

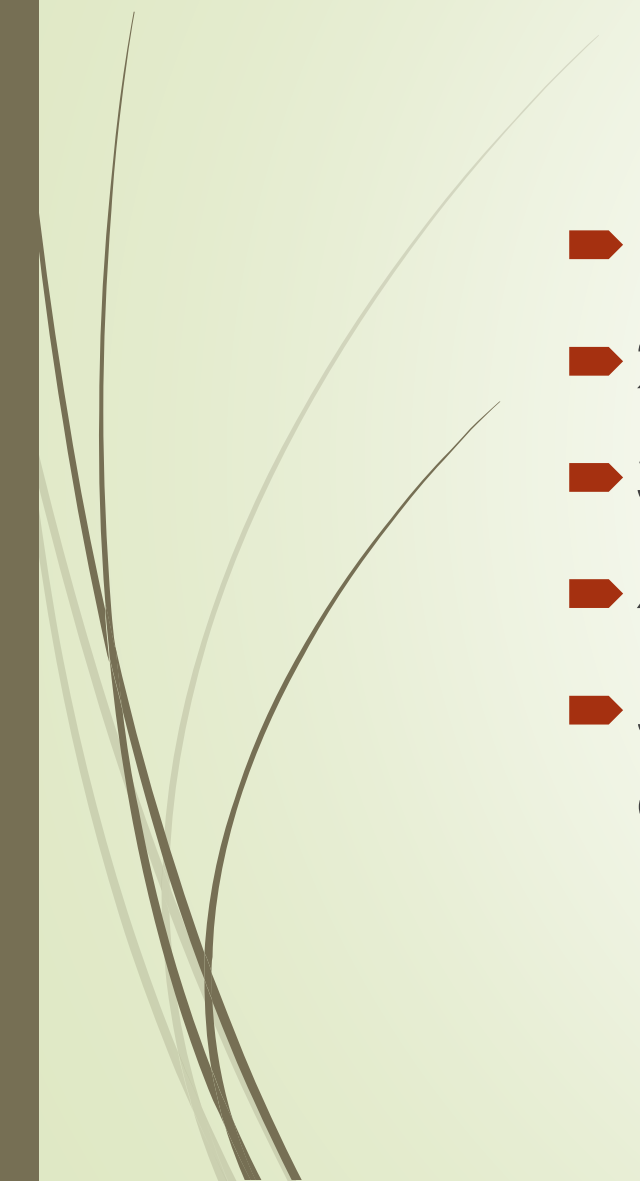


Goal Setting Process – The Options

- Simple Approach – Brainstorming and agree on the goals
 - Complete List of all suggestions – use a ranking process
 - Callahan's Process – Advance questionnaire and 2-3 hour work session
 - Two day retreat and additional training opportunities
- 



Callahan's Goal Setting Process

- 
- 1. Set time table for the process
 - 2. Advance questionnaire – 5 questions
 - 3. Responses tabulated and summarized
 - 4. Facilitate one city council work session
 - 5. Review and discuss responses from questionnaire

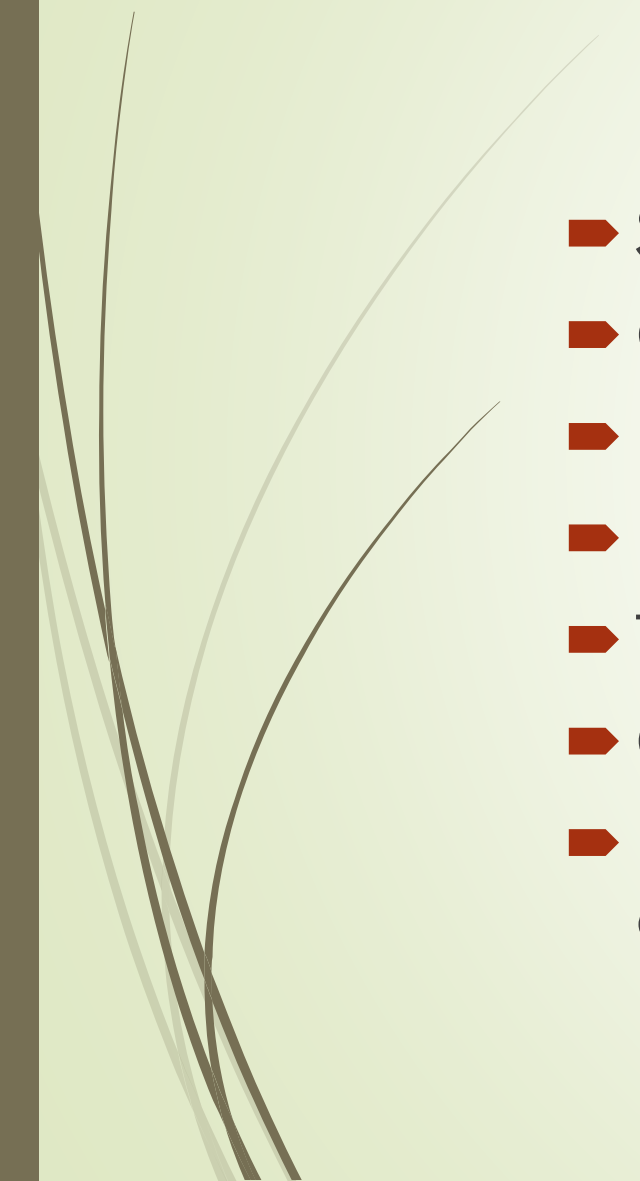


Callahan's Goal Setting Process (continued)

- 6. Identify, modify, and list potential programs and projects
- 7. Ranking process to identify top goals and objectives
- 8. Prepare written report summarizing results of goal setting session
- 9. Council approves goal setting report by resolution



Callahan's Goal Setting Process - Tips

- Start with “Legacy question”
 - Ground rules for the session
 - Five exhibits – summarize responses and review
 - Ranking of projects – “dot process”
 - Team work discussion
 - Callahan's Handouts – various topics and workshops
 - Final report – Draft copy to city administrator or city council
- 



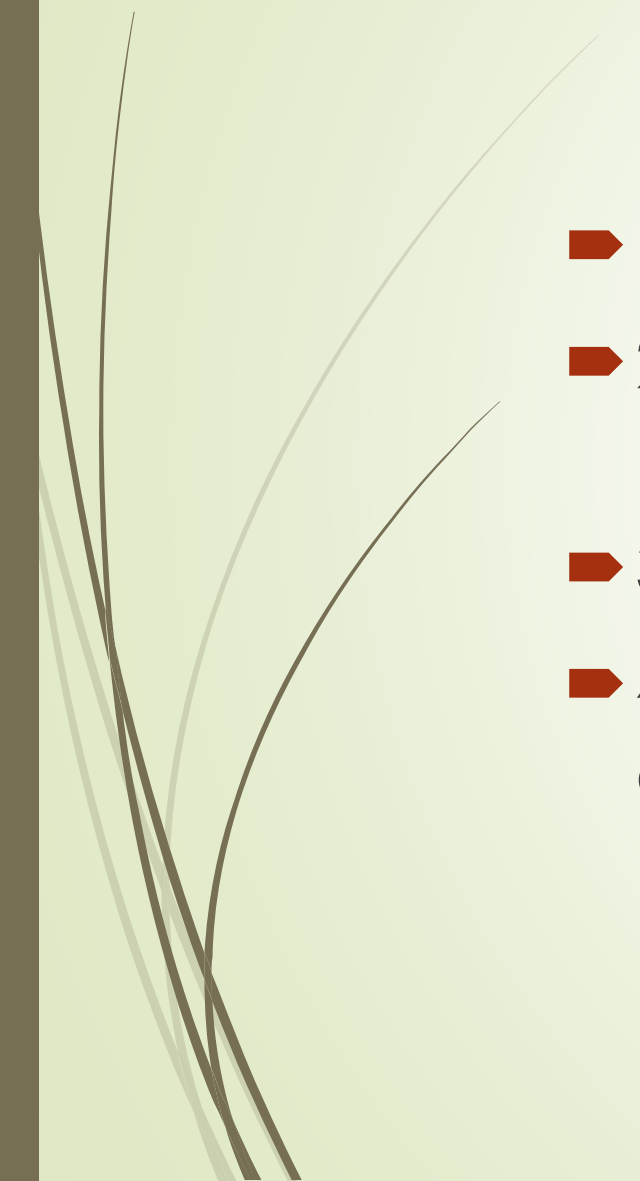
Callahan's Advance Questionnaire and Workshop Session Agenda – 5 Exhibits

- A. Major Accomplishments – recent 2 years
- B. Issue, concerns, and trends
- C. Significant initiatives, programs, and policies – ranked
- D. Capital projects and equipment purchases - ranked
- E. Teamwork suggestion, concerns

Note: Exhibits C & D used in budget preparations process and CIP

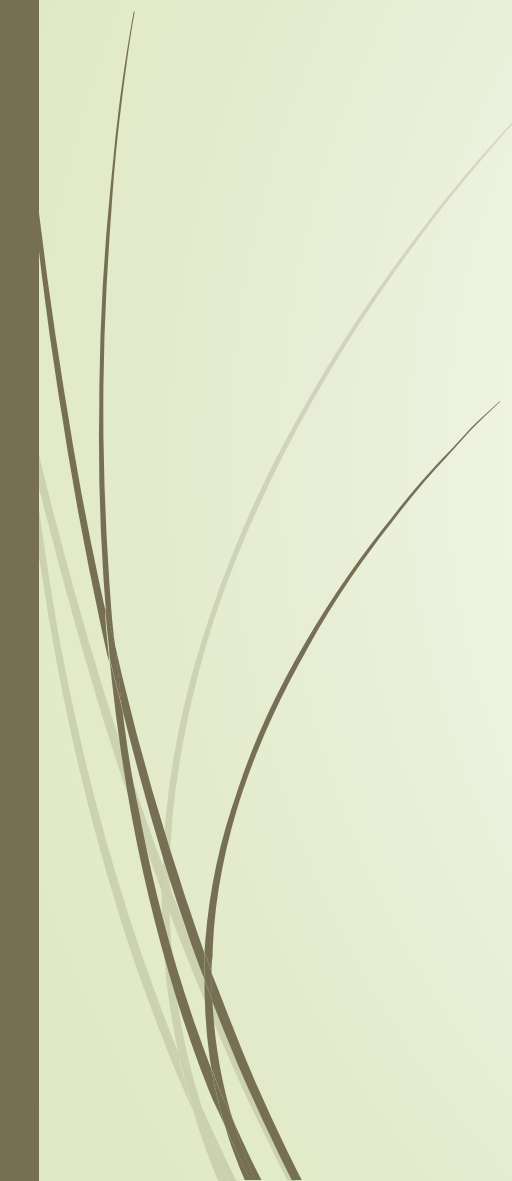


Follow up – After Goal Setting Session

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- 1. Review and approve report by resolution
 - 2. Prepare “action plan” for each top rated project
 - 3. Post the goals at city hall
 - 4. Schedule quarterly update on progress made on completing the goals

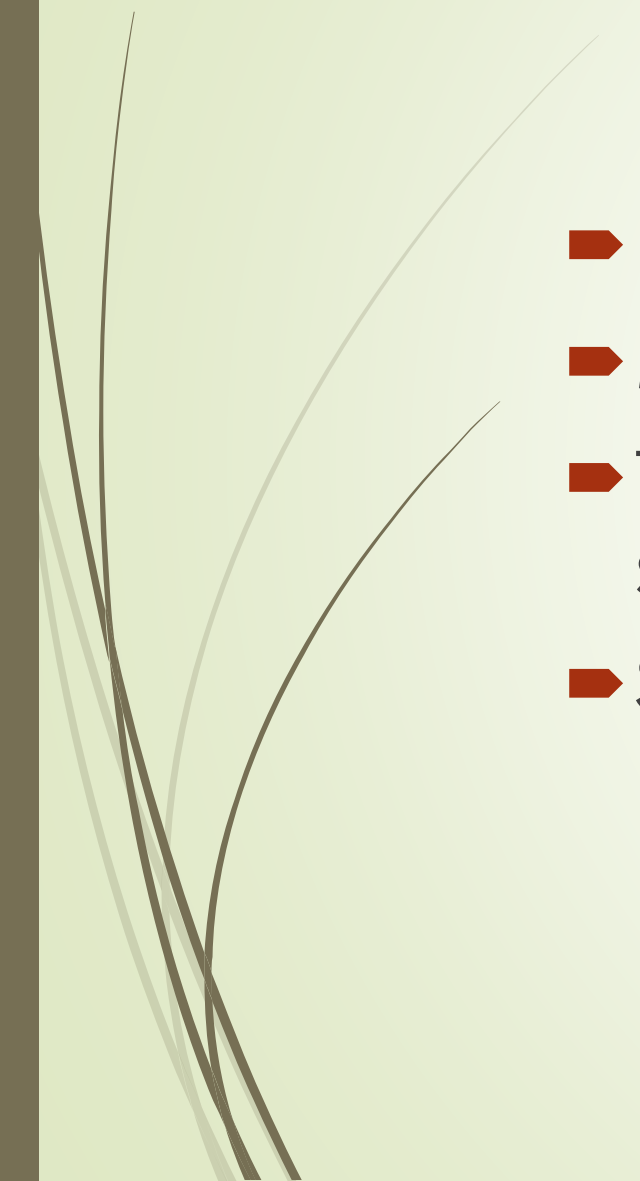


Communicating Council Goals to Citizens

- Post on city website
 - Prepare short summary of goals for citizens
 - Schedule town hall meeting explain goals
 - Presentations to service clubs
 - Community leaders meetings
- 



Sources of Information on Goal Setting

- Iowa League of Cities publications
 - Municipal Policy Leaders Handbook
 - Talk to city officials who conduct goal setting sessions
 - Select a facilitator and conduct your first session
- 



Final Comments – Your thoughts?

- Cities that schedule goal setting sessions
 - Advise and suggestions
 - Describe your process
- 