

Work Planning – 2024 End of Year Summary

Background:

In 2024, Human Resources Organizational Development (HR-OD) continued training on work planning. **Sixteen agencies are complete within three years.** Remaining agencies are assigned with the goal to train final cohort in 2027.



Round Two Work-Planning Cohort:

Together with our third-party consultants at Boldly & Co. we wrapped up quarter one check-ins with the **six agencies trained in late 2023**, including Employee Assistance, Engineering, Finance, Information Technology, Library, and Parks.

Our work together in quarter one ensures agencies are:

1. Communicating their top 10 agency goals with those who stand to be impacted
2. Developing check-in mechanisms to ensure accountability and progress throughout the year
3. Planning for the following quarter(s)

After the first quarter, agencies self-sustain the work planning process for the rest of the year. A retrospective from round-two cohort suggests the **identification of the agency's top goals, dedicated conversations about work planning, and iterative nature of attempting new ways of work planning** were most beneficial to staff.

Round Three Work-Planning Cohort:

In December 2024, we continued to train agencies citywide work planning basics. **Six more agencies** joined the third year of our day-long workshop. This included Civil Rights, Fleet, Mayor's Sustainability Office, Monona Terrace, Office of the Independent Police Monitor, and Streets & Urban Forestry. Attendees left with a concrete action plan for 2025 Quarter 1 goals and will check in with HR-OD and Boldly & Co. on managing to the work plan.

Impacts:

Nine agencies completed follow-up evaluation in December 2024. **Lessons learned** indicate setting 10 goals to encompass the top efforts of each agency is challenging. Mid-year requests from policy makers and other agencies often delays goal completion, and the breath of each agency's work is challenging to distill in ten goals. Some set less than ten.

Evaluation data tells us that anywhere from **five to ten** of each agency's top goals were complete. We saw an **overall 80% goal completion rate**. Data suggests **discipline sticks best with accountability**; however, no agency specifically indicated that ongoing consultation would help them stay on track. Some indicated the work planning process **"helped us achieve more"** while others noted leadership transitions, operating budget outlook, Federal funding schedules, and multi-year goal setting decreased the agency's ability to complete all goals. Other accountability mechanisms may be needed.

Organizational Issues to Attend To:

After three years of implementation, **several critical issues arose that would be helpful to resolve in the long term:**

1. Interagency relationships and collaborations for project purposes
2. Planning and reacting to Council, Council requests
3. Planning and reacting to adhocacy or new projects
4. Inefficiencies in communications, tools and meetings
5. Operating without a citywide strategic plan
6. Staffing, turnover and lack of redundancy
7. Growing city, reduced services with added difficulty due to budgeting process

Organizational Development is committed to working with leadership citywide to find meaningful paths forward to address the known challenges that could support the work planning practices in the future.

Want to Learn More about Work Planning?

Connect with our Performance Excellence Specialist, at OrganizationalDevelopment@cityofmadison.com to learn more or get involved.