

# GUIDE

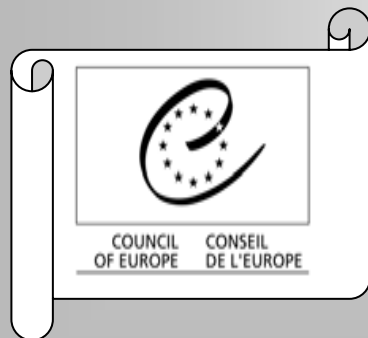
*(UDHEZUES)*

NE NDIHME TE AUTORITETEVE VENDORE  
QE

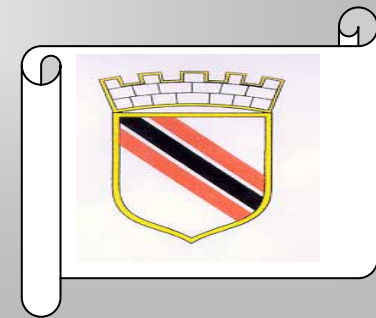
KONKUROJNE ME PRAKTIKA TE SUKSESESHME

*Ne fushat:*

- 1. Menaxhimi i burimeve njerezore*
- 2. Menaxhimi i taksave e tarifave vendore*



**DUKE KONKURUAR  
NUK FITONI VETEM JU  
POR E GJITHE  
SHQIPERIA**



***SQARIME PER PARAQITJEN E PRAKTIKES QE MENDOHET SE KA SJELLUR RREZULTATE DHE KA VLERE PER TU APLIKUAR NE NJESI TE TJERA VENDORE***

- Ju lutemi lexoni “PROSPEKTUS”!
- Ju lutemi plotesoni pyetesorin me kujdes dhe dergojeni te plotesuar edhe ne rast se nuk e gjykoni te arsyeshme per te marre pjese ne konkurim per praktiket me te mira.
- Ju lutemi **reflektoni rreth praktikave te perdorura** ne Njesite tuaja Vendore ne drejtim te fushave apo situatave te sukseseshme te menaxhimit te burimeve njerezore dhe menaxhimit e taksave e tatimeve vendore.
- **Ne rast se i vleresoni te sukseseshme** atehere perdorni formularin e meposhtem qe do tju sherbeje si guide (udhezues) dhe dergojeni bashke me pyetesorin e plotesuar per te marre pjese ne konkurimin qe po organizohet.

NE VAZHDIM PO JAPIM DISA SITUATA TE SUKSESESHME QE KANE PER QELLIM QE TE TREGOJME SE NE CFARE DREJTIMESH I PRESIM PRAKTIKAT ME TE MIRA REFERUAR DY FUSHAVE TE PERZGJEDHURA.

GJENI GJITHASHTU BASHKELIDHUR NJE SHEMBULL TE PARAQITJES SE NJE PRAKTIKE

PRAKTIKAT QE DO TE DERGONI MUND TE PERFSHIJNE NJE APO ME SHUME SITUATA TE SUKSESESHME. CDO NJESI VENDORE MUND TE DERGOJE PRAKTIKA EDHE PER TE DY FUSHAT E PERZGJEDHURA.

Shenim:

Pyetsoret e plotesuar dhe formularet e praktikave me te mira do te dergohen brenda dates 15./09./ 2004 ne adresen:

---

**FUSHAT E KOMPETICIONIT DHE DETAJIMI NE SITUATA TE SUKSESESHME**  
**FUSHA E KOMPETICIONIT 1.**  
**MENAXHIMI I BURIMEVE NJEREZORE**

Duke qene se fusha e menaxhimit te burimeve njerezore eshte e gjere e me shume elemente kemi menduar te paraqesim disa situata te sukseseshme qe mund te evidentohen prane Njesive Vendore. Kete veprim e bejme me qellim qe autoritetet vendore qe evidentojne nje, dy ose me shume situata te tilla te mund te marrin pjese ne konkurimin per evidentimin e praktikes me te mire pamvarsisht se nuk e mbullojne me situata te sukseseshme te gjithë spektrin e Menaxhimit Modern te Burimeve Njerezore.

Me poshte pershkruhen disa situata qe mund te konsiderohen te sukseseshme:

- Struktura organizative eshte ndertuar me nje proces analizimi e permiresimi gjithperfshires duke studiuar gamen e funksioneve, volumin e punes per cdo strukture organizative, dhe shperndarjen e volumit te punes te reflektuar ne pershkrimin e punes per cdo strukture e cdo punonjes.
- Eshte ndertuar nje sistem i zhdervjellte i raportimit duke analizuar e shfrytezuar ne menyre periodike propozimet per ndryshime proceduriale qe rrjedhin nga stafi i specializuar. Cdo njesi organizative raporton dhe mat progresin nepermjet treguesish te matshem e te krahesueshem qe sherbejne njekohesisht si indikator te punes se Njesise Vendore.
- Eshte organizuar grumbullimi, dokumentimi dhe shkembimi i te gjithë treguesve te nevojshem sipas sektoreve duke bashkepunuar si me strukturat e brendeshme te Njesise Vendore ashtu edhe me strukturat e qeverisjes qendrore apo shoqerise civile.
- Dallohet qarte permiresimi i nivelit te menaxhimit te burimeve njerezore si rezultat i zbatimit me efektivitet te procedurave te pershkuara ne ligjin per statusin e punonjesit civil (rekrutimi sipas kerkesave te pershkrimin te punes, vleresimi periodik, sigurimi i trajnimit, motivimi, disiplina organizative, dosja e personelit, komunikimi me DAP etj).
- Eshte ndertuar e zbatuar nje praktike e maksimizimit te burimeve te brendeshme per realizimin e trajnimit te stafit e te zgjedhurve vendore.(praktikat me te mira, vlersimi i perbashket etj).
- Jane realizuar procedura te sukseseshme per planifikimin strategjik me perfshirjen e te gjithë strukturave te brendeshme dhe pjesmarrjen e perfaqesuesve te komunitetit duke arritur nje konsensus te gjere si ne njohjen e realitetit ashtu edhe ne projektimin e se ardhmes. Keto plane sherbejne si shina jo vetem ne veprimtarine e stafit dhe te zgjedhurve vendore brenda njesise vendore, por edhe per organizatat e institucionet e tjera qe veprojne brenda territorit te njesise vendore.
- Eshte institucionalizuar nje sistem i monitorimit, kontrollit dhe analizimit te propozimeve qe nxisin permiresimin e veprimtarise. Ne kete sistem mardheniet e bashkepunimit te dokumentuar me te gjithë aktoret jane faktore te ndjeshem pozitive.

## **FUSHA E KOMPETICIONIT 2. MENAXHIMI I TARIFAVE/TAKSAVE VENDORE**

Me poshte pershkruhen disa situata qe mund te konsiderohen te sukseseshme:

- Eshte ndertuar nje sistem evidencash apo rregjistrash te subjekteve te taksueshme apo qe i nenshtrohen pageses se tarifave vendore i cili sherben si nje hap i pare dhe i rendesishem per njohjen e perditësuar te realitetit dhe parashikimin e te ardhurave ne baze te tendencave te analizuara. Te dhenat nga ky sistem shfrytezohen lehtesisht nga strukturat e interesuara te Njesise vendore e sherbejne gjithashtu per te realizuar transparencen ne kete drejtim.
- Jane miratuar dhe realizohen procedura te sukseseshme per parashikimin e te ardhurave vendore, pergatitjen e projekt-buxhetit, realizimin e te ardhurave sipas parashikimit dhe realizimin e shpenzimeve apo investimeve bazuar ne keto te ardhura brenda vitit buxhetor. .
- Procedurat e ndjekura per percaktimin e nivelit te Taksave dhe Tarifave ne perputhje me politikat sociale dhe ato te zhvillimit ekonomik kane sherbyer si zbutese te problemeve ekonomike sociale dhe kane nxitur zhvillimin ekonomik vendor sipas strategjive egzistuese. .
- Evidentohet permiresim i shperndarjes se sherbimeve si rezultat i perdorimit te tarifave e te ardhurave te tjera vendore perkatese ose qe jane realizuar per ate qellim. Tregues te qarte bejne evidente nivelin e realizimit te te ardhurave nga cdo tarife apo takse dhe njekohesisht tregojne nivelin e investimit nga keto te ardhura per permiresimin e sherbimit ne formen e indikatorëve.
- Llogaritja e koston per cdo sherbim udheheq procesin e percaktimit te tarifave dhe evidentohet qarte e ne menyre transparente nevoja per subvencione kur tarifat nuk mbulojne teresisht koston e sherbimit. Qytetaret e subjektet jane koshjente si per nivelin e subvencionit kur ai aplikohet ashtu edhe kur tarifat qe ata paguajne mbulojne koston e sherbimeve. Transparenca ne kete drejtim i ben qytetaret e subjektet me te ndergjegjeshem, me bashkepunues e me aktive ne dhenien e kontributit te tyre qe ne shume raste eshte shprehje e besimit ne qeverisjen vendore.
- Jane ndertuar strukturave organizative eficente per evidentimin, vleresimin, kontrollin, mbledhjen e taksa-tarifave dhe komunikimin me strukturat e tjera financiare.

(TITULLI I PRAKTIKES ME TE MIRE)

**TE DHENA TE PERGJITESHME**

<b>Fusha e menaxhimit</b>	
<b>Njesia Vendore</b>	
<b>Adresa , Tel.,Fax, e-mail.</b>	
<b>Personi i kontaktit</b>	
<b>Periudha e zbatimit</b>	
<b>Faza e zbatimit</b>	

**1.PERSHKRIM I PERGJITESHEM I PRAKTIKES ME TE MIRE**

*Pershkruani shkurtimisht Praktiken qe ju e konsideroni te vlefshme per tu praktikuar edhe ne njesi te tjera vendore.*

*(10-15 fjali)*

**2.PERSHKRIMI I ENTITETIT**

- *Pershkruani te dhenat e njesise tuaj vendore qe kane lidhje me praktiken*
- *Cila ishte gjendja para aplikimit te procedurave te sukseseshme qe keni aplikuar.*
- *Procedura e analizimit te gjendjes*
- *Strukturat e angazhuara per permiresimin e gjendjes*
- *Pershkruani shkurtimisht synimet,objektivat e paracaktuara.*

*(deri 2 faqe mundesisht ilustroni me tabela e shifra)*

### **3.PROBLEMET APO CESHTJET PER TU ZGJIDHUR**

*Shenoni me pika shkurtimisht problemet apo ceshtjet te cilave i adresohej permiresimi me procedurat e reja.*

*(10-15 rreshta)*

### **4.PERSHKRIMI I METODES SE ZBATIMIT**

*Pershkruani metoden qe keni perdorur per te zbatuar projektin apo synimet e parashikuara.*

*(deri nje faqe)*

## 5.PERSHKRIMI I ZBATIMIT SIPAS FAZAVE

<b>Faza e Pare. ( veprimi )</b>	<b>Koha</b>
<i>Pershkruaj veprimin shkurtimisht duke cituar edhe se kush ishte pergjegjes</i>	<i>kohezgjatja</i>
<b>Faza e Dyte. ( veprimi )</b>	
<i>Pershkruaj veprimin shkurtimisht duke cituar edhe se kush ishte pergjegjes</i>	<i>kohezgjatja</i>
<b>Faza e Trete. ( veprimi )</b>	
<i>Pershkruaj veprimin shkurtimisht duke cituar edhe se kush ishte pergjegjes</i>	<i>kohezgjatja</i>
<b>Faza e Katert. ( veprimi )</b>	
<i>Pershkruaj veprimin shkurtimisht duke cituar edhe se kush ishte pergjegjes</i>	<i>kohezgjatja</i>
<b>Faza e Peste. ( veprimi )</b>	
<i>Pershkruaj veprimin shkurtimisht duke cituar edhe se kush ishte pergjegjes</i>	<i>kohezgjatja</i>
<b>etj.</b>	
( numuri i fageve varet nga sasia e fazave dhe pershkrimi i tyre)	

## **6. REZULTATET E ARRITURA SIPAS VEPRIMEVE TE KRYERA**

*Mundohuni te vini ne ballance perpjekjet e bera me rezultatet e arritura*

(rreth nje faqe)

## **7.REKOMANDIME PER APLIKUESIT E PRAKTIKES TUAJ.**

*Shpjegoni sa me qarte se cfare do ti rekomandonit kolegeve tuaj te njesive vendore qe mund te aplikojne praktiken tuaj mundesisht me pika.*

**KRYETARI I NJESISE VENDORE \_\_\_\_\_**

(\_\_\_\_\_)

\_\_\_\_\_ me dt. \_\_/\_\_/2004



# SHEMBULL

---

## STRATEGIC OPERATIONAL PLANS – CITY OF WINNIPEG

### I. GENERAL DATA

**Management area:** Strategic Management.

**Name of the practice:** Development of strategy implementation (operational) plans

**Indicator:** Development of strategy implementation (operational) plans

**Indicator stage:** 4-5.

**Implementing unit:** Municipal office

**Name and address of the implementing unit:**

**Date of implementation:** 2000-2004.

**Contact person:** Connie Walker, Manager, Strategic Planning Unit  
Chief Administrative Officer Secretariat, City of Winnipeg  
City Hall, 3<sup>rd</sup> floor, 510 Main Street, Winnipeg Manitoba, Canada R3B 1B9  
204-986-2377, fax 204-986-7196 .cwalker@city.winnipeg.mb.ca

City of Winnipeg  
City Hall, 3<sup>rd</sup> floor  
510 Main Street  
Winnipeg Manitoba  
Canada R3B 1B9  
[www.city.winnipeg.mb.ca](http://www.city.winnipeg.mb.ca)

**Place of replication:** The City of Kalamazoo, Michigan, “Blueprint for ACTION: 2003”, is the current version of the City’s strategic plan, which has a three-year planning cycle. The City of Kalamazoo strategic plan may be found at <http://www.ci.kalamazoo.mi.us>, click on Special Projects and Reports, then on Strategic Plan.

The strategic focus areas, goals, and objectives that make up the Strategic Plan are reflected in the City of Kalamazoo’s annual budget priorities, and will continue to drive budgetary priorities in the coming years. Performance objectives and outcome measures will also be developed based on the strategic goals and objectives in the strategic plan. All of these elements will be captured and communicated through an annual action plan for implementation. An annual action plan will link priority strategic objectives to budget resources, and will be reviewed and adjusted each year based on the progress made towards achieving objectives and goals.

## II. DESCRIPTION

### *1. Characteristics of best practice*

In an ideal local government environment (stage 5), there are approved implementation plans to implement an approved strategic plan. The implementation (operational) plans would have the following characteristics:

- Defines the tasks of various units/employees with respect to implementation,
- Include an implementation schedule,
- Have assigned the responsibility for monitoring the implementation, and there is periodic or annual monitoring and reporting of progress in implementation,
- Includes monitoring of financial resources,
- There is long range financial planning implemented by annually approved operating and multiple year capital budgets,
- There is systematic regular updating of plans, which consider the monitoring results.

In the City of Winnipeg, the approved long-range strategic plan is called “Plan Winnipeg”. Plan Winnipeg is implemented by a three year implementation action plan called “Serving Citizens – The City of Winnipeg’s Action Plan 2000-2002”, the name of which reflects the approach to service provision that Winnipeg is pursuing. The plan is available on the following web page:

[http://www.city.winnipeg.mb.ca/interhom/about\\_winnipeg/inside/org\\_plan\\_perf.stm](http://www.city.winnipeg.mb.ca/interhom/about_winnipeg/inside/org_plan_perf.stm)

A number of years ago, Winnipeg decided to begin a process of reviewing how it provides services, with the idea of re-aligning service provision to match how the average citizen perceives services are provided (along functional versus departmental lines). While this process is not complete, “Serving Citizens” is an important step in the process. “Serving Citizens” is broken into key service areas as they are perceived by the public, and each service area highlights the strategies of “Plan Winnipeg” that are relevant to the service area. The services provided and the Departments providing them have indications of current service levels (which are most frequently activity levels) and key service goals/strategies (or actions) to be implemented over a three period. The results achieved (most frequently activities completed) are monitored and reported in an annual report to the citizens. See “2001 Annual Report on Performance” at:

[http://www.city.winnipeg.mb.ca/interhom/about\\_winnipeg/inside/org\\_plan\\_perf.stm](http://www.city.winnipeg.mb.ca/interhom/about_winnipeg/inside/org_plan_perf.stm)

In addition, there are annual business plans for each Department that are linked to “Serving Citizens”. These are confidential plans however, as they contain personnel/staffing actions.

The City's long-range financial plan may be found on the same web page, called "Financial Management Plan". The implementing multiple year capital budget for 2002 and the 2002 current operating budget may be found at [http://www.city.winnipeg.mb.ca/interhom/about\\_winnipeg/inside/financial\\_reports.stm](http://www.city.winnipeg.mb.ca/interhom/about_winnipeg/inside/financial_reports.stm)

While there is some linkage between the "Financial Management Plan" and "Plan Winnipeg", these linkages could be strengthened. Linkages between the capital and operating budgets and the strategic plans mentioned, have not yet been developed.

"Plan Winnipeg" is updated every 5 years. Currently, "Serving Winnipeg" is being completely updated every three years, although this will be changing to coincide with a change to a four-year term of Council, and will be updated with each new incoming Council. "Serving Winnipeg" receives quick reviews on an annual basis, and with the major review after each election. Departmental business plans are updated annually. All of these updates consider completed monitoring results and previous financial results.

### *2. General description of the implementing unit*

Winnipeg (Census Metropolitan Area population 684,800) is the capital of Manitoba (population 1,143,509), a vast, resource-rich province somewhat larger in size than the states of California, New York and Indiana combined. Manitoba is bordered by Ontario to the east, Saskatchewan to the west and North Dakota and Minnesota to the south. It also borders on Hudson's Bay, which provides shipping access to Europe. The City of Winnipeg is located at the junction of the Red and Assiniboine Rivers, almost at the geographic centre of North America. With an ethnically diverse population, Winnipeg is characterized by slow but steady growth. It is the eighth largest city in Canada and dominates the Manitoba economy. Since 1945, Winnipeg has grown steadily, based on its position as a major grain, financial, manufacturing, and transportation centre. Winnipeg was formed by the amalgamation of several smaller municipalities in 1972. Members of the Council, other than the Mayor, are elected on the basis of one each from the fifteen wards into which the city has been divided. The Mayor is elected at large.

### *3. Problems solved*

Winnipeg is successfully cascading its long-range strategies down to its one-three year operational plans and down further to annual business plans. In addition, Winnipeg is utilizing its strategic planning processes to evolve into a service-based organisation that continuously measures performance in those services delivery areas.

The City of Winnipeg has established its vision and priorities for the future through a strategic plan called "Plan Winnipeg". "Plan Winnipeg" is actually being implemented through a number of means, including the three year operational plan called "Serving Citizens", annual Departmental Business Plans, and its capital and operating budgets. The performance of the city operations, and the tracking of its achievements in implementing its strategic plan are publicly reported. A loop is formed so that the reporting of performance and achievements will feed into subsequent updates of the strategic, operational, and business plans.

#### *4. Description of applied tool*

“Plan Winnipeg” is City Council’s long-range policy plan. It is intended to guide Winnipeg into the next decade by addressing the broad physical, social, economic, and environmental conditions in the city. In that sense, Plan Winnipeg is the most important document prepared by the City of Winnipeg because it provides the foundation for all civic activity. All other documents, budgets, public works, programs, or developments must be consistent with this Plan.

Winnipeg developed its first ever organization-wide implementation plan in 2000. The City of Winnipeg's Action Plan – “Serving Citizens” – details the link between Council's vision and strategic direction, and the actions to be undertaken by the organization. Based on the direction received through Council's approval of “Plan Winnipeg” and the three year budget, this action plan:

- aligns the service goals and strategies developed through departmental business planning with Plan Winnipeg and Council's Priorities,
- provides high level goals for the administration and begins to define measures of performance,
- presents the results of the administration's first efforts in measuring service outputs and costs,
- lists Council's additional leadership activities that are also in support of Plan Winnipeg.

"Serving Citizens" is intended to support the Mayor and Council in strategic planning and budgeting. This document is also intended to demonstrate the Administration's commitment to being responsive to Council's direction and accountable for results. “Serving Citizens” may be found on the following web page: [http://www.city.winnipeg.mb.ca/interhom/about\\_winnipeg/inside/org\\_plan\\_perf.stm](http://www.city.winnipeg.mb.ca/interhom/about_winnipeg/inside/org_plan_perf.stm)

To access the City of Winnipeg “2001 Performance Report”, which reports on performance in implementing Plan Winnipeg follow the link on this web page:

[http://www.city.winnipeg.mb.ca/interhom/about\\_winnipeg/inside/org\\_plan\\_perf.stm](http://www.city.winnipeg.mb.ca/interhom/about_winnipeg/inside/org_plan_perf.stm)

While this report essentially reports on activities completed, future performance monitoring reports will report on performance achievements outlined in “Serving Citizens”.

Cascading down from Plan Winnipeg and the Corporate Action Plan is a third level of planning activity – Departmental Business Plans. Each Department completes an annual business plan (with a three year outlook). These Plans are formulated around “services”. Business Plans are a key tool for Departments in managing their operations. In addition, these business plans provide senior management with all the information necessary to assess service strategies relative to Council’s priorities and direction. Each Plan includes:

- An executive summary,
- An introduction,
- An analysis of services being provided to the public,
- A description of the Department’s strategic direction and the service goals for the next three years,
- Resources required to deliver the services categorized by: financial, human resource, information technology resources,
- Performance measures of success.

The Departmental Business Plans are confidential documents as they contain sensitive information related to personnel and staffing actions. A very comprehensive Business Planning Workbook was developed to assist Departments in their business planning efforts. An electronic copy has been made available.

Areas of continuing improvement and development for Winnipeg include:

- Even greater alignment of “Serving Citizens” with “Plan Winnipeg”,
- Performance measures that will more accurately measure outputs or outcomes versus current measurements of activities completed,
- The development and use of “service templates” to more tightly integrate strategic planning, budgeting and performance measurement. The service templates will:
  - Include the results of surveys of citizens that report their perceptions of service performance, but also include objective service performance data,
  - More directly link “Plan Winnipeg” directions, “Serving Winnipeg” action strategies, and the annual “Business Plans” containing the planned actions of each Department,
  - Provide service level information including key service output levels by year and budget impact of service levels,
  - Provide service costing, staffing levels, funding sources,
  - Provide service efficiency and in the future, service effectiveness measures.

Winnipeg will implement “service-based” financial reporting in 2002, and in future years, will move to a service-based budget (versus Departmental basis). Service-based budgeting is similar to task-based budgeting, but budgets are provided at the service level versus task level. This will result in the ability to fully align budget planning, priorities, and reporting with strategic planning priorities.

### *5. description of the implementation method*

Winnipeg strategic planners feel strongly that an organisation wanting to integrate strategic planning, budgeting and financial performance reporting and performance measurement should start with strategic planning. As a result, the following steps have been taken in Winnipeg.

**Step 1.** A strategic plan was prepared with public input and participation, in Winnipeg's case, called "Plan Winnipeg – 2020 Vision", which had a twenty year time horizon.

**Step 2.** During the strategic plan preparation, Winnipeg was evolving into an organisation that had a more service-based focus. The planning consultations provided the administration with a view of how citizens perceived service delivery. The plan was organized around five priority service delivery areas:– Downtown and neighbourhoods,– Government and the economy,– Planned development, transportation and infrastructure,– Public safety, health and education,– Environment, Image and Amenities.

These five service delivery areas would form the basis for further evolution of the strategic planning process.

**Step 3.** Winnipeg also developed its first ever organization-wide implementation plan in 2000. The City of Winnipeg's implementation plan – "Serving Citizens" – details the link between Council's vision and strategic direction, and the actions to be undertaken by the organization.

Based on the direction received through Council's approved "Plan Winnipeg" and the three year budget, this action plan:

- aligns the service goals and strategies developed through departmental business planning with Plan Winnipeg and Council's Priorities,
- provides high level goals for the administration and begins to define measures of performance,
- presents the results of the administration's first efforts in measuring service outputs and costs,
- lists Council's additional leadership activities that are also in support of Plan Winnipeg.

**Step 4.** Winnipeg then developed Business Planning Workbook, to assist Departments in developing the more specific annual departmental business plan. Currently the budget process meets the strategic planning process at this level, although in the future, there will be more linkages at all three strategic planning levels. The contents of the business plans have already been described.

**Step 5.** To assist in strengthening the linkages between the three planning levels, to assist in bringing a greater service-based orientation, and to begin strengthening budget links, the strategic planners have developed a "service template". By the end of 2002, service templates will be developed for all 40 "service areas". The service template provides a very useful, yet easily understood snapshot of key characteristics of the service described.

**Step 6.** For the 2003 budget, financial reporting will be summarized by service area.

**Step 7.** By approximately 2004-2006, Winnipeg will "service-based" budgeting and reporting, allowing a very tight integration of strategic planning, business planning and financial planning/budgeting/reporting.

**Step 8.** Winnipeg will continue to improve performance measurement, which will become easier when the service-based approach has become more fully developed. Performance measurement will begin measuring results at the output and/or outcome level, versus the current "activities completed" level.

### *6. Cost-Benefit Considerations*

The City of Winnipeg is unable to estimate the costs involved over the last several years in strategic planning, moving towards service-based service delivery, and performance measurement. Staff, which includes strategic planning staff, financial staff, as well as staff in each Department have undertaken most of the work. Each new step that is developed requires a very substantial effort, while each time it is repeated, or updated, it becomes easier and more familiar. The Business Planning Workbook for example, required quite a substantial effort to develop, and to modify as it was tested with the Departments. Likewise the first business plans of the Departments took months of effort by many people, whereas subsequent plans take less time to develop.

While Winnipeg has already started to reap some benefits of a service-based orientation that is driven by strategic planning, the greatest benefits will accrue when the process is completed. With the complete integration of the processes of strategic planning, financial planning/budgeting/reporting, and performance measurement, Council will be able to exercise much greater control over the strategic provision of services in a manner that is in much greater alignment with the changing priorities of the community it serves. Certainly, this will point to areas of lesser priorities in which savings may be found, and to areas where the community would like to increase service levels and do so knowing what the cost implications are. Performance measurement will also measure increasing internal efficiencies, and permit benchmarking with others if so desired. While there is certainly a very substantial effort required to put these processes in place, the on-going effort required to continue it on an annual basis once it is in place, will be a very small cost for the large benefits to be derived.

### **III. RECOMMENDATIONS FOR REPLICATING UNITS**

Winnipeg has learned several important lessons through the strategic planning work to date including the following:

- Winnipeg’s strategic planning efforts are guided by the Corporate Planning Framework (described on p. 61 in Plan Winnipeg). This Framework insures that each of the plans build upon each other and ties Council’s highest level vision to the organization’s actions. It has been extremely helpful to have such a Framework, past planning efforts have been disjointed and ad hoc.
- Political commitment to strategic planning is very important.
- Public consultation is critical in developing a community-based long-term strategic plan. Plan Winnipeg is a critical plan in the organization and in the community more broadly. Its strength lies in the robust public consultation process undertaken during each review period.
- Winnipeg Council members are elected by wards and the Mayor is elected at large. Because Plan Winnipeg is an overarching Plan covering the entire City, the Plan challenges all members of Council to consider the long-term interests of the City as a whole in their day to day decision-making.
- Plan Winnipeg now includes quality of life indicators. These indicators will be tracked to provide Council with some indication of whether or not their policy framework is actually achieving the results intended.

- The Corporate Action Plan (Serving Citizens) was Winnipeg’s first corporate planning effort. The Plan comprehensively documents the strategies being implemented in each of the business areas. Winnipeg will streamline this Plan in the next effort, paying greater attention to the strategic levers and performance measures. Winnipeg is anxious to move to a more robust and objective Report on Performance. Historically, the Report was a laundry list of accomplishments. The 2000 report aligned accomplishments against the Chapters of Plan Winnipeg. The 2001 report aligned accomplishments with the more precise direction statements of Plan Winnipeg. It also included results from the 4<sup>th</sup> annual public opinion survey and more quantitative measures of performance in some key business areas.
- In linking Council’s strategic direction to organizational actions it is critical to talk the same language. For example, Council talks about ‘outcomes’ – ‘safety’, ‘neighbourhood revitalization’, etc. Administratively, there are ‘Departments’ – the Police Department, the Planning Department, etc. Departments are relatively meaningless to elected officials and to citizens. To bridge this difference, Winnipeg undertook an exercise 4 years ago to document all of the City’s “services” (from a citizen’s perspective). With this inventory now complete (including information on customers, value, preliminary costs, outputs, quality measures etc.) Winnipeg is now able to link ‘services’ to the strategic outcomes defined in Plan Winnipeg. Winnipeg utilized the Management Reference Model for Government Services to assist in this exercise.
- Cascading down from Plan Winnipeg and the Corporate Action Plan is a third level of planning activity – Departmental Business Plans. Each Department completes an annual business plan (looking three years out). These Plans are formulated around “services”. Business Plans are a key tool for Departments in managing their operations. In addition, these business plans provide senior management with all the information necessary to assess service strategies relative to Council’s priorities and direction. A very comprehensive Business Planning Workbook was developed to assist Departments in their business planning efforts, and this type of assistance is a requirement to achieve a consistent approach by all Departments.
- To date Winnipeg have not been able to make a strong link between the planning efforts and the budgeting efforts. Currently, budgeting is done by rolling up line item accounts, and the budget discussion focuses on the money going in – there is no clear tie to what Council gets for their investment (i.e. there is no clear tie to ‘services’ and/or to performance). Winnipeg will be moving to a ‘service-based’ budget. This would allow Council to track spending against their strategic priorities and would allow a clearer assessment of value.
- Winnipeg strategic planners feel strongly that an organisation wanting to integrate strategic planning, financial planning/budgeting/reporting and performance measurement in a similar manner should start with strategic planning. Strategic planning should provide directions to financial planning and budgeting, not the other way around. In terms of performance measurement, “what gets measured... gets done”. However there is a very good chance that the wrong things will be measured (and therefore wrong things being done), unless performance measures are developed within the context of the strategic planning framework.