



nextgen people

City of Dallas

Goal Setting & Performance Evaluation Kick-Off & Alignment

1.20.2026

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Transformational Leadership Coach

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KICK – OFF MEETING AGENDA

Duration: 60 minutes

Format: Virtual

Welcome and meeting objectives	5 Minutes
Scope, Approach & Timeline	10 Minutes
Confirmation of evaluation population	10 Minutes
Decision calendar and Council touchpoints	15 Minutes
Governance, cadence, and escalation framework	15 Minutes
Communication and confidentiality approach	10 Minutes
Phase Zero and Phase One deliverables review	10 Minutes
City inputs required for Phase 0 & 1	10 Minutes

WELCOME & MEETING OBJECTIVES – 5 MINUTES

- **Welcome & Meeting Objectives**
- **Introductions**
- City of Dallas participants
- Nextgen People project team

Purpose of the Kick-Off

- Align on scope, approach, and timing for Phase Zero and Phase One
- Confirm governance, decision-making, and Council engagement points
- Establish expectations to support an efficient and well-governed execution

Outcomes for Today

- Confirmed evaluation population and Phase Zero and Phase One scope
- Agreed decision calendar and Council touchpoints
- Confirmed governance, cadence, communication, and confidentiality protocols
- Reviewed Phase Zero and Phase One deliverables and administrative alignment
- Confirmed City inputs, owners, and next steps toward Phase Two readiness



PROJECT SCOPE, APPROACH & TIMELINE

10 Minutes

PROJECT SCOPE, APPROACH & TIMELINE -10 MINUTES



Overview of the Engagement

- Support goal setting and performance evaluation for Council-appointed officials
- Phased approach aligned to the City's fiscal cycle
- Designed for consistency, clarity, and defensibility



Workday Alignment

- Workday serves as the **system of record**
- Recommendations are **designed to fit existing Workday structures**
- No assumed system configuration or administration in scope

PHASE TIMELINE & DELIVERABLES MATRIX

Phase	Key Deliverables	Primary Activities	City Roles Involved	Consultant Roles Involved	Target Dates
Phase 0 – Project Initiation & Scope Confirmation	<ul style="list-style-type: none"> Confirmed scope, cadence, and governance Communication and confidentiality protocols 	<ul style="list-style-type: none"> Introductory alignment meeting Confirm evaluation population, decision calendar, and Council touchpoints 	Jesse Moreno & City Council members	Project Executive, Project Manager	Jan 5 – Jan 16, 2026
Phase 1 – Strategic Alignment & Baseline Review	<ul style="list-style-type: none"> Strategic alignment summary Prior-year performance review synthesis 	<ul style="list-style-type: none"> Review of existing evaluation criteria, prior-year outcomes, and current fiscal priorities to inform upcoming goal-setting. Alignment discussions 	Jesse Moreno & City Council members	Project Executive, Performance Strategy Lead	Feb 12 – Feb 26, 2026
Phase 2 – Benchmarking & Best-Practice Analysis	<ul style="list-style-type: none"> Benchmarking brief KPI and success-criteria recommendations 	<ul style="list-style-type: none"> Benchmark peer cities and national public-sector standards Translate benchmarks into Dallas-specific guidance 	Jesse Moreno & City Council members	Performance Strategy Lead, Evaluation Specialist	Feb 26- – Mar 13, 2026

PHASE TIMELINE & DELIVERABLES MATRIX

Phase	Key Deliverables	Primary Activities	City Roles Involved	Consultant Roles Involved	Target Dates
Phase 3 – Stakeholder Engagement & Input Collection	<ul style="list-style-type: none"> Interview themes•3 Survey summary (anonymized) 	<ul style="list-style-type: none"> Conduct confidential interviews and surveys Synthesize qualitative and quantitative input 	Jesse Moreno & City Council members	Research & Feedback Lead, Project Manager	March 13 – Apr 3, 2026
Phase 4 – Goal-Setting Design & Preparation	<ul style="list-style-type: none"> Draft goal frameworks by role KPI and success-criteria drafts 	<ul style="list-style-type: none"> Goal frameworks developed in alignment with the City’s pre-fiscal-year goal-setting cycle. Integrate benchmarking and stakeholder input 	Jesse Moreno & City Council members	Performance Strategy Lead, Facilitation Lead	Apr 3 – Apr 17, 2026
Phase 5 – Goal-Setting Facilitation	<ul style="list-style-type: none"> Facilitated Council sessions Draft FY goals for each official 	<ul style="list-style-type: none"> Facilitate structured in-person Council sessions Guide KPI development 	Jesse Moreno & City Council members	Project Executive, Facilitation Lead – in person	Apr 17– Apr 29, 2026

PHASE TIMELINE & DELIVERABLES MATRIX

Phase	Key Deliverables	Primary Activities	City Roles Involved	Consultant Roles Involved	Target Dates
Phase 6 – Goal Finalization & Documentation	<ul style="list-style-type: none"> Final approved goals & KPIs Workday-ready documentation 	<ul style="list-style-type: none"> Finalize goals and performance measures Deliver tracking templates 	Jesse Moreno & City Council members	Performance Strategy Lead, Project Manager	Apr 29– May 15, 2026
Phase 7 – Evaluation Instrument Design	<ul style="list-style-type: none"> Customized evaluation tools Rating scales and criteria 	<ul style="list-style-type: none"> Design role-specific evaluation instruments Align criteria with benchmarks 	Jesse Moreno & City Council members	Performance Strategy Lead, Evaluation Specialist	May 15– May 30 2026
Phase 8 – Mid-Year Review Support (Covering Q1–Q2, October–March)	<ul style="list-style-type: none"> Mid-year progress summary: Informal feedback Updated Performance & Development Records 	<ul style="list-style-type: none"> Conduct light-touch progress check-ins 	Jesse Moreno & City Council members	Project Manager, Evaluation Specialist— in Jun 1 – Jun 19, 2026 person	
Phase 9 – 360° Feedback & Self-Assessment	<ul style="list-style-type: none"> Completed 360s Self-assessment summaries 	<ul style="list-style-type: none"> Administer 360-degree feedback Support self-assessments Ensure confidentiality 	Jesse Moreno & City Council members	Research & Feedback Lead, Evaluation Specialist	Aug 30 – Sep 14, 2026

PHASE TIMELINE & DELIVERABLES MATRIX

Phase	Key Deliverables	Primary Activities	City Roles Involved	Consultant Roles Involved	Target Dates
Phase 10 – Evaluation Synthesis & Analysis	<ul style="list-style-type: none"> • Draft evaluation narratives • Evidence-based findings 	<ul style="list-style-type: none"> • Analyze KPIs, benchmarks, and feedback • Prepare preliminary findings 	Jesse Moreno & City Council members	Evaluation Specialist, Performance Strategy Lead	Sep 14– Oct 15, 2026
Phase 11 – Council Closed Sessions	<ul style="list-style-type: none"> • Facilitated closed sessions • Agreed ratings and outcomes 	<ul style="list-style-type: none"> • Facilitate confidential Council deliberations • Support consensus-building 	Jesse Moreno & City Council members	Project Executive, Facilitation Lead – in person	Oct 15 – Oct 30, 2026
Phase 12 – Final Reporting & Merit Input	<ul style="list-style-type: none"> • Merit-planning inputs • Final evaluation outputs provided in advance of January merit implementation. 	<ul style="list-style-type: none"> • Deliver final reports to HR • Connect outcomes to next-year goals 	Jesse Moreno & City Council members	Project Executive, Project Manager	Oct 31— Nov 21, 2026
Ongoing – Quality Assurance & Communication	<ul style="list-style-type: none"> • Status updates • Continuous QA 	<ul style="list-style-type: none"> • Regular check-ins • Confidentiality safeguards • Real-time adjustments 	Jesse Moreno & City Council members	Project Executive, Project Manager	Throughout

CONFIRMED EVALUATION POPULATION

- City Manager
- City Attorney
- Administrative Judge?
- City Secretary
- Inspector General

DECISION CALENDAR

Phase Zero authorization	January 8, 2026- Present	Council confirmation of evaluation population, scope, governance, and decision cadence
Goals approval checkpoint	April 2026	Council approval of performance goals and success measures for Council-appointed officials
Evaluation framework confirmation	May 2026	Council confirmation of evaluation criteria and approach prior to mid-year review
Mid-year review acknowledgment	June 2026	Council acknowledgment of progress review and continuation of goals
Closed-session evaluation deliberations	October 2026	Council deliberation and alignment on evaluation outcomes in closed session
Final evaluation and merit alignment	November 2026	Council confirmation of final evaluation outputs to support merit and next-year planning

COUNCIL TOUCHPOINTS

Kickoff and Phase Zero confirmation	Initial alignment with designated Council staff on scope, governance, and evaluation population	<i>(January 2026)</i>
Pre-goal-setting coordination	Council staff touchpoints to prepare materials and align on facilitation approach	<i>(February–March 2026)</i>
Council goal-setting sessions	Facilitated Council sessions to establish performance goals and success measures	<i>(March–April 2026)</i>
Mid-year progress touchpoint	Council-level visibility into progress and confirmation to continue or adjust focus	<i>(June 2026)</i>
Evaluation preparation and routing	Council staff coordination to prepare materials for closed-session deliberations	<i>(September 2026)</i>
Closed-session deliberations	Council closed sessions to deliberate and align on evaluation outcomes	<i>(October 2026)</i>
Final outcomes and merit alignment	Council confirmation of final evaluation outputs supporting merit and next-year planning	<i>(November 2026)</i>



GOVERNANCE, CADENCE, AND ESCALATION FRAMEWORK

PROPOSED GOVERNANCE MODEL

Council Leadership

- **Mayor Pro Tem Jesse Moreno**
Council Committee Chair overseeing elected official evaluations
Role: Council oversight, decision authority at defined checkpoints

City Project Leadership

- **Executive Sponsor: City Council**
- **Mayor Pro Tem Jesse Moreno**
Council Liaison
Role: Day-to-day coordination, routing materials, scheduling Council touchpoints

Additional City Coordination

- **Tomy Mollas**
Role: City coordination and alignment support
- **Ahmad Goree**
Role: City coordination and alignment support

(Roles reflect current coordination and participation and do not supersede formal City authority.)

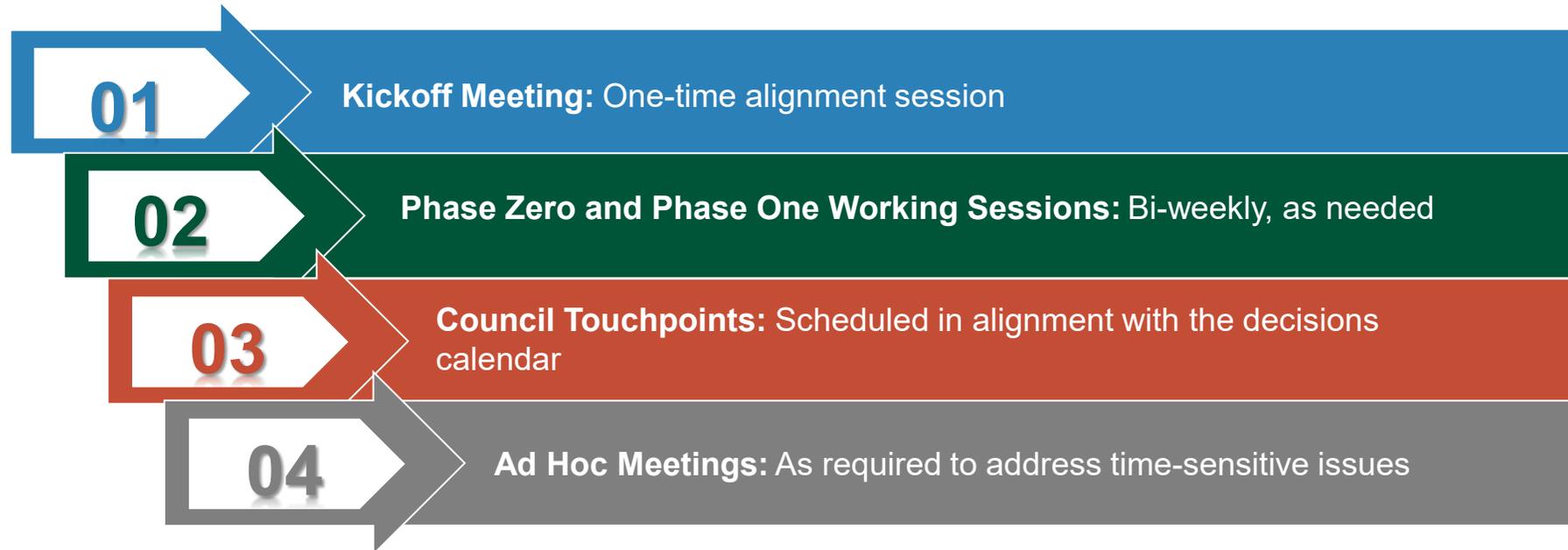
Consultant Governance

- **Nextgen People – Project Executive**
Role: Overall engagement leadership, facilitation, and delivery; City POC: Lepora Flournoy
- **Nextgen People – Project Manager**
Role: Day-to-day execution, timeline management, and deliverable coordination

Governance Principles

- **City Council** retains decision authority at defined checkpoints
- **Priscilla Chambliss to Jesse Moreno** manages day-to-day coordination and escalation
- **Nextgen People** facilitates, advises, and delivers within approved scope

CADENCE MODEL



Reporting Rhythm

- Written updates aligned to Milestones
- Materials routed in advance of Council touchpoints
- Formal deliverables submitted at the completion of each phase

COMMUNICATION AND CONFIDENTIALITY APPROACH

Protect confidentiality while enabling timely, well-governed decision-making

Communication

-  Designated City points of contact for coordination and routing
-  Regular updates aligned to milestones and decision points
-  Materials shared in advance of Council touchpoints, as appropriate

Confidentiality

-  Stakeholder input handled confidentially and reported in aggregate
-  Evaluation materials prepared and routed consistent with City protocols
-  Closed-session matters supported in accordance with Council governance requirements

PHASE ZERO AND PHASE ONE DELIVERABLES REVIEW

Phase Zero Deliverables

- Confirmed scope
- Governance and working cadence
- Communication and confidentiality approach

Phase One Deliverables

- **Strategic alignment and baseline briefing**
Prior-year performance review synthesis and key themes to inform goal setting

Deliverable Review and Acceptance

- Deliverables reviewed with Jesse Moreno and designated Council staff
- Feedback incorporated prior to finalization, as appropriate

CITY INPUTS REQUIRED

-  Any relevant edits to the Timeline
-  Agreement, requested edits, or need for additional information
-  Existing evaluation criteria and templates
-  Prior-year evaluation reports and outcomes
-  Additional requirements or preferences from HR and or City Council
-  Current fiscal priorities and budget context



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THANK YOU!!!

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