Town Council Tracking Spreadsheet: **03/01/2021**

Over the years, many ideas would come forward in workshop or council meetings or be identified by Town Staff. These ideas were discussed but would not be defined within the context of all work being done. Some were logged on individual Staff lists but were not compiled in a master list. Newer items would bump older items from planned activity simply because they were discussed most recently. Direction on priorities was missing. Follow-up on outstanding items was not done consistently. And, lower priority items would resurface without historical reference on past discussions. Residents had no way of knowing (without watching every meeting/workshop) what the Council was currently working on or where a specific item may fall within the larger list of items.

In 2017, as part of their goal setting, the Town Council created a Tracking Spreadsheet.

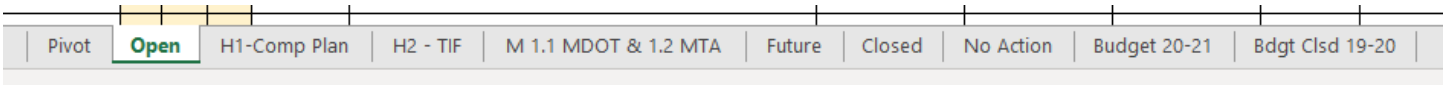
The goal of the spreadsheet was multi-faceted:

(1) Ensure the capture of all suggestions, projects, activities created or connected to the Town Council's work.
(2) Allow for identification of Council Goals and top Priorities.
(3) Allow for prioritization of all items to assist Town Staff with allocating resources and setting realistic timelines. This includes readjustment of prioritization as new issues arise and/or take precedence over existing issues.
(4) Ensure regular follow-up on all items.
(5) Allow for transparency with residents by providing a complete list of Council activity.

At the end of each Council meeting, the Task Spreadsheet is reviewed/updated as needed based on current activity. The Task Spreadsheet is published as part of every agenda packet usually at the end of the packet and is also posted on the Town Website.

Understanding the Spreadsheet:

The Spreadsheet is an Excel Workbook which means there are "**TABS**" at the bottom of the spreadsheet. These tabs are used to segregate the items:



Clicking on each tab – will automatically bring up the spreadsheet and data for that Tab. The Tabs are defined as:

Pivot: Table showing OPEN and CLOSED items by Category/Priority.

Open: All OPEN items considered as Active (currently being worked on) or Inactive (awaiting resources or timeline specific)

H4 – Comp Plan: Breakdown of tasks for High Priority – No. 4 – The implementation of a new Gray Comprehensive Plan.

H5 – TIF: Breakdown of tasks for High Priority – No. 5 – The Planning needed for the new Village Tax Increment Financing District.

H9 – Route 115: Breakdown of tasks for High Priority – No. 9 – The planning for the Route 115/Yarmouth Road infrastructure project.

M1.1 – MDOT & 1.2 MTA: Breakdown of tasks for Medium Priority No. 1.1 MDOT current issues and Medium Priority No. 1.2 MTA current issues.

Future: Issues that were deemed as having value, but not urgent enough to require immediate resources.

Closed: All Items for which work has been completed.

No Action: All Items that were discussed and closed without action.

Budget 21-22: A list of Budget related items created throughout the 20-21 year – to be discussed during the 21-22 Budget meetings.

Bdgt Clsd 20-21: A list of Budget related items created throughout the 19-20 year which were discussed during the 20-21 Budget meetings.

Pivot: The Pivot Tab is a data graph to show counts of items listed – both Open and Closed. This allows the Council to track data on outstanding Open items, as well as, see progress with Closed items.

*O/F/C

Count of Activity/Task

OPEN

Row Labels	H	L	M	Grand Total
Administrative		2	3	5
Budget			2	2
Comp. Plan / Economic Development		1		1
Comp. Plan Update	1			1
Comp. Plan Update/ Conservation Plan	1			1
Economic Development	1			1
Joint Leaders			1	1
Open Space / Conservation Plan	1			1
Ordinance	1	3	8	12
TIF Goal / Budget	1			1
Traffic		1	3	4
Grand Total	**6**	**7**	**17**	**30**

*O/F/C

Count of Activity/Task

CLOSED

Row Labels	-	H	L	M	Grand Total
Administrative	1	1	1	2	5
Budget				1	1
Economic Development	1				1
Joint Leaders				3	3
Ordinance	1	1	1	5	8
TIF Goal / Budget		1			1
Traffic - MTA				1	1
Grand Total	**3**	**3**	**2**	**12**	**20**

The Top Graph shows OPEN items by Category with a count of H- High, L-Low, M-Medium and Grand Total.

The Bottom Graph shows CLOSED items by Category with a count of "Dash" or never assigned items, H-High, L-Low, M-Medium and Grand Total.

Open: This would be considered the most valuable tab as it is the MAIN Tab identifying all OPEN items on the Tracking Spreadsheet (excluding Budget items). The tabs that follow the OPEN tab (up to the Future tab), are breakdowns of smaller tasks UNDER an existing MAIN item on the OPEN Spreadsheet.

For Example, the 'implementation of the newly approved Comprehensive Plan' is logged on the OPEN tab as High – 4 (H4); however, it would be impossible to capture all the many tasks required to implement the Comprehensive Plan under one line item. Therefore, a separate tab (Spreadsheet) was created – H4- Comp Plan. On that tab (spreadsheet), the Council can breakdown & track individual tasks, such as – Committees reviewing the Comp plan, Dept Heads reviewing the Comp Plan, or obtaining information from Windham. Each one of these more detailed tasks can be logged individually on the H4-Comp Plan tab (spreadsheet) to allow for proper tracking.

Header: When selecting the OPEN Tab (spreadsheet), look at the very first two rows of information – this is referred to as the "HEADER".

	*Status: O = Open C = Closed F= Future					Priority: **H = 1-3 months M = 4-9 months L = 10+ months - Guideline							Last Update: 12/17/19
No	Goal/Category	*O/ F/C	** Prty	P No.	Target Date	Description	Sub by:	Owner:	Assigned to:	Dated Logged	Last Update	Comments	

The Header is a **KEY** to the Data within each logged item. The User will notice that the Header remains static even if they scroll through the document. This allows the User to see the Key no matter which item they are viewing on the spreadsheet. This SAME Header is used on all the Tabs except the Budget Items tab (spreadsheet).

Row One is a KEY to the COLORED columns on the spreadsheet (Column D and E):

Status: *O = Open, C = Closed, F = Future - (Column D – the User sees *O/F/C)

Note all the items on the OPEN Tab (spreadsheet) will have an "O" in Column E, but if the User selects the "Future" tab (spreadsheet), they will see "F" – Future in Column D. On the Closed tab (spreadsheet), the User will see "C".

Priority: ** (Column E – the User sees **Prty)

H = 1-3 months – represents HIGH Priorities on the list
M = 4-9 months – represents MEDIUM Priorities on the list
L = 10+ months – represents LOW Priorities on the list

It is important to note, that the timeframes are a guide to help with prioritization, but do NOT dictate them. For example, the Comprehensive Plan is a high priority, but will take 12-18 months or more to implement. The Urgency of the tasks overrides the guide. Individual tasks needed to complete the plan will be worked on in the short term and continue until all tasks are completed.

Each Priority level has its OWN Color on the spreadsheet.

High Priorities will have an H in column F and be highlighted in **YELLOW**.

Medium Priorities will have an M in column F and be highlighted in **ORANGE**.

Low Priorities will have an L in column F and be highlighted in **GREEN**.

*O/ F/C	** Prty	P No.
O	H	5
O	M	1.1
O	L	1

The Last of the COLORED columns is Column F and represents the Priority Number (or P No.). Within each Priority Category (High, Medium and Low), the items are then prioritized with numbering. 1, 2, 3, etc.

Last Update: XX/XX/XXXX – identifies the date the spreadsheet was last updated.

*Status: O = Open C = Closed F= Future Priority: **H = 1-3 months M = 4-9 months L = 10+ months - Guideline Last Update: 12/17/19

No	Goal/Category	*O/F/C	** Prty	P No.	Target Date	Description	Sub by:	Owner:	Assigned to:	Dated Logged	Last Update	Comments

Starting from the left hand side to the right hand side, the columns are:

No.	Each item logged is given a unique "number" as priority category may change over time, this number remains static
Goal/Category	High Level Categories to help group items – such as "Ordinances" or "Traffic"
***O/F/C**	Open, Future or Closed
****Prty**	Priority – H – High, M – Medium, L – Low
P No.	Priority number for each item within a group, for example, High – 1, High – 2, High – 3 – in this column – the user will see 1, or 2, or 3
Target Date	Estimated Date of completion or TBD (to be determined).
Description	A more detailed description of this specific item
Sub by	The person who submitted the item to the Council for consideration
Owner	Assigned "owner" of the task – please note – the Town Manager is listed for Town Staff items
Assigned to	Is the person currently working on the item and/or responsible for following up on the item
Dated Logged	Date the item was originally logged
Last Update	Date the item was last updated
Comments	Comments tracking the activity and discussions for the specific item. This column will also have "Next Steps" defined.

Please Note – under the "Target Date" – it is possible to see the words "detail tab" instead of an actual target date as shown below. This is a hyperlink which will take the user to the specific 'detail tab' which shows individual tasks associated with the larger item logged on the list. For example, the Comprehensive Plan Item H4 has a detail tab H4 – Comp Plan.

Target Date
Detail Tab

Please Note – the header for all Tabs (spreadsheets) within the workbook is the same EXCEPT for the Budget Tab.

As items are worked on, new items are introduced, changes in resources occur or new information or partners on items change, the Council may reprioritize items (and does so frequently especially in the Medium or Low categories). When trying to track an individual item, the User should NOTE the "No." assigned to the item (first column) as that number will always remain the same no matter where the item is moved. Once an item on the 'active' tabs (Open, H1, H3, M1.1/M1.2 or Future) are completed (or closed) that item will be moved to the "Closed" tab (spreadsheet).

Budget Items Tab (Spreadsheet):

A	B	C	D	E	F
					Last Updated: 03/05/19
No	Items Label	Cost Est.	Task No.	Description	Comments
15	Code Enforcement Software	New Fees in place	L8	Transitioning to a new online Code Enforcement Software was approved in 2018 budget. Annual fee is $18,000. Costs are to be offset with new/increased fees to users and/or with savings in resource time to	Some new fee changes have been made. Need to analyze what the gap is between the fees and the annual user costs are & budget accordingly. At this point, it is too early to determine annual fee as not all modules will be needed. Training underway & more information should be available in the Spring. May not be able to collect all the money

The Budget Tab (spreadsheet) has a different header than the other Tabs (spreadsheet):

No. Each item logged is given a unique "number".

Items Label High level category for the budget Item

Cost Est. The cost estimate for the budget item.

Task No. IF the item was carried forward from the Council Tracking Spreadsheet, it would have a task number listed here. In this example (L8) or Low #8. IF it is solely listed on the Budget Items Tab (Spreadsheet), then this field will have a "N/A" not applicable.

Description A more detailed description of the budget item.

Comments Comments detailing any discussions the Council has had regarding the budget item.

Last Updated: XX/XX/XXXX – identifies the date the spreadsheet was last updated.