



Sandy City Council Office

10000 South Centennial
Parkway Suite 231
Sandy, UT 84070
O | 801-568-7141
Sandy.Utah.Gov

MEMORANDUM

January 9, 2025

To: City Council Members

CC: Shane Pace, CAO

From: Zach Robinson, Council District 3
Marci Houseman, Council District 4
Matt Dixon, Workshop Facilitator
Dustin Fratto, Council Executive Director

Subject: Process and Expectations for the January 14th Budget Workshop

Event Date: January 14, 2025, 5:15 – 8:30PM (dinner from 4:30 – 5:15PM)

Meeting Purpose

The primary objective of the workshop is to develop a cohesive set of high-level city council budget priorities for the upcoming FY2026 budget and beyond. These budget priorities will be used to assist the council in evaluating various budget requests. Evaluations will take place using a simple evaluation tool that will be developed based on the council's weighted priorities.

Participants & Expectations

The mayor and city chief administrative officer have been invited to take the first 15 minutes of the workshop to share their thoughts related to budget priorities. Following their presentations the city council will be invited to go through a series of facilitated exercises designed to identify their top priorities through which they'd like to evaluate the upcoming budget. The administrative team, including the Mayor, CAO, and Department Heads have been invited to attend and observe the meeting as members of the audience. Council staff has also been invited to attend and observe the meeting as members of the audience. Members of the public may also be present to observe the process. The workshop will also be live streamed via Zoom Webinar.

Those participating in the workshop are expected to be engaged in the process, deferential to the process and to the facilitator, respectful of one another, willing to openly share thoughts and insights, and willing to consider other participants perspectives. Council members will also be asked at various times throughout the process to vote on different ideas and priorities that will come up during the process.

The Process

City council members will be seated at two tables. At times during the process, some of you may be asked to switch tables to enable council members an opportunity to work with other council members.

The process will involve each council member writing their individual thoughts/ideas to the questions that will be asked. Council members will then be asked to share their individual ideas with those seated at their table. Each table will then be asked to discuss and consolidate their ideas and come up with a list of the top ideas they can agree on as a table. Representatives from each table will then be asked to stand and share their table's best ideas with the group. Ideas will be written on large Post-its and displayed on the wall for the group to see and further discuss.

Once the council identifies their top budget priorities (displayed on the wall), they will be given a number of stickers and asked to allocate their stickers to each of the budget priorities. This exercise enables the group to see which priorities carry more weight in overall importance to the group. The council will then discuss what weight should be applied to each of the evaluation criteria.

It is anticipated that a simple spreadsheet evaluation tool will be created and used to help the council during the budget review process. The tool will allow the council the ability to rate each budget proposal they want to evaluate against their defined priorities. They can then use the raw scores, and weighted scores help guide their discussions and decision making. Below is an example:

EXAMPLE:		COUNCIL PRIORITES							
BUDGET REQUESTS			Priority 1	Priority 2	Priority 3	Priority 4	Priority 5	Raw Score	Weighted Scores
		wt.	0.30	0.25	0.20	0.15	0.10		
Budget request 1	raw score	7	5	6	3	4	25	5.4	
	wt. score	2.1	1.25	1.2	0.45	0.4			
Budget request 2	raw score	5	4	8	8	5	30	5.8	
	wt. score	1.5	1	1.6	1.2	0.5			
Budget request 3	raw score						0	0	
	wt. score	0	0	0	0	0			
Budget request 4	raw score						0	0	
	wt. score	0	0	0	0	0			
Budget request 5	raw score						0	0	
	wt. score	0	0	0	0	0			
Raw Score Rating Scale									
1 - Significantly Below budget priorities									
3 - Below budget priorities									
5 - Meets budget priorities									
7 - Exceeds budget priorities									
9 - Significantly Exceeds budget priorities									

During the workshop, if a vote is required, the group will use the Fist to Five method of voting. This method will help the group identify where there is consensus and where more work may be needed to reach consensus. Below is a brief explanation on how Fist to Five works.

- **Fist** – communicates a “NO” vote or in consensus it means, “I object and will block consensus.”
- **1 finger** – “I’ll just barely go along,” or “I don’t like this but it’s not quite a no.” In consensus this indicates not being in agreement but not blocking the consensus.
- **2 fingers** – “I don’t much like this but I’ll go along.”
- **3 fingers** – “I’m in the middle somewhere. Like some of it, but not all.”

- **4 fingers** – “This is fine.”
- **5 fingers** – “I like this a lot, I think it’s the best possible decision.”

The workshop will begin at 5:15 PM and is anticipated to last three hours. Please come prepared and ready to share your thoughts and ideas in support of developing the city council’s budget priorities for the upcoming budget cycle and beyond.