

2019 Strategic Planning

LOCAL GOVERNMENT LEADERSHIP
CORE COURSE

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Course Objectives

- 1 Learn how to strategically plan for your community
- 2 Know how to implement your plans to get things done

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What is Strategic Planning?

- SMART
- GOAL SETTING
- Set priorities
- Focus energy and resources
- Strengthen operations
- Ensure that employees and stakeholders are working toward common goals
- Establish agreement around intended outcomes/results
- Assess and adjust the organization's direction in response to a changing environment

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What kind of plan?

- Municipal Strategic Plan
- Comprehensive Master Plan
- Economic Development Plan
- Capital Improvement Plan
- Project Plan

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2019 Community & Economic Development

2019 Municipal Budget

LOCAL GOVERNMENT LEADERSHIP
CORE COURSE

What kind of plan?

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Develop Planning Process

- What is the best process to develop your strategic plan?
- Identify the need for the plan
- Consider constraints and resources
 - Time and money
 - Expertise and technical assistance
 - Need for a facilitator?
 - Best practices

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Planning Process

- Who are the stakeholders?
- How should the public be involved?
- Is there general agreement on the community's future direction?
- Is your community at a crossroads?
- How will the plan be used in decision-making?
- Who should participate and when?
- What level of environmental scan is needed?
- How should the community and/or partners provide feedback on the plan?




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Strategic Planning Steps

- Identify & Include Stakeholders
- Collect Objective Data
- Gather Input
- Create Draft
- Review, Revise, & Finalize
- Disseminate & Publish
- Implement Action Steps
- Monitor Performance
- Report On Progress
- Continually Update

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Three Fundamental Questions



WHERE ARE WE NOW?



WHERE DO WE WANT TO BE IN THE FUTURE?



HOW DO WE GET THERE?

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Where Are We Now?

Present condition – find out through an environmental scan:

- Stakeholder Analysis
- SWOT (Strengths, Weaknesses, Opportunities, Threats) Assessment
- Data Collection
- A thorough assessment will give you a “snapshot” in time as a reference point




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Collect Background Documents

- What are the critical background documents?
 - Fiscal (Budget, Audit, Program Analysis)
 - Legal (Municipal Code, State & Federal Law)
 - Plans (previous strategic plan, Master Plan, Economic Development Plan, etc.)
 - Other (WAM budget guidance, CREG reports, community surveys, etc.)
- Distribute relevant documents to entire planning team and stakeholders (consider making all documents available online)



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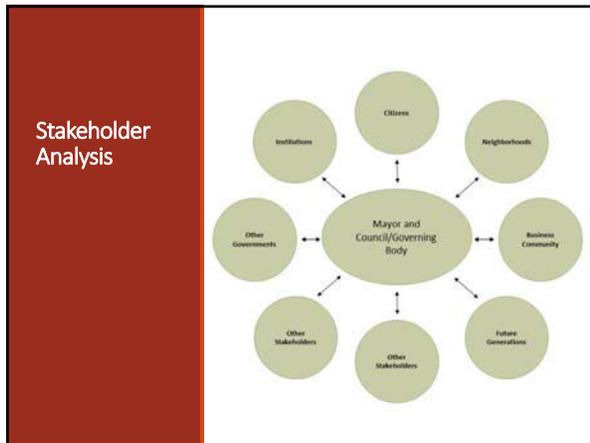
Identify & Include Stakeholders

OPEN ACCESS

- Think broadly to include organizations, persons, and classes that will be affected by the strategic plan
 - Local elected leaders
 - Key staff
 - Other local governments, joint powers, etc.
 - Businesses
 - Taxpayers
 - Residents
 - Nonprofit organizations
- ALWAYS include Press/Media



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SWOT Assessment

What are the **STRENGTHS** of our local government organization? (Internal)

What are the **WEAKNESSES** of our local government organization? (Internal)

What **THREATS** might our community face that we need to be on guard for? (External)

What **OPPORTUNITIES** might be presented to our community? (External)

	Helpful	Harmful
Internal	Strengths S	Weaknesses W
External	Opportunities O	Threats T

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Data Collection

- Demographic Information
- Financial Condition Assessment
- Infrastructure Assessment
- Citizen surveys
- Other indicators

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Gather Input

- Values, ideas, support
- Subjective and objective data
- Public meetings, surveys, focus groups
- Perceptions, rumor mills, press coverage, public comments can affect outcomes

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Gather Input

- Seek first to understand, then to be understood
- Public meetings are typically poorly attended (unless the issue is controversial, and then loud voices show up)
- CAVE people are everywhere – be patient!

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Environmental Scan of trends

- Demographics
- Economics
- Social
- Technological
- Environmental
- Political
- Regulatory or legislative

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Collect Objective Data

- Where and what is the data?
- Population and social demographics
- Economic measures and financial indicators

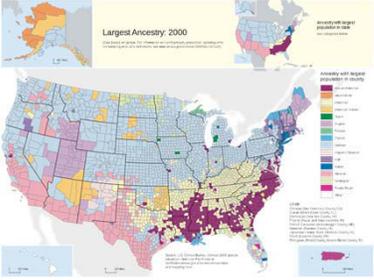




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Tips on Collecting Objective Data

- Use official public data whenever possible (it is free, verifiable, and trusted)
- Consider asking WBC or UW to help gather data
- Trends are usually more important than data that simply is a snapshot of a moment in time
- Create appropriate charts and other illustrations that visually convey information



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Where do we want to be in the future?

- What do we hope will be true in the future?
- Vision for the community

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	Vision	Defines where you want to be; incorporates community values
	Mission	Defines your role in helping to achieve the vision; reflects internal values
	Values	How you choose to operate and/or what you truly want

"If you don't know where you're going, any plan will do."

Peter Drucker

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Guiding Values

Beliefs that are shared among the stakeholders of an organization

Values are what drives an organization's culture, establishes its priorities, and provides the basis from which decisions can be made

How we choose to operate and what we truly want

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Guiding Values, such as...

- Integrity
- Community support
- Ownership
- Respect
- Competency



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Example of "Ownership" Value



I WILL NOT SAY
"IT'S NOT MY
JOB" OR "WE
ARE SHORT-
STAFFED"



I AM AVAILABLE
TO ASSIST,
ENCOURAGE
AND HELP
OTHERS



I WILL TAKE
RESPONSIBILITY
FOR MY ACTIONS
AND BEHAVIOR



I WILL THINK
"TEAM",
SHARING
SUCCESSSES &
FAILURES
TOGETHER

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Mission



- > Municipality Core Business
- > Why do we exist?
- > What contributions do we make to the community and to the quality of life for our citizens?
- > What is the value we give to our citizens?

"The Cheyenne Police Department is 'Protecting the Legend' of Cheyenne by working in cooperation with citizens to lead the charge in preventing crime and defending the rights of the community"

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Managing Change with Strategic Planning

Vision	Skills	Incentives	Resources	Action Plan	Change
?	Skills	Incentives	Resources	Action Plan	Confusion
Vision	?	Incentives	Resources	Action Plan	Anxiety
Vision	Skills	?	Resources	Action Plan	Resistance
Vision	Skills	Incentives	?	Action Plan	Frustration
Vision	Skills	Incentives	Resources	?	False Starts

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Articulate a Vision in the Future

- > Think of the future in the present tense
- > What is your community like? Who lives there? Why do they stay? What is unique? What do you value?
- > What should be retained? What should be dropped? What is missing that should be created?
- > ASK WHAT IF?

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Sample Vision Brainstorming

- Economically diverse
- Forward-looking
- Fun, recreation
- Growing in a planned, sustainable way
- Opportunities to live, work and play
- Hometown pride
- Attractive community
- Value of youth in community



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Sample Vision Statement

Saratoga, "Where the Trout Leap in Main Street", prides itself on its people, its rustic community heritage, its first class outdoor recreational opportunities and its constant quest to dream big.



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How do we get there?

- What do we need to do to make it so?
- How do we turn our vision into a reality?

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Setting Goals and Objectives

S M A R T

- S** Specific
- M** Measurable
- A** Attainable
- R** Relevant
- T** Time Based

Goals: Specific projects, programs or efforts that collectively form a strategy

Objectives: Expected outcomes or results from achieving specific goals. Can be short-term (1 year or less) or long-term

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Implementation – Make It So!

- Take action:
- Key milestones – steps to make it happen
- Timeline (start, complete)
- Project lead
- Who else needs to be involved?

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Implementation - Action Plan

Goal: Develop Options for Navigation and Mobility Throughout Community				
Action	Outcomes	Timing	Players	Resources
Completion of Trails Master Plan	Enhanced pedestrian, equestrian and bicycle routes	Long Term; over 10 years	City Council, County Commissioners, property owners, developers, engineers	WYDOT, developers, property owners; 1% Sales Tax
Implement Safe Routes to Schools Plan	Safer school access	Underway and will be completed with 1-2 years	City, Engineer, Public Works, Police Department	WYDOT, school district
Develop plan for bicycle routes and lanes within City	Better overall mobility	Mid to Long Term; 5-10 years	City, Engineer, Public Works, Police Department	WYDOT; Safe Routes to Schools

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Implement Action Steps

- The key to a successful plan is to implement specific actions
- Incorporate the plan into your budget
- Manage your operations in a manner that consistently supports the plan's vision and mission
- Support the action steps that are primarily implemented by others

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Monitor Performance

- Regularly review progress
- Annual, quarterly, or monthly review
- Performance measures should be clear to all
- Incorporate performance into annual department plans and employee evaluations (and compensation)
- Make adjustments as necessary
- Accountability, transparency, and effectiveness of plan implementation is key
- Celebrate successes!

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Report On Progress



- Create a comprehensive report template that fits the plan
- Provide written and verbal reports, as appropriate
- Post progress updates on same website where the plan is posted
- Outcomes should clearly move the community closer to the Vision
- Keep the public informed of significant achievements or setbacks (Yes, this includes the press/media!)

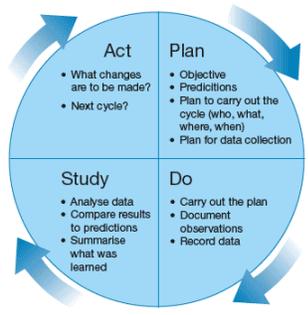
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Continually Update

- Most plans can quickly become outdated (some are as soon as they are created)
- Develop a method to update the plan when performance monitoring suggests need for change
- Strategic plans do not become better with age; however, the cumulative impact of good plans can steadily improve your community
- Set a window of time for consideration of creation of a new plan

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Continually Update



- Follow W. Edwards Deming's cycle of continuous improvement:
 - Plan, Do, Study, Act

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Questions about Strategic Planning?



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Thank You!

This presentation was prepared by Community Builders, Inc., a Wyoming-based consulting firm specializing in community and economic development, under contract and in cooperation with the Wyoming Association of Municipalities.

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