Mapping the Township’s Journey: Strategic Planning Concepts and Tools

Presented by Steve Wright, MPA, Lean Six Sigma Green Belt
Administrator, Northfield Center Township (Summit County, Ohio)
About Your Instructor

10 years of strategic planning facilitation experience

12 years of performance measurement and management experience

Firm believer in the notion that innovation comes through collaboration
Welcome and Agenda

• What is strategic planning?
• Why do strategic planning?
• How should strategic planning be done?
• Components of strategic plans/planning
• Organizations doing it well
• Bringing it all together: The Logic Model
• Questions/Discussion
What is Strategic Planning?

- Effective strategic planning articulates not only **where an organization is going** and the **actions needed to make progress**, but also **how it will know if it is successful**.

  Balanced Scorecard Institute
Strategic Planning Cycle

1. Understand the global environment and emerging trends.
2. Assess the strengths, weaknesses, opportunities and threats.
3. Validate or modify the organization's mission and vision.
4. Develop goals, strategies and actions.
5. Execute and manage the strategy and actions.
6. Assess and adjust the plan as an ongoing process.

INPUT FROM:
- Leadership
- Workforce
- Stakeholders
Why do strategic planning?

Describe your experiences with strategic planning. Did the creation of the plan(s) benefit your department or organization?
Benefits of Strategic Planning

- Creates consensus on key issues and strategies
- Increases commitment to, and capacity for, implementing strategies
- Creates clear communication of priorities
- Enhances management and control of initiatives
- Contributes to improving overall org performance
- Increases individual job satisfaction (elevates the purpose of daily work)
How Should the Planning Process Be Done?

• Strategic planning should
  • Be collaborative and inclusive
  • Reflect the environment/customer needs
  • Help staff to see the connection between their work and broader strategic direction
Strategic Planning Components
Getting Back to Basics

- Strategic Plan “Must Haves”
  - Vision
  - Mission
  - Values
- Analysis of the Current State
- Goals/Objectives
- Relevant Programs/Projects/Actions
- Performance Measures
What is a vision?

• A description of the organization’s aspirations/what an organization desires to be in the future

• The intended end result/outcome for your service recipients/customers or corner of the world
Vision Examples

• We are a vibrant and prosperous region where everyone thrives and all things are possible. (Cuyahoga County)

• One day, all children in this nation will have the opportunity to attain an excellent education. (Teach for America)

• A world without Alzheimer’s disease. (Alzheimer’s Association)
What is a Mission?

• The reason an organization exists
• It answers the following questions: “What do we do?” and “How are we different?”
• A written declaration of an organization's core purpose and focus that normally remains unchanged over time.
Mission Examples

• To drive regional growth, economic opportunity, and individual well-being by mobilizing cross-sector resources and providing superior services. (Cuyahoga County)
• Spreading ideas. (Ted)
• To create lasting solutions to poverty, hunger, and social injustice. (Oxfam)
What are Organizational Values?

- Driving characteristics of an organization (e.g. “inclusive”, “team-oriented”, etc.)
- How an organization desires to be defined
- Creates a behavioral framework through which strategy is accomplished
What is Current State Analysis?

• Purpose and function
  • Used to determine the internal and environmental factors that could either enhance or inhibit attainment of goals/the Plan

• Examples:
  • GAP Analysis
  • SWOT (incorporates environmental scanning)
Gap Analysis

Current State → GAP → Desired State

Key steps to bridge gap

Action Plan
SWOT Matrix

HELPFUL (for your objective)
- Strengths
- ...
- ...
- ...

HARMFUL (for your objective)
- Weaknesses
- ...
- ...
- ...

INTERNAL (within organisation)
- ...
- ...
- ...

EXTERNAL (outside organisation)
- Opportunities
- ...
- ...
- ...

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## SWOT Examples

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<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>• Educated and experienced staff</td>
<td>• Limited financial resources</td>
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<tr>
<td>• Visionary director</td>
<td>• High percentage of staff eligible for retirement</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
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<tr>
<td>• Grant funding</td>
<td>• ORC constraints</td>
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- **Strengths**
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Goals

- Clear
- SMART
- Setting goals
- Pure
- Relevant
- Measurable
- Environmentally sound
- Recorded
- Agreed
- Final
- Ethical
- Attainable
- Performance
- Specific
- Right
- Resolution
- Legal
- Challenging
- Positive
- Plan
- Time-bound
- Goal
A goal by any other name…

• What you call it (goal or objective) is less important than the purpose it serves.
• A goal should create a viable, measurable roadmap for success AND tie action to outcomes
• Should not be so broad or nebulous that you can’t discern:
  • What you are doing
  • Whom you are doing it for
  • What you hope to accomplish
  • What success looks like
SMART Goals

- Specific
- Measurable
- Attainable
- Relevant
- Time Based
SMART Goal Example

- One way to make your goal specific is to think about the 'who', the 'what', the 'where' and the 'when' of your goal.
  - By the end of 2018, 75% of children in Children and Family Services' custody in Cuyahoga County will achieve permanence within 12 months.
Is SMART Smart Enough?

Grace LaConte’s
SMART and CLEAR Goals

<table>
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<tr>
<th>SMART</th>
<th>CLEAR</th>
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<tbody>
<tr>
<td>Specific</td>
<td>Collaborative</td>
</tr>
<tr>
<td>Measurable</td>
<td>Limited</td>
</tr>
<tr>
<td>Achievable</td>
<td>Engaging</td>
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<tr>
<td>Results-Oriented</td>
<td>Actionable</td>
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<tr>
<td>Time-Bound</td>
<td>Refinable</td>
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THE STRATEGIC PLAN ACTS AS A HIGHER LEVEL, MULTI-YEAR UMBRELLA.

OPERATIONAL/ACTION PLANS INDICATE THE WORK THAT WILL BE DONE, IN EACH YEAR, TO DRIVE ATTAINMENT OF THE STRATEGIC GOALS.
Key Differences Between Strategic and Operational Plan

• Strategic Planning is about driving the organizational vision. Operational planning is about driving tactical objectives.
• Operational Planning is done to support Strategic Planning.
• Strategic Planning takes into account the internal as well as the external environment. Operational Planning is concerned with the internal environment of the organization.
• Strategic Planning is driven by top level management, whereas the Operational Planning is a function of middle-level management.
• Strategic Planning covers the whole organization, but Operational Planning is done in a particular unit or department of the organization.
Performance Measurement & Management

BUT IF WE DIDN'T MEASURE THINGS WE WOULDN'T KNOW HOW GOOD WE WERE AT MEASURING THE THINGS THAT WE'RE MEASURING!
Purposes of Performance Management

• Assess the relative attainment of strategic plan goals and, if necessary, contribute to annual course correction
• Accountability for results
• Enhance transparency of results
• Motivate and guide staff
• **NOT counting for counting’s sake!**
# Characteristics of Good Performance Measures

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<th>Characteristics</th>
<th>Timely</th>
<th>Actionable</th>
<th>Tracked and monitored frequently</th>
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<tr>
<td>Financial and non-financial</td>
<td>Make clear the definition of organizational success</td>
<td>Specific to your organization and operations</td>
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<td>Inform decision-making</td>
<td>Relatively few, not focusing on too many outcomes at once</td>
<td>Owned by someone who is accountable for achievement</td>
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<td>Allow for comparisons to be made to enable improvements</td>
<td>Reflect on and relate to overall org goals</td>
<td>Results-oriented and not action-focused</td>
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Organizations Doing Strategic Planning Well

• Baltimore City Fire Department
  (https://fire.baltimorecity.gov/strategic-plan)

• Cuyahoga County Department of Health and Human Services

• Fort Lauderdale, Florida
Bringing It All Together

Connecting the Strategic to the Operational to, ultimately, Outputs and Outcomes