



TOWN OF VICTOR

Strategic Plan

Your Voice...Your Town

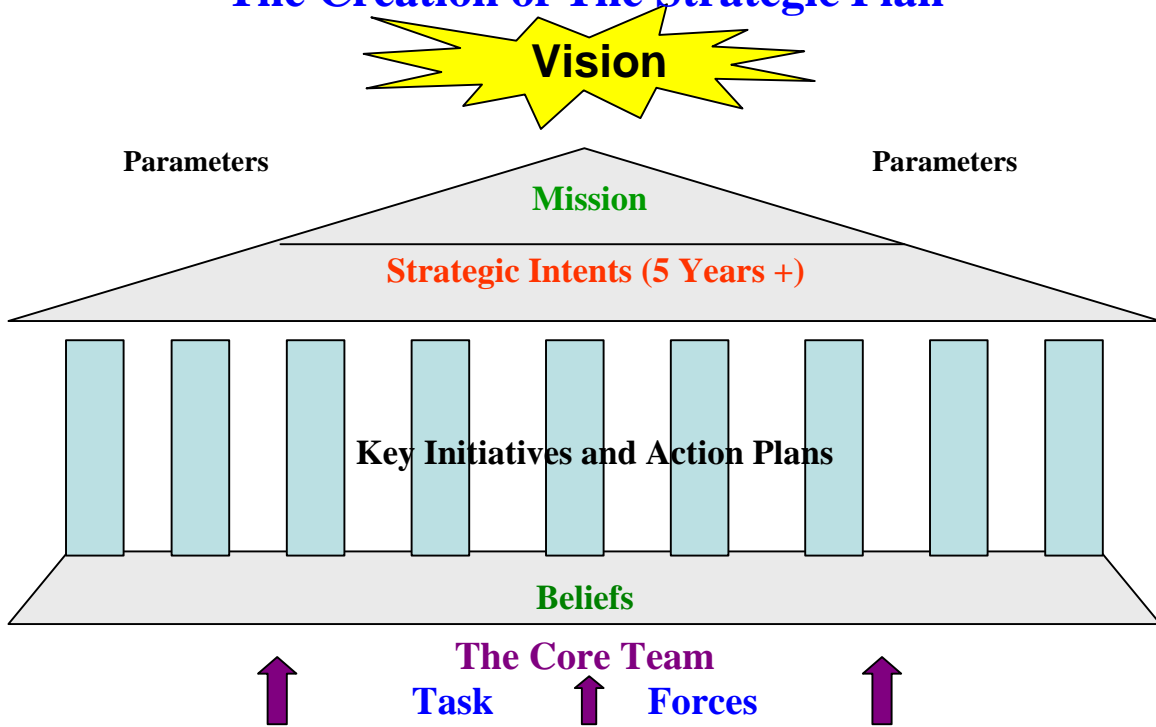
The Strategic Planning Workbook

Definitions

PLC ASSOCIATES, INC.

The Strategic Plan

The Creation of The Strategic Plan



- **Vision** – *Compelling future state.*
- **Mission** – *Purpose.*
- **Beliefs** – *Core Values.*
- **Parameters** – *Boundaries, defining reference points.*
- **Strategic Intents** – *Specific, measurable, five year municipality/community results. Related to productivity/explicit outcomes.*
- **Key Initiatives** – *Multi-year Initiatives which support Strategic Intents. Typically related to specific areas of endeavor such as quality of life, town/city services, senior living, parks and recreation, events and activities, community involvement, historical preservation, etc.*
- **Action Plans** – *Highly detailed, one year plans with timeframes, responsible parties, budget which are selected annually for implementation.*

Strategic Planning: *An Overview*

Strategic Planning is a precise discipline and process designed to fully utilize the collective expertise of the community through a facilitated process which results in a *Strategic Plan*. It is the *Strategic Plan* which serves as a framework and guide for moving the municipality to its *Desired State* and realizing its *Strategic Intents*. The discipline and process of *Strategic Planning* creates a means for significant breakthroughs.

Strategic Planning is both *Strategic* and *Operational*. *Strategic* refers to developing a long-range focus and direction; it references the global perspective. Accordingly, a *Core Team* is established and charged with detailing the *Strategic Intents, Vision, Mission, Beliefs and Parameter* components of the Plan. It is the *Core Team* that has the ultimate responsibility for presenting the entire Strategic Plan to the decision makers of the municipality for response and sanction. The *Core Team* works interdependently with the *Task Forces*, which develop the *Operational* aspects of the Strategic Plan. Specifically, Task Forces are charged with examining a particular area of opportunity and subsequently, creating *Key Initiatives* and supporting *Action Plans*.

The Core Team is typically facilitated by the Project Leader who also meets/briefs periodically with each *Task Force*. All work and results are carefully monitored by the Project Leader. Both the Core Team and Task Forces have designated *Facilitators* who serve in key leadership roles of the respective groups. The Core Team and Task Forces follow a very specific, detailed sequential protocol. All Agendas and Reporting Protocols are preset by the Project Leader.

Strategic Planning has both *internal and external support*. The Project Leader serves as an advisor, responsible for directing the forward progress of the various Teams in developing the Strategic Plan, according to designated timeframes. The Project Leader interacts on a regular basis with designated internal personnel who assist in scheduling, data collection, communication and other logistics of the process.

Once the Strategic Plan is approved, the municipality proceeds to the *Implementation and Monitoring Phase*. Accordingly, a protocol is set up for *Periodic Reviews* and, on an annual basis, *Comprehensive Reviews*. The Project Leader assists in structuring an effective, streamlined model for tracking results and monitoring progress. At the discretion of the municipality, and in consideration of the need for support, the Project Leader typically assists in the first transitional year of implementation.

Strategic Planning Process:

Key Terms

Action Plans – Detailed one year plans with timelines, responsible parties, and budget. Selected from the Strategic Plan on an annual basis.

Beliefs – Deeply held convictions reflective of municipality/community values and character. Pervasive truths that flow from the core of the community.

Core Team – A representative group of constituents who convene and examine issues related to the municipality/community Strategic Intents, Vision, Mission, Beliefs, and Parameters. These, in addition to the Key Initiatives, are sanctioned by the Core Team.

Critical Issues – Those items or issues which must be addressed if the municipality is to achieve its Mission and realize its Strategic Intents.

External Analysis – Comprehensive view of all the dynamic variables which impact the municipality/community. Includes economic variables, best practices, “like communities”, demographics, etc. Describes Opportunities (O) and Threats (T).

Facilitator – Individuals, in key leadership roles who work with the Project Leader to achieve designated outcomes through focused teamwork. Facilitators are selected for the Core Team as well as Task Forces. The Core Team Facilitator serves as Co-Facilitator with the Project Leader, who has primary responsibility for the Core Team.

Internal Analysis – Comprehensive view of the municipality/community initiatives, results, and practices; includes a description of Strengths (S) and Weaknesses (W).

Internal Coordinator – Internal stakeholder who works, in partnership with the Strategic Plan Project Leader. Assists in gathering data, coordinating communication, scheduling and other activities related to the Strategic Plan.

Key Initiatives – Multi-year Initiatives aimed at moving the municipality/community to its Desired State and realizing the Strategic Intents.

Strategic Plan – The document. Includes: Strategic Intent, Vision, Mission, Beliefs, Parameters, Key Initiatives and Action Plans with associated Cost/Benefit analysis and prioritization.

Strategic Planning Process – A sequential and systematic process designed to fully utilize the collective expertise of the municipality/community. A highly facilitated process which results in a Strategic Plan, builds broad based critical mass support and positions the municipality/community for implementation.

Mission Statement – Our purpose. Responds to: Who are we? Whom do we serve? What do we do? Why do we do it?

Off Line – Outside of scheduled meeting time. Includes assigned tasks which will be “reported on” during upcoming strategy session.

Parameters – Boundaries or reference points for directing the work of the municipality; what will not occur.

Project Leader – The external Trusted Advisor who works integrally with the governance of the municipality and all participating members of the community to achieve designated outcomes. Directs and leads the process, does not participate in decision making. Typically serves as the Core Team Facilitator.

Slice Team – A representative group of individuals who convene to perform a specific task, in a short time frame.

Strategic Intent – Specific measurable results to achieve over a five year period, (or more) which directly relate to designated areas of achievement/improvement.

Task Force – A representative group with specific expertise/interests who are charged with recommending Key Initiatives and Action Plans to the Core Team.

Technical Writing – Process wherein selected individuals take concepts and follow through with the writing component, “Off Line”.

Vision – Compelling future, the Desired State.