



Saskatchewan Municipal

Management Resource

Seven Steps of Strategic Planning: An Overview

Introduction

Strategic Planning is an essential process for all corporations like municipalities. A municipality without a strategic plan is a municipality that is failing to serve its residents in the most effective way that it can. This resource is meant to provide a very brief highlight of what strategic planning is, and what the key steps to designing a strategic plan are. It is not meant to be a comprehensive resource on strategic planning.

What is Strategic Planning?

Strategic planning is a management process that, while examining the organization as a whole, addresses three main questions:

1. Where are we today?
2. Where do we wish to get to, and when?
3. How do we get from here to there?

Strategic planning basically maps out the route Council wished to take to get to the municipality's desired future.

Why is Strategic Planning Important?

Municipalities that implement a strategic plan can be more effective and efficient at utilizing their scarce resources to meet the present and future needs of their communities. Strategic planning helps municipal councils to define a clear purpose; set defined and realistic goals; provide guidance to administration on day-to-day activities; and be proactive rather than reactive.

The Seven Steps

Strategic planning can be done in many different ways. In this resource, a seven-step process is presented.

1. Making the Commitment to Plan

- It is important that everyone on council, and senior administration members, are on the same page about the planning process and equally committed to working through it. Set out a timeline, and make sure you've set aside enough resources to make it all happen. Your municipality should consider whether or not you need to get an outside facilitator to help you through the planning process. This is highly recommended, especially the first time you develop a strategic plan.

2. Agreeing on the Municipality's Responsibilities

- In this step, your municipality identifies the things that you are required to do as well as the things that you do by choice.

3. Developing Mission and Vision Statements

- A mission statement describes the what, how and why of the organization's work; or who the municipality is, what it wants to do, for whom, where and when.
- A vision statement expresses where you want your municipality to be over the long-term.
- Both of these statements are useful to the planning process, however it is often during arguments over wording of these statements that planning processes break down. Make sure that you don't let disagreement derail the planning process. You can always come back to this step at a later time.
- The objective of the step is to describe the work you do and what you want your municipality to look like at a defined period in the future.

4. SWOT Analysis

- SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. SWOT is a simple tool for completing the essential environmental scan, which provides your municipality with the information you need to have in order to be able to begin making decisions.
- Strengths and Weaknesses are internally focused lenses. The idea is to examine your municipality and honestly assess yourself.
- Opportunities and Threats are externally focused lenses. In this case, your municipality must consider all of the external factors that impact your municipality.
- A completed SWOT analysis paints a good picture of the environment in which your municipality must operate.

5. Prioritizing the Issues

- Once you know the environment you're operating in, and you know where you want to go (Vision/Mission), then you need to begin to identify what you are going to do to get there. One way to do this is through open brainstorming, where everyone gets to contribute their ideas.
- Eventually, you will need to look at all of your ideas and start to prioritize them. Make sure to consider which ideas will have the greatest impact, for the minimum amount of effort, in helping your municipality achieve its goals.

6. Creating an "Action Plan"

- Once you have prioritized your ideas/strategies, you need to develop specific action plans to show how you will implement them. While your vision statement might look ten years down the road, your action plan should be focused on a timeline more like three years.
- For each idea/strategy, identify what will be done to work towards it, by when, by whom, and using what resources. Be as specific as you can, and make sure that everyone knows how their work is contributing towards progress.

7. Monitoring and Evaluating the Plan

- Reviewing the plan, and evaluating your progress, is a critically important step if your municipality's strategic planning efforts are to be useful. Evaluations are most effective when everyone has some degree of accountability.
- Regular reports to council (at least quarterly) are one way to keep everyone focused. It is also important for the council to feel free to make changes to the strategic plan if unforeseen circumstances arise. This can't happen without an ongoing process of monitoring and evaluating the plan.

Conclusion

Strategic planning is a critical weapon in the arsenal of a fully functioning and responsible municipality. However, it's important to remember that it is a tool, and that it isn't meant to in any way hamper or restrict the municipality's flexibility in dealing with situations as they arise. The intent of strategic planning is in fact to help provide clarity and focus to the work of the municipality, but it is not written in stone. If something needs to be changed, it should be changed, so long as it still fits with the municipality's overall mission.

Regular reviews ensure that the strategic plan is kept fresh in everyone's mind. This eliminates the notion that once the strategic plan is completed, it will simply be a document that collects dust on the shelf, with none of the goals that were established by the municipality being recognized.

For Further Information

If you want to find more information about strategic planning, there are several resources you can check out. The Municipal Leadership Development Program (<http://www.mldp.ca>) offers a partial-day module on Strategic Planning that provides some more context for this information. The Municipal Capacity Development Program (www.municipalcapacity.ca) offers strategic planning services to municipalities that are prepared to work with other regional partners to develop a regional plan. You can also check out Municipal Best Practices on the MCDP website.