

Strategic Planning

An Overview of Strategic Planning: Jefferson County Government Strategic Plan

Intercounty Coordinating Committee

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Objectives of This Presentation

- ❖ Sharing of key concepts about strategic thinking and strategic planning
- ❖ Sharing of content and process of the Jefferson County Government Strategic Plan (approved in December 2010)
- ❖ Discuss/share applications of strategic thinking and strategic planning in the ICC counties (plus questions and answers and perspective sharing)

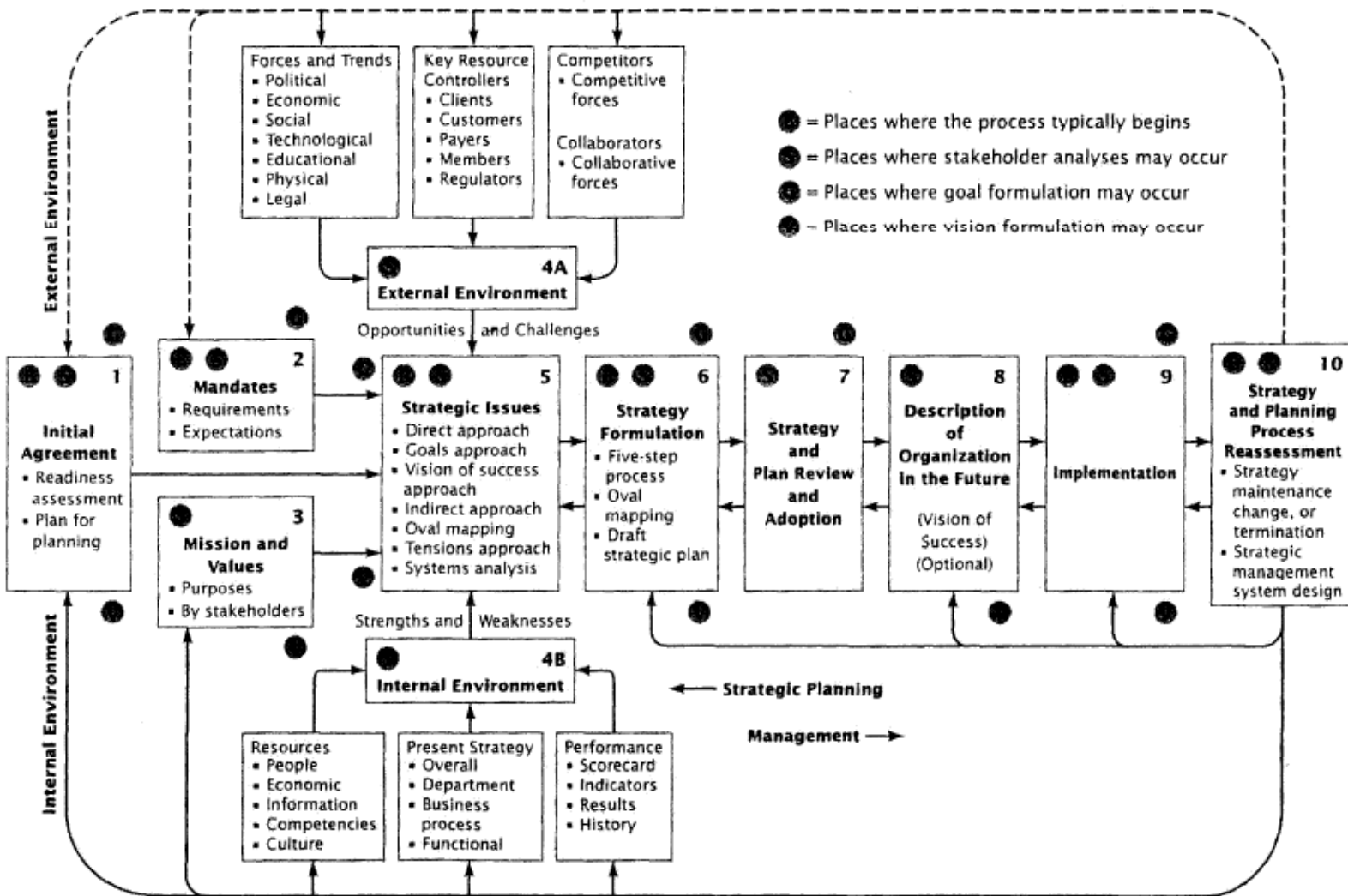


Context for Strategic Planning

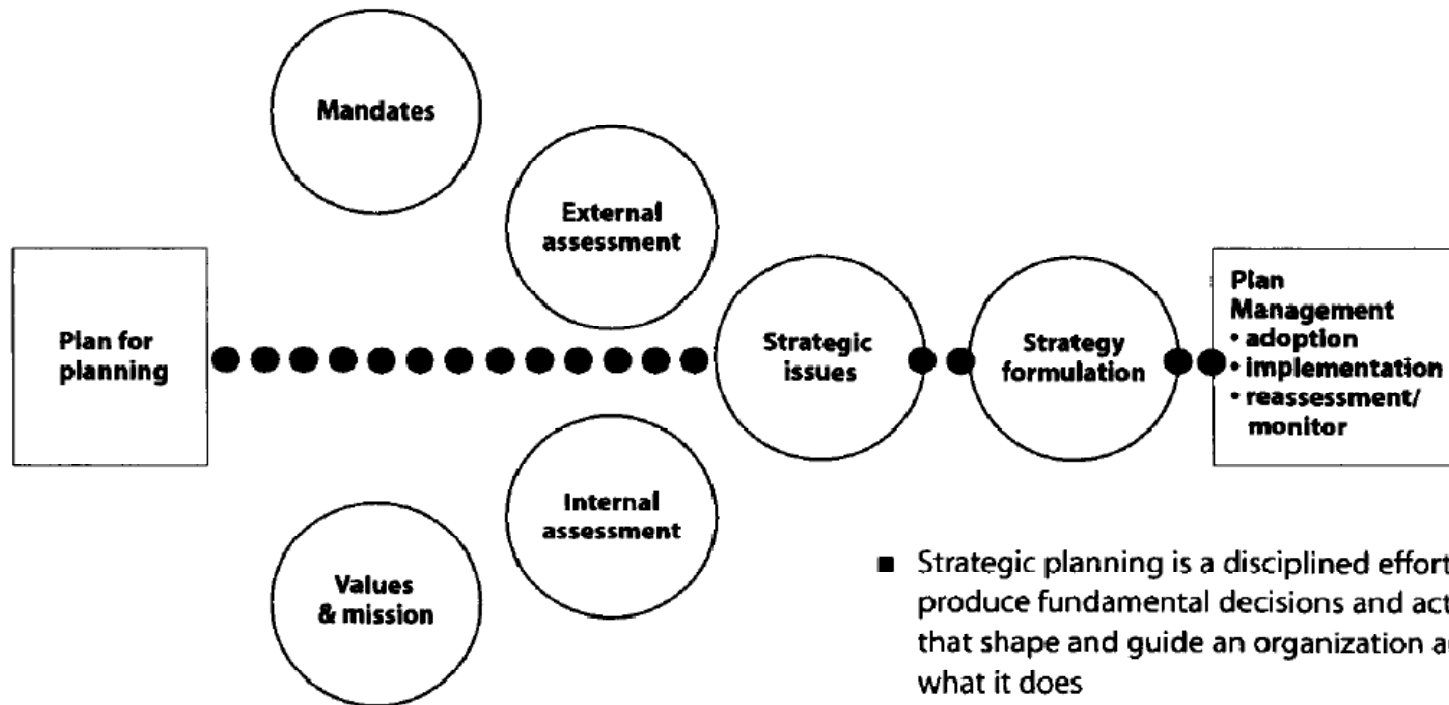
- ❖ Determine what is of most importance and what to do about it.
- ❖ Strategic Planning is about “the organization”.
- ❖ Customize the approach with a “plan for the plan”.

Figure 4 ■ The Strategy Change Cycle

From Bryson, John M. & Farnum, K. Alston. *Creating and Implementing Your Strategic Plan*. Jossey-Bass: San Francisco, 2005.



Overview of strategic planning process



Adapted from Bryson, etc.

- Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide an organization and what it does
- It's a powerful tool that helps organizations figure out what's really important and what to do about it



Step 1: Plan for Planning

- ❖ Diagnose organization's situation and readiness to plan.
- ❖ Develop the plan process, people to involve, process steps, etc.



Stakeholder Analysis

- ❖ People to involve and consider.
- ❖ Those affected by or who have an effect on the plan.
- ❖ External and internal.



Primary Stakeholder Groups

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Primary stakeholders groups identified by the Steering Committee include:

- ❖ **Employees and Union – Internal**
- ❖ **Clients of our Departments/Customers of Our Services – Internal**
- ❖ **Future Generations – External**
- ❖ **Businesses (Present and Future) – External**
- ❖ **People of the County - Internal and External**

Section 1
STAKEHOLDER ANALYSIS
 (Those individuals/groups that we affect and that affect us.)

Participants generated a list of external and internal stakeholders. Participants then nominated a shorter list of primary stakeholders and those that may warrant extra emphasis during development of this plan.

External

- ❖ Future Generations
- ❖ Businesses (Present and Future)
- ❖ People of the County
 - Taxpayers
 - Voters
- Families
- Youth
- Federal Government
- State of Wisconsin
 - Rules and Regulations
 - Lawmakers
 - DNR
- Other Units of Government
- Churches/Faith Groups
- Potential Clients (Countryside)
- Realtors
- Broad-based Customer
- Bordering Counties
- Commuters (Work here.)
- Wildlife
- Guests of Residents
- Ag Groups/Farmers/Producers
- Veterans

- Educational Systems
 - School Systems
 - Universities/Colleges/Technical Colleges
 - Parents/Families
 - Students
- Health Care Providers
 - Clinics
 - Medical Professionals
 - Therapists

- Nonprofits
 - Literacy Council
 - PADA
 - Etc.
- Supporters/Advocates of Jefferson County
- Philanthropists
- Environment
 - Tourists
 - Tourism
 - Media
 - Investors
 - Absentee Owners/Landlords
 - Crime Victims
 - Local FMS/Emergency Services
 - Transportation
 - Drivers
 - Airports
 - Railroads
 - Homeless People
 - Transients
 - Non-English Speakers
 - Migrants

Internal

- ❖ Employees
- ❖ Clients of Departments
- Residents of Countryside
- Individual Departments
 - County Board of Supervisors
 - Vendors for Departments
 - Prisoners
 - Volunteers
 - Judicial Staff
 - Unions
 - Boards/Commissions
 - Committees

Note:

- ❖ Primary Stakeholder
- Secondary Stakeholder



Step 2: Mandates

- ❖ Formal – codified.
- ❖ Informal – community expectations.
- ❖ Informal may be embodied in norms and expectations of key stakeholders.

Strategic Planning

Step 3 Values and Mission



Definitions and Distinctions

- ❖ **Values** = what an organization believes, reflected in how it acts.
- ❖ **Mission** = what an organization does.
- ❖ **Vision** = what an organization wants to be in the future.



Values

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Service:

Respect: We respect others and people we come in contact with (including future generations); the “Golden Rule” extended over time.

Transparency: We need to abide by open meetings laws, welcome public input and be as open as possible.

Honesty: We will assess cost and value accurately, holistically and honestly

Responsibility: We have equal and binding responsibility for our many rights. We are responsible for ourselves, our nation, our world and future generations.



Values

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Stewardship:

Trust and Stewardship: We need to be wise stewards of what has been entrusted to us. (financial, timeliness, people resources, natural resources, etc.). We are stewards of things that are entrusted to us (such as buildings, facilities, equipment, land, vehicles, etc.)

Accountability: We have to be accountable for what we are striving to do; we should have explanations but not excuses.



Values

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Skills:

Competence: Exercise responsibility in doing my job and having the necessary skill-set.

Professionalism and Efficiency: When we deal with the public we handle it in both a professional and quick manner. We will get the answer right away or get them to the right place.

Innovation: We are willing to approach things differently than they have been done before; get beyond “that’s the way we have always done it.”



What is a Mission Statement?

- ❖ Purpose of the organization
- ❖ Its core function.
- ❖ The organization's reason for being – the “work” of the organization.
- ❖ What the organization does uniquely well.
- ❖ Mission/purpose should define the organization's intentions toward the clientele it serves.



Mission/Motto

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Jefferson County Mission Statement:

“To fulfill County government’s responsibilities to its citizens and advance the quality of life in Jefferson County.”

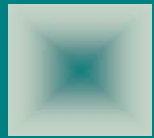
There was interest in developing a shorter version of the mission for use in various County communication pieces. A Motto for Jefferson County government was approved.

Jefferson County Motto:

“Jefferson County: Responsible government advancing quality of life.”

Strategic Planning

Step 4 Assessments



Assessments

❖ Purpose for Assessing the Environment

- This exercise alerts an organization or community to conditions that may require a response.
- It provides a “systems view” of clues and prompts for possible issues, vision ideas and strategies.



Assessments

❖ Outputs and Tools

- Four lists comprise the classic Strengths, Weaknesses, Opportunities and Challenges (S.W.O.C.) Analysis

- Strengths
 - Weaknesses
- } Internal (past and present)
- Opportunities/Hopes
 - Challenges
- } External (future)



Assessment

Jefferson County Government Strategic Plan

- ❖ The significant assessment work in Section 4 significantly informed the development of possible issues in Section 5.
- ❖ In addition, the results from the “Opportunities and Hopes” became the basis for the Consensus Vision Statements in Section 5.

Strategic Planning

STEP 5 Strategic Issues and Consensus Vision Statements *The Heart of Strategic Planning*



Identifying Strategic Issues

- ❖ All the data generated and process has led to this point.
- ❖ The issues identified during this step represent those the organization believes will significantly affect its future.

A Strategic Issue is...

- ❖ a fundamental challenge affecting the organization.
- ❖ Is different than an *'operational' issue*.



Characteristics of Strategic Issues

- ❖ Extensive impact on key stakeholders.
- ❖ Extensive implications as suggested by the “assessments”.
- ❖ Significant consequences to the organization if not addressed.



Determining the Strategic Issues

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- ❖ The Steering Committee selected 3 strategic issues based on a review of:
 - The results from the Decision Matrix Tool (7 candidate issues)
 - Findings from the countywide citizen opinion survey
 - Dialogue around the impacts of issues on the future of County government



Three Strategic Issues

Jefferson County Government Strategic Plan

Strategic Issue 1. Education and Communication: How can County government educate both the public and its own internal stakeholders about its mission and services?

Strategic Issue 2. Environmental/Economic/Cultural: How do we protect and preserve our environmental and cultural heritage, and become energy secure while encouraging and supporting sustainable economic activity?

Strategic Issue 3. Public Services/Quality: How do we decide what services we should provide and at what level while responding to quality, quantity and return on investment?



Definition of Vision

Jefferson County Government Strategic Plan

- ❖ A vision statement is a “description of a desired end-state” or a “description of what is desired to be in place at a future point in time”. The Final Plan contains a detailed vision of success for Jefferson County government.



Five Prominent Consensus Vision Statements

Jefferson County will:

- ❖ Be known for its strong agricultural economy and farmland preservation.
- ❖ Attract new businesses and grow existing businesses because it becomes known as a place with a high quality of life, attractive business sectors and high functioning County government.
- ❖ Be our “home place” of nice small towns with proximity to urban areas, but retain our rich and diverse base of assets.
- ❖ Maintain and improve our environment that supports a healthy lifestyle and healthy living.
- ❖ Become the center of the Glacial Heritage Area and be known for its recreational opportunities.

Strategic Planning

Step 6 Strategy Formulation



Definition of a Strategy

- ❖ Is a pattern of purposes, policies, actions, decisions, and /or resource allocations that address a strategic issue.



Purpose of Step

- ❖ To create a set of strategies for each strategic issue that has been identified in Step 5-Strategic Issues.



Exploring Possible Strategy Ideas

- ❖ What are some practical alternatives or initiatives that we might pursue to address this issue?
- ❖ What are the key actions that must be taken to implement the major initiatives?



Major Strategy Initiatives For Issue 1: Education and Communication

Staff/Resources - Commit staff and resources to education and communication about County Government.

Education/Schools - Integrate County Government matters into existing school curriculum.

County Government Strategic Plan - Communicate and educate about the content and direction of County Government based on the County Strategic Plan.

Best Practice and Marketing Research - Use expertise of UW Whitewater faculty and/or others in developing a communication system that is based in sound practice and methods.

Media - Package a variety of multi-media communication methods such as films, videos, technology assisted mechanisms, web-site updates, print and other innovative methods.



Major Strategy Initiatives For Issue 2: Environmental, Economic, Cultural

County and Community Projects - Integrate real County (and community projects) into implementation programs in order to demonstrate County commitment to this issue.

Sustainability Task Force - Use the “charge” of the Sustainability Task Force as a way to move forward individual projects (see Major Strategy Initiative 1. above) and other ideas -- including the development of a “County Energy Plan”.

Partnerships and Relationships - Build on relationships with our large employers and other communities/municipalities to advance this issue (including Trek, Fort Health Care, Standard Process, Custom Shop, Nestle’s, Cities of Jefferson, Watertown, Waterloo, others) .

Other Vision Documents, Plans and Transportation Planning - Use the vision ideas from the Jefferson County Comprehensive Plan Update (with Economic Development Emphasis), and follow-up with a rigorous transportation plan.

Cultural Heritage - Build on our established cultural heritage and long term values.



Major Strategy Initiatives For Issue 3: Public Services/Quality

Understanding about County Government - Determine and develop the foundational understanding about the importance and role of County government.

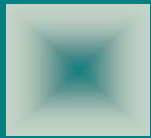
Mandates Interpretation and Public Good - Determine County services that are essential for quality of life, environmental stewardship, economic development and the public good, but are not necessarily formally mandated.

County Department and County Committees - Advance the response to service provision and quality through the work of individual County departments and policy committees.



Plan Management and Implementation

- ❖ The plan implementation process step provides the direction as to how the adopted strategic plan will be incorporated into relevant County government organizational systems.
- ❖ The Steering Committee identified those key implementation bodies, including County policy committees and departments that will be critical leaders of plan implementation.
- ❖ The County's Administration and Rules Committee will provide plan oversight and a plan update should be considered in two or three years.



Follow-Up Resources

- ❖ University of Wisconsin-Extension: Community, Natural Resource and Economic Development Programs and County Offices

- <http://jefferson.uwex.edu/community-development/community-resource-development/strategic-plannin>
- <http://www.uwex.edu/ces/cnred/>

Jefferson County Citizen Survey Report, 2010

- <http://jefferson.uwex.edu/community-development/community-resource-development/strategic-plannin>