

FROM VISIONS TO REALITY: *An Overview of the Strategic Planning Process*

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This continuing education article and accompanying self-assessment is worth 2.0 elective credits as part of the Township Governance Academy, offered through the Michigan Townships Association. See page 21 for details.

OBJECTIVES

- To understand the basic concepts and tools of the strategic planning process
- To learn why strategic planning is important to the township
- To identify the key characteristics of an effective strategic plan
- To recognize the importance of tracking and evaluating the strategic plan on an ongoing basis

CORE COMPETENCIES:

Leadership Abilities: Possess vision, especially relative to the township's needs or potential

Management Skills: Utilize strategic planning to attain objectives

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Fast forward to the year 2020. What will your township look like? Do you envision high-rise buildings and industrial centers, or wide-open spaces with farm fields and houses scattered along the terrain? Do you see residents coming together in a new township hall or future generations frolicking in a well-maintained park alongside a popular creek that has flowed through your township for hundreds of years? Or do you fear an empty main street, vacated farms and boarded-up houses?

*Rather than guessing what life might be like in the future, your township board can lead the charge to shape the future of your township today. However, just as the Cheshire Cat pointed out in Lewis Carroll's classic *Alice in Wonderland* when Alice asked the cat *which way she ought to go*, he replied that it didn't much matter if she didn't know where she wanted to get to.*

Find out how the strategic planning process can help your board create a vision for your township and set you on the path of turning that vision into reality.

You've probably heard the adage: "If you fail to plan, you plan to fail." Let's be clear upfront: planning has been around for a long time; it's the strategy part that came later. Since the 1960s, "strategic planning" is a phrase that's been common nomenclature in the business world and halls of higher learning. And while most people claim to know what the concept is all about, the truth of the matter is that the idea has had a metamorphosis over the past 40 years.

"This ain't your daddy's strategic planning anymore" is perhaps an apt way to describe the change. A symposium conducted by the Sloan School of Management at the Massachusetts Institute of Technology recently looked back at how the concept has evolved over time, noting that this cutting edge tool had turned into a "cookie-cutter" approach to management by the 1990s. Somehow it had lost its luster, evident by the fact that MBA programs no longer looked at "strategic planning" as the magic bullet for leading organizations to instant success. There was to be more learning ahead.

During the past decade, strategic planning has "grown up." Scholars and corporate executives have witnessed the changes that have occurred, discovering that strategic planning is merely a tool—not an end in itself, but simply a means to achieving desired outcomes. There was a move to deemphasize the "plan" and focus on the "strategy" part of the equation. And that made a huge difference in the resurgence of strategic planning in the 21st century.

Increasingly, the public and nonprofit sectors have begun incorporating "strategic planning" into their work, taking the process to a different level and in doing so, giving a needed passion to this unique process. By assessing an organization's strengths and weaknesses, exploring opportunities and threats in the external environment that could impact on the operation of the organization, and identifying the current and future needs of those individuals that the organization serves, strategic planning becomes a powerful tool for an organization.

Let's examine how strategic planning

relates to township governance.

Outcome-based Planning

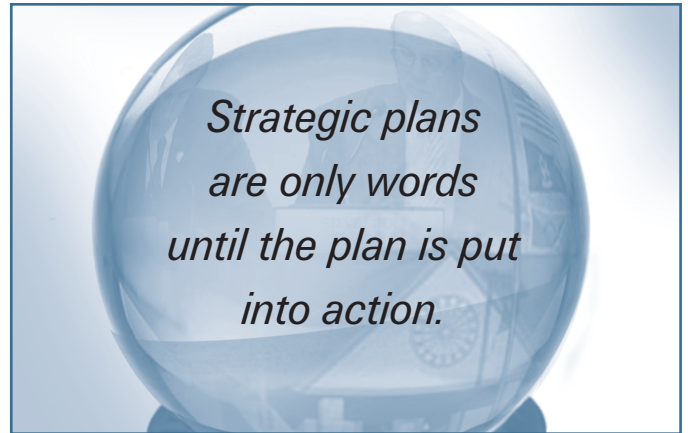
Often confused with long-range planning, strategic planning refers to the approach being used to implement change whereas long-range planning refers to the period of time.

The two are not synonymous. And strategic planning is different from general planning in that no "wish list" is created; instead viable opportunities are identified, evaluated and purposely selected for implementation. A plan that does not include goals indicating what the township wants to be or achieve is *not* strategic.

"Strategic planning" is essentially a two-fold process to identify, discuss and determine outcomes. It's a process of looking inside the township, which allows, first and foremost, the opportunity for the township to discover and communicate its vision of its future. Secondly, it provides the framework necessary to take the steps to turn this vision into reality. It ultimately answers the tough question: If the township was operating most effectively, what would be happening?

The strategic process indicates movement, preparing a township to best respond to changing circumstances. Strategic planning addresses where the township is going over the next year or years (what it could or should do), how it's going to get there, and how it'll know if it got there or not. Key to the process is the exploration and dialogue that occurs in answering these questions. What is fascinating about strategic planning is the manner in which diverse interests and opinions move toward collaboration and strive for a common goal. But be prepared—the process is not linear; there's a lot of "two steps forward, three steps back" type of progress that goes on along the way.

What length of time should a strategic plan cover? While time frames vary from



one to 20 years, the most common time frame is three to five years. One of the factors determining the length is how much change the township and/or local government as a whole is likely to experience. The faster the rate of change, the sooner the plan must be reviewed and revised based on new opportunities and challenges. Keeping a strategic plan useful is an ongoing endeavor.

The Value of a Strategic Plan

While it's hard to think about the future when you feel like you can barely keep up with what's going on today, there are a myriad of reasons to establish and "work" a strategic plan. As the population and composition of townships change, and local government faces greater demands with fewer resources, it is becoming more important for townships to operate strategically and be responsive in a dynamic environment. Increasingly, residents are expecting the township to have the right processes in place to implement a strategic plan. Though the upfront effort may initially seem cumbersome to the township board and others involved in the strategic planning process, the benefits are numerous.

Although the township can be many things to many people, it cannot be all things to all people. Townships without a strategic plan often lack a sense of identity and purpose. Disagreements about how to use resources, dissatisfied constituents, and a frustrated board and staff can result. A well-constructed strategic plan provides the direction needed to stay focused on

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the township's values and priorities despite varying opinions, outside pressure or chaos. It is the glue that binds the township and its leaders together, helping to achieve consensus.

Since the plan helps discern what is most important over the long term, it provides a framework for making decisions or securing approval more efficiently. This is especially important in government, where election cycles and turnover of both elected and appointed officials could cause the township to stray from its plan. A strategic plan can also help by:

- focusing resources on key priorities
- providing a tangible way to evaluate how well the township is meeting its goals
- empowering staff and volunteers to carry out their jobs because they know the outcomes to achieve
- minimizing quarreling over which direction the township should go
- becoming more needs-driven versus budget-driven
- improving the image of the township
- being viewed as proactive rather than reactive
- linking the strategic plan to the annual planning and budget cycles

Les Schick, a community development consultant and retired Michigan State University Extension specialist from Jackson County, points out that townships without strategic planning may lose out on grant opportunities. "Even very small townships need to have a plan in place or they lock themselves out of state and federal grants when it comes to obtaining funding for projects such as recreational parks," Schick notes.

Unfortunately, some townships with smaller populations, or those experiencing little change, do not believe this to be the case. Schick, who has worked with many mid-Michigan townships on their strategic plans, insists that planning is "absolutely essential" no matter what the size or composition of the township.

"Even the most rural townships need a plan to preserve rural character or bring in

new industries," he says. "On the other end of the spectrum, planning is also important to townships on the fringe of urban, industrialized areas where fast growth is likely."

Characteristics of a Good Plan

Strategic planning should be part of a township's overall business plan. Oftentimes, townships wonder if there is an ideal time to begin the process. "When it seems least necessary" is often touted as the right time. Most experts in the field agree that sooner, rather than later, is better unless there are circumstances that may not permit plan completion with the core planning committee and leaders (i.e., around election time). Also, the readiness of the township board to make the commitment to proceed with this type of endeavor should be factored in. Be aware that the process takes several months and that it's a good idea to have the plan completed prior to the start of the township's budget and operational planning cycle.

A common misconception is that an effective strategic plan needs to be a lengthy, detailed document. In reality, the most useful strategic plan is relatively short compared to an operational plan. In fact, the annual operational plan, which is the more detailed document in terms of what is being done when and by whom, is driven by the strategic plan.

The strategic plan itself is only a guide; more important is the process of how the plan translates into action and adapts to fit new realities. A good rule of thumb is to review the plan every quarter. The full strategic plan should be revamped every three to four years, unless the township is experiencing tremendous change.

A good plan provides the framework for making decisions in an uncertain environment and motivates the township leaders and constituents—the soul of the township—to take the steps to move

from a current state to a more desirable one.

Leading the Charge

A good first step is to assess how ready the township board is for beginning the strategic planning process. This can be done by one or more board members requesting that the topic be placed on the agenda and getting approval to investigate the idea further and report on the logistics involved to move forward on this endeavor.

Keep in mind that if the leaders aren't willing to openly share information, listen carefully and be flexible, the process could be an exercise in futility—one that would not reflect favorably on the board in the public's eyes. The irony is that if a board is willing to make the commitment to do whatever it takes to reach consensus on a strategic plan that will be of optimal benefit to the constituents, improved board relations usually result which have far-reaching effects beyond the task at hand.

Once the board has agreed to begin the strategic planning process, it is crucial for the board to recommend the composition of the strategic planning team, keeping in mind the value of having a demographically diverse group committed to the charge. The leader should be a well-respected, credible individual who is trusted and articulate but who does not have a vested interest in the township in order to remain objective. This individual may develop the framework for the overall planning process; however, another member of the team or a consultant may be designated to administer the process.

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It's important to include at least one person on the team who has the authority to make strategic decisions, along with as many stakeholders as possible, including those responsible for implementing the plan. The board should ensure that the team is representative of the various perspectives, including elected officials, appointed officials, department heads, volunteers, school board members, citizens and other leaders in the community.

The goal is to make decisions that have the greatest benefit for the township as a whole. Roles need to be assigned, including the appointment of a secretary to record the minutes. Moreover, the group needs to be able to think strategically rather than operationally on issues. It also needs to develop a passion for the process.

While most experts agree that a small group should lead the charge, there must be large group input and feedback along the way in order to obtain a view of the township from a variety of perspectives. Any person or group that has a vested interest in, or relevant relationship with, the township should be identified and offered a means of providing input into the process.

"Collaboration with the neighboring communities is also important," Schick adds, pointing out the value that can be gained from working together on planning mutually beneficial outcomes for those in the township as well as in surrounding areas.

A needs assessment must be completed with the various interests whether through a focus group, discussion forum, and/or telephone interviews. The township must be careful not to verify what it already knows, but instead to look outward and beyond its current scope, assessing how external factors could change the values held by the township's constituents. The greater the stakeholders' involvement and understanding of the process, the more support the team will receive.

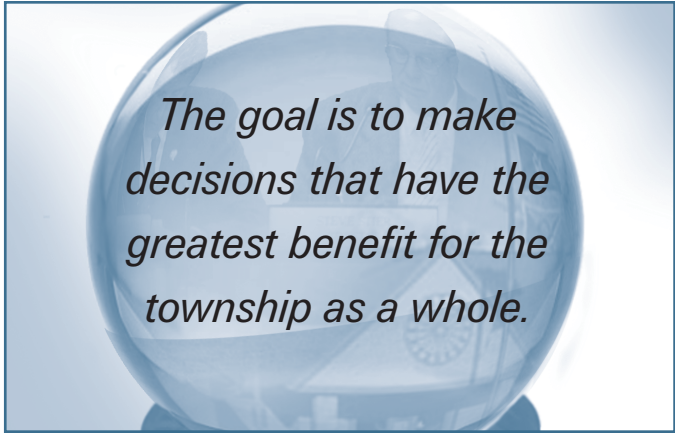
After the strategic planning team is determined, an overall schedule needs to be created. While there is no "right" schedule, literature shows that some

opt for an intensive three-day retreat while others prefer a two-year project. Many experts agree, however, that having the plan completed over the course of two or three months, with meetings every two to three weeks often proves valuable in maintaining momentum. If the meetings include a quorum of the township board, they are subject to the Open Meetings Act, requiring proper notification and recordkeeping of action taken. The goal for most townships is to have broad participation with low cost in a short time frame. Ideally, the plan should precede the budget planning process.

The strategic planning team must have a comprehensive view of the various stakeholder priorities so it can recommend clear direction through consensus, defining both the purpose and vision for the township based on the values important to the township's constituents. It often proves valuable to generate as much positive publicity about the process as possible, putting a clever name to the process and informing the public about it whenever possible.

Logistical Considerations

While some townships embark on strategic planning by themselves, many choose to use the services of a consultant to assist them. This is especially the case when a township is new to strate-



The goal is to make decisions that have the greatest benefit for the township as a whole.

gic planning, has had a previous unsuccessful plan, or no one has the time or capability to facilitate the process. The fee to utilize a third party ranges from zero, in the case of a volunteer, to several thousand dollars for an independent consultant all the way to \$20,000 or more if contracting with a firm that provides full-service planning. Michigan State University Extension Service can also provide some low-cost assistance; contact your local extension service for details.

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At the outset, it's critical to determine who will draft the strategic plan. A typical plan is 10 pages, and usually one or two writers are selected to put the plan together. A good plan contains the four "Cs"—clear, concise, creative and compelling. It also articulates the vision for the township's future. There are outlines and grids that can assist with this task; one of the more popular formats is available for free at www.planware.org/strategicsample.htm. Consultants will usually recommend a certain format and will draft the plan, which typically includes a table of contents, an introduction by the township supervisor or board, summary, mission and vision statements, township profile, critical issues/strategies, goals and objectives, and possibly an appendix. The report must be easy to understand.

Regardless of who writes the document, review and approval of the draft plan must occur in a realistic time frame. Although the planning committee should review the draft, it is not always necessary to have all team members involved in this process if the committee

agrees to have a subcommittee serve as reviewers. After the review is completed, the committee reaches consensus on which revisions to accept and submits the plan to the township board for approval.

Beginning the Process

Although there is no single "right" way to develop a plan for your township, all strategic plans have common elements. The strategic planning committee should work together to identify these basic elements, which lay the groundwork for creating a shared idea of what it is that the township is strategically planning for.

The cornerstone of the planning process begins with defining the township's purpose, mission and vision—at least in draft form. These statements may already exist or the committee may need to work with the board, staff and volunteers to create these three statements.

Typically a one-sentence answer to the question of *why the township exists*, the **purpose** has the values of the township embedded within it. An example might be: *Purpose Township exists to deliver*

quality service to all citizens who reside in Purpose Township.

The **mission** takes the purpose a step further by identifying the township, its people and its focus in a concise, yet memorable statement. For example: *The mission of Mission Township is to improve the quality of life in the community through the effective, efficient and equitable delivery of local government services to the residents and businesses of the township.*

Creativity begins to emerge as the group works to achieve consensus on the **vision** for the township. The vision describes the image of the township's desired future and is inspirational in nature. For instance: *Vision Township will be viewed as one of the "Top Ten" places to raise a family in Michigan due to its family-friendly values, top-rated schools, clean and well-maintained parks, and safe neighborhoods. [To learn more about crafting a vision for your township, attend the MTA Township Governance Academy class, "Creating a Vision for Your Township," on January 27, 2004, at the MTA Annual Educational Conference in Lansing.]*

CASE STUDY

Strategic Planning Helps Northville Charter Township See 20/20



In 2000, the **Northville Charter Township** (Wayne Co.) Board decided that it wanted to see 20/20.

"We have always been goal-oriented, but we wanted to achieve greater clarity and crystallize our vision for the future," says Supervisor **Mark Abbo**, when asked the reason why his board took on the challenge of developing a strategic plan. "We want to remain a 'sustainable community,'" he explains, noting that the township is preparing for the changes that lie ahead when growth in Northville Charter Township levels off.

"Success isn't an accident," he adds, noting the value in having a shared understanding of the township's mission along with future policy guidance throughout all facets of the township—from the board of trustees to the planning commission to the staff. "We want to make sure that everyone's arrows are pointing in the same direction."

Aptly titled "Strategic 2020 Vision," the township's plan covers a 20-year time frame, identifying and analyzing the various data and trends relative to population, land use, economic development, transportation and government regulations. The township is utilizing the services of Langworthy, Strader, LeBlanc Planning, Inc. to assist with the plan. During the past decade, the population in Northville Charter Township increased by 22 percent; over the same time, the median household income rose by 9 percent. When the township launched its strategic plan three years ago, it identified several challenges: rapid growth, high resident expectations, public land shortage, and outdated township facilities. However, at a follow-up meeting conducted at the end of October 2003, the township reviewed its plan at the three-year point, along with facilitating a discussion on where the township is headed as a result of new information and

Although it is likely that these elements will be altered to some degree as a result of what is discovered through the assessment, scanning and strategic development processes that follow, it is useful to have a shared point of reference to work from.

Putting on Your Strategic Thinking Cap

The assessment portion of the strategic planning process begins with taking a long, hard look at your township. What does it do well? What could it do better? While the answers might seem apparent on the surface, it's important to conduct an in-depth, comprehensive "scan" since this activity sets the stage for the township's future by examining possible scenarios that may emerge and impact the township.

Two assessments, internal and external, should be orchestrated by the strategic planning committee. Oftentimes, the committee involves other groups to assist with these assessments as well as dividing up the "scanning" task among the ranks of elected and appointed officials and staff. Sometimes a third party is involved to gain

fresh perspectives. It's important to be inclusive at this point so no critical items are left out of consideration.

The *internal assessment* should identify the township's strengths and weaknesses, along with information on the performance, problems and potential of the township. It's important to determine what must be done by statute and what types of things the township is doing (or could be doing) that may be optional. Examining the community's perceived and actual needs along with determining ways to best address these needs are critical areas to include. Your committee can obtain constituent input through written or phone surveys, focus groups, interviews, comment forms, and township meetings. Assess your township's organizational performance by reviewing how it performs statutory functions; delve into the financial audit and look at the competency and contributions of its staff and volunteers. Critical issues should be identified as well as the township's capacity to respond to each of these issues. Since the township has limited resources, are there certain aspects that could be performed through

other sources so the township can focus on doing what it does best?

Build on the township's strengths rather than go off in a new direction and consider the township's capacity that reflects high value to its residents. Are things in place to satisfy the needs of residents in the future? How does this fit in with legal and statutory requirements of the township? In answering these questions, the need to eliminate, create or repackage some services may come to light.

The *external assessment* involves an environmental scan, identifying and evaluating the major forces and critical issues that could affect the township. One of the most effective tools to do this is by examining trends relative to demographics, government, science/technology, society and the economy. Utilize information gathered by the Census Bureau, MTA, other municipalities and the media to assess the big picture. It's vital for the committee to discuss how trends could impact the township.

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insights. Participants and attendees at this meeting included the township board, staff, planning commission, zoning board of appeals, economic development corporation, school superintendent, the manager for the City of Northville and the public.

According to **Chip Snider**, manager of Northville Charter Township, 85 percent of the goals that were set in 2000 have been achieved. The other 15 percent, he says, are longer-term goals related to land use. Snider credits a lot of the success to the cohesiveness of both the planning and implementation teams, especially the "buy in" achieved through an enthusiastic, committed supervisor and board of trustees setting the charge.

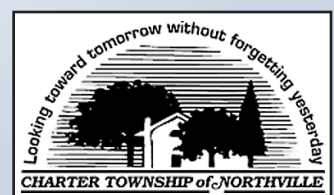
Although this community, which is located in Wayne County, currently serves more than 21,000 residents, trends now indicate that slower growth, an aging population and a decrease in household size will make a difference in terms of revenue and delivery of services. While the township reiterates its core values, such as open communication, innovativeness and quality service, it also examines what impact emerging issues and trends could have on the township as a whole.

At the October meeting, each of the various departments provided a brief report on the progress in their area as well as a lengthier discussion on future challenges. As a result of the new information and knowledge, goals and strategies were updated and redefined. "Through the process, we create viable solutions," Snider says. "We do not have to think alike but we do have to think together."

Additional discussion followed to determine the township's greatest challenges and priorities, as well as the next steps in the process. The emphasis is on the next four years with specific recommendations and a focus on implementation. For the remaining 12 years of the plan, general direction and broad goals for future policy guidance are given.

Snider says that he's not sure how to operate a township in today's day and age without having a strategic plan. "I'm a firm believer that we behave like we think, and if we think strategically, then we'll act strategically."

And it's easy to see how acting strategically can have some positive results. In April of 2004, Northville Charter Township will debut its new fire hall; three months later, its new 40,000-square-foot township hall is slated to open. And in December, the police department will have a remodeled building that previously housed the township offices. Now that's seeing 20/20! ■



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For example, take a look at how the following trends could affect your township: greater demand on township officials' time, difficulty recruiting and retaining volunteers, greater accountability, increasing population, aging township halls, and the need for greater security measures in the community. These are just a few of the trends that your team may uncover through the scanning process. The value of this exercise is in making assumptions about what outcomes could emerge from the various trends.

After assembling a list of trends, the next step is for the township to ask: What are the most promising opportunities, and what are the most immediate and/or far-reaching threats?

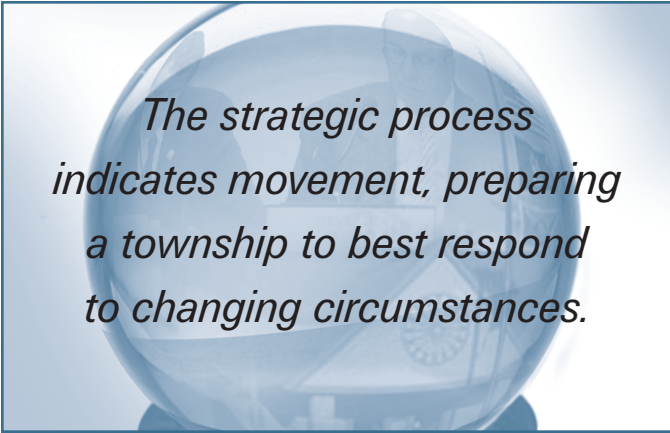
Identifying Strategic Directions

Gathering comprehensive, accurate and meaningful data is the heart and soul of the strategic planning process. Equally important is for the committee to sort through and analyze the information, siphoning it down to a list of trends that can be used for the next part of the process.

To gain insight on interpreting what each trend may mean to the township, it is valuable to share the compiled list of the findings with elected and appointed officials, department heads/staff and volunteers. Some townships have found it useful to have an informational meeting at the township hall where interested members of the community may comment on the trends and the possible implications of these trends.

After careful analysis, including research and verification, the committee must agree on the major trends or critical issues facing the township—those that the strategic plan must address. These trends and critical issues are reworked into *strategic issues*, which are forces that need to be reckoned with since they impact or have consequences for the township and its constituents.

Since having between five and seven strategic issues is the manageable range



The strategic process indicates movement, preparing a township to best respond to changing circumstances.

to organize most strategic plans around, the committee must discern which issues become priorities based on mutually agreed upon criteria, such as impact, consequences and immediacy. Each strategic issue that makes “the cut” should be one that supports those activities most closely tied to the township’s mission (at least as it is currently understood) and one that the township can do something about—either through current resources or future allocations.

When driven by clearly identified trends, strategic issues create collective “buy-in” and passion. They create a type of restlessness in that a disparity exists between the current state of the township and that which could be. This tension needs resolution, which brings us to the next step in the strategic planning process.

Crafting the Plan

Once the overall assessment has been completed, the township should be able to more clearly state its purpose and refine its mission statement in light of the strategic issues which have been identified. Now the committee can lead the charge in helping the township address these issues and deciding what to do about them. The committee may involve other groups to come up with ideas on how to address the issues. This is often a time of debate and reassessment.

Ultimately, a framework must evolve relative to the type of approach that is recommended to achieve the desired results. This is the point where goals, objectives and strategies are formulated and agreed

upon by the strategic planning committee, becoming integral components of the strategic plan.

Goals are based on the issues identified through the assessment process. Goals provide direction as to where the township wants to go. They are realistic and achievable, along with being quantifiable. [For example: *Goal Township will have a new township hall that is operational by December 2006.*] Some sources indicate that having

between three to seven goals at any given point in time is realistic, depending upon the nature of the goals and the time frame for completion. The rule of thumb is one goal per issue. Avoid making existing programs the goals and connecting them back to the purpose.

Objectives are measurable targets that describe specific outcomes and include specific time frames for completion as well as accountability. They should be aggressive but attainable. [For example, *the Objective Township Building Committee will oversee the bid process for the proposed new township hall and work with the township manager to recommend a contractor to be voted upon by the township board at its September 2005 meeting.*]

Strategies link long-term planning and the annual plan. Strategies help determine the township’s priorities and answer the question of *how* the township will achieve its goals. [For example, *the Strategy Township Board will authorize that up to 15 percent of the township’s fund balance in 2006 will be appropriated to the building fund for the new township hall.*] Since one or more strategies are linked to every goal, it is imperative to develop effective strategies that move the township forward in a significant manner rather than maintaining the status quo. One of the best ways to formulate strategies is to ask questions and evaluate the costs, benefits and trade-offs of alternative strategies.

The strategic planning committee must examine the township’s critical issues and determine how to utilize the township’s

strengths to address these issues. Laws and policies may influence or limit what actions the township may take. The committee must also analyze the opportunities that may be available, constantly asking how the strategy addresses the issues, and making sure that it's financially viable and aligned with the township's mission. It is wise to expect the unexpected when launching a strategy and to realize that some adaptation is often inevitable along the way.

Approving the Plan

After the strategic plan is drafted and revised by the strategic planning committee, it should be reviewed by all key decision-makers, including the township board and department heads/senior staff. It is vital for those involved to be comfortable with the direction that the plan suggests as well as the priorities that have been identified. Any concerns should be aired and resolved prior to the plan moving on to the township board for approval. Department heads, staff and/or those individuals responsible for translating the strategic plan into an operational plan must also agree that the strategic plan allows for development of action steps.

Once the strategic plan has been reviewed, it goes to the township board for approval at the township board meeting. Upon approval, copies of the plan are made and distributed to the appropriate stakeholder groups. Be aware that a strategic plan has both internal and external audiences. Internally are those who are dependent upon the plan for their work, such as the elected officials, staff and vol-

unteers. External include the constituents in the township and others who depend upon and/or utilize the township's services, including the media and outside vendors. The board has legal, ethical and fiduciary responsibility for outcomes that evolve from the plan.

Strategic plans are only words until the plan is put into action. When translating a strategic plan into a work plan and budget, the township board and staff must both understand and be committed to the plan. Changes may be needed to reorganize the structure of committees or departments to better facilitate achievement of the goals.

The **action plan**, which is usually completed by department heads, staff and/or volunteer leaders, outlines the specific steps to be taken to achieve the strategies. The action plan is detailed, noting timelines, needed resources and responsible parties, along with indicating progress markers. The board must approve the budget requests made by department heads who are responsible for implementing the various elements of the strategic plan.

To ensure accountability, brief follow-up reports must be provided to the township board, especially during the first three months of the plan. The board should not deal with aspects related to operations or administration, but rather focus on issues of strategic direction and policy. If a priority needs readjustment or more resources should be allocated to achieve a goal, it would be best for staff or an implementation team to put forth a

recommendation to be voted upon so the board focuses on policy decisions.

Keeping Tabs on the Process

Ongoing monitoring and evaluation are as important as identifying the issues and goals. Since each of the objectives in a strategic plan has clearly identified outcomes and time frames for completion, it is fairly easy to evaluate the results and link incentives to achieving desired outcomes. Performance measures track progress against the plan, identify improvements and reward performance by looking at outcomes, efficiency and quality. Although staff and the township board evaluate the effectiveness of the plan, constituents are the final judge.

It's important to keep in mind that strategic plans are guidelines, not rules. Astute planners know that a good plan is affected by internal and/or external changes. Even the best laid plans have to be altered, or sometimes even abandoned, based on new information. Townships that have a good understanding of the strategic process continually collect information that may affect the plan and decision-making process. It's important, however, to have valid reasons for deviating from the plan.

Many experts believe that it is worthwhile to review the plan in terms of internal and external factors annually and to adjust strategies and activities for the coming year while preserving the basic direction of the plan. Another option is a "rolling strategy," wherein adjustments are

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made to the second year of the plan in light of experience gained in the previous year and another year is added. A strategic plan should be thoroughly reviewed every three to four years, not only because of external changes, but also due to turnover that often occurs on the board and staff during that time frame. It's important that newcomers have a voice in the plan.

Good communication throughout the entire strategic process continuum is critical to the success of your township's plan. Board, appointed officials, staff and the community should all be able to convey what the township's top priorities are at any given point in time. That's why it's important to share the plan and its progress with your constituents whenever you have the opportunity. In addition to updates being made available at township meetings and posted in the township hall, township newsletters and local media can also provide avenues for publicizing your plan and related outcomes.

Ensuring Success

Having a strategic plan does not guarantee success. Unrealistic goals, a lack of resources and poor stakeholder buy-in are some of the reasons why strategic plans aren't always successful. Sometimes the plan is poorly constructed such as when a township fails to conduct a thorough strategic analysis. The most common reason by far is when a township puts the plan on the shelf and is unaccountable for its implementation.

The best way to ensure success is to keep the radar screen focused on internal and external trends, allocating time at every board meeting for feedback on what significant factors could impact the township and its strategic plan. By establishing a fluid and flexible strategic plan, your township can be nimble enough to seize opportunities and avoid threats with systems that can respond efficiently and effectively for the benefit of the township.

"Unless we have a clear idea and plan in place describing where we want to go and how we plan on getting there, future residents will look at us as failures," says Sean McDermott, trustee with **Fenton Charter Township** (Genesee Co.), which is in the beginning stages of developing a strategic plan. "If we don't lead well today, the township won't be what the residents need and want in the future. It will be too late to control what's happening 10 or 15 years from now if we don't do the strategic visioning work today." ■

TGA Candidates: Self-Assessment appears on page 21.

Want to learn more about strategic planning? Les Schick, a community development consultant and retired Michigan State University Extension specialist from Jackson County, will teach "Strategic Planning and Visioning: What Will Your Township Look Like?" on January 29, 2004, at the MTA Annual Educational Conference in Lansing. For more information on the Conference, visit www.michigantownships.org or call the MTA Education Center at (517) 321-6467 for a registration brochure.



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Continuing Education Self-Assessment

Participants enrolled in the Township Governance Academy (TGA), a credentialing program offered through the Michigan Townships Association, may obtain 2.0 elective credits for successful completion of this quiz. To obtain credit, **participants must answer the following 10 multiple-choice questions by circling the correct answer and receive a passing score of 70 percent.** The questions are based on content from the article, "From Visions to Reality: An Overview of the Strategic Planning Process," beginning on page 12.

There is no charge to take the quiz or to obtain TGA credit. Township officials interested in enrolling in the Township Governance Academy may call Jennifer Gorchow, MTA education specialist, at (517) 321-6467, ext. 251, for more information.

Completed quizzes should be sent to: MTA Education Center, 512 Westshire Drive, Lansing, MI 48917, or faxed to (517) 321-8908. MTA will notify you of your results within three weeks after receiving your quiz. *IMPORTANT: Please keep a copy of your completed quiz in your TGA binder.*

TGA Continuing Education – December 2003 "From Visions to Reality: An Overview of the Strategic Planning Process" 2.0 Elective Credits

(To receive credit, this quiz must be completed by January 1, 2007.)

NAME: _____ TOWNSHIP & COUNTY: _____
ADDRESS: _____ CITY/STATE/ZIP: _____
E-MAIL ADDRESS: _____ PHONE: _____

1. Which of the following is NOT true of strategic planning:

- a. it prepares a township to best respond to changing circumstances
- b. it is a two-fold process used to identify, discuss and determine outcomes
- c. it is synonymous with long-range planning
- d. it includes goals indicating what the township wants to be or achieve

2. The most useful type of strategic plan is:

- a. an annual operational plan
- b. a detailed document, describing the steps of the action plan
- c. an outline of the various trends that can impact the township
- d. relatively short in terms of the number of pages

3. What three characteristics must the strategic leadership team possess for the strategic process to work most effectively?

- a. commitment to the process, a common viewpoint and an accounting background
- b. a willingness to share information, listen carefully and be flexible
- c. conflict management skills, a positive attitude, and a long history with the township
- d. strong opinions, the ability to persuade others, and good presentation skills

4. Which of the following is NOT a reason why strategic planning is important to the township:

- a. it helps the township be viewed as reactive rather than proactive
- b. it empowers staff and volunteers to do their jobs since they know what they need to achieve
- c. it avoids shifting priorities due to leadership changes
- d. it provides a means to evaluate how well the township is meeting its goals

5. What is the most important element of the strategic plan with respect to ensuring its implementation?

- a. provide a copy of the final strategic plan to all interested parties
- b. set target dates to achieve outcomes
- c. obtain buy-in with stakeholders at the beginning of the process
- d. require staff to provide written progress reports on a monthly basis

6. A good strategic plan is:

- a. brief, bold, basic and brilliant
- b. logical, lean, lofty and likeable
- c. succinct, simple, safe and sound
- d. clear, concise, creative and compelling

7. Which of the following statements is true?

- a. the township supervisor should draft the strategic plan

- b. there is no single "right" way to develop a strategic plan for your township
- c. a strategic plan must include a mission statement, goals, strategies and budget information
- d. the strategic plan should cover no more than a period of five years

8. Trends help the township identify:

- a. strengths and weaknesses
- b. impacts and outcomes
- c. opportunities and threats
- d. forces and capacities

9. Before the township board approves the strategic plan, it should be reviewed by:

- a. department heads, staff and/or volunteers involved with its implementation
- b. the public
- c. an editor
- d. neighboring communities

10. The most important fact to keep in mind about the strategic planning process is:

- a. it provides a step-by-step guide to help address citizens' concerns
- b. it offers sound advice based on current situations
- c. it is ongoing and continuous
- d. it predicts what the future will look like for the township