



Strategic Plan Development for Public Sector Organizations and Agencies

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Definitions of what a strategic plan is abound; every textbook has its own. For our purposes, a strategic plan is simply:

...an integrated set of goals, objectives and actions designed to bring about a particular result (usually termed a 'mission' or 'vision') at some future point

Strategic plans are often accompanied by parallel implementation plans, which outline responsibilities, timelines, resource requirements and organizational or operational changes required in order to deliver on the strategic plan initiatives. The term 'strategic plan' often is used as an umbrella term covering all these aspects, which is perfectly reasonable, as they are all critical to the success of a strategic planning effort, and are all very much the focus of any such work we do with our clients.

Philosophy of Our Approach

Our approach when working with an organization in a strategic planning process is predicated on the following philosophy:

- **The client must actively be involved in the process** - We cannot prepare a strategic plan 'on behalf of' a client. For a plan to be successful, it must belong to our client - which means that the client must play an active role in its development, and implementation.



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TCI Management Consultants was founded in 1991 and consists of senior level management consultants who espouse a philosophy of providing personalized and direct service to clients. Our core focus is on strategic marketing issues in business-to-business situations working with organizations in tourism, entertainment, culture, publishing, IT, telecommunications, utilities, and energy service as well as government and the not-for-profit sector.

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- **Mere facilitation is not enough** - We have found that it is not enough to act as merely a facilitator in a strategic planning assignment - we must also bring 'content' to the table in terms of new ideas and approaches, as well as critically testing new suggestions and recommendations for reasonableness as they emerge throughout the process.
 - **Early and tangible results are important** - In the implementation of a strategic plan, it is important to show tangible results early on in the process, in order to boost the morale of the participants and act as a catalyst for further progress.
 - **Focus on implementation** - We very much focus on developing a strategic plan which is grounded in reality including a good 'business case'. We are also very conscious of focusing on the implementation issues which are likely to emerge with the plan. This entails recognizing the resources and capabilities of the organization as well as providing assistance with implementation matters when these arise.
 - **Form follows function** - This dictum from the world of architecture also holds in strategic planning. Often clients want to change their organization structure before doing anything else. Our approach in contrast is first to develop the strategic plan (i.e. the road map of where the organization wants to go) before designing the vehicle that will take it there. This sequence ensures that the organization structure (which includes the Board and Committee structure, as well as any staff) is best positioned to deliver on the Strategic Plan developed.
 - **The role of the Board of Directors is to direct** - We are very much advocates of the so-called 'Carver model' of Board function, which states that the appropriate function of a Board of Directors is to look after the long-term future and financial well-being of an organization. Under this approach, Board members do not get involved in the day-to-day minutiae of running the organization, but rather reserve their efforts for strategic and long-term goals.
- This philosophy has led to the development of the strategic planning process outlined below.

Steps Involved in a Strategic Planning Process

While the process may vary somewhat in each project, usually, there are ten steps involved in the strategic planning process that we undertake with our clients. Briefly, these are:

1. Detailed review of relevant background materials to ensure that we, as consultant/facilitators are familiar with the issues involved;
2. Personal interviews with Board members and perhaps selected stakeholders to understand the purpose of the organization, the issues involved, etc.;
3. Holding of a one-day workshop session with the Board (and perhaps selected stakeholders) to discuss/develop mission, vision, goals and objectives of the organization, and to form 'Task Forces' or small working groups to investigate possible strategies and actions resulting from or implied by the goals and objectives; this workshop can also involve an envi-



- ronmental scan of key issues confronting the organization, as well as a SWOT analysis, i.e., an analysis of the strengths, weaknesses, opportunities and threats confronting it.
4. Research, planning and assessment done by the Task Forces, guided by a "Terms of Reference" drawn up by the consultant/facilitator - assistance is then provided by the facilitator on an 'as required' basis - this phase of activity should last no more than one month in order not to lose momentum. Often, we as consultants may also carry out independent market research, e.g., membership surveys, interviews with other organizations, etc. in order to add value to the overall planning process.
 5. A second one-day workshop, at which the mission/vision, goals and objectives are verified or modified, and the Task Forces bring back to the larger group their suggestions and recommendations for action, which are then discussed and agreed upon or modified by the entire group - also, the appropriateness of the structure and operation of the organization as a vehicle to implement this plan is discussed at this point;
 6. Preparation of a Strategic Plan document by the consultant/facilitator, summarizing the mission/vision, goals, objectives, strategies and actions agreed upon - this is then sent out to Board members (and perhaps selected stakeholders) for comment;
 7. Individual meetings with the Board members (and perhaps selected stakeholders) to discuss any final modifications of the plan, but particularly to focus on matters of implementation (i.e. where do they personally get involved in implementation activities, what tools/resources do they need, etc.);
 8. (If required) a third one-day session with the Board (and perhaps selected stakeholders) to discuss and agree upon the organization structure (if changes are required) and the implementation plan, with timetables for key milestones, critical path activities identified, responsibilities (primary and backup) allocated, etc.;
 9. Documentation of the agreed-upon Implementation Plan, and distribution to all Board members (and perhaps selected stakeholders); and
 10. On-going monitoring and evaluation, to ensure that the Implementation Plan is being followed.

These ten basic steps may be modified for any individual client, depending upon their current position in the process, or other underlying factors that may influence the level and extent to which these steps may apply.

