

# Village Board Retreat & Strategic Planning Workshop

## Outline and Preparation Sheet

### Long Grove, Illinois WORKSHOP BACKGROUND

#### Village Board and Staff Preparation Guide 2011

## THE LONG-RANGE/STRATEGIC PLANNING PROCESS

Although the word "planning" appears in the description, I need to emphasize at the outset that the end result of this process is not to create a "plan" that sits on a bookshelf like a trophy; rather, the primary outcome is to foster strategic thinking and communications among Village Board members and senior staff. The end result of this session should be a viable listing of identified and prioritized goals and objectives that mesh with your overall vision of the Village of Long Grove's Services, Programs and Policies.

### **-General Outline of Discussion Sessions**

#### **Session I. Community Values and Visions of the Future-**

Exploration and identification of the Village's desired future condition as individuals and as a group. **Focus Question.** Imagine that you left the Village tomorrow and didn't return until 2025 or 2030. Develop three to four "vision" statements that would describe what you think you would see or hope you would see in the way of Village accomplishments, policies, land use development, facilities and programs 10 or 20 years into the future. There are no wrong answers—use your imagination!

#### **Session II. Environmental Scan & Assessment of Strengths, Weaknesses and Opportunities (SWOT)-**

A. Identification of the internal factors inhibiting the achievement of the future vision. **Focus Question A:** How are you functioning as team, as an organization? Are you moving toward a policy focus? Can you identify the factors that may be inhibiting your achievement of clear roles, particularly organizational

arrangements, work methods, staffing resources, finances, facilities, other governments, etc? (A portion of this phase may include a Small Group Exercise)

B. A review and accounting of the external factors present in the environment that can potentially impact the success of the Village's activities both negatively and positively. **Focus Question B:** What's happening around you? What are the major challenges you anticipate facing in the coming two–four years? Can you identify the factors that may be inhibiting your achievement of the future vision, particularly regional trends, national policies, work methods, finances, other governmental agencies, etc.

**Session III. Goal Identification-**

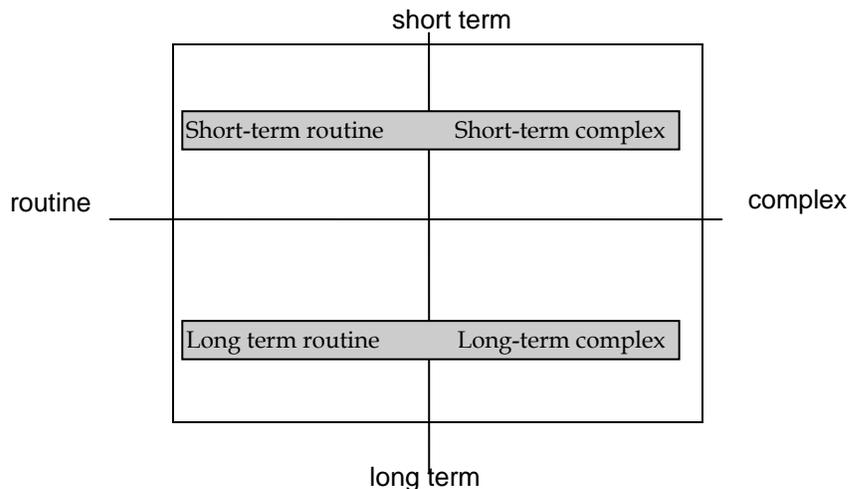
Collaborative establishment of strategic goals and objectives necessary to achieve the future vision. Goals will range from short-term simple objectives to long-term complex goals. **Focus Question:** What are the new and ongoing goals and accomplishments you want staff to concentrate on or put in place in the short term? . . . the long term? The facilitator will lead Senior Staff through a goal development session. Each participant should be prepared to present 3-5 measurable goals or objectives for the near and long term.

**Session IV. Classification and Prioritization of Goals**

Collaborative classification of complexity and priorities. Using a group discussion technique, the group will work together to classify the identified goals according to a matrix of complexity and time to complete. Once the goals are classified as short or long term, complex or routine, a consensus ranking of goals and objectives in each quadrant of the matrix below will be done by all participants via follow-up balloting.

Policy Classification  
Grid

-Gabris



## BACKGROUND INFORMATION

To prepare your list of long or short term goals to bring to the session, consider formulating your desired goals in response to these common “Brainstorming Questions” for Strategic Planning:

- What significant initiatives, programs or mandates can you identify that the Village **must** confront in the next 2-10 years?
- What significant initiatives, programs or mandates can you identify that the Village **would like** to address in the next 2-10 years?
- What significant initiatives, programs or mandates have been **postponed** that should be re-evaluated?
- Do you foresee any significant changes or **paradigm shifts** in the next 5-10 years that will impact the Village or the Village government?

### What Are “Strategic Issues or Strategic Goals?”

This question is the topic of nearly endless debate among authors, observers and facilitators of strategic planning efforts. For the sake of our exercise, here are some guidelines and suggestions from some of those authors and observers that help to describe what “strategic” issues typically include.

Strategic issues or goals should include what is truly important for the Village to accomplish given the breadth of circumstances and information (at both the policy and operational levels) that confront the Village government. Identifying strategic issues can be compared to pouring your own professional assessment of all the issues the Village faces into a filtered funnel. What eventually emerges is a mix of “clarified” issues that **demand attention.**

[/www.naccho.org/topics/infrastructure/mapp/upload/strategic\\_issues.pdf](http://www.naccho.org/topics/infrastructure/mapp/upload/strategic_issues.pdf)

Further hints: As many experts on the topic debate this question often, the following summary of ideas is offered to help you think about or identify “strategic issues” for the retreat. According to various authors, strategic issues or goals usually follow this pattern of key indicators (NACCHO MAPP Framework):

- Strategic issues usually include a *tension or conflict* on an issue that must be resolved because of differences over past ways of doing things v. future demands; differences between current capacities and necessary capacities; differences in roles and responsibilities; significant differences between needs and resources.

- Strategic issues tend to have *no obvious best* solution. These kinds of issues are likely to present significant operational or policy concerns for either the government as a whole, for a particular work unit, or for key individuals. If an obvious *best* solution exist, than the strategic question is why hasn't the approach been implemented yet?
- Strategic issues represent a *fundamental choice* that must be made at the highest levels of the organization at either the policy (elected) or administrative level. From this vantage point, strategic issues tend to be viewed as responses to the "forces of change."

## **PREPARATIONS AND APPROACH**

As with any group discussion, the ultimate success of the retreat will hinge on your involvement. Your willingness to step back from your usual role at regular meetings and workshops and work as a team is of key importance. Communication of ideas and patience will be vital to the success to your day's work. Our discussions will be broad-based and each member of the senior staff should come prepared to share ideas on what can and should happen in the near and not too distant future.

My role during the session is to facilitate the "process" itself. My primary goal as facilitator is to elicit--to the best of my abilities- the equal participation of all involved. I will offer comments ask for clarifications and elaborations or probe your reasoning, but I will not be evaluating or judging your ideas. I will be the neutral ombudsman--fostering dialogue and guiding your discussions. In order to be effective, I will be laying out ground rules at the beginning of the day that are designed to keep things moving and avoid personal debates and the monopolization of time by energetic or more talkative members.

Be prepared for our sessions by thinking of the following:

*-come to the sessions with an open-mind and a willingness to listen as well as speak*

*-be prepared to comment on Village operations, roles of those in Village government, and policy issues important to the Village in a comprehensive context--giving credence to the overall impact of certain plans, decisions, actions and inactions*

*-be prepared to articulate and explain what your consider to be the KEY short and long-term goals, issues and objectives that are, or will be, facing the Village and its various programs and services.*

## **SOURCES AND READING SUGGESTIONS ON STRATEGIC PLANNING**

Bryson, John M., Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement, rev. ed., San Francisco: Jossey-Bass, 1995.

Gabris, Gerald T., Strategic Planning in Municipal Government: A Tool for Expanding Cooperative Decision Making between Elected and Appointed Officials  
Public Productivity & Management Review, Vol. 16, No. 1 (Autumn, 1992), pp. 77-93

Gabris, Gerald T., "Educating Elected Officials in Strategic Goal Setting," Public Productivity & Management Review (1989), 23, vol. 2, pp.:161-175.

Mobilizing for Action through Planning and Partnerships (MAPP) The MAPP Framework, NACCHO <http://www.naccho.org/topics/infrastructure/MAPP/index.cfm>

Mintzberg, H., The fall and rise of strategic planning. Harvard Business Review, (1994, January-February), pp. 107-114.

Canary, Hal W. Linking Strategic Plans With Budgets, Government Finance Review (April 1992): pp 21-24.

Greg Kuhn, Ph.D.  
Asst. Director  
NIU Center for Governmental Studies  
Facilitator

# BRAINSTORMING FORM

## 2011

**PLEASE TAKE A FEW MINUTES TO JOT SOME IDEAS BEFORE THE SESSION**

Section one. Visions of the Future.

Take some time to imagine what the future of Long Grove and the Village government could or should look like in the future. Imagine that you left Long Grove today and didn't return for 15-20 years. Develop two to three statements that would describe what you think you will find or what you hope to find in the Village when you return in 2025. There are no wrong answers—use your imagination!

- 1.
- 2.
- 3.

Section one. Short-term ideas.

Develop three or four critical short-term goals and issues to discuss during the session. By short term, I mean any goals, objectives, services or issue that you would like to see initiated or completed within the upcoming fiscal year. These should be plans, programs etc. than can be realistically achieved or initiated within the next fiscal year, that in your opinion, the staff and Village Board should commit to.

- 1.
- 2.
- 3.
- 4.

Section two. Long-term ideas.

Develop three or four essential long-term goals and issues to discuss during the session. By long-term, I mean any goals, objectives, services or policy issues, while being initiated in the coming fiscal year, cannot be realistically advanced or completed for three, five, seven, or more years down the road. Medium to long-term goals typically include many of your most costly and complex initiatives and ideas.

- 1.
- 2.
- 3.
- 4.