Strategic Planning Do’s and Don’ts From the Experts
The Team - Panelists

Shawn Purvis – Town of Apex
Warren Miller – Fountainworks Inc.
Brian Barnett – Town of Mooresville

Unable to Attend
Natalie Spillman – Chesterfield Co, Virginia
Why Jump in the Strategic Plan Pool

Why did your organization create or update the strategic plan?
Pre-Game (Before Rollout)

Who’s the Key Players
◦ Who’s Involved in Creating the Plan

To Consult or Not to Consult? (That’s the Question)

Structure, Hierarchy, Nomenclature (the playbook)

Who Do You Start With?
◦ Elected Officials
◦ Senior Management
◦ Department Heads
Town of Mooresville
2016 Strategic Planning

**Goals**
- Customer Service
- Transparency &
- Citizen Engagement
- Economic Development
- Organizational Excellence
- Financial Stability
- Planning, Infrastructure & Housing
- Public Safety
- Recreation & Cultural Services

- Leadership Team Kickoff (Jan 2016)
- Board of Commissioners Retreat (Feb 2016)
- Community Focus Groups (Mar 2016)
- History Maps Review Strategic Plan Process
- Draft Goals
- Develop Goals & Objectives
- Leadership Team Session (Mar 2016)
- Periodic Staff Updates to the Board (Apr - Sept 2016)
- Performance Measurement Training (Apr 2016)
- Staff Performance Measurement Peer Review (July 2016)
- Present Draft Strategic Plan to Board (Oct 2016)
- Develop & Revise Strategic Plan (July - Sept 2016)
1st Quarter - Kickoff

Implementation Strategy
- Who was Targeted 1st, 2nd, 3rd and so-forth
- Hail of Bullets or Sniper Shot Approach (how to get departmental input)
- Creating Buy-In
2nd Quarter – Writing the Plan

Who Physically Writes the Plan
How is the Plan Presented
Approval Process
3rd Quarter – Carrying Out the Plan

How’s Responsible for Carrying out the Plan Specifics

Monthly, Quarterly, Semi-Annually, Annually Meetings

Your Level of Involvement
Evaluating Existing Space and Facility Conditions at Police HQ Game Plan

**Team**
- $50k project budget
- Architect
- Core Team: Chief Williams, Jon Y., Maj Childress, Angel, Dave Treme, Curt
- Jim O.
- Buildings and Grounds Staff
- Bill Burgin or similar
- Leadership Team.

**Steps**
- **Evaluate Proposal**
  - With Chief and team
  - September 30th
- **Team Meeting with Architect**
  - September-January
- **Hire Architect**
  - By September 15th
- **Draft Design/Cost Options**
  - September-January
- **Staff Meeting to Discuss Leadership Team-Midyear Review**
  - October/November
- **Review Options with Board**
  - November
- **Present to Board**
  - February

**Success Factors**

**Challenges**

**Goal**
- February 2018
- Board approval of recommended vision and options and costs for space needs of police department.
- Repurpose existing spaces.
- Allows for new crime data center and other services.
- Additional office and meeting space.
- Schematics-2nd part of process.
- Adding on to the space, if needed new wing.
- Estimate potential costs.
- Conceptual Picture.
- Meets mission, vision, and values of the community.
4th Quarter – Reporting/Evaluation

Reporting Frequency

Reporting Audience

Accountability

Community Input

Strategic Plan Changes

Performance Indicators for Recreation

<table>
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<th>Goal</th>
<th>Obj.</th>
<th>Indicator</th>
<th>Target</th>
<th>FY16</th>
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<td>1</td>
<td>% of Ropy Lines lined up on Y.4 completed during FY</td>
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<td>10%</td>
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<td># of total participants in athletic program offers</td>
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<td># of total participants in non-athletic program offers</td>
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<td># of new programs developed during FY</td>
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<td>% of info to provide programs received through fax</td>
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<td># of &quot;inclusive&quot; program offered</td>
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<td># of participants in following age groups: (5-8, 9-12, 13-17, 18-25)</td>
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<td>% increase in program participants</td>
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<td># of &quot;new&quot; revenue generated during FY</td>
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<td>3</td>
<td># of newspaper advertisements produced during FY to market programs/events</td>
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<td>&quot;New &quot;ideas&quot; on Recreation and Parks Facebook page</td>
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Post Game Analysis – Words of Wisdom

ANY LAST WORDS OF WISDOM
Have a Happy or Merry....

- Merry Christmas
- Happy Hanukkah
- Happy Kwanzaa
- Happy New Year
- Happy “I like to Work when everyone else is out on vacation”