Strategic Planning

Strategic planning determines where your organization is going over the next few years and how it's going to get there.

A strategic plan is a coordinated and systematic way to develop a course and direction for your organization.
How long does strategic planning take?

2 weeks → 2-5 months ← 1 Year
smaller Org size larger
high Consensus on Mission low
high Consensus on Priorities low
available Availability of Information not available

“Plans are of little importance, but planning is essential.”

Winston Churchill
Strategic Planning Process

1. Desired State
2. Current State
3. Choose Priorities & Set Goals
4. Implement Track & Pivot

Desired State
What's Possible?

Current State
What's now?

Goals
Choices
Priorities
Turns and Pivots
Desired State

- What's possible?
- Mission Statement
- Vision Statement

Generally, we have a reaction based approach

- What's broken?
- What's not working?

Good planning is strengths based

- What's possible?
- What's working well?
- Where is the potential?
- What would it look like if we expanded on our strengths?
Excellence Canada Standard - Bronze

1.2 Strategy and Planning
a) Vision, mission is communicated
b) Commitment to Excellence, Innovation and Wellness
c) Risks are identified
d) Policies & plans are communicated

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Mission Statement

Serves as your TRUE NORTH
- Supports decision making

Motivates and Inspires
- both internally and externally

Answers Why?
- gets to the core of why we exist

Sets us apart
- not vague
- speaks to what's unique

Clarifies the how?
- Explains what you do to tackle the why
Vision Statement

Inspires commitment
- Helps staff and supporters see that you are working together to achieve something big

Propels Action
- Sign post in the distant future
- Others can see where you are going
- They can think about how they can help you get there

Articulates what success looks like
- If we truly achieve the mission what would that look like?

Is Believable
- Can be a stretch but still in the realm of possibility
- One day we can get there

Assess Current State

What are the factors shaping today?

1) Outside world:

Societal trends

Politics

Economy

Technology
Assess Current State

What are the factors shaping today?

2) Where we swim
3) Us

Inside the Tank

Outside the Tank

Horizon Scan
- What's relevant
- What's likely
- What's emerging?
- What does this mean to us?

Qualitative
- What we believe
- What we sense
- What we predict

Quantitative
- Numbers and stats
- News
- Industry publications
- Reports
Inside the Tank!

Customer Focus - Mini Assessment

- What clients do we serve now?
- What criteria do they use to assess you?
- How do you think we are doing?
- How do we know?
- What do we want to do different?

Customer Experience  Customer Surveys

Finding Nemo
(Learning about You)

Performance

Gain different perspectives
- Leadership
- Staff
- Board
- Clients

What’s working and what’s not from a diverse perspective
- Be open
- Don’t take it personally
- Make it safe and honest

Focus Groups

- Analyze assessment data
- Historical profile
- Goals met
- Financial performance
- Gains and losses

Surveys
Excellence Canada Standard - Silver
2.2 Strategy and Planning
a) Strategic plan is developed and implemented
b) Key priorities and measurable goals are developed
c) Baseline indicators for measurement are established

How are we going to close the gap?
What are the forces that are driving us towards the desired state?
What are the forces that are holding us back?

What challenges to tackle?
What waves to ride?
Choose Priorities and Set Goals

Set Strategic Priorities (3-5)
- Define direction
- Drive resource allocation
- Provide focus

We can't do everything. So let's do something!

Collect ideas into themes and turn it into action

Active words:
- Expand
- Maintain
- Eliminate
- Launch
- Improve
- Invest in
- Grow
- Revamp
- Focus

Set Strategic Goals for Each Priority (3-5)

Write this all down as part of your strategic plan
Excellence Canada Standard - Gold
3.2 Strategy and Planning
a) Strategic plan is current/monitored and evaluated
b) Scorecard is used to monitor/measure and evaluate
c) Priorities, goals and progress on plans are communicated
d) Innovation and knowledge management are evident

Implement, Track & Pivot

What are the SMART Goals for this year, month, week?
What needs to happen to reach this goal?
What else needs to change?
Culture   Leadership
Excellence Canada Standard - Platinum
4.2 Strategy and Planning
a) Evaluation and improvement of planning process
b) Levels and trends - measuring financial performance
c) Scorecard is used to monitor/measure and evaluate results
d) Innovation and knowledge management are consistent
e) Levels and trends - used to mitigate risks
What if we are off track?

Get Curious

- What assumptions did we make?
- Which of these are no longer valid?
- Is it time to pivot stay the course?

Plan's don't always survive their collisions with reality

We need to adjust and pivot

Back to the drawing board
"Plans are of little importance, but planning is essential."

Winston Churchill

Council’s Strategic Plan

Vision Statement

Toronto is a caring and friendly city.
We have opportunities to sustain and enrich our lives and reach our highest potential. Our diversity is valued and celebrated and our communities are a source of pride. We are actively involved in the social, cultural and political life of the city.

Toronto is a clean, green and sustainable city.
We integrate environmental stewardship into our daily activities. We maintain and improve the health of the environment for present and future generations.

Toronto is a dynamic city.
As the nation’s leading economic engine, we are a centre of innovation and growth with a strong international presence. Our dynamic city is well positioned to succeed in the world economy.

Toronto invests in quality of life.
We invest in quality of life – socially, economically, culturally and environmentally – to make Toronto a desirable place to live, prosper and visit.

Mission Statement

The Government of the City of Toronto champions the economic, social and environmental vitality of the city. The City strives to provide high quality and affordable services that respond to the needs of our communities and invests in infrastructure to support city building. The City is a leader in identifying issues of importance and in finding creative ways of responding to them.

The City of Toronto promotes and maintains a system of responsible and accountable governance where the interests of individuals and communities are balanced with those of the city as a whole. Public participation is an integral part of the City's decision-making processes.
Strategic Themes

City Building
• City building views the City as a whole and focuses on investment in social and physical services and infrastructure, which are fundamental to the city’s quality of life.

Economic Vitality
• Economic vitality refers to the health of the city’s economy and includes such factors as diversified employment, skilled workforce, competitiveness, investment and affordability.

Environmental Sustainability
• Environmental sustainability encompasses principles of environmental balance and the integration of environmental considerations in our social and economic activities.

Social Development
• Social development encompasses principles of social equity, social well-being and citizen engagement, and is an important determinant of healthy communities and quality of life.

Good Governance
• Good governance refers to the system of municipal government in terms of its role as a democratic institution, a public policy maker and a deliverer of public services.

Fiscal Sustainability
• Fiscal Sustainability refers to the City’s ability to maintain its program and services while also funding its growing commitments.

Strategic Goals

Throughout the development of the 26 Strategic Actions, it was recognized that these themes and goals are interconnected and interdependent and that collaboration is essential to successfully achieving the goals. Thus each Strategic Action addresses multiple themes and goals and involve the efforts of the whole organization or several City Divisions to realize.
Developing Strategic Actions

Integrated Planning

Strategic Action planning is part of a broader integrated planning and performance measurement framework utilized by the City of Toronto.

The planning framework pyramid demonstrates how service planning and multi-year budgeting informed by performance metrics, support Strategic Actions which all ultimately meet Council priorities.

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Strategic Actions for 2013-2018

**City Building**
1. Implement Smart Urban Growth Strategies
2. Invest in Culture
3. Develop a Long-term Transportation Plan and Policies

**Economic Vitality**
4. Increase Employment Opportunities
5. Accelerate Economic Growth

**Environmental Sustainability**
6. Support Environmental Sustainability
7. Develop a Long-term Solid Waste Management Strategy

**Social Development**
8. Support Affordable Housing
9. Strengthen Neighbourhoods
10. Enhance the City’s Quality of Life
11. Advance Toronto’s Motto ‘Diversity our Strength’
12. Improve Emergency Response and Prevention

**Good Governance**
13. Open Government by Design
14. Engage the Public
15. Strengthen Public Service Governance
16. Strengthen Intergovernmental Relationships
17. Enhance the City’s Capacity to Serve Toronto’s Diversity
18. Develop and Implement a Workforce Plan
19. Improve Customer Service
20. Enhance Performance Measurement
21. Improve Organizational Excellence
22. Implement Shared Services

**Fiscal Sustainability**
23. Update the Long-term Fiscal Plan
24. Improve Service and Financial Planning
25. Ensure State of Good Repair for Infrastructure
26. Finance the City’s Growth
STRATEGIC ACTION #21

Improve Organizational Excellence

Implement a Common Management Framework by 2018 to continue building a culture of organizational excellence and enhance confidence in the quality of City services by:

- Adopting a framework to systematically measure and continuously improve in key organizational categories including:
  - Leadership
  - Customer Service
  - Employee Focus
  - Access, Equity and Diversity
  - Process Management
  - Planning and Financial Management
- Undertaking an organizational baseline assessment across the organizational categories.
- Developing and implementing a four-year organizational improvement plan by the end of 2014 based on the results of the baseline assessment.
- Educating the organization about the common management framework, communicating organizational progress and results and recognizing organizational improvement and excellence.

THEMES AND GOALS

<table>
<thead>
<tr>
<th>Good Governance</th>
<th>City Building</th>
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<tbody>
<tr>
<td>• Organizational Excellence</td>
<td>• Service Excellence</td>
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Dr. Adam Stoehr - Bio - adam@excellence.ca
Vice President, Education and Research, Excellence Canada

- Has overall responsibility for Excellence Canada’s educational services, including the development and deployment of Excellence Canada training and certification.
- One of Excellence Canada’s primary faculty members. Facilitates leadership, organizational assessment, process improvement, and quality management training across Canada.
- PhD in Business Strategy at the University of the West of England, Bristol Business School. Thesis: The Relationship between a Strategic Approach to Quality and Employee Happiness
- Holds a Masters of Business Administration (MBA) from the Rotman School of Management at the University of Toronto and a Bachelor of Business Administration (BBA) and French degree from Wilfrid Laurier University
- Trained more than 20,000 adults since 2000
- Has conducted more than 20 Canada Awards for Excellence award verifications since 2000.
- Completed a postgraduate certificate in Adult Training and Development from the Ontario Institute for Studies in Education of the University of Toronto (OISE)
- Lives outside of Toronto with his wife and two children
- Join my network: www.linkedin.com/in/adamstoehr