

Strategic Planning: Theory and...the other thing

Ohio Economic Development
Association
Basic Course
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Who's this?



Why Do Strategic Planning?



Well?

- “Realistic appraisal of resources, constraints, opportunities”



Okay...

- Set achievable goals



I guess...

- Formulate actions to meet goals



Benefits to community (per IEDC)

- Shapes future



- Defines the organization's purpose



- Balance community goals with local resources



- Mutually accepted goals/common agenda



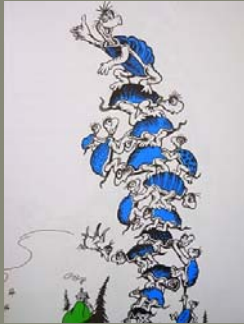
Why else?



How much money do you have?
How much time?



Who's on your back?



How do you decide what you're going to do today? This month?



From IEDC

"Strategic planning helps communities steer their economic development to effectively realize their long-range...goals. Ad hoc approaches to economic development generally fail to address community needs or long term goals, and typically have a limited positive impact....As each new project or program is taken on, the strategic plan is a reminder as to why those...are being implemented and what purpose they serve the community." (Intro, p. 29)

The Plan has your back



3 main parts:

- Where you are
- Where you want to go
- What you have to do to get there.



It's like....



Types of strategic plans

- Comprehensive
 - Regional (CEDS)
 - Local
 - District
- Type
 - Marketing
 - Retention
 - Entrepreneurship
 - Etc...



What you have to work with

- Existing programs



And...

- Existing organizations (and their history)



And...

- Existing people (and their baggage)



And...

- Existing businesses (and their history and baggage)



And then there's you...

- Scratch a planner....



The big questions

- What do we need?
- What do we have to work with?
- Given that, what are our goals?
- How do we best fit what we have to those goals?



Your job

- Fit what you have to what you need as best as possible, and fill in to meet other priorities.



The truth lies between...

- Perfection is the enemy of good



- Failing to plan is to plan to fail.

Another tension

“Strategic Planning helps communities...concentrat[e] on what is feasible rather than determining what will be” (Intro to ED, p. 24)



But....

Stretching is good



Make no little...you know



Do NOT try this alone!

- Participants
 - Stakeholders
 - Community
 - Onlookers
- Champions
 - Advocates
 - Power brokers
 - Resource mobilizers



How IEDC thinks it should work

See Bottom of Page 25

- Note time frame
- Note where “stakeholders” and “community” come in –

DON'T DO THAT!



Wha?

- Time frame is too long – you will lose ‘em.
- You probably don’t need *that* much analysis time



The Bigger Problem

- Leaving out stakeholders = pissed stakeholders.
- Bringing community a *fait accompli* = recipe for disaster!

Scratch a planner....



Pieces and Parts

Per IEDC

- Pre-Planning
- Assess community and competitiveness
- Formulate Goals, Objectives Strategies
- Identify Evaluate, Prioritize projects
- Plan of action
- Implement
- Monitor & Evaluate
- Retool and Adjust
- Start all over again!*

Getting Organized (Pre-Planning)

- What?
- Where?
- Who?
- When?
- How?
- Why?



What's our purpose?

- Internal organization or collaboration?
- New issues or tweaking old?
- Evolution or Revolution?



Where is our focus?

- Geography to cover {did you pick the right one?}
- Focus {& non-focus} areas
- How does this connect to... everything else?



Who?

- Who needs to be involved?
 - Who informs?
 - Who decides?
 - Who listens?
- Who doesn't?
 - (be veery careful...)



Della's Rules of Public Engagement

- When in doubt, include.
- Open mikes are not engagement.
- They're spending their time... pull them into something that matters.
- Dig deeper.



Della's Rules of Public Engagement

- Transparency is more and more life and death.
- Tell the truth.
- You're building relationships, not just getting feedback.
- You can't hide anymore.



When

- Length of initiative (short is good and getting better)
- When will you hold meetings?



How

- Plan out the process
- Lesson plan the meetings
- Change it up
- Remember: the best laid plans....



Why

You're going to have to be ready to explain...

- Why spend the money?
- Why take the time?
- Are you going to waste my time?
- What are we going to get out of it?
- Why don't we just go *do stuff*?

Your turn!

1 minute:

You're gonna do a strategic plan. List the people/agencies that should be part of your organization's strategic plan.

Your Turn!

1 minute:

What would be three big issues where a good strategic plan would help your work today?

Your Turn!

1 minute: what would be the three best arguments you could make to your community about why you should do a strategic plan?

Pieces and Parts

Per IEDC

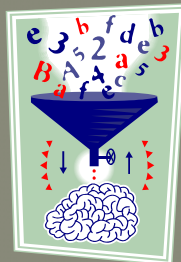
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Analyzing your local economy



Information

- There's a lot of stuff
- You can have too much stuff.
- You might not have the right stuff.



Information:

- How much can you trust your stuff?



Della's Rules of Analysis

- Don't assume past trends = future trends
- Think multiple futures
- Think in ranges
- Play with the numbers

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What's a goal/objective/strategy?

Ya wanna argue or ya wanna get it done?



How do you do this?

- Majority, Consensus or Unanimous?
Know which you need.
- Coalesce around the key issues {from the Information}
- Safety in numbers.

How do you do this?

- Given them something to throw darts at.
- How detailed? Too detailed? Not detailed enough?
- Wording matters, but content matters more.
- Expect many drafts.

Your turn: Set some goals!

- Get organized
- Listen to my story
- Pick a goal scribe
- Identify three key issues
- Identify three potential goals
- Take the goal you like best and identify two objectives/strategies
- Get ready to tell the rest of us.

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Identify, Evaluate....Prioritize?

- So, who *is* your favorite child?



But...

- 10 lbs flour, 5 lb sack.



How set priorities?

- Safety in numbers....
- Pick a measuring stick(s) (hint: you should have already made it!)
- Measure... get lots of measures



Wha?

- What were your goals/objectives?
- How will you know if you have met one?
- What benefits will occur if you meet that goal?
- Which ones will benefit the community most?

Some simple priority-setting tools

- Survey (paper or online) – ask people to rank priorities
- Stickers on printed list
- Stickers on crowdsourced list
- Weighted scorecards
- Arm wrestle (not recommended)



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Finally!



Make it easy on yourself...

- Tie actions to goals and objectives. In the document, in how you talk about it. Make it amazingly easy to trace.
- Leave some wiggle room.
- Use a matrix.
- Don't spend a lot on printing.

Don't spend a lot on printing?



Pieces and Parts

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Booooring



Why don't we do monitoring and evaluation well?

- No time!
- We're *doing stuff*!



- (We don't really want to know the answer...)

So what can we do?

- Remember: 10 lbs flour....
- Set up the plan to make evaluation easier
- Separate implementers from evaluators
- Establish that this is information, not judgment.



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How often?

- Depends...
 - Year?
 - 3 years?
 - 5 years?
- Useful shelf life is probably shorter than you think.
- How fast is the world changing around you?

Other stuff in this chapter

- Benefits
- Costs {Really? Really?}
- What can go wrong?



What can go wrong?

- Too much backroom.
- Not enough involvement.
- Not enough *channeling* of involvement.



What else can go wrong?

- Encyclopedias
- Rainbows and Unicorns
- Grocery lists



Can more stuff go wrong?

- No one on the hook
- Did we do it or not?
- Back to business as usual



What can go right?

- Community energized
- Leadership empowered
- Resources get the best ROI
- You have clear direction
- You spend your time on the stuff that matters.



The Parking Lot



Thank you!

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