

1. Whose plan is it? The strategic plan is for:**✗ The whole organization**

- **The whole organization *and* separate plans for major divisions, units, etc.**
- **Part of the organization (specify division, unit, program)**
- **Other, such as a community or county coalition (specify)**

The plan is County government's plan for addressing the future needs of its citizens. It's for County Board, County departments and citizens.

2. What Period will the plan cover?

- **2 years**
- **5 years**
- **10 years**
- **Other (specify)**

This is a long-term/long-range plan. A long-range plan is desirable to enable forward thinking. Also recognizes that this plan will likely have short-term implications. Routine monitoring and check-in on County government conditions will help determine plan update needs. Most framed this as a 5 to 10-year plan.

3. What concerns, problems, or issues do you hope the plan will address? (Identify potential organizational issues for the purpose of gauging the energy of the members and the interest of the members and the interest in designing a planning system)

The primary purpose of this question is to gauge the energy of the members and their interest in planning. The responses to this question indicate there are many issues that have arisen within the Jefferson County government as an organization to address. The facilitator is satisfied as well as convinced that there are organizational issues to deal with.

Cautionary Note: Strategic Planning focuses on organizational issues and as a process is not intended to deal with all of the technical matters facing government (such as special financial goals which likely requires a special process).

4. What measures of effectiveness should be used to evaluate the success of the planning effort? (The final product is a useful strategic plan, all key stakeholders were involved, the process went smoothly)

Many valid measures were identified such as adoption by the County Board; consensus of all County Board members that the plan represents their needs and goals; Integration of County staff and employees' concerns; and solicitation of concerns from the public. Three of the four responses call for a very inclusive process as an important measure of effectiveness.

5. What is the purpose of the planning effort? (To figure out what is really important, to reach an agreement on priority issues, to work together to address issues)

A major purpose is to develop a plan through an organized process that results in consensus on key or strategic issues. Other purposes are to have a process for discovery, education, movement toward a consensus vision and a strategy framework.

6. Who is sponsoring the process? (Sponsors are individuals who legitimize the process. (They are typically leaders with prestige, power and authority to commit organizations and resources to strategic planning and to hold people accountable.)

The sponsors legitimize the process and typical leaders identified include County Board members; County Administrator; Department Heads; and the Administration and Rules Committee. These could be considered formal sponsors.

7. Who are the process champions?

There was some overlap between sponsors and process champions.

Who is the primary champion who will manage the process? (Champions provide the energy and commitment to follow through. They are usually the people who have primary responsibility for coordination of the strategic planning process from day-to-day. They promote the process and model the kind of behavior they hope to get from other participants.)

The primary project manager for the proposed process would be the County Administrator. UW-Extension could provide facilitation and continuing educational support.

8. What kind and what size of team will work best in your organization?

- Facilitator suggests that up to 15 planning team members are manageable as a planning body
- But there will likely be a need for a process for direct input by County Department Heads and County Board members not formally on the planning team.

What does this mean for the composition of a strategic planning team?

A suggested team could include: seven chairs of large committee or their designees; seven Department Heads from large County departments; one County Administrator.

A mechanism for additional direct input by other County Board members and other Department Heads will likely be important.

Who should be involved on the planning team? (The strategic planning team coordinates the day-today process and plan needs, and is responsible for developing the plan over time in cooperation with designated stakeholders.)

See prior section.

9. Who should be involved in the overall guidance and review of the plan? (The strategic planning coordinating planning committee sets process policy and direction and provides accountability and final review.

This is a small coordinating group that keeps the process going in between meetings and is the contact/client group for the facilitator. A suggested coordinating group is similar to the current workgroup, i.e. County Administrator; UW-Extension Agent; Two Administration and Rules Committee members (Jim B and Steve N.); and one additional at-large supervisor (Carol K.)

10. Are you using consultants and other resource experts?

- Yes
- No
- Unsure**

If unsure, what kind of help do you need.

This depends. UW-Extension could be the designated facilitator, however if we want some broader community information through a survey instrument, we may need a paid resource such as the UW-River Falls Survey Research Center.

11. What type of written plan do you envision?

- Short executive summary
- Full strategic planning report
- Other (describe)

A summary, a full proceedings report (documenting each workshop's results) and a more user friendly presentation format.

12. How many hours do you wish to give to planning meetings?

- 1 – 12
- 12 – 24
- 24 – 40
- 40+

24 – 40 hours appears to be in the ball park for actual workshop time. Just six workshops at three to four each could result in workshop time of 24 hours. If a couple listening sessions were included along with several focus group sessions, another 15 to 20 hours of meeting time could be expected. Additional time to design, arrange and manage survey work is required if this is chosen as an element of the work plan. In addition, the in-between coordinating committee time would be required.

13. What is the expected time frame for the planning process?

- **6 months**
- **12 months**
- **Other**

It is important to be realistic and the expected time-frame depends on when the process actually begins. A realistic estimate of time is probably 6 to 12 months, with some suggesting that 12 months is a realistic expectation.

14. Process Steps

An important question (see Question 14 in Handout Packet from June 25) is about the suggested steps to be used in the Strategic Planning process. Described below are the specific step suggestions to consider.

1. Plan for Planning (Being done now)
Stakeholder Analysis (Initial stakeholder work being done now, and additional stakeholder implications during plan development)
2. Mandates Step – Formal/Informal
3. Values/Mission/Purpose
4. Assessments: (Internal and External – SWOC Analysis) - facilitated sessions and broader input options

Options for Broader Involvement

- Opinion Survey
 - Listening Sessions (North Side/South Side of County, for example)
 - Focus Groups for Identified High-Profile functions (i.e. Countryside, UW-Extension, Other)
 - Use Planning Team and Involve Advisors
 - Department Head - Governing Body Assessment Tool for internal assessment
 - County Board - Governmental Body Assessment Tool for internal assessment
5. Strategic Issues (2 to 4 Key Issues)
 6. Strategy Framework (for 2 highest priority strategic issues)
 7. Review and Approval Process
 8. Follow-Up Detailing and Implementation Mechanisms