

## Section 6.1

### Strategic Planning

#### Executive Summary

The purpose of this document is to provide a working manual for Nova Scotian municipalities to conduct a strategic plan. Whether a municipality wishes to produce a strategic plan in house or, hire a consultant to guide them through the process, this document will provide the material to make informed decisions. This document should be viewed as an introduction to strategic planning and further details on the topic can be found in a host of books, journal articles and web sites.

Strategic planning is a systematic process for identifying and implementing programs that capitalize on the municipality's strengths and weaknesses, while recognizing there are external threats and opportunities that have an impact upon the municipality. Quite simply, it provides the means for a municipality to chart a future it desires rather than reacting to events as they unfold. It provides the opportunity for the municipality to develop a vision of the desired future of the municipality with the participation from all stakeholders. The process also includes steps to ensure the strategic plan remains current, and responds and adapts to a changing environment.

There are seven basic steps in preparing a strategic plan, which are as follows:

1. Getting Organized
  - Striking a Strategic Planning Team
  - Setting Organizational Framework
  - Identifying Municipality's Mandates
  
2. Clarifying Values and Mission
  - Stakeholder Analysis
  - Municipality's Values
  - Municipality's Mission Statement

3. Assessing the Situation
  - Situation Assessment
  - SWOT Analysis (strengths, weaknesses, opportunities and threats)
  - Identifying Strategic Issues
4. Strategic Plan
  - Formulate Strategies
  - Integrating Strategies to Strategic Plan
  - Municipality's Vision Statement
  - Evaluation Process
  - Prepare Document
5. Adopting the Strategic Plan
6. Implementation
  - Formulate Implementation Process
7. Strategic Issue Management
  - Reassess Strategies and Strategic Planning Process

There are five main benefits of conducting a strategic plan:

1. It promotes strategic thought and action.
2. It focuses attention to critical issues.
3. It enhances a municipality's organizational responsiveness and performance.
4. Policy makers and decision makers are better able to fulfill their roles and the team work of municipal staff is strengthened.
5. A strategic plan provides the ground work for a municipal business plan.

The Strategic Plan can take twelve to twenty working days spread over a six to twelve month period, depending on the breadth and complexity of issues to be addressed. For any municipality, this is a manageable and rewarding endeavor, as a review of many successful municipalities will indicate, a strategic plan is the cornerstone to their success.

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## Section 6.1

### Strategic Planning

#### Part I - Background

##### Introduction

The purpose of this document is to provide a working manual for Nova Scotian municipalities for conducting a strategic plan. Whether a municipality wishes to strike out on their own to produce a strategic plan or hire a consultant to guide them through the process, this document will provide the material to make informed decisions. This document does not presume to be a detailed analysis of strategic planning, because there are numerous books, journal articles and web sites which can provide a detailed review on the topic.

The procedure provided in this document integrates the techniques from a variety of sources, to produce a model for the municipal setting in a clear and simple to use methodology. The reference section provides a review of some of the better source documents and web sites used to compile this paper. Of these, however, John Bryson's book, *Strategic Planning for Public and Non-Profit Organizations* stands out primarily because it focuses on government and non-profit organizations rather than on business applications. Consequently, many of the methods forwarded in other documents dealing with government have usually been based on Bryson's work.

##### Why Strategic Planning?

Over the last two decades, there have been a wide variety of new management techniques, ranging from cost-benefit analysis, planning-programming-budgeting systems, zero-based budgeting, management by objectives, Total Quality Management, re-invention, re-engineering, etc. On the whole most have disappeared and many were never really implemented. Strategic planning, however, has grown in popularity and use as an effective management tool, especially with municipalities. A quick review of the Internet will quickly illustrate the number of municipalities which have used strategic planning and made it a cornerstone of their organization's success.

**Strategic Planning has become the cornerstone for many successful municipalities.**

**Strategic planning can deal with a changing environment.**

**It provides a vision to the future, based on a municipalities strengths, weaknesses, threats and opportunities.**

Primarily, the world is changing and no community is exempt from change, due to internal and external factors. Increasingly, each municipality is faced with resource limitations. This requires careful choices and requires new directions to deal with these new realities.

Strategic planning is a systematic way to manage change and create the best possible future within this new realm. It is a creative process for identifying and implementing programs capitalizing on a municipality's strengths, weaknesses, threats and opportunities. It focuses on the allocation of scarce resources to critical issues and encourages municipalities to investigate alternative resources. A strategic plan documents a course for the municipality. This can be particularly important in light of potential changes in personnel at the staff and council levels, thus ensuring the course is maintained. Finally, strategic planning can give a community a clearer picture of its own unique identity and draw attention to aspects regarding the municipality that have been overlooked before.

Therefore, as a management tool for Nova Scotian municipalities, strategic planning is highly recommended. For those municipalities which have already embarked on this process, this document will provide further clarification to streamline their strategic planning process to better fit the needs of the municipality.

Allison and Kaye in their book *Strategic Planning for Nonprofit Organizations: A Practical Guide and Workbook*, noted there are three values in completing a strategic plan:

**Reactive vs. Opportunistic**

1. A municipality's chances for success are greater if the organization has a strategic plan. Over the long haul, a municipality which is intentional and strategic in its thinking will accomplish more than being reactive and opportunistic without a strategic plan.

**Shared vision**

2. A municipality's chances of success are greater if the organization commits to building a vision which is shared by the councillors, staff and stakeholders.

**Inclusive Process**

3. An inclusive strategic planning process is an excellent way to develop a strategic plan and build commitment to a shared vision. In the long run a municipality which includes most of its stakeholders in formulating and maintaining its strategic plan will come closest to achieving its true potential.

### What is Strategic Planning?

Quite simply, strategic plans attempt to answer the questions:

- Where are we right now?
- Where do we want to be in the future?
- What strategies will we need to implement to get there?
- What internal and external forces are operating that will hinder or help us to achieve our long term goals.

To operate properly, strategic planning requires a broad information gathering process, the development and exploration of strategic alternatives, with an emphasis on the future implications of present decisions. This process can facilitate communication and participation among some divergent groups of interests and values. Through the combined efforts from these groups it can encourage analytical decision making and promote the successful implementation of the plan itself.

**Strategic planning builds on the political decision making process.**

The strategic planning process is different from other management techniques, in that it builds on the nature of the political decision making process and encourages the inclusion of the major stakeholders in the planning process. Proponents of strategic planning have noted the failure of the other systems is due to the fact they are either ignored or tried to circumvent or to counter the political nature of the organization rather than build on the nature of the political decision making process.

### What are the benefits of Strategic Planning?

There are five main benefits for a municipality to complete a strategic plan.

**Systematic Information Gathering**

1. The major benefit of strategic planning is the promotion of strategic thought and action. This leads to a more systematic information gathering about the municipalities' external and internal environment, various stakeholder interests, clarification of its future direction, and the establishment of priorities for action.

**Focus on the issues**

2. It provides for improved decision making, as it focuses attention on the crucial issues and it helps key decision makers figure out what to do about them. Strategic planning can help the municipality formulate and clearly communicate its strategic intentions. It can assist in making today's decisions in light of future consequences. It can help develop a coherent and defensible basis for decision making across all levels and functions within the municipality while exercising maximum discretion in those areas under their control.

**Enhanced Responsiveness**

3. From the first two points, it can enhance a municipality's organizational responsiveness and performance, as the municipality is encouraged to clarify and address major organizational issues, and respond wisely to internal and external demands and pressures. This permits the municipality to effectively deal within a rapidly changing environment. However, strategic thinking and acting are what count, not just thinking alone.

**Team Building**

4. Strategic planning can directly benefit the policy makers and decision makers to better fulfill their roles and meet their responsibilities. The teamwork and expertise amongst all municipal staff are likely to be strengthened.

**Business Plan Development**

5. A strategic plan provides the groundwork for a municipality to conduct a comprehensive business plan.

**It requires the commitment of the major decision makers and stakeholders.**

Although strategic planning can provide all of these benefits, there is no guarantee it will. Strategic planning is simply a set of concepts, procedures and tools. Municipal leaders, managers and planners need to be very careful about how they engage in strategic planning because their success will depend at least in part on how they tailor the process to their specific situation. In other words, strategic planning will only work if enough municipal decision makers, managers and planners support it and use it with common sense.

There are, however, situations when strategic planning should not be contemplated, for example when there is a major crisis in the organization (the municipality is in the process of searching for a

**If a consultant is to be hired, what factors should be considered in the selection process.**

new Chief Administrative Officer or experiencing a major financial crisis) or there is not the commitment by key decision makers to produce a strategic plan. This is the paradox of strategic planning: where it is needed most, it is least likely to work and where it is least needed, it is most likely to work. Most of the crisis situations are short term considerations and should not preclude the municipality from embarking on strategic planning once the major threat of the crisis has subsided. The lack of commitment by key decision makers, however, is a major obstacle which must be resolved internally.

### **Consultants**

If the municipality lacks the skills or experience to undertake a strategic planning process, it may be well worthwhile to consider a consultant. In many instances, this avenue would be the recommended route as the consultants could assist in producing a strategic plan in a timely manner, keep the participants focused on the issues, minimize potential conflicts and be an invaluable resource throughout the process.

As with all municipal tendering processes, there will be a need to send out an expression of interest for a consultant to conduct the municipal strategic planning. In the evaluation process, the municipality may wish to consider the following:

- Does the consultant have a good grasp of the needs of the municipality?
- Does the proposal clearly outline the methodology, specific tasks to be performed by the consultant, and those required by the Strategic Planning Team?
- Is the methodology a “cookie cutter” exercise or will it be tailored to the specific needs of the municipality?
- How does the consultant plan to work with the staff of the municipality, the stakeholders and the Strategic Planning Team?
- Has the consultant clearly identified what will be included in the final product?

**What are the rules of the game to a successful strategic plan?**

- Is there a clearly stated completion date and timetable? Are they acceptable?
- Do the consultant's staff have the qualifications to meet the requirements of the task?
- Which of the consultant's staff will be involved in the process? Will there be substitutions with less qualified junior staff once the project has commenced?
- Are the proposed project costs within line for each of the consultants? If not, determine what and why there are differences between the proposals?
- Will the consultant provide the background information and training for the municipality to conduct their own strategic planning in following years?
- Do the consultant's references and general reputation meet expectations?

**Rules of the Game**

A strategic plan will require the input from a variety of people, including municipal staff, councillors, concerned citizens, business people, etc., which will form part of the Strategic Planning Team (see Part III, Step 1.1). One aspect of this process the members of the Strategic Planning Team should recognize is the Team will consist of individuals with divergent interests, points of views and concerns. In addition, there will be members of the team who will be resistant to organizational change. Assuming the team will be able to obtain full agreement on every issue would be a mistake, for it should be difficult if not near impossible for such a group to agree 100% on every issue. Therefore, the Strategic Planning Team should start the exercise with the notion of building a consensus on each issue. That means, each individual may not fully agree on each point, but the team should strive toward a point which each team member would be able to live with the final decision. This will require some give and take from all individuals as they work from divergent points of view, to a middle ground. Many times, all that is required are subtle changes to the wording.

**Confidentiality**

If disagreements between members of the Strategic Planning Team

**Respect for other s  
views**

do arise, the team should determine how this should be presented to the public. The team may decide that there should be a degree of confidentiality, where the detailed discussions should remain in the confines of the group, and admit that the members have agreed to disagree on specific points. The goal is to build a good working relationship amongst all members. No one likes to see the “airing of dirty laundry in public.”

Following from this point, there is a need to respect everyone’s point of view. Members may not agree with each other, but everyone is entitled to their point of view and this needs to be respected.

**Keep an open mind**

The Strategic Planning Team members must be open minded and willing to listen and discuss these divergent views. Alternatively, if there is “too much agreement” on the issues, the team may wish to examine opposing points of view to encourage a full discussion of all issues and to further the creative problem solving process. The result will be a Strategic Planning Team which will work well together and encourage full participation from all members.

By following these simple rules, the Strategic Planning Team should be able to work effectively, efficiently and complete the work within a reasonable time frame.

Finally, as a committee of the municipality, the Strategic Planning Team should be aware that their minutes, notes of discussions and work may be accessed under Part XX of the *Municipal Government Act*, Freedom of Information and Protection of Privacy Act.

**Dealing with the early organizational issues can save time in the long run.**

## **Part II - Organizational Aspects**

Prior to commencing the strategic plan, there is some preliminary work that needs to be completed, dealing with the identification of potential participants of the process and a variety of organizational aspects. This would ensure the process gets off and running without the team having to deal with a number of managerial issues.

### **Organizational Aspects to Consider for the Strategic Plan**

While many of the organizational issues will be addressed in the following sections, a few of the preliminary items to consider would include:

- Assure the funding, disbursement and accounting arrangements are in place to take care of printing costs, office supplies, consulting costs, etc.
- Appoint key municipal staff and clarify their responsibilities in this process. If staff has other responsibilities, clarify their time allocations and availability.
- Establish policies about what decisions are to be made at each level.
- Determine what additional staff and/or stakeholder time may be needed. Will data processing be required? Who produces, copies and sends out the reports?
- Establish where the work will be done and what equipment is required.
- Establish a regular meeting schedule. This is especially important for civic, political and business leaders.
- Determine whether consultants will be required. If they are, the municipality must adhere to the procurement processes.
- Collect available reports, data and other material for the project.

**Identify the major stakeholders to the process.**

**Who should be involved in the Strategic Planning Process?**

The key decision makers in a municipality cannot prepare a strategic plan in a vacuum. Rather the major stakeholders must be included in the discussions. This would include customers (interested members of the public and interest groups), councillors and the mayor or warden, municipal managers, employees and unions.

This overall balanced approach to forming a Strategic Planning Team is critical for its success, and each municipality will have to strike the right balance to ensure all major parties are involved. This provides for a collaborative and interactive process at all levels. Consider the following:

- *Leadership doesn't stop at the top.* Leadership at the top levels is important, but leadership by employees in solving problems is equally important to contributing to a successful organization.
- *Listen to your customers and stakeholders.* What is really important to them? It may not always be the same as what the managers and elected officials may think.
- *Listen to your employees and unions.* The employees have the historical knowledge and experience at the day to day operations level. This information and expertise can be very influential to obtaining achievable results from a strategic plan.

With respect to unions, their mandate is to protect and forward the interests of their membership. If union membership is significant in the municipality, their involvement may be critical to the final success, as it ensures the employee's interests are represented as well as a "buy in" on the process and final results. This principle is especially critical in achieving culture change within an organization.

The rationale for including a broad-based committee is two fold:

- Those who are consulted about the plan will take a greater interest and may adopt all or part of it as their own.
- The plan will reflect a broader spectrum of viewpoints and a wider range of resources if more people have an opportunity

**Keep the numbers of the strategic planning team manageable.**

to contribute.

Obviously, a municipality cannot include all of the interested parties or stakeholders. The Strategic Planning Team must be a manageable group and as the number of participants increases the process is likely to become more unwieldy. Similarly, the greater the diversity among the participants the more time-consuming it will be to reach a consensus. Therefore, tradeoffs will have to be made during the selection process to encourage key participants to join the Strategic Planning Team, based on time and budgetary constraints of the process. It has been suggested if the numbers are to be limited at the outset, consider which individuals might be in a position to veto or block the implementation of the strategy (high-ranking officials and policy makers). These are the people to include at the outset in the Strategic Planning Team. Generally speaking, the Strategic Planning Team should not be more than 15 members. The Strategic Planning Team should also be large enough to operate at two-thirds in full attendance. The appropriate roles for this committee will include the following:

- Develop or approve a list of key issues to be addressed in the planning process.
- Review the draft reports.
- Assist in the identification and allocation of resources, both for the planning effort itself and for the implementation of results.
- Deciding initial issues such as the area to be addressed and major areas of concern.
- Divide up implementation responsibilities among participating organizations.
- Develop or endorse broad goals and at some later point broad strategies.

If there are a large number of people who could make a considerable contribution to the process but could not be part of the team due to size considerations, they should be considered for the various working committees. The size and number of the working committees will be dependent upon the breadth of the strategic plan and the issues to resolve.

## Part III - The Strategic Planning Process

### The Strategic Planning Steps

There are seven basic steps in preparing a strategic plan, which are as follows:

**The seven simple steps to completing a strategic plan.**

#### Strategic Planning

1. Getting Organized
  - Striking a Strategic Planning Team
  - Setting Organizational Framework
  - Identifying Municipality's Mandates
  
2. Clarifying Values and Mission
  - Stakeholder Analysis
  - Municipality's Values
  - Municipality's Mission Statement
  
3. Assessing the Situation
  - Situation Assessment
  - SWOT Analysis (strengths, weaknesses, opportunities and threats)
  - Identifying Strategic Issues
  
4. Strategic Plan
  - Formulate Strategies
  - Integrating Strategies to Strategic Plan
  - Municipality's Vision Statement
  - Evaluation Process
  - Prepare Document
  
5. Adopting the Strategic Plan
  
6. Implementation
  - Formulate Implementation Process
  
7. Strategic Issue Management
  - Reassess Strategies and Strategic Planning Process

## ***Step 1: Getting Organized***

### **1.1 Striking a Strategic Planning Team**

The question of who will be the person or group to initiate this process is key, for they will identify the persons, groups, organizations, etc. who will be involved in the process. In the municipal setting, it has generally been the Town Manager or CAO to initiate the process.

The identification of potential team members will require a preliminary stakeholder analysis. Once the Strategic Planning Team has been selected, they will be assigned the task of setting the parameters of the study, which must be approved by the various key decision makers of the municipality. Generally, a strategic plan should only encompass those parts of an organization or topics that are under the control of or strongly influenced by the members of the Strategic Planning Team, otherwise the commitment to institute the plan can become a major obstacle for its implementation.

Use Worksheet #2 to identify potential members of the Strategic Planning Team. These sheets may also be used to determine, who should be involved in the working committees (if required).

A list of possible participants for the final selection of the Strategic Planning Team could include the following:

- Elected Officials
- Chief Administrative Officer/Municipal Clerk
- Business Leaders and/or Chamber of Commerce
- School Board or School Officials
- Representative for local education/research institutions
- Neighbourhood representatives
- Civic organizations
- Local government department heads
- Union Leaders
- Executives of independent nonprofit institutions
- Special Interest Groups
- Religious Leaders
- Provincial and Federal Leaders
- Local media executives or representatives

**Who are the stakeholders and potential members of the strategic team?**

## 1.2 Setting the Organizational Framework

**Ensure the team members understand the strategic planning process.**

Having set the Strategic Planning Team, the first priority is to ensure that the members have a common understanding of strategic planning and management. It may be useful to distribute a copy of this document, or refer members to many of the various sites on the web on strategic planning or to a few of the books in the reference section.

Briefing the team about strategic planning can be carried out in an evening with a general discussion of the topic, and review the steps in the process. Or the team may wish to invite an outside consultant or members of Strategic Planning Teams from other Nova Scotian communities which have completed a strategic planning project to assist in the first few sessions.

**Delineate the parameters of the study.**

As the planning team begins to delineate the parameters of the study some of the questions they must answer include:

- Who will lead the strategic planning process?
- What are the role and function of the staff and/or coordinator?
- Who should be involved at various stages of the process?
- What are the purpose and focus of the strategic plan?
- What is the geographical area of the plan?
- What will be the preferred steps in the process?
- What resources will be needed to get the job done?
- What is the time frame of the process?

The answer to these initial questions will help the group organize themselves and focus on the main issues of embarking on the strategic process. In the first step all of the issues will not be completely identified or resolved and the list will require further modification as the group proceeds through the strategic planning process. One thing that must remain clear to all participants is that this is an ongoing process, which should go through a number of cycles as it evaluates and identifies additional critical areas of concern. In other words, do not expect major breakthroughs in the first few steps.

**Develop a work plan with achievable time lines.**

At this stage, the team needs to develop a work plan to guide the project participants. A draft work plan on Worksheet #1 provides a guide for the whole process and may be used to scope out the strategic plan. The work plan can be an invaluable tool in determining time frames, resources required, tasks for the work

committee, etc. Generally, a Strategic Plan can take twelve to twenty working days spread over a six to twelve month period, depending on the breadth and complexity of issues to be addressed.

It may also be useful to use this information to map out the time lines on a Gantt Chart. These charts can provide a visual reference to determining the length of each step and the whole process. It also provides an effective reference throughout the process to determine if the team is on track and when you should start planning for future tasks. Worksheet #3 illustrates how a Gantt Chart may be set up for your process.

### **1.3 Identifying the municipality s mandates**

**What functions does a municipality perform?**

This step is often not included in most of the other strategic reviews, however, it can be a fairly important starting point. Typically, few members of any organization have ever read the legislation, ordinances, charters, etc. that determine the organization's official mandate. Therefore, they have made two typical mistakes:

**What is the basic legislative framework for our municipality?**

- By not knowing what an organization must do, they are unlikely to do it.
- By not understanding the legislative background, they may believe they are more constrained than they actually are.

By doing this initial review of the basic legislative framework, a municipality would be better able to understand what constraints there may be on their actions and the limitations or lack of limitations for their strategic plans. Worksheets' #4 and #5 provide an outline for performing this task.

At this step, the team may wish to include the municipality's solicitors as a resource for any questions the Strategic Planning Team may have on the municipality's charter, policies and by-laws. Questions concerning the Municipal Government Act and other provincial legislation may be referred to your solicitor.

### ***Step 2. Clarify the municipality s mission and values***

**What is the municipality s mandate?**

The mission statement is not a difficult component of the process but it is an essential step, because it clearly documents the purpose

**What kind of municipality do we want?**

of the municipality. When developing the mission statement the team will be responding to the question, “what is the municipality’s mandate.” It needs careful articulation and communication. A mission statement helps to channel and direct strategic planning and management efforts and therefore, assists all participants in understanding the challenge. The mission statement should be no more than a paragraph or even a slogan. This process should involve a detailed discussion about the municipality’s identity, purpose, the desired response to the stakeholders, and the municipality’s philosophy and values. These discussions will temper the future of the strategic plan and many of the ideas, concepts and visions discussed at this stage will most likely become recurring themes throughout the process influencing the final vision of the strategic plan, and in turn the municipality.

In other words, “what kind of municipality do we really want in the future?” The agreement on the purpose of the municipality provides the avenue for the municipality to follow a sequence of conflict resolution activities, which is to agree on purposes, identify problems and then explore and agree on solutions. By understanding the municipality’s philosophy, values and culture, it is less likely to make serious errors in formulating subsequent strategies to fulfill its mandate and mission.

Expect the completion of the tasks in this step to evoke considerable debate amongst the Strategic Planning Team. Therefore, in developing the work plan, do not scrimp on the allocation of time, as several hours of debate could quite easily evolve at this stage. It would also be unwise to limit the debate on this stage, because its importance to the overall process cannot be overstated, as the results from this step will temper the subsequent steps in the Strategic Planning Process, as outlined in Worksheet #1.

**2.1 Stakeholder Analysis**

**Who are the stakeholders?**

The essential aspect of the mission statement is to reflect the stakeholder’s concerns, as the key of the success for a municipality is the satisfaction of the key stakeholders. Therefore, prior to completing the mission statement, a stakeholder analysis is required. The first few steps of this process require the Strategic Planning Team to identify who the municipality’s stakeholders are, what their criteria are for judging the municipality’s performance (eg. what is their stake in the municipality or its output), and how well the

**What is their relationship to the municipality?**

municipality performs according to those criteria from the perspective of the stakeholder. In addition, the group may also attempt to understand how the stakeholders influence the municipality. Worksheets #6 and #7 provide some of the basic questions to answer to identifying the various stakeholders.

Once all of the various stakeholders have been identified, it may be a useful exercise to use this information to rank all of the stakeholders in terms of importance or influence. This exercise should foster a better understanding of the various stakeholders in terms of size and interests, and to identify those with the greatest needs.

## **2.2 Municipality s Values**

The stakeholder analysis forms the basis for viewing the municipality's values. This step helps in clarifying the municipality's relation to the stakeholders in respect to their expectations and assessments of the municipality's performance. This is a necessary step to the formulation of the Mission Statement and the analysis of the municipality's strengths, weaknesses, opportunities and threats.

**Determine the municipality s values by answering six questions.**

Worksheets #8 and #9 identifies the six questions that need to be answered:

1. Who are we as a municipality?

In defining this answer, draw a distinction between what the municipality is and what the municipality does. The common error is to define an organization by what it does, and as a result important avenues of strategic response to issues are not pursued. Bryson in his book points to an excellent example of this, at the early part of the century. The railroads only saw themselves in the business of railroads, rather than as transportation companies which happened to be in the railroad business. When the automobile and trucking business began to emerge they found it rather difficult to compete because they were unable to make the paradigm shift.

2. Our municipality must respond to what basic needs or problems? (For example: social, business, protection, education, urban and rural development).

The answer to this question provides the basic social justification for the municipality's existence, which is to meet the needs and address the problems of its stakeholders. Thus the municipality must be viewed as a means to an end and not as an end in itself.

3. What does the municipality want to do to recognize or respond to these needs or problems?

The purpose of this question is to encourage the municipality to respond to the stakeholders' needs and the issues it should address. The problem with many organizations is that they lose touch with the people they are supposed to serve, tending to rely on their own interpretation of the issues and how to deal with them. Therefore, the municipality must be encouraged to maintain a meaningful dialogue with its stakeholders.

This dialogue with the stakeholders is more likely to encourage a constant review and refinement of the municipality's mission, mandates, service levels, financing, management and managerial structures and enables the municipality to remain an effective organization. Generally speaking, most changes to an organization are a result of responding to outside influences and needs.

4. How should the municipality respond to the key stakeholders?

In answering this question, the municipality must decide what relationship it wishes to develop with each of the stakeholder groups and how it wishes to deal with their issues and concerns. This also prompts the initial discussions on potential strategies, which will be addressed in greater detail in Step 4.

5. What is the municipality's philosophy and what are the municipality's core values?

When a municipality is unclear of its philosophy or core values, strategy development becomes more difficult, especially if the desire is to obtain achievable results. For example, if a municipality develops a strategy because it

sounds like the right thing to do and it believes that is what the stakeholders wish to hear, but it does not truly intend on dealing with the issue, then the strategy is valueless and it calls into question the whole process.

6. What makes our municipal government structure distinct or unique?

At one time this would have been relatively easy to answer because municipal government's structure, function and services had been relatively stable. In the last decade, however, municipal governments have gone through a number of transformations with provincial/municipal government restructuring, out sourcing of some municipal operations and with private and nonprofit organizations offering some similar services. As this environment becomes more competitive, those organizations that cannot provide a distinct advantage or contribution may lose out.

### 2.3 Municipality's Mission Statement

#### What is the *raison d'être* for the municipality?

After completing the Stakeholder Analysis and the Municipality's Values worksheets the Strategic Planning Team may begin the draft of the Mission Statement. The Mission Statement provides the *raison d'être* for the municipality. It should focus on the end result the municipality hopes to attain with less emphasis on an activity. Once the group has identified a number of points it wishes to express in the Mission Statement the Team may wish to shorten it to a slogan which captures the essence of what the Team wishes to accomplish or express, as it will provide guidance for the direction of the remaining process. Do not expect quick agreement on the Mission Statement, and if it becomes apparent the Team is not making any progress on this step, move onto the next phase of the process and come back to it at a latter date. As the team progresses through the next steps, it may wish to reexamine and refine the Mission Statement with more detail in terms of specific programs, services or relationships that may evolve in the strategy formulation with its stakeholders.

The Mission Statement will become useful in the formulation of goals, identifying strategic issues and plans, and as a basis to resolve conflicts within the group, that is, "do they reflect the Municipality's

Mission Statement?” It may also be a useful tool to ensure the Team remains on course and does not drift beyond the scope or the purpose of the strategic plan.

Examples of Mission Statements

**Government Mission Statements**

City of Fredericton

“Working together to serve our customers in an effective, efficient, professional and financially responsible manner.”

City of Grand Prairie, Alberta

“Helping to make Grand Prairie ‘The Greatest Place To Be’ by providing, supporting or facilitating municipal services that meet community needs and enhance quality of life for all.”

Department of Housing and Municipal Affairs, Nova Scotia

“Leadership and service in support of effective local government, adequate, affordable housing, equitable property valuation, and an integrated land information system.”

**Organization Mission Statements**

Institute of Public Administration of Canada (IPAC)

"Dedicated to excellence in public service"

Canadian Institute of Planners

“The Canadian Institute of Planners represents and supports professional planners in Canada and is the national advocate for the growth of health, sustainable and liveable communities created through effective planning.”

Association of Municipal Administrators (AMA), Nova Scotia

“The Association of Municipal Administrators, of Nova Scotia sees as its mission, the improvement of the quality of local government administration in the Province of Nova Scotia by:

- playing an active role in the identification and development of educational programs for its members;
- providing forums for exchanging ideas;

**What is the existing situation of the municipality?**

- **geographical features,**
- **development patterns,**
- **land use and zoning,**
- **recreation and open space,**
- **roads, water and sewer lines**

- providing a respected resource to municipal elected officials in this province;
- providing services to its members to improve their professional capabilities;

***Step 3: Assessing the Situation***

**3.1 Situation Assessment**

Before the municipality can start the SWOT analysis and make choices about the strategic plan, it is important to have a complete understanding of the existing situation of the municipality. This section, provides details on how to prepare a comprehensive assessment of the physical, economic, social, cultural and organizational environment of the municipality. To a large degree, each municipality should have most of this information available, for example Municipal Planning Strategies, land use by-laws, engineering servicing plans, recreation plans, etc. What is needed is to compile the information for the Strategic Planning Team. If the information is not available, this step may involve a fair amount of work, which to a large degree may be compiled at an early stage by the municipal staff prior to starting the process. The other aspect of this section, is that it will encourage involvement from the various departments of the municipality in the strategic planning process, as they prepare and present this material to the Strategic Planning Team. Otherwise the Strategic Planning Team could be divided into workgroups, each responsible for collecting the information for each of the sections.

Worksheets' 11, 12 and 13 provide a suggested listing of the types of information which could be useful for the Strategic Planning Team. To a large degree the level of detail of this step will be determined by how comprehensive the strategic planning process is to become.

1. Physical Environment

“A picture is worth a thousand words,” and when dealing with a municipality, proper maps are critical to promote a better understanding of the issues and the interrelationship between various elements of the municipality. There should

be two series of maps, the first series should include only the limits of the area which will be affected by the strategic plan. This series of maps will include all of the detailed data (physical, economic, social and cultural information) and, urban and rural planning strategies. A second series of maps should include a larger area of the surrounding communities or areas which have an impact upon the study area and vice versa. The second series of maps do not need the level of detail of the strategic planning study area. Rather, they are to provide a context for first series of maps and to facilitate discussions for the SWOT analysis.

There should also be extra maps produced which can be used as working sheets, which members can draw on to facilitate discussions.

If the municipality does not have the maps they require, they may wish to contact the Land Information Services at the Service Nova Scotia and Municipal Relations.

2. Economic Environment

- **economic base**
- **resource base**
- **commercial retail, office, industrial and residential development**
- **tourism**
- **trade area**

The economic environment data should be available from a variety of sources, for example, the planning/development departments, Business Improvement Districts, Regional Development Agencies, at the Federal Government (Statistics Canada, Canada Mortgage and Housing Corporation) or at the Provincial Government (Agriculture and Fisheries, Community Services, Economic Development, Environment, Natural Resources, Tourism and Culture, Transportation and Public works, and Service Nova Scotia and Municipal Relations).

For those items where detailed information is not available, the Strategic Planning Team will have to determine how important the information is to their study and whether it would be worth the time, effort and cost to acquire the information. Assistance in making these decisions should be available from the appropriate departments at the municipal, provincial and federal levels of government.

Some of the information should be relatively easy to transfer to some of the base maps prepared in the previous section.

- **population profile**
- **labour force**
- **social services**
- **community groups**
- **community facilities**
  
- **historic sites**
- **museums**
- **schools**
- **universities and colleges**
- **theatres**
- **libraries**
- **festivals**
  
- **government structure**
- **services**
- **resources**
- **finances**
- **staff expertise and resources**
  
- **business community**
- **environmental groups**
- **cultural groups**
- **service and community organizations**

This would facilitate more productive discussions.

3. Social Environment

Similar to the economic environment section, the information should be available from a variety of sources, especially at the municipal, provincial and federal levels of government. Worksheet 12 provides a listing of the topics which may be reviewed.

4. Cultural

The purpose of this section (see worksheet 12) is to identify cultural aspects of the community which could be utilized by members of the community and to attract visitors from outside of the community. The sources of this information should be the municipality, local historical or cultural societies, the federal and provincial departments of culture and tourism.

5. Municipal Organization

The purpose of gathering this information is to better understand the municipal organizational structure and how it works (see worksheet 13). For example, is there a Chief Administrative Officer or Council Committee structure for administration of the municipality? What are the various municipal departments and what is the reporting structure? What talents and expertise do the staff possess? What resources are available at the municipality, in terms of equipment, land and staff? What are the financial and resource limitations of the municipality? By developing a greater understanding of the resources available at the municipality, it is easier to formulate and realize achievable strategic plans.

6. Interest Groups

The Stakeholder Analysis of worksheet 6, may have identified many of the important interest groups. This

**What are the views and concerns of the stakeholders?**

section is to ensure that all groups are specifically identified. This is to better understand how a strategic plan may affect them as well as how they may try to affect the strategic plan. Therefore as a result of the identification, they can be either consulted or brought into the strategic planning process.

7. Surveys

Surveys are an invaluable method of soliciting views, concerns, issues and ideas from the various stakeholders. Furthermore, surveys provide an excellent forum to educate and inform stakeholders of the nature and purpose of the strategic plan and to enlist their support. In many ways, this step may be key to the final success and acceptance of the strategic plan, because without this support, implementation of the strategic plan becomes less assured. The scope of the strategic plan will determine the extent of the surveys.

If surveys are to be conducted, the Strategic Planning Team needs to develop a list of topics or key issues to initiate the consultive process. The information gathered to this point should provide the team the ability to identify five to ten key issues. The questionnaires, interviews, focus groups and public meetings can start with the introduction of the purpose of the process, then obtain the participant's views on key issues and then proceed to solicit further views. It is strongly suggested that the Strategic Planning Team not rely on just one method of obtaining information from the public. Rather, use a combination of two or more of the methods identified.

Questionnaires:

A survey, if based on a random sample within the municipality, can provide a reasonably accurate means of measuring the opinions, attitudes, concerns and ideas from the general populous or specific groups. There are two basic methods, either a telephone survey or a mail-out survey.

If you have ever been the recipient of either type of survey, you will understand, they should be short, to the point and easy to answer. Similarly, from the

Strategic Planning Team's perspective, they should be easy to tabulate and analyze. Therefore it is suggested they use predominately closed questions, where there is a list of possible answers from which the respondent must choose. Open questions, where the respondent must answer a question in their own words, are more difficult to transcribe or paraphrase into a useful form and to analyze, therefore they should be used minimally.

The order of the questions can also be important. Keep the questions which can be answered quickly and easily at the first, to allow the respondent to become comfortable with the questionnaire. The more difficult or complex questions should be toward the middle and end of the questionnaire.

The number of surveys to be conducted depends on the size of the community. It needs to obtain some meaningful results within a limited budget and should be defensible by the team. In regards to the telephone interviews, experience has shown it is better to hire people to conduct the interviews rather than to rely on volunteers. Senior high school or university students have often been suggested for such situations.

Finally, the surveys should also include a brief description of the purpose of the strategic plan and how it may relate to the participants.

It is strongly recommended that prior to conducting telephone surveys or sending out questionnaires they should be tested on a sample audience and reviewed by someone with experience in survey techniques.

#### Interviews:

If the Team plans to conduct interviews, there should be two sets. The first group should include the major politicians (include the three levels of government) and may include major government representatives whose departments or programs have a direct impact upon your municipality. The second group should

include the key individuals in the community, who have a high profile and are active in community affairs. These individuals do not have to be limited to any particular group, association or level of government and might include local business people, social activists, retired politicians or anyone who is actively involved in community affairs and local issues.

The interviews should begin with a short review of specific topics concerning the issue at hand. The focus of the discussion should deal with the problems, prospects and positive features of the community and solicit ideas or suggestions for the future of the community from the interview. The interviewer should take notes throughout the interview and summarize in point form immediately after the interview. The interview should not last much more than one hour.

#### Focus Groups:

A focus group is another name for a group interview or group discussion, where there is a focus on a particular topic. They usually involve putting together a group of seven to ten individuals in a meeting which should not last longer than two hours. With the guidance of a facilitator, the group reviews a series of questions relevant to the issue identified. Through this method, you can develop a better understanding of the range and depth of opinions, beliefs and ideas from a target group. This in-person setting permits the exploration of unanticipated issues or problems that people raise, and draws out detailed responses. The individuals for the focus group are usually chosen because they represent a target group you are trying to reach to understand. In order to ensure a better representation, three to four focus groups should be conducted.

Normally, a trained facilitator is required to ensure the discussion covers the main points of interest and remains focused on the main issues. The meetings are either recorded on audio tape for transcription

and analysis, or there is an individual to take detailed notes. Focus groups are a qualitative research technique and are often used prior to a more quantitative analysis. For example, the information gathered from a series of focus groups may be used as a basis for the design of a questionnaire.

The weakness of conducting focus groups is that they do require a facilitator who has been trained or has experience in focus groups. The transcribing of the information gathered and its organizing, categorizing and analysis can be a daunting task. Although the focus groups can provide detailed information and be extremely useful, they may not be representative samples of the population and therefore should be interpreted cautiously.

#### Public Meetings:

Public Meetings may be the most effective way to introduce the strategic planning process, purpose and goals to the widest audience and obtain direct feedback at one time. It is also an opportunity to introduce the members of the Strategic Planning Team to the public and review the preliminary issues identified by the group.

Similar to the focus group, there is a fair degree of preparation required. The first priority is to determine the location, time and date of the meeting. If this includes a larger geographical area, more than one meeting should be scheduled. The meetings should not be longer than two hours and one hour would be preferable. There should be at least two weeks between advertising for the meeting and the actual dates. This would also be an excellent time to try to get some articles in the local papers on the strategic planning process to create an awareness. An agenda should be prepared to include; introduction to the team; what is strategic planning, purpose of strategic planning for this community; time frames; preliminary issues; question and answer sessions; and, a session which should allow the public to forward their ideas, concerns, potential for the

**What are the strengths, weaknesses, opportunities and threats to a municipality?**

area, etc.

It would be preferable if there was a handout for the meeting covering these main points, the Strategic Planning Team’s names and contact numbers. This also provides an opportunity to include a questionnaire. If the strategic plan is limited to a specific area, provide a map of the area and provide the rationale for this geographic area.

It may also be worthwhile obtaining the names and addresses of the audience so that further mail outs can be sent out. There should also be someone at the meeting to take minutes, ensuring the names of the participants and their comments are documented.

### 3.2 SWOT Analysis

At this step, the information gathered in the previous steps is organized and analysed through the SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats). This provides information on the organization’s strengths and weaknesses in relation to the opportunities and threats it faces (see worksheets 14 to 17). The Strengths and Weaknesses of the SWOT analysis generally refer to the internal present state of the organization, while the Opportunities and Threats are generally external and future oriented. For a municipal situation, however, the distinction between internal and external factors is not as meaningful as it is for private business because the municipality serves a more encompassing group of stakeholders, who are generally participants in the municipal governing experience.

As Bryson has noted, some communities have focused on their “hopes and concerns,” rather than doing a SWOT Analysis. In addition, by focusing on the hopes and concerns, the strategic team is more likely to evoke value concerns, which are usually more important to a community-oriented strategic planning process. The decision to do a SWOT analysis or a “hopes and concerns analysis” will be for the Strategic Team to address, however, most methodologies for a strategic plan do focus on the SWOT analysis.

The strengths and weakness’ review should be made with as much

objectivity as possible because if the realities of the municipality and the government organization are not reviewed honestly and openly the realization of the strategies may be severely limited. It is difficult to learn about ourselves if we are not willing to be critical of our own behaviour. Therefore, at this juncture of the process the Strategic Team Members must be willing to check their egos and concerns about protecting their “own turf” at the door, and be willing to have very frank discussions.

The major purpose of any strategic planning is to view and understand the various future oriented threats and opportunities that may prompt an organization to respond before it becomes a crisis. However, any effective response to these threats and opportunities require a thorough knowledge of the internal organization’s strengths and weaknesses. Therefore, strategic planning is concerned with finding the best or most advantageous fit between an organization and its environment.

There are a variety of techniques that may be employed to complete this section; individual analysis; subgroup analysis; “organizational highs, lows and themes” exercise; and the “snow card” technique. It should be noted, this step may require more than one meeting because of the amount of information to cover.

**There are four techniques to completing a SWOT analysis?**

#### Individual Analysis:

**Individual Analysis involves compiling a SWOT list individually, then meeting as a group to discuss.**

A first cut at defining the SWOTs for the municipality may be undertaken by the individuals of the Strategic Team, using the worksheets 14 to 17. After individually creating these lists, the members meet and each member goes over their findings, observations and conclusions.

At the meeting, a facilitator will be required for the review of the individuals lists. Each of the strengths, weaknesses, opportunities and threats should be dealt with separately. Usually, it is quite helpful if the items are listed on the wall, so that they are visible to all members. If an item has been raised by one individual, there is no need to repeat it. The facilitator should keep the discussion focused on each issue at a time and keep the discussion moving at a good pace because there should be a lot of ground to cover. Upon reviewing all of the lists, a final list should be prepared with

items modified or expanded as necessary.

It is common to have an item which may be listed as both a strength and a weakness or an opportunity and a threat. For example, it is determined that many people prefer to shop in another community, this would be perceived as a threat, however, it could also represent an opportunity, because what they want to shop for is not available in your community.

The advantage of this method is that individuals are less likely to be constrained by comments or ideas of other team members and it may facilitate a greater flow of ideas. The disadvantage of this method is that the ideas of one are often the spark needed by others to follow through on another direction.

**Group Analysis:**

In this instance, rather than doing the work individually, the Strategic Planning Team would divide into four or five groups and compile the list of strengths, weaknesses, opportunities and threats using the attached worksheets. Otherwise this method remains the same as the individual analysis, except a group spokesperson would review the group's findings.

The primary advantage of this method is one of time, as it could speed up the process.

**Organizational Highs, Lows and Themes**

For an organization, it is sometimes helpful to first look to the past for what was good or worked well and what was not so good or did not work so well, before you can look to the future. As a result, the Team should focus on what the municipality should do differently so as to not repeat the same mistakes. This method was first devised by Kouzes and Posner.

The Strategic Planning Team will need a room with a large wall (or black board) which can be covered with large sheets of paper to make one large sheet. This should be divided into top and bottom halves, representing the highs and the

**Group Analysis involves working through the SWOT analysis with four or five sub-groups.**

**Organizational highs, lows and themes involves working as a group and reviewing what the municipality did in the past.**

lows. At the far right draw a vertical line to represent the date for today, at the far left-hand side draw a similar line representing how far back the team wishes to go back (usually five to ten years).

Each member of the Strategic Planning Team should then begin to list on small pieces of paper all of the municipalities “highs” and “lows” within the time frame. This could include the arrival or departure of successful and not so successful leaders, successful or unsuccessful management programs, useful or disastrous innovations and so on. Each item should be dated, and labelled as a high or low and placed accordingly on the wall sheet. The group then identifies common themes relating to the highs and the lows or to both. The themes are analysed in terms of the following questions:

- a. What strengths have the municipality relied on to deal with threats, to take advantage of opportunities? Which were ignored?
- b. What weaknesses have the municipality had in dealing with the threats and opportunities? What has been done about them?
- c. What opportunities have the municipality had? Which were taken advantage of, what ones were the municipality unable to take advantage of and which ones were ignored?
- d. What threats did the municipality deal with? Which were handled successfully, unsuccessfully and which were ignored?

Through the answers to these questions, the Team should identify patterns on the relationship between the strengths, weaknesses, opportunities, threats and themes. In particular, pay close attention to what the municipality’s strategies have actually been rather than what has been voiced in official statements. Based on the previous history, the Team should project what they would like to see in the future and what new themes the team would like to see.

#### Snow Card

“Snow Card” method is a form of organized brainstorming, where the brain stormed points are listed individually on

**The snow card method provides a format for an organized group brainstorming session.**

separate sheets of paper (snow cards) and then grouped into categories according to themes (snow balls). There would be four rounds of consideration for the strengths, weaknesses, opportunities and threats.

The Strategic Planning Team can either work as a whole group or break into sub-groups of four to five people. The Team would brainstorm on one of the SWOT issues, listing their ideas on a worksheet. Upon the completion of this list, the team would review the items and pick the best five to ten items for that round. After repeating this process for the four rounds, the team would write the items on separate pieces of paper or cards. The cards are collected and attached to the wall, clustering the cards with similar themes (snowballs). The team should agree on what the theme or category name should be for each group. As the team discusses the various clusters, they should determine whether they are a good fit, whether there are other subcategories and if there are any linkages from one category to another. The various snow balls should be arranged in order of priority. This can be achieved through a group discussion of the “snowballs.” Alternatively, each of the members of the team could be given seven to ten dots and be asked to place one dot on each item they consider to be the important. Once the issues have been ranked, the cards should be collected and prepared in the SWOT categories, in order of importance.

The main point to remember in this section is to attempt to keep the analysis simple. Otherwise, there is the greater potential to get bogged down in completing the assessments. If the discussions do start to lose their focus, the group may wish to examine some of the work they have already completed, with respect to the municipality’s mandates, stakeholder analysis, the municipality’s values and mission statement to bring the item back into focus. The other important factor is to realize this SWOT Analysis is to promote group discussion and the facilitator should ensure all participants are involved in the discussions.

### 3.3 Identifying Strategic Issues

**What are the strategic issues facing a municipality?**

**Who considers them to be an issue?**

**Why is it an issue?**

**What are the consequences of not addressing the issue?**

**Test to see if the issues are strategic or operational?**

**The team may wish to review the list of strategic issues with Council and/or the public for feedback.**

The identification of the strategic issues is a milestone in the strategic planning process, because once the Strategic Issues have been identified, the path to completing the strategic plan will become much clearer and easier to follow. This is perhaps the most exciting stage as well, because you can expect good healthy debates, especially with respect to setting the priority of the strategic issues. The important point to remember at this stage is to remain focused on the identification of the strategic issues, not on their resolution because that is the next step. Many problems in management arise because they start focusing too early on the potential solutions to a problem, without truly understanding the problem. Consequently the arising strategies will not fully address or resolve the issue. Like the earlier stages, this step needs a facilitator to keep the process moving and on topic. It also suggested that this step take place no more than two weeks after the SWOT Analysis, while it is still fresh in the Strategic Planning Team's minds.

Worksheet 18 provides an example on how the Strategic Team may identify the main issues. The first priority is to ensure this is an issue the municipality can do something about. Otherwise, it is not a strategic issue for the municipality, rather it would be an issue for another organization, for example the provincial or federal levels of government. In the previous sections, the methods outlined as the Individual Analysis, Group Analysis and Snow Card methods may provide an appropriate forum to the identification of these issues.

Worksheet's 19 and 20 provide a quick and easy test on the issues to determine whether the strategic issues identified are truly strategic issues or operational issues (those issues which can be handled by the existing departments within the municipality with minimal difficulty). This testing may also be useful in determining a priority of strategic issues to be resolved.

At the end of this stage, the Strategic Planning Team may wish to consider presenting the Strategic Issues to either Council or at another Public Meeting. The rationale for this is twofold, it keeps the public and Council informed on the process and it provides a forum to discuss the relevancy and ranking of the issues and whether the public or Council agrees. If there are major differences or other issues identified, the Strategic Planning Team has the opportunity to reevaluate their issues and if necessary modify them. In the long

**The five steps to formulating strategies.**

term, this will also increase a greater “buy in” or acceptance of the work of the Strategic Planning Team.

***Step 4. Strategic Plan***

**4.1 Formulate Strategies**

At this stage, the Strategic Planning Team must deal with the strategy formulation to deal with the strategic issues. The process of formulating strategies consists of five steps, these are:

1. Identify the practical alternatives or visions the municipality might pursue to address this strategic issue. For each strategic issue there may be more than one alternative to resolve the issue or vision on what would be desired. At this stage the team is encouraged to be innovative and unrestrained in their formulation of dynamic alternatives and visions. The next steps will determine whether they are realistic or attainable. (Worksheet 21)
2. Identify the barriers to the realization of these alternatives or visions. As innovative or dynamic the alternatives or visions may be, this step provides a “reality check.” What would prevent the attainment of these alternatives or visions? These barriers could include for example, lack of resources (economic and expertise), physical constraints, conflicts with other municipal goals and objectives. (Worksheet 22)
3. Identify the major proposals the municipality might pursue to either achieve the alternatives or visions, or to overcome the barriers to their realization. In other words, are these proposals achievable by the municipality? (Worksheet 23)
4. For those proposals which are achievable, identify the actions which existing staff must undertake to implement these major proposals. The resulting action plan should be a self contained worksheet for each strategy or proposal. It should provide:
  - a detailed description of the project;

- the intended outcome;
- which section of the municipality will be responsible for its completion;
- a listing of the resources and actions required to complete the task;
- the potential impact upon other strategies; and
- a proposed timetable for the strategy.

The completion of this step should involve representation from the municipal departments or organizations responsible for the completion of this initiative. (Worksheet 24)

5. Identify the steps the staff must take within the next six months to commence implementation of these major proposals and ensure the assignment of the areas of responsibility. (Worksheet 25)

Throughout this part of the process, it is important to remember what resources the municipality has and will require to undertake these new programs. Without the proper resources, the realization of these goals will be extremely difficult to achieve.

In using the above five step process, the snow card technique may be used to generate the responses. As Bryson noted, there are five advantages to using this method. It allows for relatively large groups to become involved in the process. Second, it keeps people from immediately jumping to final solutions, without examining all possible alternatives. Third, it keeps people from over evaluating their ideas and keeps a balance between idea creation and evaluation. Fourth, it encourages people to focus on where they are and where they would like to be. And fifth, the participants must deal directly with the implementation problems directly.

In using the five step process, a number of potential conflicts within the Strategic Planning may be avoided, primarily because each step provides a filtering process, eliminating alternatives or visions which are not practically attainable by the municipality. In other words, there must be a balance between what the municipality intends to do, what is needed, what is feasible combined with what the municipality's capable of doing.

#### 4.2 Integrating Strategies to a Strategic Plan

At this stage, it is time to view those strategies which survived the five step review of the previous step. It may be useful to categorize the strategies into functional areas. These should be considered the action plans which will be required by the municipality and by the various municipal departments and stakeholders. These strategies should be compared to the municipality's corporate goals and objectives and the municipal planning strategy to determine if they are compatible and if necessary propose the appropriate amendments to these documents.

These strategies will form the blueprint for action by the municipality, where it provides an outline as to what is to be done, who or what departments will be responsible, when it will be done, the results desired and the results which can be measured in order to evaluate attainment. This will include identifying how the municipality will allocate resources (i.e., financial, human and stakeholder resources). Through this process the Strategic Team should identify which of the strategies can be achieved and form part of the Strategic Plan based on the above evaluations.

The Strategic Planning Team should attempt to rank the strategies at this stage. Again, being mindful of the municipality's resources (i.e., what can be reasonably done within the next few years?).

#### 4.3 Municipality's Vision Statement

The purpose of the vision is to develop a clear and succinct description of what the municipality should look like after implementing its strategies and achieves its full potential. While the Mission statement outlines the municipality's purpose, the Vision Statement goes further to describe how the municipality should look as a result of the implementation of the strategies identified through this process.

This step is purely optional, however, it does provide a clearer picture to all stakeholders where the municipality wants the strategic plan to take them and assists in the future evaluation of the strategic plan. It should provide inspiration to the future of the municipality. The vision statement should not focus more than three to five years into the future. The level of detail is something the Strategic Planning Team will have to decide upon, as vision statements have

**What should the municipality look like after implementing the strategic plan?**

**Once the strategic plan has been implemented, there needs to be an ongoing evaluation process of the various strategies.**

ranged from one to ten pages in length. In some instances, teams have left this step until after the adoption and acceptance of the strategic plan itself because they would then know which were the accepted strategies and it would allow participation of other stakeholders. However, considering the evaluation step and the continual evaluation of the strategic plan, it may be more reasonable to complete the vision statement at this time.

The vision should include the mission, core values, basic strategies, performance criteria, decision making rules, ethical standards and emphasize the important social purpose the municipality serves and that justifies its existence. This vision should be a composite view of the Strategic Planning Team, it should have a high impact and be powerful.

#### **4.4 Evaluation process**

The action plans for each of the strategies should be prepared in a manner which permit yearly evaluation, in terms of accomplishments within projected time frames, the municipality's budget and staffing requirements. The Strategic Planning Team should recommend a standing subcommittee of this team, whose responsibility will be to monitor the implementation of the action plans. Generally, this should comprise three to five members, who will monitor the progress of the Strategic Plan on an annual basis to report back to the Municipal Council.

Worksheet 27 provides a basic outline for the evaluations under the headings of responsibility, feasibility, resources and timetable. Under these headings some of the questions which may be asked are as follows:

##### **Responsibility:**

- Have those identified as having responsibility for this project participated as expected?
- Is additional support required to coordinate the project?
- Is additional direction or help required to allow those responsible for achieving their objective more effectively?
- Are changes required regarding the responsibility for the project?

##### **Feasibility:**

- Has the feasibility of projects now been determined?

**Final report format for the strategic plan.**

- Do changes have to be made to projects as a result of the feasibility assessment?

Resources:

- Are the key people participating?
- Are additional key people required to participate at this time?
- Are the finances in order?

Timetable:

- Is the proposed schedule being followed?
- Have the actions which were identified to be completed at this point in time been completed?
- Should the timetable be adjusted?

**4.5 Prepare Document**

It is time to start pulling all of the work into a documented form to take to the Council and public, although as Bryson notes the greatest achievement has been accomplished where “shared thinking and acting are what count, not strategic plans in and of themselves.”

The document could include the following headings to help organize the Strategic Planning Teams work:

- Introduction (including purpose, process and participants)
- Mission Statement
- Municipality’s Mandates
- Vision Statement
- Situation Assessment Summary (include appropriate maps)
- SWOT Summary
- Major Strategic Issues
- Functional Strategy Statements
- Implementation Plans, including action plans (include maps and schematics to demonstrate the points)
- Staffing Plans, including municipal staff and volunteers if needed
- Financial Plans, including operating budgets for each year of the plan, plus any necessary capital budgets or fundraising plans
- Monitoring and Evaluation Plans

**Council review of the strategic plan and adoption.**

***Step 5 Adopting the Strategic Plan***

At this stage, the Strategic Planning Team has the final document to go to Council for approval. As with any major endeavour of this nature, the team has to determine how they wish to approach this stage. In some instances, the team may wish to hold another Public Meeting to review the results to ascertain public support, review the major initiatives and if necessary modify the plan accordingly. The team may wish to hold a special informal meeting with the Council prior to taking it to a Council Meeting. This would give the councillors the opportunity to review the document to ensure the members of Council have an understanding of the strategic planning process, what process the team went through and the major findings. Again, it also gives the team the opportunity to modify the document to address any issues which were overlooked or to reinvestigate any strategies if required or address specific concerns of any individual or group of councillors and stakeholders. This final consultation with the public and Council should also encourage a greater acceptance of the Strategic Plan.

As suggested with the Public Meetings, there should be a two-week notice given for any meetings. Prior to any meeting, you may also wish to brief the members of the press to ensure they have a full understanding of the document as well.

***Step 6 Implementation***

Upon the successful adopting of the Strategic Plan, the last function of the Strategic Planning Team revolves around meeting with the major managers of the municipality to initiate the formulation of the action plans and delegation of tasks. To a large degree, much of this work should have been completed with Worksheets 24 and 25. The final detailed action plans, would then be completed by the various municipal departments or other organizations where applicable.

At this point the Strategic Planning Team, may wish to consider the formation of the Evaluation Team to ensure the evaluation process is adhered to, as outlined in Section 4.4 and Worksheet 27. Depending on the circumstances or the strategies involved, such an evaluation can be on an annual basis or every six months, with the annual reviews going to Council.

**The strategic plan requires maintenance and adaption to respond to a changing environment.**

### ***Step 7 Strategic Issue Management***

Once the Strategic Plan is adopted by council and its implementation has commenced that does not mean it is the end of the process. Municipalities do not exist in a static environment, strategies must be maintained and if necessary updated or modified to deal with this ever changing environment. In some situations, if the strategies have proven to be ineffective or the situation has changed, it may be necessary to identify new strategic issues and formulate new strategies and eliminate the ineffective strategies. Similarly, as new issues arise, new strategies will have to be formulated to deal with them, hence the term Strategic Issue Management.

This is not to imply that the municipality must necessarily start the whole process over again, rather it should be considered more as strategy maintenance, especially considering when most of the background work (mission, mandates, SWOT analysis, vision statement, etc.) has been completed.

Therefore, the municipality may wish to set up a systematic process with principal managers to identify key strategic issues which have arisen because of the changing environment or a shift of the priorities of the existing strategic issues for the same reason. Depending on the situation, such a review may be done on an annual or biannual basis. Quite simply, this would involve using the steps already outlined, from the SWOT Analysis or Identification of Strategic Issues (step 3) process, forward.

#### **Summation**

As stated in the beginning, the purpose of this document is to provide a better understanding of the Strategic Planning Process and provide a potential model for a municipality to follow if they wish to embark upon a strategic planning process by themselves. As noted previously, the municipality may wish to consider hiring a consultant to guide them through the process and act as a facilitator at various stages. In this case, the document should provide the information to better evaluate potential candidates to best suit the needs of the municipality.



## Definitions

**Action Plan:** Statements of the details of each tactical description, including details of who is responsible for each specific step and when each step will be completed.

**Consensus:** A general agreement among the constituency.

**Goal:** A broad statement describing what we will do in the future, how our organization will appear, or how we will deliver services based on our vision. A description of a long-range strategy positioning us to achieve our vision.

**Indicator:** A specific characteristic or event that is directly measurable and reflects some aspect of the performance being measured.

**Mandates:** Externally imposed legal requirements and informal requirements and priorities that affect our organization.

**Mission Statement:** A declaration of our organization's purpose.

**Objective:** Statement of what needs to be done in order to reach a specific goal and by what date (broad time frame).

**Paradigms:** the lenses through which we view our world, and include our attitudes, behaviours, and actions. Paradigms can be international, national, ethnic, organizational or individual.

**Paradigm shift:** A change in the way in which we view our world, or a change in our attitudes, behaviour or actions.

**Stakeholder:** Any group or individual who is affected by or who can affect the future of our organization, in other words they have a "stake" in what we do. Examples of a municipality's stakeholders group would include citizens (include all citizen groups living within the municipality), taxpayers, service recipients, the governing body, employees, unions, interest groups, the financial community, businesses and other governments (local, provincial and federal).

**Strategic Planning:** A disciplined effort to guide the activities of the organization.

**Vision Statement:** A description of how our organization appears in the future including our values. The statement is inspiring and describes our organization as a success in meeting the needs of important stakeholder. The statement also provides guidance and long range direction to staff.

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#### Websites

City of Grande Prairie: [www.city.grande-prairie.ab.ca](http://www.city.grande-prairie.ab.ca)

City of Kingston: [www.city.kingston.on.ca/info](http://www.city.kingston.on.ca/info)

City of Fredericton: [www.city.fredericton.nb.ca/cityhall/strategic](http://www.city.fredericton.nb.ca/cityhall/strategic)

City of Moncton.org/english/strategic.htm

## *Worksheets*

The following worksheets are provided as a guide only. As the Strategic Planning Team begins its process, it may become apparent that the team will want to modify them or add additional sheets to suit the individual needs of the municipality.

## Work Plan

Task	Time	Budget
1. Getting Organized		
• Striking a Strategic Planning Team	_____	_____
• Setting Organizational Framework	_____	_____
• Identifying Municipality's Mandates	_____	_____
2. Values and Mission		
• Stakeholder Analysis	_____	_____
• Municipality's Values	_____	_____
• Municipality's Mission Statement	_____	_____
3. Assessing the Situation		
• Situation Assessment	_____	_____
• SWOT Analysis	_____	_____
• Identifying Strategic Issues	_____	_____
4. Strategic Plan		
• Formulate Strategies	_____	_____
• Integrating Strategies to Strategic Plan	_____	_____
• Municipality's Vision Statement	_____	_____
• Evaluation Process	_____	_____
• Prepare Document	_____	_____
5. Adopting the Strategic Plan	_____	_____
6. Implementation		
• Formulate Implementation Process	_____	_____
7. Strategic Issue Management		
• Reassess Strategies and Strategic Planning Process	_____	_____



## Strategic Team Analysis

Member

Interests and Abilities

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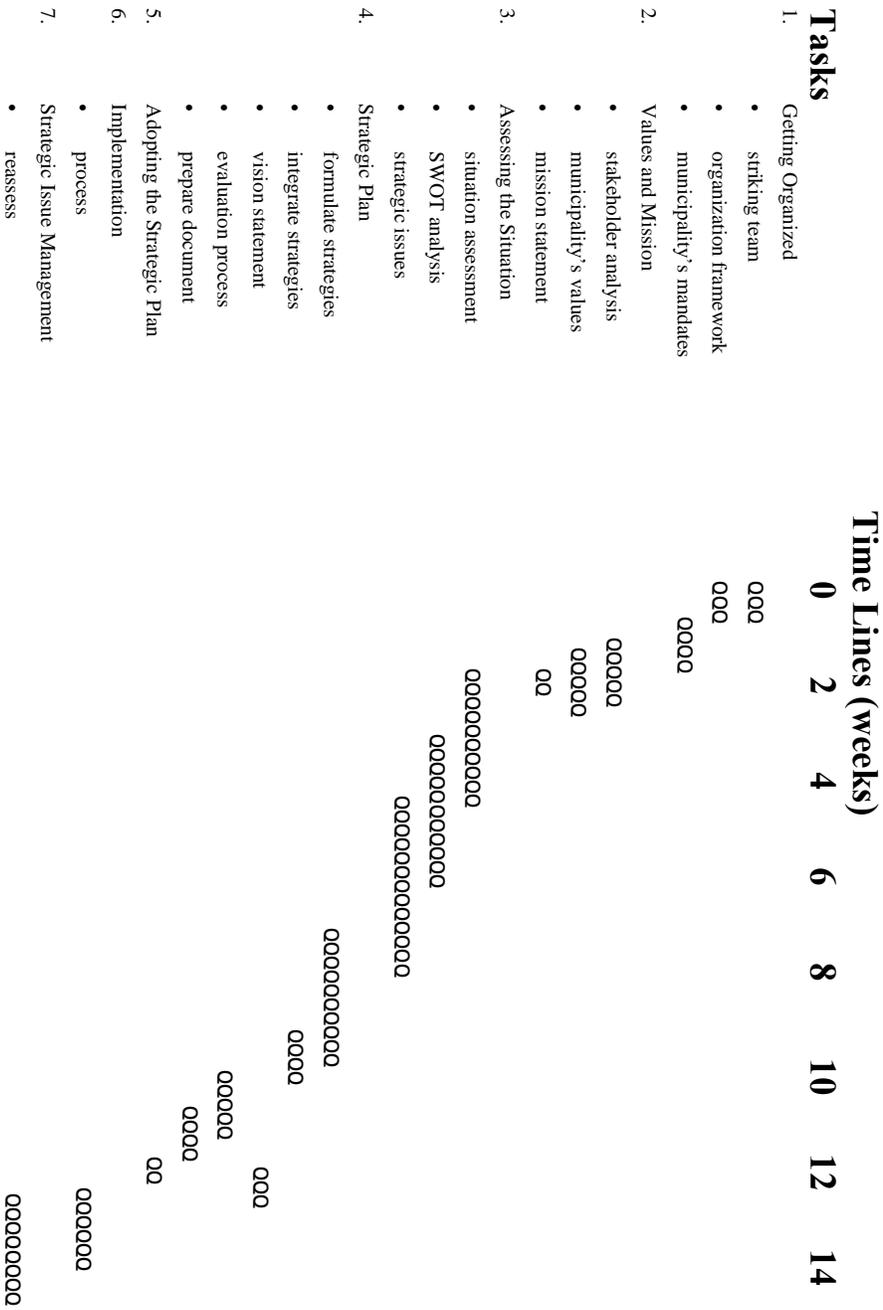
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# Gantt Chart

## Strategic Plan - Gantt Chart (Sample)







## **Municipality s Mandates** **(continued)**

- Municipal By-laws and policies

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3. What do we hope to achieve?

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## Stakeholder Analysis

Stakeholder: \_\_\_\_\_

1. What is the stakeholders' interest or relationship with the municipality?

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2. What influence does the stakeholder have with the municipality?

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3. What influence does the municipality have with the stakeholder?

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## Stakeholder Analysis (continued)

4. What criteria does the stakeholder use to judge the municipality?

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5. As an organization, what does the municipality need from this stakeholder, to survive and prosper?

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6. How important is the stakeholder to the municipality?

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7. Rank: \_\_\_\_\_



## Municipality's Values Worksheet

1. Who are we as a municipality?

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2. Our municipality must respond to what are the basic needs or problems? (For example: social, business, protection, education, urban and rural development)

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3. What does our municipality want to do to recognize or anticipate and respond to these needs or problems?

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4. What should the municipality's responses be to the key stakeholders?

- a.
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## Municipality's Values Worksheet (continued)

- b. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- c. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- d. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- e. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- f. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. What is the municipality's philosophy and what are the municipality's core values?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. What makes our municipal government structure distinct or unique?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## Situation Assessment

### Data Collection

#### 1. Physical Environment

- geographical features
- development patterns
- land use and zoning
- natural resources/features
- open space
- infrastructure (e.g. water, sewer, roads)
- condition of developed areas
- major provincial transportation corridors
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

#### 2. Economic Environment

- economic base
- resource base
- commercial development
- retail development
- office development
- industrial development
- housing development
- tourism development
- real estate development
- trade area profile and markets
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



## Situation Assessment

### Data Collection (continued)

#### 3. Social Environment

- population/demographics
- labour force
- social services
- community organizations
- community facilities
- recreational facilities
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

#### 4. Cultural

- history
- historic sites
- museums
- schools
- universities and colleges
- theatres
- libraries
- festivals
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



## Situation Assessment

### Data Collection (continued)

#### 5. Municipal Organization

- municipal government structure
- municipal services (e.g., recreation, fire, police)
- municipal resources (e.g., equipment, land)
- budget and financial considerations
- workforce expertise and resources
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

#### 6. Interest Groups

- Business Groups (e.g., downtown, industrial parks)
- Environmental Groups
- Cultural Groups
- Service/Community Organizations
- \_\_\_\_\_
- \_\_\_\_\_

#### 7. Surveys

- questionnaires
- interviews
- focus groups
- public meetings
- \_\_\_\_\_
- \_\_\_\_\_



**SWOT Analysis**  
**Internal Strengths Worksheet**

Strength # \_\_\_\_\_

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**SWOT Analysis**  
**Internal Weaknesses Worksheet**

Weakness # \_\_\_\_\_

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**SWOT Analysis**  
**External Opportunities Worksheet**

Opportunity #\_\_\_\_\_

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**SWOT Analysis**  
**External Threats Worksheet**

Threat # \_\_\_\_\_

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## Strategic Issue Identification

1. What is the issue? (This must be an issue which the municipality can take some action.)

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2. Who considers this to be an issue?

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3. Why is this an issue? (What makes this an issue in terms of the municipality's mission and mandates, and the SWOT analysis?)

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4. What are the consequences of not addressing this issue?

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## Strategic Issues Test

Strategic Issue: \_\_\_\_\_

1. When will the “strategic” issue confront the municipality?
  - (1) immediately
  - (2) next year
  - (3) two or more yearsScore: \_\_\_\_\_
  
2. How broad of an impact will this issue have on the municipality?
  - (1) single division
  - (2) department
  - (3) entire municipalityScore: \_\_\_\_\_
  
3. What impact will this strategy have on the municipality’s budget?
  - (1) minor
  - (2) moderate
  - (3) majorScore: \_\_\_\_\_
  
4. Will the strategies for issue resolution likely require:
  - a. Development of new service goals and programs?
    - (1) no
    - (3) yesScore: \_\_\_\_\_
  
  - b. Significant changes in tax sources or amounts?
    - (1) no
    - (3) yesScore: \_\_\_\_\_



## Strategic Issues Test (continued)

c. Major facility additions or modifications?

(1) no

(3) yes

Score: \_\_\_\_\_

d. Significant impact upon staffing levels?

(1) no

(3) yes

Score: \_\_\_\_\_

5. What is the lowest level of management that can decide how to deal with this issue?

(1) Line Staff Supervisor

(2) Department Head

(3) Town Manager, CAO or Council

Score: \_\_\_\_\_

6. What are the probable consequences of not addressing this issue?

(1) inconvenience or inefficiency

(2) significant service disruption or financial impact

(3) long term service disruption or large financial impact

Score: \_\_\_\_\_

7. How sensitive is the issue relative to community, social, political or cultural values?

(1) minor

(2) moderate

(3) major

Score: \_\_\_\_\_

Generally speaking, if the scores are predominately 2 and 3, it can be considered a major strategic issue. If the scores are predominately 1 and 2, it can be considered more of an operational issue.



## Practical Alternatives

Strategic Issue: \_\_\_\_\_

What are the practical alternatives the municipality might pursue to address this strategic issue?

Practical Alternative # \_\_\_\_\_

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Practical Alternative # \_\_\_\_\_

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Practical Alternative # \_\_\_\_\_

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## Barriers Identification

What are the barriers to the realization of these alternatives?

Barrier # \_\_\_\_\_

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Barrier # \_\_\_\_\_

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Barrier # \_\_\_\_\_

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## Major Proposals

What are the major proposals the municipality might pursue to either achieve the alternatives, or overcome the barriers to their realization?

Strategy # \_\_\_\_\_

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Strategy # \_\_\_\_\_

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Strategy # \_\_\_\_\_

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## Strategic Action Plan

Strategy # \_\_\_\_\_ Name of Initiative: \_\_\_\_\_

Project/Program description: \_\_\_\_\_

\_\_\_\_\_

Intended Outcomes: \_\_\_\_\_

\_\_\_\_\_

Responsibility Centres: \_\_\_\_\_

\_\_\_\_\_

Feasibility: \_\_\_\_\_

\_\_\_\_\_

Resources Needed: \_\_\_\_\_

\_\_\_\_\_

Impact upon other Strategies: \_\_\_\_\_

\_\_\_\_\_

Timetable: \_\_\_\_\_

Immediate Action Required: \_\_\_\_\_

\_\_\_\_\_



## Major Actions Worksheet

What major actions, with existing staff and within the existing job descriptions, must be taken within the next year to implement the strategies or proposals?

Strategy # \_\_\_\_\_ Major Action # \_\_\_\_\_

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Strategy # \_\_\_\_\_ Major Action # \_\_\_\_\_

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Strategy # \_\_\_\_\_ Major Action # \_\_\_\_\_

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Strategy # \_\_\_\_\_ Major Action # \_\_\_\_\_

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## **Progress Evaluation**

Strategic Action Plan: \_\_\_\_\_

**Responsibility:**

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**Feasibility:**

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**Resources:**

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**Timetable:**

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