

5-year Strategic Plan: Update

Board of Selectmen

September 7, 2021



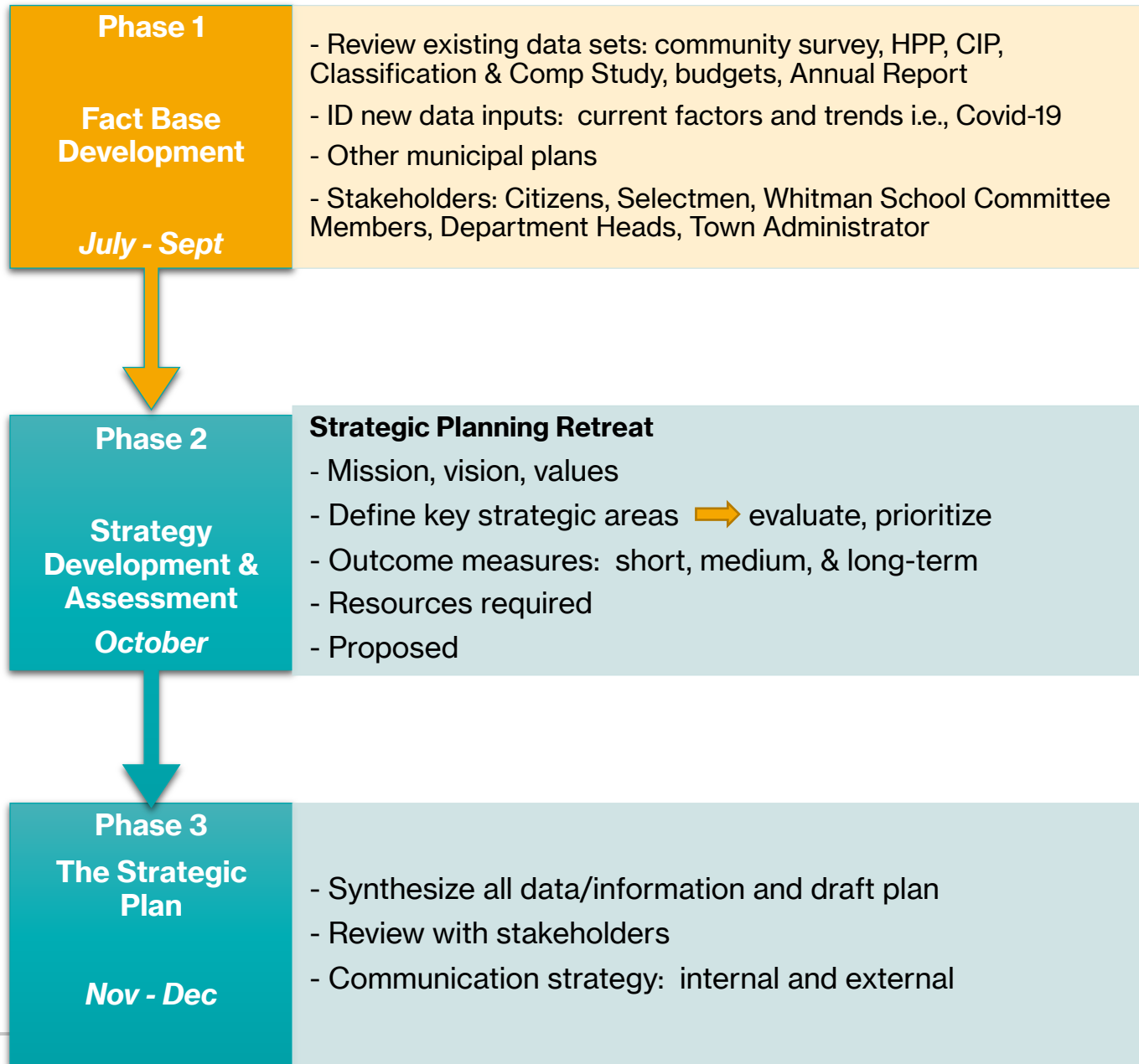
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Strategic Planning



- **Strategic planning is an organizational management activity** used to:
 - ✓ set priorities
 - ✓ focus energy and resources
 - ✓ strengthen operations
 - ✓ ensure that employees and other stakeholders are working toward common goals
 - ✓ establish agreement around intended outcomes/results,
 - ✓ and assess and adjust the organization's direction in response to a changing environment.
- It is a disciplined effort that **produces fundamental decisions and actions** that shape and guide what an organization is, who it serves, what it does, and why it does it, **focusing on the future.**
- Effective strategic planning **articulates where an organization is going and the actions needed to make progress and how it will know if it is successful.**

Planning Phases



Phase 1: Organization review and fact base development July - September

Element	Objective
Background research: existing reports and data sets	<ul style="list-style-type: none"> • Gain ingoing perspectives on key issues • Organization review
Department Head Interviews	<ul style="list-style-type: none"> • Capture and detail a range of insights • Understand dynamics, trends, emerging issues & priorities
Board of Selectman Interviews	<ul style="list-style-type: none"> • Capture and detail a range of insights • Understand dynamics, trends, emerging issues & priorities
Whitman School Committee Members	<ul style="list-style-type: none"> • Capture a wider set of perspectives
Comparative benchmarking analysis of analogous cities & towns	<ul style="list-style-type: none"> • High-level review of strategic plans, vision/mission statements, short and long-term goals, and performance measures.

- **24 interviews completed to date:**
 - 14 Department Heads
 - Town Administrator
 - School Superintendent
 - 4 members of the Board of Selectmen
 - 4 Whitman School Committee Members

Phase 2: Strategic Opportunities Development & Assessment

Element	Objective	When
<ul style="list-style-type: none"> • Strategic Planning Retreat 	<ul style="list-style-type: none"> • Daylong retreat with Department Heads, Board of Selectmen, Whitman School Committee members to: <ul style="list-style-type: none"> • Articulate mission, vision, values • Define and prioritize a range of overarching 5-year strategic priorities • Identify goals, objectives, and performance metrics informed by Phase 1 fact base and identification of and potential for new opportunities • Evaluate strategic opportunities based on alignment with mission, vision, and values and potential for impact • Initial perspective on required investments and a strategic analysis based on: <ul style="list-style-type: none"> • utilization of current assets, infrastructure & capabilities; • compelling value for constituents; • uncertainties and risks; • investments & staffing implications 	<p><i>October</i></p>

Phase 3: The Strategic Plan



Element	Objective	When
<ul style="list-style-type: none">• Final Strategic Plan	<ul style="list-style-type: none">• Final insights and recommendations in a 5-year strategic plan that:<ul style="list-style-type: none">• Captures the Town’s vision, mission, strategic goals, objectives• Provides an implementation roadmap• Is a framework for tracking monitoring, and evaluating key indicators to guide implementation, track progress, and report outcomes	<i>November - December</i>



Next steps & Questions

- Identify date for strategic planning retreat