

# Strategic Workshops for Public Agency Governing Boards and Executive Teams

## RECOMMENDED APPROACH

### PHASE 1 Preparatory Interviews

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Our strategic planning engagements typically begin with interviews with the key stakeholders to help us better understand the various perspectives of the agency and anticipated outcomes from the strategic planning process. We have a standard set of interview questions which examine stakeholder insights on agency performance, strategies, opportunities, challenges and uncertainties. We also solicit input on the draft agenda for the workshop. Key stakeholder may include governing board members, chief executive, staff executives and other stakeholders.

We find individual interviews work best for strategic processes. The interviews are conducted by the same individual who will be facilitating the strategic workshop. Interviews are held in confidence. The information gathered from the interviews is used to inform the agenda and the discussion at the strategic workshop, however the consultant does not share the content of individual interviews or who shared what information. This helps to insure an honest and open conversation and, by better informing the facilitator, contributes to a more productive process. Ideally the interviews can be either face-to-face or by telephone. Interviews typically last 45-60 minutes.

Following the completion of the interviews we prepare a final draft workshop agenda for review by senior staff.

### PHASE 2 Strategic Workshop with Board and Staff

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Based on the needs of the agency, we have found that a Search Conference approach works well in most public agency strategic workshops. Our approach is a hands-on engagement of the participants. We use various discussion techniques to ensure all perspectives are heard and that no one individual or group dominates the discussion. Various group process techniques help eliminate ideas with little agreement, focus participants on areas of agreement and move the group towards consensus on key issues. Where there is disagreement we document that disagreement and help groups identify options for solutions or alternatives.

Among the techniques we use:

- \* Brainstorm
- \* Small group discussions
- \* Nominal group technique
- \* Multi-voting
- \* Affinity diagram
- \* Strategic plan litmus tests

Our strategic workshops begin with broad discussions and insights and then narrows those insights to specific agency goals and strategies. The facilitated conversations typically track the following path:

- a) *External Scan*: How has the world changed in the last five years which influence the work of the agency?

- b) *Desirable and Probable Future*: Looking five years out what are the desirable and probable futures for the issues affecting the agency? How can the futures be influenced to help assure the desirable future?
- c) *System Analysis – History*: What are the key milestones and successes of the agency?
- d) *Public Value of Agency*: How does the agency want to be known by the community? What does success look like? Examine the mission and vision for the agency. Develop key values.
- e) *System Analysis – SWOT*: Assess the strengths, weaknesses, opportunities and threats of the agency.
- f) *Strategic Initiatives*: Identify key initiatives for the agency and draft initial short and longer term goals which will move the agency towards the desired future.
- g) *Action Planning*: Identify key strategies and next steps.

At the end of the day the group typically has developed a picture of its desired future, updated or created a mission and vision, identified three to five strategic initiatives and begun work on establishing 12-18 month and four year goals. At this point we ask the group to allow staff – or a small work group – to take the drafted materials and refine them for later review and discussion by the full group. This includes drafting complete language for the mission, vision, and values along with the strategic initiatives and preliminary goals and strategies.

We typically plan a 7-8 hour workshop, beginning at 8:30 AM (start networking refreshments at 8:00 AM) and concluding by 4:00 PM with a working catered lunch. Half-day workshops are possible depending on the desired outcomes from the agency

### **PHASE 3 Follow Up Workshop**

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We recommend a follow-up workshop in 30-45 days to review the work refined by staff or the work group and to continue work on constructing the strategy for the agency. This typically a half-day workshop designed to accomplish the following:

- a) *Mission/Vision/Values*: Review and finalize language.
- b) *Strategic Initiatives*: Proposed language is reviewed. Group discusses what success would look like for each initiative and the organizational capacity to achieve those successes.
- c) *Goals and Strategies*: Group reviews specific short and long term goals and identifies measurable strategies to achieve those goals

Since this is a workshop format, the governing board will not be adapting this formally at the workshop. We recommend the outcomes from the two workshops be agendized at a regular meeting for adaption. This allows final refinement by staff, time for public review and opportunity for the public to comment before the governing board takes final action to adopt the strategic direction for the organization.

### **PHASE 4 Debrief with Agency Executives**

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We follow up on a workshop with a summary consultation with the agency executive to answer any questions or provide insights from the workshop conversation. As an added service we can be engaged to prepare a draft strategic plan or facilitate follow-up sessions.