

What's in your plan?

Envisioning your township's future

A printout of the township parks and recreation department's strategic plan is never far from Vanessa Hardy's desk.

The parks and recreation director of **Comstock Charter Township** (Kalamazoo Co.) reaches for the document anytime a resident suggests a buying a piece of property, hosting a concert in a park or starting a children's nature program. A quick scan of the department's mission and goals will tell her if the suggestion is a good fit, or if it conflicts with the township board's vision. Hardy knows that without the strategic plan, she could become distracted by her department's day-to-day operations and lose sight of the big picture.

Since the 1990s, the township's parks and recreation department has relied on a five-year strategic plan to guide its priorities, decisions and projects. What started as a necessary stepping stone to applying for Michigan Department of Natural Resources (DNR) grants has become a vital tool used not just by Hardy, but also by members of the parks board.

Their painstaking planning has paid off with multiple grants, updated facilities and preparation for recreational trends, such as trails. They're not always able to meet every goal, but over the years, they've learned that isn't really the point.

"You'll never get to do everything," Hardy said. "Your plan is more of a direction. It helps me stay focused on our mission."

Comstock Charter Township isn't alone in its reliance on strategic planning. For decades, businesses, nonprofit organizations and local units of government have gathered demographic information and public input, set goals and created action plans to lead them into the coming years.

Townships that use this process decide for themselves what they want their future to look like. They take a hard, honest assessment of their current status, and how that compares to their ideal future. Then, they determine what they must do to realize change.

Strategic planning goes beyond simply creating a document that the township board must approve. It brings community leaders and residents together and ensures that each is on the same page. It guides township board members and officials to make decisions that are in line with the overarching mission and goals for the community.

Different approaches to this process may work for different townships. Some might choose to hire a consultant and spend several months gathering data and crafting a large document. Others may decide to complete the plan in-house, or to finish much of the planning during a short retreat. Your plan may cover the entire township, or just one department. What each plan will have in common is the goal of working toward a vision for the future.



What is a strategic plan?

A strategic plan is essentially a guide to help your township reach its desired destination. It's a road map designed to lead your township to a place of change.

Since the 1960s, strategic planning has evolved into a long-term process used by both businesses and the public sector to guide them toward a clearly defined vision. Over the years, the focus has shifted to the process itself as units of government, nonprofit organizations and business leaders integrate strategy and long-term thinking into their everyday decisions.

Townships that create strategic plans take a step back from the day-to-day operations and scrutinize their current realities. They evaluate what the township is doing well, and where it needs improvement. They also look outside the township for positive opportunities—as well as upcoming challenges. These assessments are not accepted as facts that cannot be changed. A strategic plan allows the township to address problems and threats while enhancing its strengths.

Plans of this nature cover a span of several years and involve a great deal of time, information about the community and public involvement. They require elected and appointed officials to envision what they want their township to look like in the next 10 years or so. Multiple forums and meetings must be held to provide residents with an opportunity to voice their opinions and offer input into the direction of the township. Goals are set, and strategies are created to help meet those goals. And long after the strategic plan is in place, board members and department heads must constantly evaluate the township's progress, and whether any components of the plan should be changed.

A strategic plan is not simply a list of projects to be completed and checked off. It is a living document that, in reality, is never truly complete. It's not a magic fix that guarantees success. Rather, it is a tool to be used daily as a township moves into the future.



This continuing education article and accompanying self-assessment is worth 2.0 elective credits in MTA's Township Governance Academy (TGA). See page 27 for details.

OBJECTIVES

- To understand the concepts and tools of the strategic planning process
- To learn why strategic planning is important to the township
- To recognize the importance of tracking and evaluating the strategic plan on an ongoing basis

CORE COMPETENCIES

- Possess vision, especially relative to the township's needs or potential
- Utilize strategic planning to attain objectives



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Why plan?

Many officials might say they already plan for their township's future. They use a master plan to make zoning decisions and carefully outline their finances in their annual budget.

Mark St. Charles, supervisor of **Green Oak Charter Township** (Livingston Co.), knew he and his board had a grasp of their township's big picture, but that picture was easily lost in the daily demands of running a local government.

Going through the strategic planning process gave him assurance that he and his board had the same priorities for the township. They knew they didn't have conflicting agendas and could work more efficiently to improve their community. "From time to time, you have to take a break from the day-to-day governance of the township, have a meeting, roll up your sleeves and talk about the bigger picture," St. Charles said.

Board members and officials who know what's important to their community aren't pressured to attempt to take on every project that comes across their desks. They know where the township is headed, and they have a plan to get there. Residents feel a sense of ownership as they are brought into the conversation of what the future should look like, and they become more active participants in bettering their community.

Townships that plan ahead are more likely to be proactive, rather than reactive. Their leaders are familiar with the community's current status, and they're aware of upcoming trends and changes that may pose a threat. Instead of addressing threats as they come, townships with strategic plans know far in advance how to use their strengths and positive opportunities to manage, or even avoid, potential problems. Their plan provides them with a framework and context that helps them make smart decisions that are in their township's best interest.

The cycle of continual planning can also help to keep townships from becoming stuck in a rut. Without evaluating

strengths, weaknesses and goals on a regular basis, local governments can become satisfied with the status quo, and eventually become stagnant. Strategic planning forces officials to think about the future, and it encourages them to brainstorm fresh ideas that reinvigorate their communities.

Deciding not to do a strategic plan may actually disqualify your township or department from grant opportunities. Many grants, such as some offered by the DNR, require strategic plans from applicants and have detailed guidelines for acceptable plans. The act of strategic planning could open up your township to more funding opportunities.

Getting started

One person alone cannot create a strategic plan. Though the initial idea may start with one individual, it must spread to the rest of the township board to see movement.

A good first step is to take the idea to the entire board for discussion. Board members can then decide whether they want to move forward, and if they do, they should take formal action. Some boards may decide to form a strategic plan task force or committee, with a few members and even people from the community assigned to lead the project.

Townships that engage in strategic planning should map out a schedule and overview of what they want their process

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to include. For **Filer Charter Township** (Manistee Co.), hiring an outside consultant was the best option. Officials agreed that a professional could efficiently lead the board and residents through the process, and they applied for a grant with the help of the Manistee County Alliance for Economic Success. Once their grant was awarded, they hired a consulting firm to gather demographic information, organize public meetings and create a planning document.

Hiring a knowledgeable, skilled person allowed the township to finish its strategic plan much more quickly than it could have on its own, Zoning Administrator **Lynn Kooyers** said. The consultant directed them to use techniques and strategies that were proven to work in her previous experience. Using a consultant also allowed the township's small staff to avoid becoming bogged down and overworked with additional duties.

"It was very helpful for us to have someone who had been through this process before with different communities," Kooyers said. "I felt that the professional guidance was well worth the fee."

Another option for townships that would like professional help but aren't sure of the price tag is asking for help from a regional government association. Green Oak Charter Township Clerk **Michael Sedlak** reached out for help from the Southeast Michigan Council of Governments (SEMCOG), which allowed each board member to fully participate in the planning process without stepping back to act as a facilitator—and without paying a higher price. "We all felt strongly that I needed to be a participant and not a moderator," St. Charles said. "Having another facilitator allowed me to be an active participant, and not a moderator."

Townships should also map out the logistics before entrenching themselves in the process. Officials should determine who will lead the charge of tasks such as scheduling meetings and sending notices. Decide in advance if the township wants to target certain groups in the community for involvement, and how often they should be involved.

Officials should also pick a schedule that works best for their township. For example, Green Oak Charter Township chose to complete the bulk of its planning at a board retreat. Others, including Filer Charter Township and Comstock Charter Township, spread their meetings throughout the course of several months. (Remember, if the meetings include a quorum of the township board, they are subject to the Open Meetings Act, requiring proper notification and recordkeeping of action taken.)

Townships that don't use a consultant might benefit from seeking out other townships that have completed the process for advice on necessary legal steps. Other organizations, such as the DNR, might also require specific details that could help townships that are starting their first strategic plan.

Going public

Another important decision to make is how your township will involve the public in creating the strategic plan. This part of the process could come in a variety of forms. Some townships, such as Green Oak Charter Township, get

an idea of what the public wants to see by conducting an in-depth survey. The feedback from the survey responses is then used by the strategic planning committee to determine priorities and values.

Filer Charter Township chose to conduct a series of focus group meetings, giving everyone who wanted to attend an ample opportunity. Invitations were mailed to key people from sectors such as business, industry and transportation, ensuring that the meetings would be well-attended. The board had identified priorities before gathering the focus groups, and each was printed on a large display board. Then, members of the public who attended the meetings were given pushpins that they used to mark the priorities most important to them. The priorities that received the most pushpins became the township's priorities.

"People appreciate being asked their opinion about where they live," Kooyers said. "Involving people early made a big difference. They took pride in the fact that they were included."

Comstock Charter Township's parks and recreation department tries to keep the public involved even before it's time to start a new strategic plan. In addition to a five-year survey and workshops, Parks and Recreation Board Chair **Linda Law** seeks public input at least once a year to stay in tune with the needs of the community. It's better to hear what the community has to say on an annual basis, not just every five years, she said.

Cast the vision

Strategic planning is essentially a two-part process. Before you can develop a strategy for change, you need to know where you're headed. Creating a vision is a crucial first step in setting a direction for your township. Once you have completed this step, the rest of your strategic plan will address how your township can achieve the vision.

This is a time to gather a variety of people and perspectives. Your strategic planning committee could involve township leaders, and even residents and members of the business community, and ask them to think creatively about their community's future. Visioning is a chance to imagine what your township would be like in an ideal world.

The visioning process alone could take weeks, depending on the timeline and method your township has chosen. Some townships may choose to spread this part of strategic planning over multiple board meetings, or hold a special meeting dedicated to visioning. It could be done in community workshops, or in an informal setting among strategic plan committee members.

In Filer Charter Township, the hired consultant took a consensus of township planners before crafting a vision statement. Planners were given questions to consider in advance, then met to discuss their answers. Their thoughts were eventually turned into a one-page, detailed vision statement outlining ideal conditions for the township.

Other townships may find that their vision can be conveyed in a shorter statement. Comstock Charter Township's parks and recreation strategic plan is significantly

shorter, using a bulleted list describing what leaders want the department to be like.

Whatever the length, the vision statement should set the foundation for the strategic plan. It should be descriptive while instilling pride in residents and inspiring them to join in the effort of improving the community. At the same time, leaders should be able to measure their success and weigh decisions against the vision statement.

If your township already has a vision or mission statement, leaders should take a fresh look at it. Re-evaluate your statement based on current conditions and decide if it's still applicable. Chances are that it should at least be updated.

You are here

Each set of driving directions includes two locations—a starting point and an ending destination. The vision statement sets the destination for a township, but leaders can't start developing strategies to reach that destination until they know their current location. To accomplish this, township officials should conduct an assessment of both their township's internal conditions and external factors that may have an impact. This is typically referred to as a SWOT analysis—strengths, weaknesses, opportunities and threats.

A township's internal scan can involve reviewing any piece of information that officials can get their hands on—Census data (www.census.gov); information from MTA, such as salary studies (www.michigantownships.org), or from regional planning groups; facilities such as water, sewer, transportation and telecommunications; local employers and industries; and assets such as parks, natural resources and attractions. Future projections of population and economic changes may also play a role. The committee should consider which services the township performs well, and whether any need improvement. Public input could also be used at this point to get an accurate portrait of how residents perceive their community and if there are needs that are not being met.

Once the scan is complete, the committee should make a list of the township's strengths and weaknesses. Study the information that was gathered and determine whether these items should be considered positive or negative. For example, Green Oak Charter Township lists strong leadership and natural environment assets as strengths, while an outdated police station and a lack of community engagement are listed as weaknesses. Ask yourselves question after question to determine the root issue of problems in your community.

The township should also conduct an external scan of factors that may affect the community but are beyond the leaders' control. These could be industrial or recreational trends, the economic climate and other short- or long-term changes that could impact your township. Opportunities could mean people, organizations or facilities that are under-utilized assets. Your committee could also consider grant



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funding opportunities from public and private sources of which the community hasn't taken advantage.

Once the scan is complete, list the opportunities and threats that your township faces. In Comstock Charter Township, the parks and recreation department listed an energetic community with an interest in pursuing improvements as an opportunity, while a challenging economy was considered a threat.

Your strategic planning committee will likely find that many of the issues identified in this exercise will fall into categories, such as infrastructure, transportation, public safety and economic development. Grouping similar issues into one category can help narrow your scope and determine the major priority areas for your township.

The analysis may result in more category areas than can possibly be addressed in the next five years. Committee members should rank the categories in order of importance and, if you have more than a handful, eliminate the least important items. The eliminated items can always be included in the next strategic plan if they don't make the cut this time.

Goals and objectives

With the SWOT analysis complete, leaders should be able to see clearly how the township falls short of its vision and what needs to change. Your strategic planning committee should then turn the needed changes into general goal statements. A goal should not be mistaken for a project to be assigned. It is instead a realistic, achievable direction that will lead to change.

In Comstock Charter Township, the parks and recreation board had a vision for its parks to be considered valuable assets for relaxation, recreation and learning. However, a weakness identified in the SWOT analysis was a lack of funding in the department. The parks and recreation board combated this weakness by setting a goal of establishing

partnerships with businesses, other government entities, and local and regional parks and recreation programs and services.

By partnering with outside programs, the township is able to host summer day camps in its wooded areas, even though it doesn't have the capacity to provide the staff and programming. "We don't have the money for programming, but we have the space," Hardy said. "We're able to join with partners and host programs that we couldn't offer on our own."

Township goals should then be broken down into objectives, a word that is often used interchangeably with the word "goals" but is actually quite different. Where goals are more general, objectives are specific and include outcomes and dates. For example, Filer Charter Township set a goal of encouraging a healthy local economy through more development. An objective was then to expand its sewer system in order to accommodate that development.

It's all about strategy

If the strategic planning process ended with setting goals and objectives, a township's plan would likely become a document of nice ideas that gathers dust on a shelf. Strategy is absolutely necessary to turn the township's vision into a reality. Your strategy should answer the question of *how* your township will reach its goals. It should translate into assignments and tasks that can be evaluated on an ongoing basis.

This process should start by answering a basic question—how do we meet this goal? The strategic planning committee

should spend time brainstorming strategies and thinking through all possible consequences of each one. Ask yourselves if the strategy addresses the root of the problem, or only an effect of the problem. Decide as a group which strategies will be the most effective, and include them in your plan.

These strategies are then broken down even further into a tactical plan. This is the nitty gritty of how your plan will be carried out in the township's daily operations. Your tactical plan is what turns your plan into action once it receives final approval by the township board. It should assign tasks to specific employees and community groups, and include deadlines to accomplish those tasks. Your tactical plan should have a metric so that it can be easily measured in the evaluation process. Give your tactical plan a timeline so that it doesn't stretch out indefinitely.

Green Oak Charter Township's board nailed down its strategies and tactical plan during its intensive retreat. Members divided into teams and volunteered to champion tasks such as revamping the township website, purchasing land for a new public safety facility and developing a piece of property into a new park. They assigned themselves deadlines and outlined measures for success.

Not only did this system provide the township with a plan of action, it also ensured that the tasks were spread among multiple people, and no one was left to carry the bulk of the weight. "Instead of one person trying to do everything, everybody divided up into teams," St. Charles said. "I can't



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do everything, nor do I want to. It's nice to let somebody else handle it."

Evaluating the process

With your plan complete and approved, it's easy to move on and forget about the goals and strategies that once energized and excited your township leaders. Frequent evaluation helps to ensure that your plan remains an integral part of your community's future.

Strategic planning experts recommend that the township board set aside time on a regular basis to check in with your strategic plan's progress. Your township could hold a town hall or strategy meeting every year, or even every six months, and invite the public to participate. Ask for a progress update at board meetings to keep the plan at the front of leaders' minds.

Board members should also monitor changes in the community that may affect your plan. Factors that you considered as you created your strategies may be different later, and you may choose to adjust your plan. For example, Comstock Charter Township's parks and recreation department had planned to create a dog park during their five-year planning cycle. Later, they learned that plans were already in the works for a dog park in a county park that is

inside their township. Law decided there was no need to duplicate the county's services, and that the township's focus would instead be to help enhance that service.

Your strategies shouldn't be considered a to-do list that will one day be complete. Township leaders should certainly keep plan deadlines in mind, and discuss what went wrong if a deadline is missed. However, this does not mean that your strategic plan was unsuccessful. Some goals that were set may be unrealistic. Others may take longer to reach than originally anticipated.

The goal of strategic planning is to help your township move toward a destination. It's not about the destination itself. The process will prove even more valuable to your township.



Bethany Mauger, MTA Staff Writer

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