



Strategic Planning Policy 1.1.0

POLICY. The Incline Village General Improvement District recognizes the importance of using some form of strategic planning to provide a long-term perspective for service delivery and budgeting, thus establishing logical links between authorized spending and broad organizational goals. While there is not a single best approach to strategic planning, a sound strategic planning process will include the following key steps:

- 0.1 Initiate the Strategic Planning Process.** It is essential that the strategic plan be initiated and conducted under the authorization of the Board of Trustees and the District's General Manager. Inclusion of other stakeholders is critical, but a strategic plan that is not supported by the Board of Trustees and the District's General Manager has little chance of influencing an organization's future.
- 0.2 Prepare a Mission Statement.** The mission statement should be a broad but clear statement of purpose for the District. One of the critical uses of a mission statement is to help an organization decide what it should do and, importantly, what it should not be doing. The District's goals, strategies, programs and activities should logically cascade from the mission statement.
- 0.3 Assess Environmental Factors.** A thorough analysis of the District's internal and external environment sets the stage for an effective strategic plan. Local, regional, national, and global factors affecting the community should be analyzed and include the following:
 - 0.3.1 economic and financial factors;
 - 0.3.2 demographic trends;
 - 0.3.3 legal and/or regulatory issues;
 - 0.3.4 social and/or cultural trends;
 - 0.3.5 physical conditions;
 - 0.3.6 community development;
 - 0.3.7 intergovernmental issues;
 - 0.3.8 technological changes, and
 - 0.3.9 environmental changes.



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- 0.4 Identify Critical Issues.** Once the Environmental Factor analysis has been completed, the next step is to use the resulting information to identify the most critical issues. Issue recognition should reflect stakeholder concerns, needs, and priorities as well as environmental factors affecting the District. The District will maintain mechanisms to identify stakeholder concerns, needs, and priorities. Among the mechanisms that might be employed to gather such information are:
- 0.4.1 public hearings;
 - 0.4.2 surveys;
 - 0.4.3 meetings of community leaders and citizen's interest groups;
 - 0.4.4 meetings with District employees; and
 - 0.4.5 workshops for the Board of Trustees and District Leadership.
- 0.5 Agree on a Small Number of Long Range Principles.** These written principles should address the most critical issues facing the District. It may be necessary to define priorities among these principles to improve their usefulness in allocating resources.
- 0.6 Develop Strategies to Achieve Long Range Principles.** Strategies relate to ways that the environmental factor can be influenced (internal or external) to meet long range principles. A single strategy may relate to the achievement of more than one principle. There should be a relatively small number of specific strategies developed to help choose among services and activities to be emphasized. Use of flowcharts or critical path mapping is encouraged in the design of strategies. To optimize the success of these strategies, opportunities should be provided for input from those who will be affected.
- 0.7 Develop Objectives.** Objectives are expected to be strategic, measurable, attainable, and timely. Objectives should be expressed as quantities, or at least as verifiable statements, and ideally would include timeframes.
- 0.8 Create an Action Plan.** The action plan describes how strategies will be implemented and includes services and activities to be



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performed, associated costs, designation of responsibilities, priority order, and time frame involved for the District to reach its long range principle or strategic objective.

- 0.9 Incorporate Performance Measures.** Performance measures provide an important link between the strategies, principles, objectives and actions stated in the plan and the services and activities funded in the budget. Performance measures provide information on whether strategies and objectives are being met.
- 0.10 Obtain Approval of the Plan.** The Board of Trustees will formally approve the Strategic Plan so it can provide the direction and policy for budget decisions.
- 0.11 Implement the Plan.** District stakeholders should work together to implement the plan. Moreover, the Strategic Plan should drive the Operating Budget, the Multi-Year Capital Plan, and long-term financial planning efforts.
- 0.12 Monitor Progress.** Progress toward meeting strategies and objectives should be monitored at regular intervals. The District will develop a systematic review process to evaluate the extent to which the Action Plan has been met.
- 0.13 Reassess the Strategic Plan.** Many external factors, such as the national or regional economy, demographic changes, statutory changes, legislation, mandates, and climate changes, may affect the environment and thus achievement of strategies. To the extent that external events have long-range impacts, strategies, objectives and actions may need to be adjusted to reflect these changes. New information about stakeholder needs or results may also require changes to the plan. It is desirable to minimize the number of adjustments to long term principles in order to maintain credibility. However, the District's Board of Trustees expects to conduct interim reviews each year, and more comprehensive strategic planning processes every five years, depending on how quickly conditions change. Performance measure results will be reviewed more frequently than the Strategic Plan.