



# Mecklenburg County's Strategic Business Planning Model

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2017  
19

STRATEGIC PLANNING & EVALUATION  
COUNTY MANAGER'S OFFICE

**What is Strategic Planning?**

A hand-drawn illustration in the top right corner shows the words "Strategic planning" written in a cursive, handwritten style. A hand holding a black pen is shown in the process of writing the word "planning".

# What is strategic planning?

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- Systematic approach of “envisioning” includes setting priorities, goals; outlining strategies and measures needed to get to the desired future
- Recognize emerging trends and patterns in the community, and predict issues in the future environment related to the marketplace, demand for service, changing community needs, etc...
- Allows for persons to translate vision into action
- Considers differences between strategies and tactics
  - Strategic thinking is leadership...creating the vision...doing the right things
  - Tactical thinking is management...executing the vision...doing things right
- Process for allocating resources over a defined period

# Strategic Planning Cycle



Update plans annually to ensure relevancy to business

# Strategic Planning Cycle



**Why is it Important?**

# Why important for Mecklenburg County?

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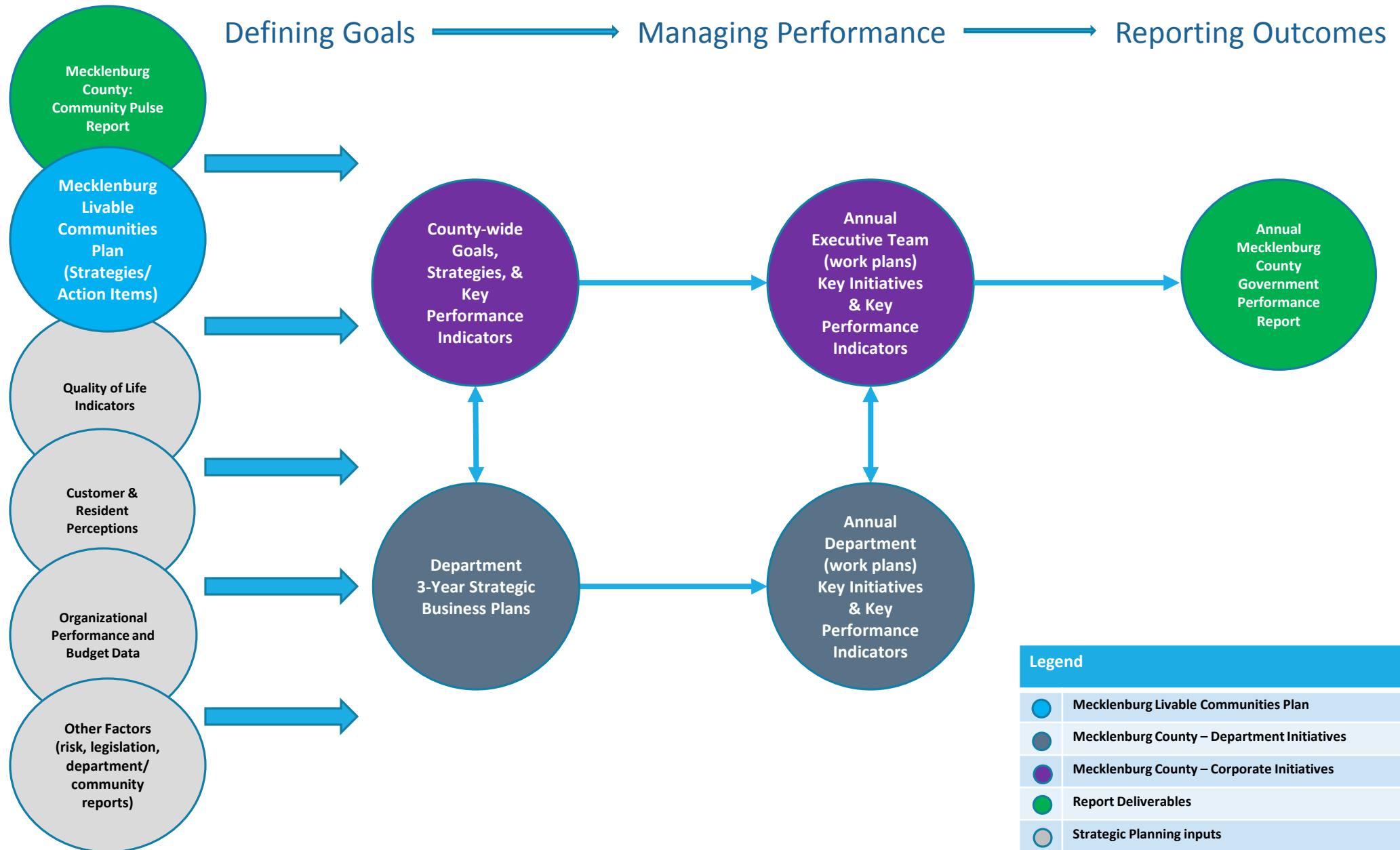
- We strive to meet community needs by setting goals and achieving outcomes
- Standardized approach for strategic planning using a methodology that spans the next three-years
- Improve strategic business planning at the department level
- Incorporate strategic thinking as part of our organizational culture...becomes the way we do “business”
- Align budget decisions to department strategic goals and strategic priorities



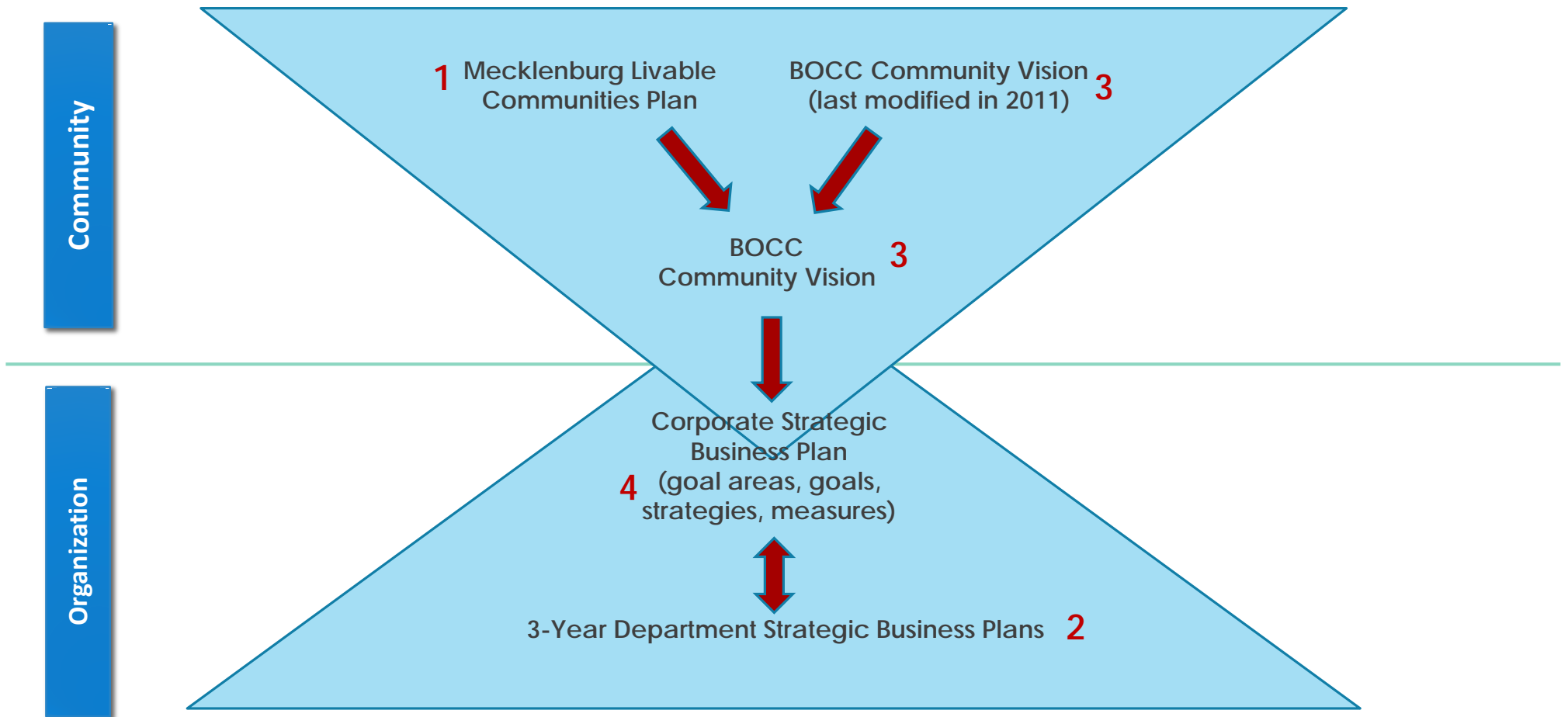
**What is the County's  
Approach?**



# Strategic Business Planning Framework



# Strategic Business Planning Vision to Action



# Department Strategic Business Planning Timeline (FY2015 – FY2017)

|                                  | FY15   |        |        |        | FY16                                     |                  |           |        | FY17   |        |        |        |
|----------------------------------|--------|--------|--------|--------|--|------------------|-----------|--------|--------|--------|--------|--------|
| Activities                       | Qtr. 1 | Qtr. 2 | Qtr. 3 | Qtr. 4 | Qtr. 1                                   | Qtr. 2           | Qtr. 3    | Qtr. 4 | Qtr. 1 | Qtr. 2 | Qtr. 3 | Qtr. 4 |
| Pre-Work                         |        |        |        |        |  |                  |           |        |        |        |        |        |
| Business Planning                |        |        |        |        | Department Business Planning             |                  | Budgeting |        |        |        |        |        |
|                                  |        |        |        |        | Mgrs. Cabinet Strategic Planning Retreat | Board Engagement |           |        |        |        |        |        |
| Post-Planning/<br>Implementation |        |        |        |        |  |                  |           |        |        |        |        |        |

# Department Strategic Business Planning Key Activities (FY2015 – FY2017)

| Activities                          | Item  |
|-------------------------------------|---|
| <b>Pre-work</b>                     |   |
| Summer 2014 – Spring 2015           | Prepare Strategic Planning approach and process   |
| <b>Dept. Business Planning</b>      |   |
| Spring – Summer 2015                | <ul style="list-style-type: none"> <li>• Department Strategic Planning “Kick-Off”</li> <li>• Department staff strategic planning and facilitation training</li> <li>• Manager’s Cabinet Strategic Planning Retreat</li> </ul> |
| Summer – Winter 2015                | <ul style="list-style-type: none"> <li>• BOCC engagement on department priorities</li> <li>• Departments draft 3-Year Department Strategic Business Plans (FY17 - FY19)</li> </ul>  |
| Winter 2015/16                      | Departments present preliminary year-one (FY17) strategic business plans to BOCC  |
| March 2016                          | Departments prepare and submit budgets linked to year-one (FY17) strategic business plans   |
| <b>Post-Planning/Implementation</b> |   |
| July 2016                           | Departments execute year-one (FY17) strategic business plan action items, key initiatives   |

**What is Included in a  
Strategic Business Plan?**

# Strategic Business Plan Elements

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- Vision Statement
- Mission Statement
- Environmental Context
  - Economic and Social Trends
  - Demographic and Social Changes
  - Other information
- Summary of Goals
- Director's Message



# Strategic Business Plan Elements (cont'd)

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**Goal:** A broad aim toward which your efforts are directed. It is a “what,” not a “how;” it tells you where you are going rather than how you will get there.

**Objective:** A specific and measureable milestone that must be achieved in order to reach a goal; it is also a “what.” A sub-level goal.

**Strategy:** A plan of action designed to achieve an objective. Strategies tell you “how” you are going to get there.

**Action:** A specific step required to deliver on a strategy. Actions are what you do and when; for every strategy, there are a number of actions.

A hand holding a black marker is writing the words "Strategic planning" in a cursive, handwritten style on a white surface, likely a whiteboard. The text is slanted upwards from left to right.

**What are the Key Themes  
for FY2017 – FY2019 Plans?**














# Development of Key Themes

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1. During September 10 County Manager's Cabinet Retreat, departments presented goals for FY2017 through FY2019
2. Goals comprised eleven key themes (internally and externally focused themes)
3. Key themes shared with the Board of County Commissioners on September 15
4. Key themes provided structure for presenting elements of strategic business plans during January 2016 Board retreat

# Strategic Business Planning Key Themes

| Organization-Focused (Internal)  |   |   |   | Community-Focused (External)  |   |   |   |   |   |   |
|--|---|---|---|---|---|---|---|---|---|---|
| Theme 1  | Theme 2   | Theme 3   | Theme 4   | Theme 5   | Theme 6   | Theme 7   | Theme 8   | Theme 9   | Theme 10  | Theme 11  |
|  |  |  |  |  |  |  |  |  |  |  |
| Talent Management( Talent Acquisition/ Development/ Retention)                   | Internal Communication and Public Awareness                                       | Leverage Financial Resources  | Leverage Technology to Optimize Service Delivery                                  | Optimize Investments in Criminal Justice  | Strengthen Families   | Economic Development  | Greater Economic Independence for Residents   | Aging with Dignity  | Community Health & Wellness   | Environmental Stewardship   |

**Other Considerations**

# Other Considerations

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- Department 3-Year Strategic Business Plans (FY17-FY19) will be rolling plans
- Annual review and updates to the Business Plans each summer/fall to ensure relevancy to business





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