

Session title: Board Members/Commissioners Roundtable: Agency Visions - The Art of Strategic Planning

Moderator/Panelists:

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Date and time: Tuesday December 10 2013, 10:15 am

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Session Summary

Bringing together heads of organizations, this round-table discussion focused on the objectives and development of strategic planning and the aspects it needs to cover.

To get the conversational ball rolling, discussions opened with a reflection on the role of participants as guardians of democracy and how their understanding of this duty influences their actions and decisions on a daily basis. Their watchdog function must always be kept in mind as it is the reason why they were appointed in the first place.

The room was divided between organizations with a strategic plan and those without one. For some, their strategic plan is in response to a legal obligation, notably in Quebec, while for others, the development of a plan is the result of new leadership or a desire to create a common vision for the entire organization. Lack of time was often cited by organizations that do not yet have a plan; however, they expressed a willingness to remedy the situation. The need to ensure a certain continuity despite having to deal with numerous retirements was often mentioned by organizations wishing to adopt a strategic plan.

The discussion then turned towards the strategic plan development process, notably whether plans should be drawn up by internal or external resources. Concerning this point, opinions were divided, some having developed an expertise internally, with others preferring to use external consultants as a means of ensuring a more diligent process. However, all participants affirmed the need to involve employees in the process.

Participants then discussed what should be included in a strategic plan. In Quebec, plans must contain the following elements: mission, vision, values, issues, strategic guidelines, areas of intervention, objectives, indicators and targets. The idea of having a few main pillars to frame reflections was raised by several participants. The importance of including components touching on human resources, finances and technology also appeared to be consensual. While some organizations make their entire strategic plan available to the public, others instead choose to disclose only a portion of it, notably the mission and vision.

Lastly, participants discussed accountability and performance measures, these two elements being intimately related to strategic planning and results-based management. The importance of establishing objective standards and the difficulty of setting work standards that do not necessarily control all stages of the work in progress were raised as issues for organizations. Nonetheless, these measures represent an important step towards better accountability and greater transparency.

In short, strategic planning appears to be a critical element of good organizational management, enabling greater internal collaboration and a better definition of the direction the organization wishes to take.