

# *Strategic Planning for Governmental Agencies*

*Day 4: Making a Difference*



***A presentation to the 2008 Pacific Emerging Issues Conference  
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Guam Society of Certified Public Accountants  
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Set your goal:

By 11:49 a.m. I want...

Remember a goal is a change in condition for the better.

*Just can't get enough of this?*

## **Notes from Duke's Casebook**

Volume 5, Issue 1

The Cynical and Resistant Edition

May 2008

The Facilitator's Toolbox  
Tricks to Overcome  
Cynicism

*The World's  
Very Best  
Margarita  
Recipe*

Tomorrow, Tomorrow,  
Tomorrow... Planning  
Can't Wait, Do it NOW!

Give me a card or send me an e-mail and I'll add you to my list.

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# The Process

*Set Foundation  
Mission, Vision,  
Values, Guiding  
Principles and  
Performance  
Measures*

*Scan, scan, scan,  
SWOT  
Identify Critical  
Success Factors  
Gap analysis.*

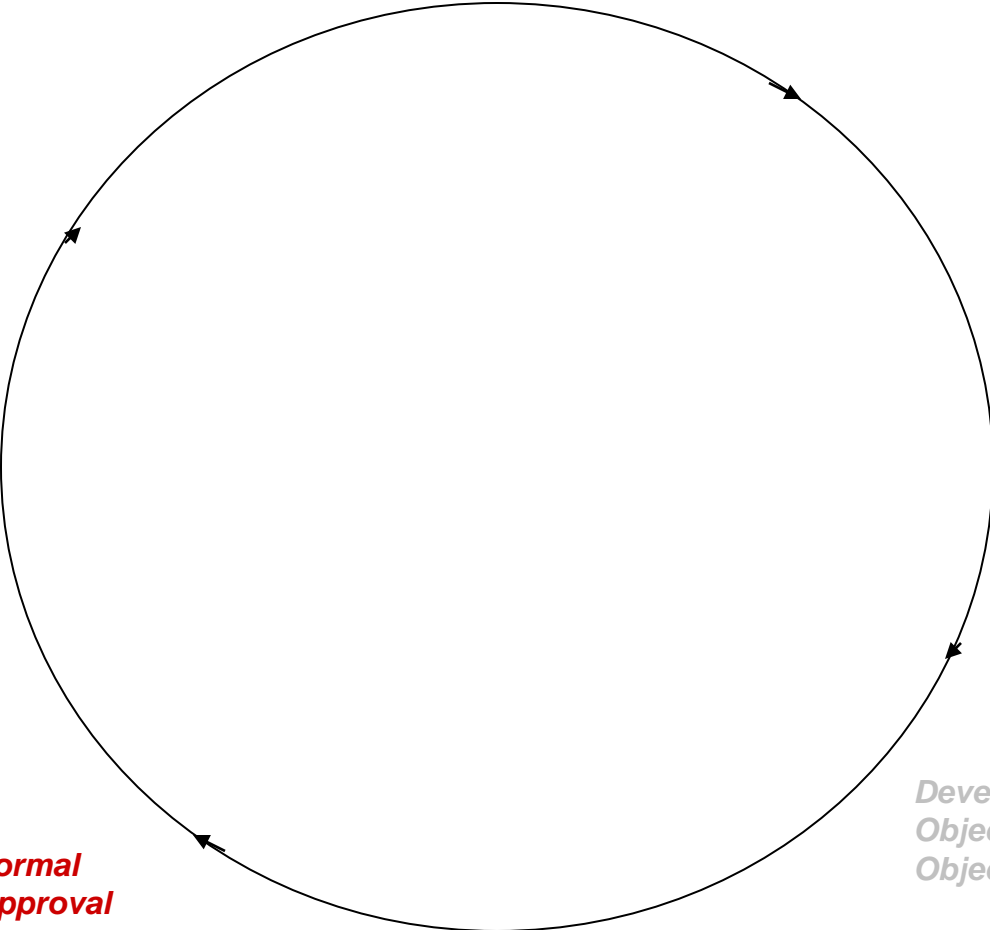
*Develop goals &  
Objectives, Prioritize  
Objectives.*

*Determine  
Action Plans,  
Budgets &  
Timelines.*

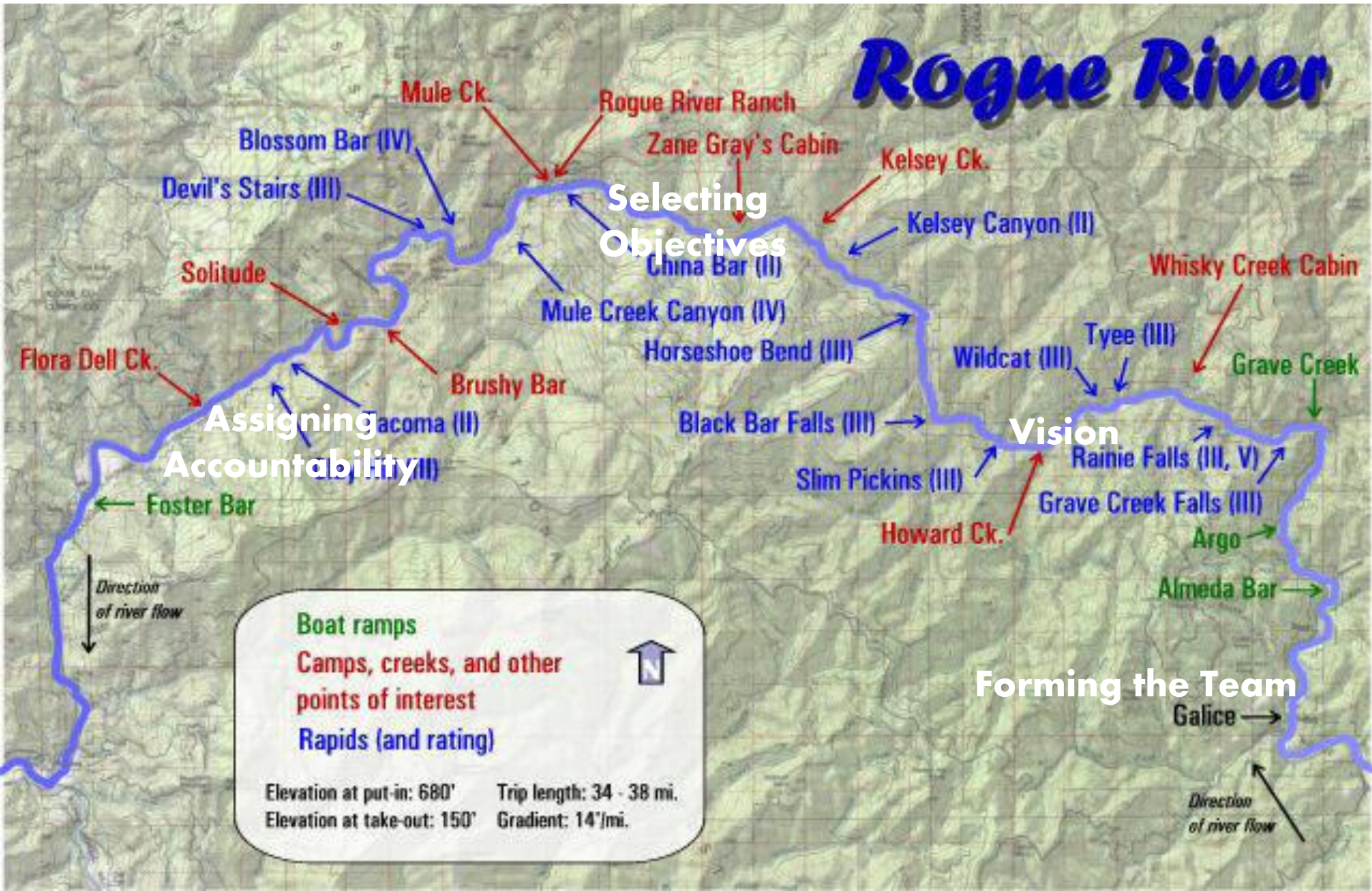
*Formal  
Approval*

*Implement*

*Assess,  
Evaluate.  
Modify.*



There will be rapids.



# Use the base camp model.



# How to ensure implementation

- get approval
- get buy-in
- get real
- prioritize and sequence
- compromise
- assure accountability, monitor implementation
- make mid-course corrections
- set aside ego, share the plan and its ownership.
- keep your eye on the prize.

## **Promoting the plan (selling it).**

- understand the plan and each of its elements.
- focus on outcomes.
- know what is essential and compromisable (and not).
- engage, encourage questions and LISTEN.
- explain don't defend.
- connect to the budget, narrative to the budget.

**Duke's Rule #6: Remember scanning never ends.**



# Implementation

Leave it to the staff,

Czar?

Planning Team?



**BREAK!**

Paul Desmond and Gerry Mulligan  
*The Way You Look Tonight*



05 The Way You Look Tonight.m4p

# Strategic Planning and Budgeting

*Strategic planning lays the foundation for Performance Based Budgeting.*

- *mission and vision critical elements*
- *goals and objectives, classic output – outcome relations.*
- *focus on efficiencies, the optimal investment of outputs to outcomes.*
- *defined and adjustable levels of service (outcomes)*
- *presumptive rewards for results.*
- *possible ties to performance standards for employees.*
- *build it into the budget process (rolling outcomes into the business plan).*

# Evaluation (just scanning continued).

- *reason for writing measurable goals.*
- *focus on performance.*
- *audit objectives for compliance; goals for change.*
- *be realistic.*
- *understand what you are evaluating*
  - effort*
  - effect*
  - efficiency*
- *be sensitive to intermediate achievements (abandon success & failure models).*
- *look for unintended consequences.*
- *look for what works; do more of that.*

# Follow-up Planning

1 year to 18 months, continued cycle.

Don't mess with mission or vision for 3 years.

Review objectives

Completed, successful outcome

Completed, incomplete outcome

Completed, failed outcome

Partial completion

Not begun, intentionally

Not begun, forgotten

Do quick scan.

# Use a facilitator

## *Pro*

*A technical process best handled by an expert.*

*Outside perspective.*

*Balance.*

*Help through the tough spots.*

*Resource for best practices.*

*Credibility.*

## *Con*

*Cost*

*Imposed agenda*

*Interference*

*Unfamiliarity*

If you use a facilitator, get the right one. Less a matter of technique than trust and care.

Just be sure you get Duke!

Finis!