

Strategic Planning Retreat Summary

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LANCASTER COUNTY
South Carolina

Introduction

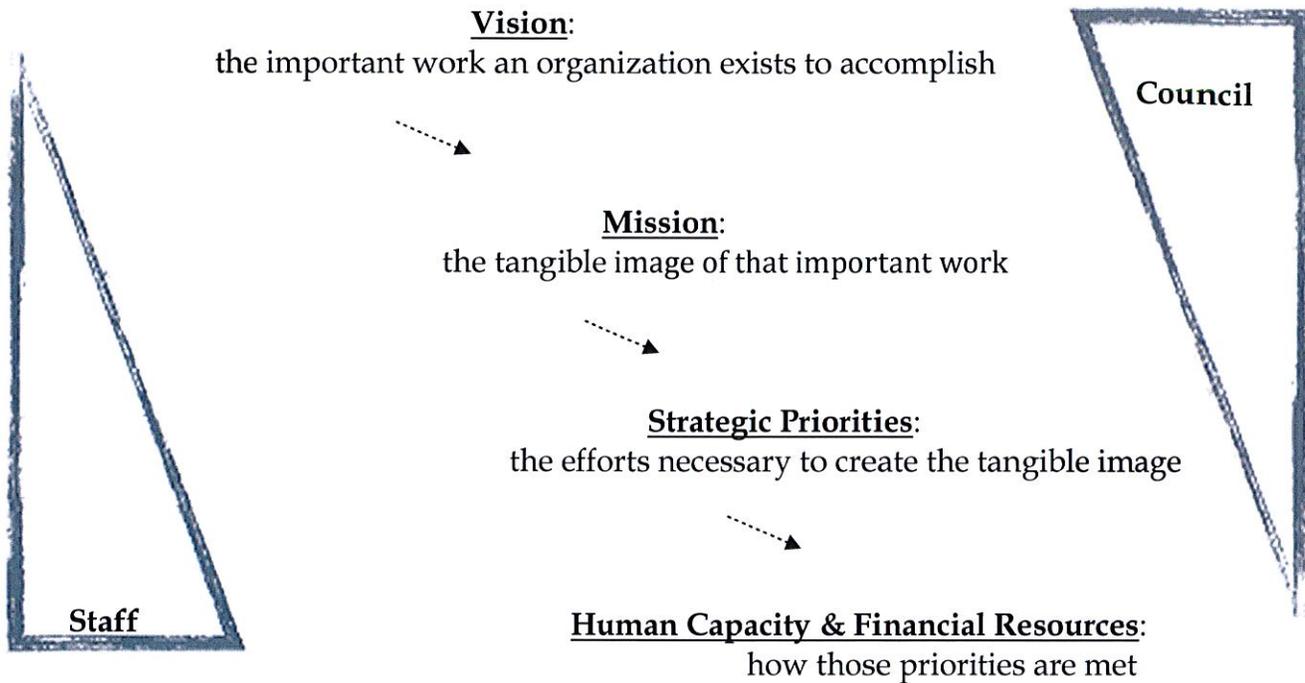
The Lancaster County, South Carolina, County Council met October 2 & 3, 2015, for a strategic planning retreat. While many strategic planning efforts focus on identifying goals and objectives for the near future, the purpose of this retreat was for Council-members to reflect on the important work that Lancaster County exists to accomplish. This reflection was intended to identify broad strategic priorities that would guide department heads in preparing requests for the development of the County's annual budget.

The retreat began with a discussion of the role that vision, mission, strategic priorities, and resources play in the development of a community's strategic plan. When developing a vision for a local government, policy-makers must consider what they believe the important work the local government exists to accomplish is. When this important work is identified and agreed upon, they must work to translate it into a tangible image; sometimes referred to as the mission. This tangible image is created by professional staff responding to strategic priorities set by the elected officials with organizational capacity - employees - and financial resources.

An example of this might be a law enforcement agency that believes its important work to be "To Serve and Protect." The tangible image of that important work can be seen in the different functions that the agency undertakes; patrol, traffic enforcement, criminal investigations, school resource officers, et al. In order for the tangible image to come into view, strategic priorities are developed for each of these divisions. While specific divisions may have more or less responsibility in certain areas, the work of most divisions may address several strategic priorities.

While the elected officials typically set the vision and define the tangible image of a local government, they may involve their professional staff in creating it. Likewise, while the implementation of the policies developed is most often left to professionals, at times, the elected officials may have a role in meeting some strategic priorities. Finally, as an organization develops strategic priorities, it's important to ensure that those efforts are in line with its stated values.

The following diagram illustrates the relationship between the concepts and the typical level of engagement of elected officials and professional staff at each level.



In addition to the facilitated discussions, the County Council read Boyle's article *Public Problems, Values and Choices*¹, in which he describes the competing values that elected officials, must balance in developing policy. The values identified are:

- Liberty - freedom, choice, and individuality
- Equality - equity, fairness, and justice
- Community - safety, security, and social order
- Prosperity - efficiency, economy, and productivity

¹ Boyle, P. 2001. "Public Problems, Values, and Choices." *Popular Government* (Fall 2001). 18-23.

Important Work and Values

The County Council determined that the important work it exists to accomplish is:

- Improving the quality of life for residents
- Collecting revenues and paying for services
- Managing resources and providing administration
- Working with partners
- Serving as the first line of citizen government
- Addressing community problems
- Providing process and direction

The Lancaster County Council identified these values to guide them in their work:

Respect

- Mutual support
- Honesty
- Fairness
- Preparation
- Courage
- For fellow Council-members
- Open-mindedness
- For employees
- Helping others
- Spirit of unity
- Community
- History and Culture
- Opportunity

Productivity

- Experience
- Expertise
- Employees
- Efficiency
- Education
- Professional development

Teamwork

- Collaboration
- Support of State Legislature

Safety and Security

Strategic Priorities

In order to accomplish the important work of the county and create a positive tangible image, the County Council identified several specific items necessary to address through an exercise. The specific items were then grouped into like categories and these were identified as strategic priorities, to which department heads will link their budget requests. The strategic priorities, and the specific issues used to identify them are:

Infrastructure, Capital, and Transportation Needs

- Long-term funding for road maintenance to keep our roads safe and better control traffic
- Capital needs for buildings, including a mechanics building and possible detention center
- Continue to improve safety by staying updated with new and better equipment
- Better manage IT resources; create a strategy to upgrade IT department
- Recreational opportunities
- Identify funding source for ongoing capital needs

Staffing and Developing Organizational Capacity

- Review potential positions such as engineer, assistant for our administrator, division heads for growth management and public safety, et al.
- Building capacity within each department
- Address staff compensation
- Employee retention
- Pool services to increase efficiency thus allowing better and more available resources
- Processes
- Continuous Process Improvement; identify, document, measure, manage and implement

Managing Growth and Development

- Continue to improve our planning and growth management process
- Address and develop economic development strategy
- Stick to Council approved comprehensive plan
- Plan with future for our citizens in mind to protect the quality of life
- Attract jobs so that fewer people in our county will have to leave for work in Charlotte, York County, Union County, NC

Resources and Funding Challenges

- Implement pet license program
- Implement business license or business registration
- Identify sources of revenue other than property taxes
- Resource allocation
- Identify programs with greatest return on investment; implement quality and effectiveness measures

Intergovernmental Relations

- Explore partnerships with schools, the City of Lancaster, and the university
- Work with state to reduce unfunded mandates on local governments

Public Information

- Improve transparency in operations
- Explore the possibility of identifying a public information officer

Public Safety

- Need to address crime, what are we going to do about it, how are we going to get positive results?
- Have judicial system expedite trials for habitual offenders to move them through the criminal justice system
- Study public safety staffing levels to maintain service levels with growth
- Develop strategy for volunteer retention and transition to more paid firefighters

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- Safe environment; police, fire, EMS

SWOT Analysis

As a final exercise, the County Council conducted a SWOT analysis in order to determine what challenges the County may face in addressing these priorities. The results of that SWOT analysis were:

Strengths

- People, workforce, staff expertise
- Funding management
- One-time funds
- Growth
- Intergovernmental relationships with Lancaster County
- Public Safety
- Sales and capital taxes

Weaknesses

- Insufficient workforce to meet demands

Opportunities

- Regional planning and cooperation
- Governmental relations with schools and other local governments
- Geographic location
- Population Growth
- Information Resource
- Business Registration
- Collaborating with Chamber of Commerce

Threats

- Accountability
- Major growth
- State mandates; e.g., tax free holidays, limitations on taxation

Staff Retreat

The administrative staff and department heads met on November 6th for a retreat that included a briefing on the work of the County Council, direction on how to align their budget requests with the Council's strategic priorities, and exercises to help them develop requests tied to those priorities. The County's Finance Director, Veronica Thompson, and Budget Analyst, Kim Hill, provided support in developing this session.

The following guidance from the County Council was shared with staff to help direct their development of funding requests:

Infrastructure & Capital Needs

- What are your needs?
- What is the total cost of ownership?
- What is the real benefit to the community?
- What is the maintenance and operation plan?
- How will you retire assets?
- Pool and share resources where feasible

Resource & Financial Challenges

- Be realistic in requests
- How can you leverage strengths to be entrepreneurial centers of expertise?
- How might you create revenue or decrease expenses?
- What's the return on investment; short term and long term?
- Are processes appropriate and fiscally sound?

Staffing & Organizational Capacity

- What is the unit cost of providing services?
- Are there additional equipment costs?
- Are current resources deployed appropriately?

Intergovernmental Relations

- Are there costs associated with collaborating and communicating?
- Are there opportunities for Mutual Aid agreements?

Public Safety

- Are we providing an appropriate level of service countywide?
- Where do the requests fit with stated priorities such as FEMA cost tracking?