

COMOX VALLEY REGIONAL DISTRICT

ARE WE ON THE SAME PAGE? WORK BOOK

GETTING STARTED – Our Agenda

- 1.0 **STRATEGIC SCAN** – The Long View
- 2.0 **STRATEGIC TOPICS** – Focus for Discussion
- 3.0 **STRATEGIC POSSIBILITIES** – Options to Pursue
- 4.0 **STRATEGIC PRIORITIES** – NOW Action Items
- 5.0 **STRATEGIC DIRECTIONS** - NEXT and LATER Objectives
- 6.0 **STRATEGIC ORGANIZATION** – Capacity Alignment

Gordon A. McIntosh - PhD

Tel: (250) 655-7455 E-Mail: ga.mcintosh@shaw.ca



GORDON A. McINTOSH

Gordon McIntosh has 40 years of management, educator and consultancy roles in the local government. As President of the Local Government Leadership Institute, he provides governance development, strategic, facilitation and leadership services. He has conducted 1,300 workshops involving 140,000 elected and appointed officials on topics such as:

- ***Are We on the Same Page?*** –making strategic choices using priority setting criteria with short term action plans consistent with organizational resources for regular monitoring
- ***Need a Vision Check-Up?*** – moving beyond vision and goal statements to describe and regularly assess progress toward a preferred future
- ***Avoiding the Rocky Shoals*** – developing a success indicators checklist to assess and develop strategies to enhance decision making, role clarity and organizational effectiveness
- ***What's in the Box?*** – determining essential and discretionary services as well as ways to maximize efficiency and ensure a balanced service delivery capacity
- ***What Does It Take?*** – identifying and developing leadership competencies for personal and organizational success along with learning and performance indicators
- ***Playing Nice in the Sand Box!*** – facilitating shared values and goals for enhanced team, interdepartmental, interagency and intergovernmental collaboration

He received the Professional Award of Excellence and served as President of the BC Local Government Management Association. His managerial positions included corporate, human service and community development functions. As the Islands Trust Executive Director, Gordon worked with a 26-member Council serving the 470 Gulf Islands in the Georgia Basin.

Doctor McIntosh's research work focuses on local government leadership competency modeling and development. Current faculty roles include the Universities of York, Dalhousie, Alberta and Victoria as well as the Uongozi Leadership Institute for a Sustainable Africa.

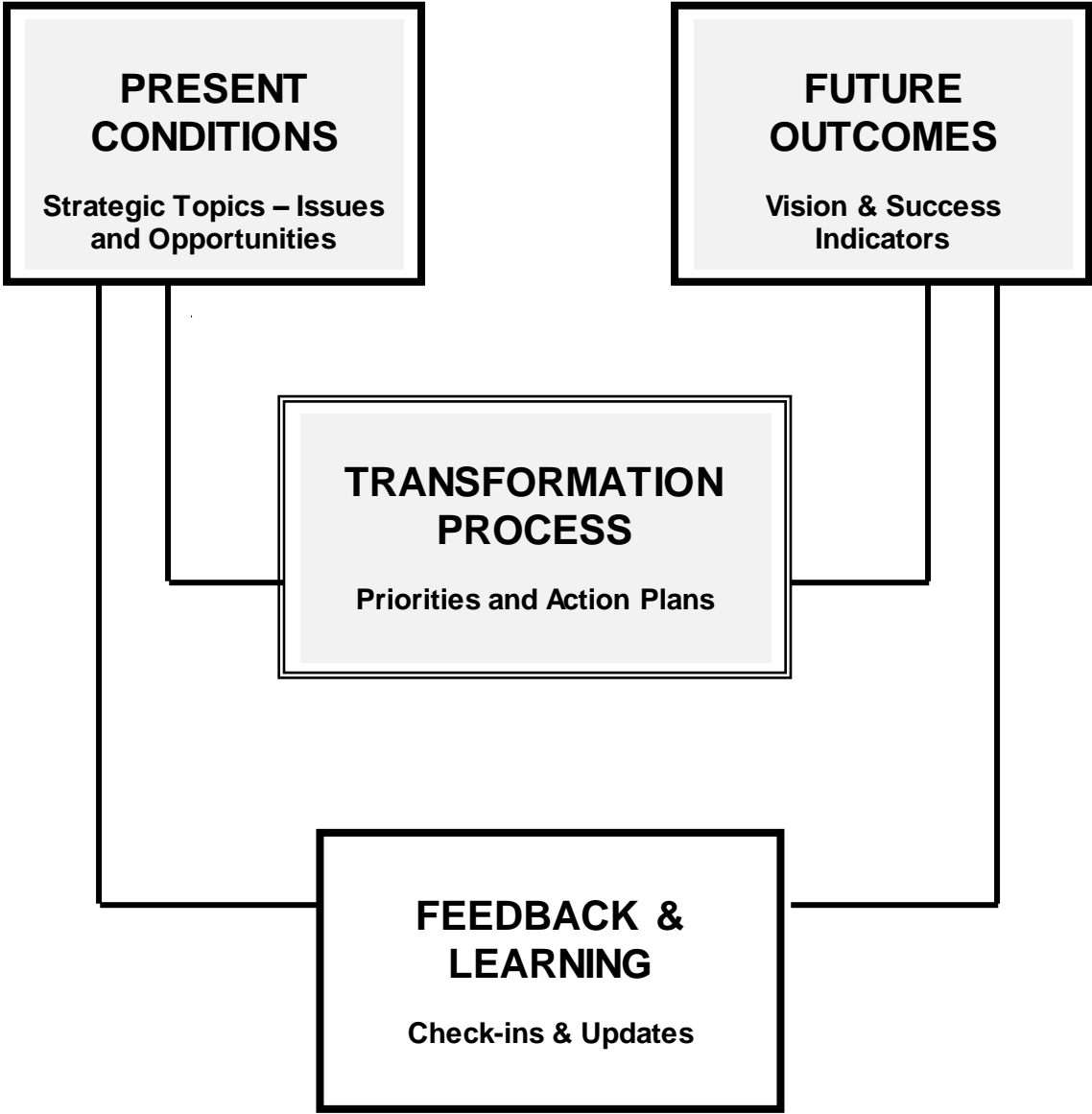
Gordon has developed 25 core modules for conference sessions, executive workshops and customized programs. He has delivered programs for local, First Nation, Métis and regional governments as well as municipal associations in every region of Canada as well as Palestine, Caribbean, Sri Lanka, Africa and Philippines. Session alumni comment that his sessions are fast paced, interactive, humorous and practical with high satisfaction ratings.

He was raised in Ottawa where he received athletic awards for water polo. Gordon and his wife Diane live in North Saanich where they enjoy cycling, gardening and hiking.

Gordon can be reached at ga.mcintosh@shaw.ca

10245 TSAYKUM ROAD, NORTH SAANICH, BC, CANADA V8L 0A2
TEL.: (250) 655-7455

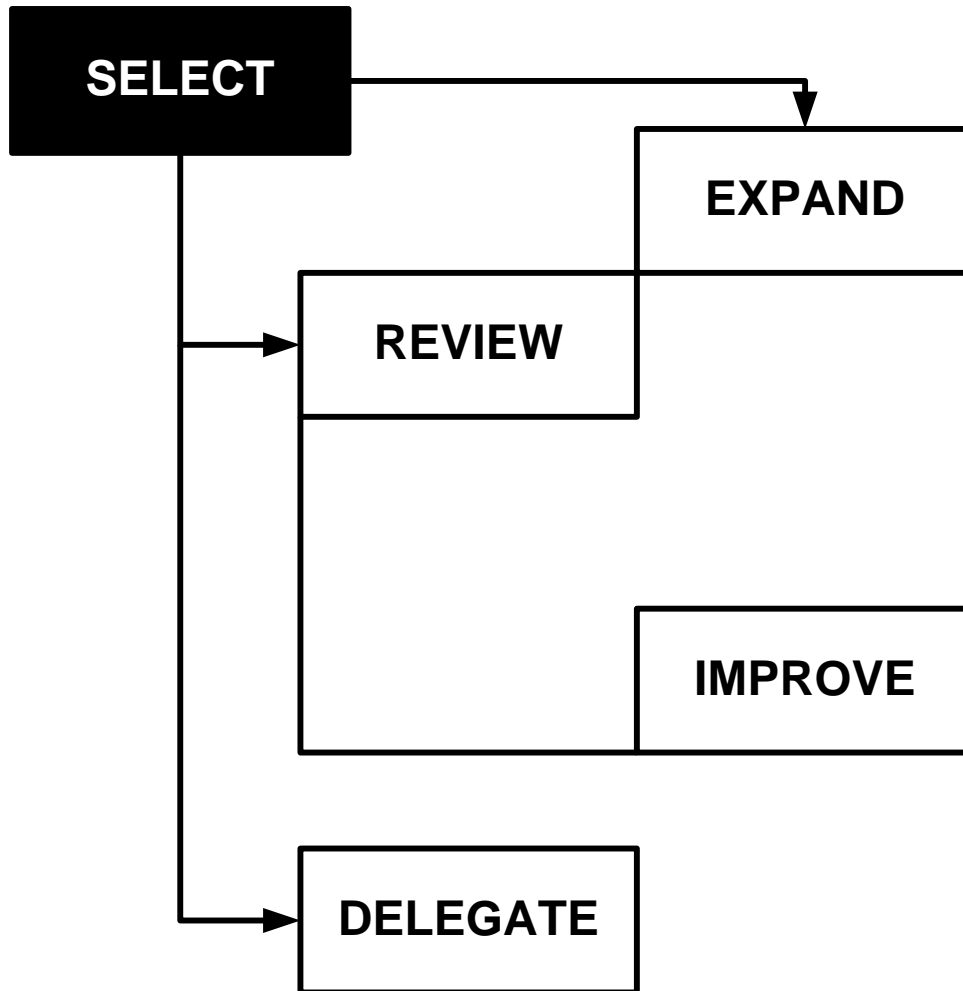
STRATEGIC LEADERSHIP MODEL



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THE CAPACITY BOX

Balancing *Competing Demands with Limited Resources*



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THE CORE FUNCTIONS

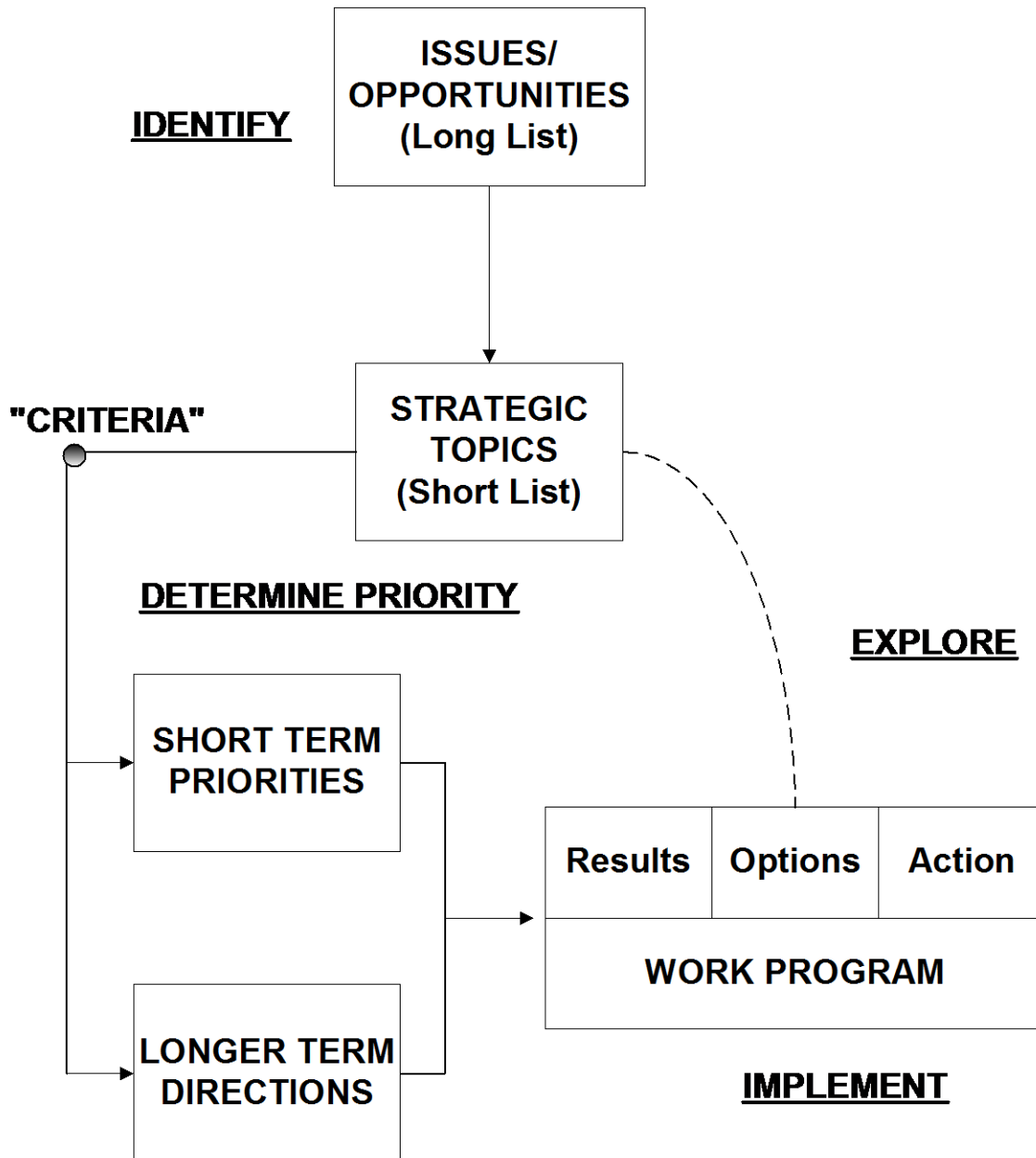
POLITICAL

STRATEGIC DIRECTION Goals Priorities Vision Values	POLICY CHOICES Legislation Budget Policy Contracts GOVERNANCE
SYSTEMS COORDINATION Personnel Information Financial Resources MANAGEMENT	SERVICE DELIVERY Schedules Details Production Delivery

ADMINISTRATIVE

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PRIORITY SETTING PROCESS



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1.1 MANDATE CHECK

WHAT DO WE DO?

<p><u>LEADING STRATEGICALLY</u></p>	<p><u>ADVOCATING INTERESTS</u></p>
<p><u>ENABLING OTHERS</u></p>	<p><u>PROVIDING SERVICES</u></p>

1.2 VISION CHECK-UP

PILLARS	WHAT WORKS WELL	AREAS FOR ATTENTION
ENVIRONMENT Human Environment Community Aesthetics Natural Area Protection Environmental Quality	<ul style="list-style-type: none"> • 	
ECONOMY Job Creation Business Retention Business Growth Business Attraction Community Image Community Sustainability		
INFRASTRUCTURE Transportation Utilities Facilities Community Systems Service Delivery		
SOCIAL Arts & Culture Support Network Citizen & Property Safety Healthy Lifestyles Health Service Access Sense of Heritage		
GOVERNANCE Good Policies Strategic Direction Role Clarity Agency Liaison		

1.3 STRATEGIC UPDATE

UPDATE BY CAO ON RECENT STRATEGIC PROJECTS

2.1 The QUESTION

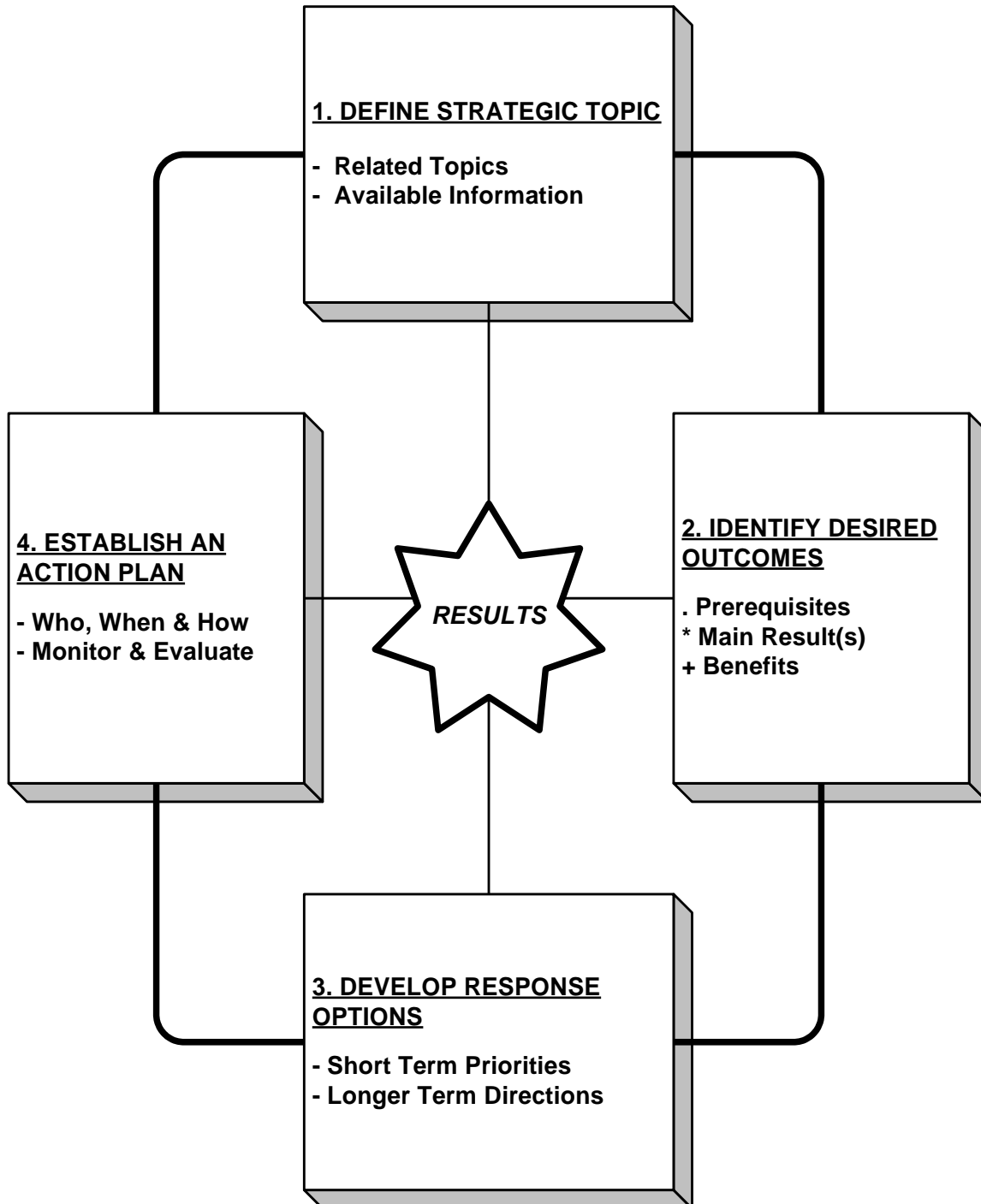
WHAT DO YOU THINK ARE
SOME OF THE *SIGNIFICANT*
ISSUES/OPPORTUNITIES *FACING*
THE ORGANIZATION AND REGION?

2.2 EMERGING STRATEGIC TOPICS

<u>DONE</u>	<u>2019 LIST</u>
<u>KEEP</u>	

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3.1 SOLUTION SEEKING



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3.2 SOLUTION SEEKING WORKSHEET

PROBLEM DEFINED (Related Issues & Key Question)	DESIRED OUTCOMES (Key Result if problem is addressed)	OPTIONS (* PREFERRED) & ACTION (to achieve key result)
		<p>OPTIONS</p> <p>* 1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>ACTION</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>
		<p>OPTIONS</p> <p>* 1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>ACTION</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>

4.1 'REALITY CHECK' CRITERIA

CRITERIA	SUCCESS		
	<i>Likely</i>		<i>Unlikely</i>
1. LEGISLATIVE EASE	Yes	Maybe	No
2. POLICY CONSISTENCY	Yes	Maybe	No
3. <i>CONTRACTUAL EASE</i>	Yes	Maybe	No
4. POLITICAL WILL	High	Neutral	Uncertain
5. ORGANIZATIONAL CAPACITY	High	Medium	Low
6. SAVINGS REALIZED	High	Medium	None
7. TIME EFFICIENCY REALIZED	Likely	Maybe	Not Likely
8. TIMEFRAME FOR RESULTS	Reasonable	Challenging	Unrealistic
9. SUCCESS LIKELIHOOD	High	Medium	Uncertain
10. COMMUNITY SUPPORT	High	Average	Low
11. FISCAL RESOURCES	Confirmed	Available	Difficult
12. PARTNERSHIP POTENTIAL	Ready	Maybe	Uncertain/No
12. LEVERAGE OTHER RESOURCES	Yes	Maybe	Uncertain/No
14. ONGOING SUSTAINABILITY	Likely	Maybe	Uncertain/No
15. HUMAN RESOURCES	Yes	Somewhat	No
16. EXPERTISE	In-house	Available	Uncertain/No
17. CONSEQUENCES/RISK	None	Uncertain	Negative
18. AFFORDABILITY	Yes	Average	No
19. _____			

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4.2 URGENCY CRITERIA

CRITERIA	URGENCY	
	Urgent	Not as Urgent
1. IMPERATIVE - Requirement to Act	Legislation	No Legislation
2. LIABILITY - Risk Exposure	Legal	Inconvenience
3. SAFETY - Direct vs. Potential Threat	Life - Imminent	Property Damage
4. FINANCIAL - Magnitude of Cost	Significant	Operational
5. VISIBILITY - Implications to Organization	Negative	Neutral
6. PUBLIC BENEFIT - Who receives outcomes?	Most	Few
7. COMMUNITY NEED - Who's asking?	At Large	Minority Interest
8. TIMELINESS – Resource Alignment	Unique	Frequent
9. STRATEGIC - Linkage to goals/priorities	Critical	Useful
10. OBLIGATION - Commitment to others	Contractual	Casual
11. LEADERSHIP - Political Requirement	High	Low
12. TIMELINE -Imposed Timeframe	Deadline	None
13. _____		

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4.3 RESPONSIBILITY CRITERIA

CRITERIA	ROLE	
	Political	Administrative
1. POLICY	New of Change	Procedure or Implementation
2. FINANCIAL	New or Change in Budget	Approved in Budget
3. EXTERNAL LINKAGE	Political Level	Staff Level
4. CORPORATE IMAGE	Agency Integrity	Service Quality
5. SERVICE LEVELS	New or Terminate	Service Standards
6. STRATEGIC DIRECTION	New or Change	Implementation
7. PERSONNEL	CAO Performance	Staff Performance
8. LEGISLATION	Ignore or Seek to Change	Interpretation
9. SENSITIVITY	High Visibility	Low Visibility
10. OBLIGATION	New or Change in Contract	Permissible
11. MEMBER LIAISON	Elected Official	Staff

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4.4 PRIORITIES CHART

Date:

COUNCIL PRIORITIES	
NOW 1. 2. 3. 4. 5.	
NEXT • •	
ORGANIZATIONAL EXCELLENCE	
1. 2. 3. •	
OPERATIONAL STRATEGIES	

5.1 STRATEGIC DIRECTIONS

FOCUS AREA	SHORT TERM POSSIBILITIES	LONGER TERM DIRECTIONS

6.1 THE CORE FUNCTIONS

POLITICAL

<p><i>DIRECTION</i></p>	<p>STRATEGIC DIRECTION</p> <p>Goals Priorities Vision Values</p> <p>The <u>PUBLIC</u></p>	<p>POLICY CHOICES</p> <p>Legislation Budget Policy Contracts</p> <p>GOVERNANCE</p>	<p><i>IMPLEMENTATION</i></p>
<p><i>STRATEGIC</i></p>	<p>SYSTEMS COORDINATION</p> <p>Personnel Information Financial Resources</p> <p>MANAGEMENT</p>	<p>SERVICE DELIVERY</p> <p>Schedules Details Production Delivery</p> <p>The <u>CLIENT</u></p>	<p><i>TECHNICAL</i></p>

ADMINISTRATIVE

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6.2 ORGANIZATIONAL CHECKLIST

1. Adherence to defined political/administrative **roles and responsibilities**.

2. Efforts to develop and achieve **strategic directions**.

3. Ability to develop a smooth transition of **plans into action**.

4. Attention to monitor and recognize **organizational** and **staff performance**.

5. Facilitation of a positive and productive **organizational environment**.

6. Accountability for the efficient use of **organizational resources**.

7. Ensure complete information and discussion to arrive at **good decisions**.

8. Consistency of attention to **internal and external communication**.

9. Respect for **diverse opinions**.

10. State of stability while addressing **changing conditions** and **issues**.

11. Evaluation of the satisfaction levels and efficiency of **service delivery**.

12. Maintenance of external **relations and partnerships**.

13. Honor principles of **transparency** and **servicing the public interest**.

6.3 ASSESSING EFFECTIVENESS

(Using Success Indicators)

<u>SUCCESS INDICATORS</u> What Works Well	Areas for Attention/Uncertainty
1. _____	• •
2. _____	• •
3. _____	• •
4. _____	• •
5. _____	• •
6. _____	• •
7. _____	• •
8. _____	• •

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