

Mayor & Board Chair Guide

To Strategic Planning



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Overview

The mayor or board chair's role in local government is complex and requires the ability to balance a variety of competing needs, opinions, and legal realities. You often serve as the chief executive officer for the organization and in that capacity, are expected to assume numerous responsibilities; providing visionary leadership, representing community interests, advocating for resources, and upholding (and creating) laws are just a few of these responsibilities. Being a stable presence that can support the city or county administration and build consensus among your fellow elected officials are additional responsibilities. The success or lack of progress a local government achieves with its strategic plan is not due solely to your actions as the mayor or board chair. However, your role is important and contributes uniquely to the process.

One of many ways you can impact your local government's progress is in how you choose to approach strategic planning and implementation. If you use the strategic plan to coordinate efforts, build consensus, align resources, and build trust with the community you will create the foundation your local government needs to make real progress and impact the community positively. Conversely, if you approach strategic planning with skepticism, misaligned or unrealistic expectations, or a lack of clarity about the importance of the strategic plan and your role in it, your organization may struggle to implement the plan; wasting resources, losing community trust, and degrading staff efforts along the way.

Your part in the strategic plan is just one of many roles you have as the mayor or board chair. Understanding the importance of strategic planning, what leads to success or failure, and your role as the chief executive for the organization is the first step to ensuring your local government's strategic plan leads to progress and success...not wasted efforts and an organization sitting in neutral. This guide gives you the basics on strategic planning, your role in the process, and how to help ensure your local government gets it right and takes your plan from paper to progress.

Purpose

This guide was created to give mayors and board chairs an overview of strategic planning within the local government context, their role in the process, and what to keep an eye on for sustained success. Both newly elected and experienced leaders can benefit from getting fresh clarity and insights into how they can personally impact the success or failure of their local government's strategic plan. A leader with clarity and understanding is the foundation of an organization with clarity and understanding. Tired



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but true, “it starts at the top” is rooted in reality. A local government’s strategic plan will not be successful if the mayor is not doing their part.

How to Use This Guide

- Read the Guide first:** Sounds simple, but read through the *entire* guide. Before you start checking your strategic plan, reviewing progress reports, and emailing people with questions...just read the guide. Give yourself the full perspective before you start digging into your specific plan.
- Take notes:** Jot down areas that give you pause, questions you have for staff or your fellow elected officials, things you need more information about before taking any steps.
- Review your current strategic plan and progress updates:** Review the existing strategic plan and any progress updates through the lens of the guide. What questions do you still have? What areas might require some discussion?
- Consider your role:** After reading the guide and reviewing the current plan and progress, identify 1 or 2 ways that you could lean more into your role in supporting the plan.
- Identify 1 or 2 next steps...not 10.** Look back through your questions and notes and identify the 1 or 2 next steps that you can take. Perhaps it’s having a conversation with the city manager, or asking for more information on progress. Don’t overwhelm yourself, or the organization. Start small and gain understanding and momentum as you go.

What is a Strategic Plan?

Most have heard of a strategic plan and many have been involved in planning or implementation of one. But, that does not mean that everyone *understands* what a strategic plan truly is. This lack of clear understanding often leads to misaligned expectations right out of the gate. This lack of clarity often makes it difficult to develop a solid plan and reach consensus during the planning process. So, what is a strategic plan? And, how is it any different from the other numerous plans that a local government often has on hand?

A strategic plan is a short to mid-range plan that identifies **where** an organization is going, **what** it will prioritize to get there, and **how** it plans to achieve success. The



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strategic plan lays the groundwork for the next **three to five years** of focus and activities for a local government.

A core planning tool, the strategic plan allows a local government to focus energy and resources in a unified way that can be clearly communicated to the public and staff. Some may feel that the strategic plan is just another document gathering dust on a shelf. However, when developed and implemented appropriately a strategic plan can be the catalyst for incredible impact in the community as well as within the organization.

Common Strategic Plan Elements	
Mission Statement:	Why does the organization exist?
Vision Statement:	Where do we want to see the organization in 3 to 5 years? What do we want to see in the community as a result of our actions in 3 to 5 years?
Guiding Principles or Values:	How do we do things in this organization?
Strategic Priorities:	What do we need to focus on to achieve our vision?
Goals:	What is the target for each priority?
Objectives/Tactics:	What do we need to do to hit our targets?
Measures of Success:	How will we know we are making progress? How will we know we have achieved success?

The Strategic Plan Pyramid

The Strategic Plan Pyramid illustrates how the different functions and roles within a local government typically fit together to make a strategic plan successful. The Pyramid goes beyond the common elements needed for a successful plan and illustrates how every role within the organization is critical for strategic plan success. It also depicts the types of outcomes that should be prioritized at every level to measure progress.

The purpose of the Strategic Plan Pyramid is to illustrate the interplay between roles, actions, and outcomes in strategic planning and how a broad vision or direction for the future must be translated into day-to-day operations for success to actually take place. From elected officials, to supervisors and frontline staff, every role within an organization contributes something different to the success of a strategic plan. All roles, and all goals are connected and support strategic planning and execution.



Figure 2: Strategic Plan Pyramid

The pyramid can be used to help make sure that each role is functioning at the right part of the plan and focused on the right measures. Role misalignment tends to happen when people are not clear about their roles. It causes confusion, duplication in efforts, and often stalled progress. This illustration can also be used to help spot check existing strategic plans and implementation frameworks to see if anything can be better aligned.

Your Role in Strategic Planning

The Strategic Plan Pyramid illustrates how the different roles within a local government fit into the strategic planning picture and where they should focus. But, what should you as a mayor or board chair actually be *doing* for the strategic plan to succeed?

Below are some of the things that you can do to support the strategic plan. Depending on the size or structure of your organization/department, some of these duties may shift or be shared among your fellow elected officials or city/county managers. Each local government is unique. The importance here is to recognize the level at which the activities are focused, understanding how your role impacts the plan, and clarifying who, if not you, is focusing on these actions.



Mayor or Board Chair

- Lead & Build Consensus:** Set the tone for productive governance and help navigate conflict so the governing body stays aligned, respectful, and able to act.
- Convening Power:** Bring people together across differences (electeds, staff, partners, community) to build alignment around goals and tradeoffs.
- Public Champion:** Serve as a primary spokesperson for the vision and priorities by communicating progress, reinforcing trust, and keeping the “why” front and center.
- Partnership Builder:** Strengthen relationships with regional partners, community organizations, and institutions that can accelerate strategic priorities.
- External Advocate:** Advocate externally for resources, policy support, and opportunities that advance the community’s adopted direction.
- Keep it Strategic:** Guide meetings and agendas toward priority outcomes by helping the governing body to stay centered on impact and long-term value.
- Model Accountability:** Reinforce a culture of follow-through by expecting timely updates, celebrating progress, and naming gaps when commitments slip.
- Steady in Change:** Provide steadiness during change or crisis by helping the organization adapt while maintaining strategic focus.

What You Can Do Right Now

So, now that you have a better understanding about what a strategic plan is, why it matters, and where you fit. What should you do next? How can you ease yourself into your organization’s strategic plan without overwhelming yourself or others? Below are a few easy steps you can take based on where your local government is in the strategic planning journey. Regardless of where the organization is, starting with one or two of the actions listed will help both you and your organization be successful. And that means more positive impacts for both the organization and the community you serve.

→ Your Local Government Has a Plan:

- Read it once:** Skim the plan for priorities & outcomes so you can name the “north star” in meetings.
- Request one update:** Ask the manager/administrator for *one* short progress snapshot (what’s on track/off track/needs a decision).



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- Use it publicly:** Reference 1 to 2 priorities in regular public touchpoints (meeting opening, newsletter, Meet the Mayor event).

→ **Your Local Government Doesn't Have a Plan:**

- Learn from peers:** Ask 1 to 2 mayor/chair colleagues what has worked and what they would avoid.
- Start small internally:** Ask the manager/administrator what the organization currently uses to set priorities (budget goals, CIP, council goals, etc.).
- Share a simple prompt:** Bring one discussion question to the body: "What 3 outcomes do we want residents to see/feel in 2 to 3 years?"

→ **You Have an Upcoming Strategic Planning Process:**

- Set expectations early:** Share what "success" looks like (clear priorities, realistic tradeoffs, visible progress).
- Invite participation:** Encourage respectful engagement and broad input, especially from voices not usually "in the room".
- Protect the space:** Keep meetings focused on outcomes (not rabbit holes) so the process stays productive.

Conclusion

Strong and steady leadership is essential for moving a strategic plan from ideas to real results. This guide has outlined why strategic planning matters and how your actions influence whether the organization gains traction or struggles to make progress. With a clear understanding of the plan and how each role contributes, you are better prepared to support alignment, build trust, and help the organization focus on what will create the greatest impact for the community.

If you want to deepen your knowledge or strengthen role clarity across the organization, the resources provided at the end of this guide can support your next steps. The goal is to ensure that your strategic plan becomes a working tool that guides daily decisions and delivers meaningful outcomes for the community you serve



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- **The Strategic Plan Pyramid & Discussion Guide:** A tool that helps local governments clarify roles, goals, and areas of focus within a strategic plan. The pyramid spurs conversation and illustrates that every role within an organization contributes to the success of successful strategic planning.

- **Local Government Guide to Strategic Planning:** A guide that expands upon the Mayor & Board Chair Guide and includes: discussion of the strategic plan and its connection to other government plans and funding sources; common challenges key areas for successful implementation; and role descriptions and “what to do now” actions for every level in local government. If you want everyone in the organization on the same page and focused on the right things, this is the guide you need.

- **Elected Official Orientation Session:** A 90-minute facilitated training session on the importance of strategic planning, the Strategic Plan Pyramid, the roles and responsibilities of elected officials in planning and implementation, and the top do’s and don’ts for successful strategic planning. Easily held during a work session, this training is perfect for getting both newly elected and experienced officials engaged, excited, and on the same page about strategic planning.

- **Strategic Planning Orientation & Readiness Assessment:** An expanded version of the Elected Official Orientation Session that offers organization-wide preparation for strategic planning or implementation. Role-based or department-specific training(s) that expands beyond the role of elected officials. Included is a review of your existing plan, Stratalysts’ role-based Readiness Assessment, organization and department-level recommendations, and Do’s and Don’ts aligned for roles and departments. This is the due diligence that makes the difference between a successful strategic plan and a plan that sits on a shelf, gathering dust and wasting resources.

Not sure what your next steps might be? I’m happy to help. Reach out, let’s chat!

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