



**WORLDVIEW
INTELLIGENCE**
Change The Outcome

Strategic Planning Proposal

Municipality of Argyle

February 2021

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Background / Need

The last five-year strategic plan for the Municipality of Argyle came to an end in 2018. It is time for renewal of a plan that is relevant to current circumstances, that can identify and take advantage of new opportunities that are emerging. An updated strategic plan will provide guidance for County initiatives and action planning over the next 3-5 year period.

The CAO is beginning the process by reviewing the current state and setting in motion a SWOT (strengths, weakness, opportunities and threats) analysis with a particular view to opportunities that will enable the Municipality to achieve healthy, sustainable financial outcomes for the foreseeable future.

For the moment, the vision and mission statements are sufficient to provide guidance. There may be a need to revisit them to refine the wording and possibly to make them more succinct, especially the mission statement. Currently there are no County/Organizational values listed in the plan. This could possibly be a useful exercise at some point – particularly internally to guide staff actions, behaviours and decisions.

The CAO has sketched out the bones of the plan using the four pillars that frame the goals of the Municipality. This will be shared with a core staff team for their input. This preparation work will then be put to the Council for their contribution. For each area of performance, their input on a future vision will be sought, thinking broadly about what the community could look like five years from now. Once a vision has been explored, the ideas can be articulated into specific goals to be taken on by the Council and the Municipality.

The Municipality of Argyle is seeking consulting support in facilitating the planning process with Council members.

Purpose / Outcomes

Inviting the Council and a core staff team for their input into the planning process means a broader range of ideas might emerge for exploration and that there will be a greater sense of commitment to the plan and outcomes due to their involvement in developing it. Having a consultant support the process with Council means the CAO can participate fully in content development. The consultant brings a wealth of strategic planning experience to the process. The end result will be a populated plan that has the support of the Council and staff.

Four main areas of focus have been identified:

- Transparency and accountability
- Economic prosperity – diversity, enrichment, population growth
- Pride of place, cultural significance including community recreation and infrastructure
- Fiscal sustainability (dominance) for the foreseeable future – long term strategy

These four areas are framed a bit differently than in the 2013-18 Strategic Plan but all goals identified are easily transferable into these areas of focus. Specific wording can be determined through the planning process.

Strategic Planning Support

Planning and Preparation

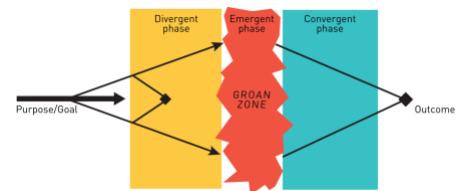
Planning and preparation includes conversations with the CAO and potentially the Warden or other key individuals to be engaged prior to facilitation of the process. Conversations with the CAO guide understanding of the objectives to be achieved and the work done to date. Conversations with the Warden or other key individuals builds support for the process prior to convening the planning.

Additionally, any documents that will support the process or are useful in understanding the current state and future opportunities will be reviewed.

The consultant will design the session (create an agenda) based on these conversations and planning documents.

Facilitation of the Council Strategic Planning Process

An afternoon, followed by a morning are recommended for this process. The process will follow the pattern of Divergence-Emergence-Convergence. The purpose/goal is to engage in the planning process and the outcome is to produce a Strategic Plan.



Divergence-Emergence-Convergence

We do this by inviting ideas for the future or by diverging, getting as many ideas as possible. It could be initially that the ideas are not that new or fresh but as idea generation continues and as people build on other ideas that have been presented, new ideas begin to emerge. These are often ideas that no one person brought into the room. Then we move to convergence, which is when the ideas are formulated into a more structured plan.

With two half day sessions, this pattern may be experienced in both sessions. It is a typical, predictable pattern of planning and behaviour.

Process Ideas for the Conversations

We typically use a combination of full and small group conversations that include presentation of small group conversations back to the full group. The small group conversations can begin with one small group and after 20-30 minutes, the groups will be asked to reform so that new people enter each conversation. This often brings new ideas and it builds commitment for the ideas.

In following the divergence-emergence-convergence pattern a typical flow would look something like this:

- Full group convening for welcome, framing of the day and introductions
- An introduction of the preparatory work, in this case including the skeleton plan developed by staff
- Identification of the goal areas for exploration

- Small groups assigned to each goal area to brainstorm a vision for the future of the community with this goal in mind
- Invitation to mix up the groups to continue the visioning
- Presentation back to the full group – with comments and reflections by the full group
- Taking the visioning ideas back into small groups and fleshing out detail and specific, particularly relating to a 5-year time frame – designing work
- Presentation back to the full group
- Back into smaller groups (mixed up again) to identify specific steps that support each of the goals (convergence)

Usually the walls are papered with flip charts and it can be hard to fully see the plan. The charts need to be transcribed, reviewed and refined to be presented back to Council.

Refinement of the Plan

The notes and ideas need to be transcribed into a document that looks like a plan. Often in this stage, the wording of goals, strategies and action steps is refined. This is work that can be done by the consultant with the CAO and any other people identified for this task.

Presentation and Approval of the Plan

Once the plan has been refined, it is presented to Council for approval. This is done by the CAO and does not need to involve the consultant. The plan is then used by Council and Staff for business and operational planning on an annual basis.

Community Engagement

It is possible the Council or Staff will want to do community engagement around the plan to build support for Council goals. This proposal does not include a recommendation or process for community engagement.

Timing

Strategic Planning with Council can take place in March 2021. It is recommended that this planning be done in 2 half days – an afternoon and the following morning. This gives Council a bit of a break and time to attend to other things and allows the conversations of the afternoon to settle, new ideas to percolate and for participants to arrive fresh to the morning sessions.

Terms, Conditions and Fees

Worldview Intelligence work is contracted and invoiced through Shape Shift Strategies Inc. Fees are below.

Preparation and Planning	<ul style="list-style-type: none"> • Planning and preparation calls with the CAO and other key people as is needed • Review of all material related to the planning process • Design of the process 	\$ 1,500.00
2 half day facilitated sessions	<ul style="list-style-type: none"> • Facilitation of the planning process 	\$ 3,000.00
Finalization of the plan	<ul style="list-style-type: none"> • Transcribing notes into a planning document • Further conversations with the CAO and possibly the warden • Finalization of the planning document 	\$ 2,000.00

HST is in addition to the above investment. We require a 50% deposit on signing for all of the agreed upon options, with balances due upon completion of each phase of the project.

Quoted fees are valid for three months.

Agreed upon expenses will be billed as accrued, and reimbursement is due upon presentation of our invoice. This will include travel (mileage) between HRM and the Municipality of Argyle, accommodation and meal reimbursements.

The Municipality of Argyle is responsible for any meeting room costs, food and beverage and session materials.

Joint Accountabilities

Worldview Intelligence will hold the details of this project in confidence and sign a nondisclosure agreement if required. We will meet project deadlines, submit reports as agreed, and keep the Municipality of Argyle apprised of project status. Worldview Intelligence will also inform the Municipality of Argyle immediately of any unanticipated problems. We will agree not to work with any direct competitors for one year without your prior approval.

The Municipality of Argyle will provide access to people and information as agreed or requested and provide logistical support, meeting rooms, facilities, administration, as needed. The Municipality of Argyle will meet payment terms as specified and reimburse expenses as agreed, provide clear sponsorship and support where required and apprise Worldview Intelligence of changes affecting the project.

Both Worldview Intelligence and the Municipality of Argyle will respond to inquiries and calls promptly and adjust the schedule if required to a mutually agreeable time frame.

Acceptance

This proposal is accepted and forms an agreement between Municipality of Argyle (you) as represented by Alain Muise and Worldview Intelligence (Shape Shift Strategies Inc.) (we) as represented by Kathy Jourdain.

For Worldview Intelligence
(Shape Shift Strategies Inc.)
Kathy Jourdain

Signature:

Date:

For the Municipality of Argyle

Alain Muise

Signature:

Date:

Halifax Harbour Bridges wanted to hire a consultant to help facilitate the development of its five-year strategic plan. The approach needed to include involvement by the board of commissioners, management and consultation with all employees. The end result is a strategic plan that people feel very good about. It reflects where the organization needs to go to continue to meet our mandate in the future. In addition, all employees will see the impact of their work in the strategic plan. Kathy's facilitation skills to encourage conversations and bring opposing thoughts to consensus is impressive.

Halifax Harbour Bridges - 2020

Kathy Jourdain, MBA

Kathy Jourdain is an internationally recognized consultant, trainer and coach with two decades of experience. She is a co-founder, with Jerry Nagel, of [Worldview Intelligence](#). With Jerry, she is co-author of *Building Trust and Relationship at the Speed of Change*, the first Worldview Intelligence book, hailed for its readability and practical application.



She is a global steward and practitioner of the Art of Hosting Conversations that Matter, a body of knowledge that offers a suite of patterns and practices for working with complexity and to engage the minds, hearts and commitment of individuals, groups, organizations and systems on issues of collective interest or concern.

Kathy was a driving force behind Envision Halifax (now Engage Nova Scotia): a voluntary organization whose mission was to ignite a culture of civic engagement. She co-designed and co-facilitated the leadership development program over a 4 year period as well as Chaired the Steering Committee. Her leadership was recognized in 2009 with an Award.

She is certified in Strategic Planning and Strategic Change Management through the International Center for Strategic Management headquartered in San Diego, CA. She holds an MBA from Saint Mary's University in Halifax, Nova Scotia and is a graduate of the Banff Centre for Management's Executive Leadership Program.

As CEO of the Atlantic Division of a major health charity, she streamlined their internal systems. During her not-for-profit career, she was a member of the Canadian Society of Association Executives (C.S.A.E.), and was on both the local and national boards. She earned the designation of Certified Association Executive (C.A.E.). Her outstanding leadership and contribution in the not-for-profit sector were recognized with local and national awards.

Kathy's company, [Shape Shift Strategies Inc](#), is based in Bedford, Nova Scotia, Canada. Her memoir, [Embracing the Stranger in Me: A Journey to Openheartedness](#), has been hailed as a deeply authentic sharing of the journey that has shaped who she is today. She is getting ready to publish her second book: *Your Healing Power Within* and is also a contributing author to *Gift of the Hit*.