

STRATEGIC PLANNING PROCESS

Pajaro Valley Water Management Agency

Ellen Cross, Strategy Driver, Inc.
Maria Pascoal, GEI Consultants, Inc.



The Facilitators

Ellen Cross



- 32 years of experience
- Recent strategic planning efforts include:
 - Calaveras County Water District
 - Ironhouse Sanitary District
 - Regional Water Authority

Maria Pascoal



- 18 years of experience
- Specializes in outreach and communication
- Teaming successfully with Ellen on water resources planning efforts since 2018

Planning Approach



Survey/Interview Topics:

- Mission, Vision, Values (MVV)
- Opportunities and Challenges
- Desired Outcomes

Workshop Topics:

1. Approach and Schedule; draft MVV
2. Finalize MVV; develop goals
3. Populate goals with priority actions

Material from Surveys, Interviews, and 3 Workshops culminates in Draft Plan

First Steps – throughout December 2022

Surveys

- Participants to include Executive Staff and Board
- Approximately 10 to 12 questions
- Conducted online via SurveyMonkey
- Invitation will come from PV Water via email
- Results presented as a summary of trends/outliers and will not include names or roles

Interviews

- Conducted with Board
- Each interview will last approximately 30-45 minutes
- Results folded into survey summary presentation

Draft Schedule

PV Water Strategic Plan 2024---?

	2022				2023																					
	Dec				Jan				Feb				Mar				Apr				May					
Week Beginning	5	12	19	26	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29
Task 1 - Strategic Plan Process Approach	[Blue bar spanning Dec 5 to May 29]																									
1.1 Internal Meeting (remote)	[Blue bar: Dec 5-12]																									
1.2 Board Kick-off (remote)	[Blue bar: Dec 12-19]																									
1.3 Board & Staff Survey and Interviews	[Grey bar spanning Dec 5 to May 29]																									
<i>Distribute Survey</i>	[Blue bar: Jan 9-16]																									
<i>Surveys/Interviews Due</i>	[Blue bar: Jan 23-30]																									
<i>Consolidate Survey Results</i>	[Blue bar: Feb 6-13]																									
Task 2 - Strategic Plan Development and Facilitation	[Blue bar spanning Dec 5 to May 29]																									
2.1 Executive Staff Preparation Meetings (remote)	[Grey bar spanning Dec 5 to May 29]																									
<i>Preparation for Workshop 1</i>	[Yellow bar: Feb 20-27]																									
<i>Preparation for Workshop 2</i>	[Yellow bar: Feb 27 - Mar 6]																									
<i>Preparation for Workshop 3</i>	[Yellow bar: Mar 13-20]																									
2.2 Strategic Planning Workshops	[Grey bar spanning Dec 5 to May 29]																									
<i>Workshop 1</i>	[Cyan bar: Feb 27 - Mar 6]																									
<i>Workshop 2</i>	[Cyan bar: Mar 13-20]																									
<i>Workshop 3</i>	[Cyan bar: Mar 27 - Apr 3]																									
Task 3 - Prepare Strategic Plan	[Blue bar spanning Dec 5 to May 29]																									
3.1 Draft Plan	[Grey bar spanning Dec 5 to May 29]																									
<i>Draft Plan sent to GM/Staff for review</i>	[Blue bar: Apr 10-17]																									
<i>Comments due to Strategy Driver</i>	[Blue bar: Apr 17-24]																									
<i>Board votes on Plan content (at regular meeting)</i>	[Blue bar: May 1-8]																									
3.2 Final Plan	[Blue bar: May 15-22]																									

QUESTIONS?

Thank you – your participation will make the Strategic Plan a success.