

# Strategic Planning, Management Studies and Operational Reviews



**dmA Planning & Management Services** has an extensive background in strategic planning, management studies and operational reviews. Much of our work is in the municipal sector however we have frequently prepared strategies for provincial organizations and other agencies to address innovation, change and future development.

The central focus of these studies is change. We are called upon by organizations operating in turbulent environments that require a critical review of their mission, future vision, and methods of service delivery. Through research, policy review and a close working relationship with the management teams and elected and appointed leadership of these organizations, we chart a course for the future. These studies ensure that organizations can continue to provide relevant services in an effective and efficient manner by embracing the opportunities in a changing environment.

**dmA** has an extensive background in multi-stakeholder consultation in a variety of settings and these skills are central to many of our strategic planning projects. The Principals in the firm have designed and facilitated planning and decision-making processes where stakeholders with conflicting interests have reached agreement in a context of compromise and consensus building. In addition to facilitating these sessions, we have frequently been called upon to conduct research and prepare policy guidelines for consultation in contentious decision-making processes.

The following tables highlight our experience with strategic planning, management studies and operational reviews.



## Municipal Corporate Strategic Plans

### Selected Projects / Client

- Municipal Strategic Plans
  - Town of Hanover
  - City of Elliot Lake
  - City of St. Catharines
  - City of Woodstock
  - District Municipality of Lunenburg
  - Tay Township
  - Town of Collingwood
  - Town of Milton
  - Township of Shedden
  - Township of Uxbridge

### Description

- Prepared background material, conducted research and facilitated workshops for the strategic planning processes in these communities.

## Strategic Plans and Service Strategies for Other Organizations

### Selected Projects / Client

- Kings County Inter-Municipal Physical Activity Strategy
- Kings Partnership Steering Committee - Recreation Funding Model
- Settlement Houses (Metropolitan Toronto)
- HRM Activity Strategy
- Ontario Basketball Association
- Michigan Parks and Recreation Association
- Ontario Federation of School Athletic Associations
  
- Ontario Library Service-South
- Strategic Directions Council: Ontario Public Libraries
- Ontario Library Service-North
- Library Boards in Markham, Kitchener, Aurora, Tay, Clarington, Oxford and Huron Counties

### Description

- Strategic Plans prepared for non-municipal clients all of which involved considerable community and group consultation and facilitation around important community issues.
  
- Library planning is a core area of dmA's practice and we have worked with a number of provincial library associations and local library boards to prepare strategic plans



## Operational Reviews and Management Studies

### Selected Projects / Client

### Description

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| <ul style="list-style-type: none"> <li>▪ Government of Newfoundland &amp; Labrador</li> <li>▪ Municipal Restructuring Studies (Ottawa - Carleton and Essex County)</li> <li>▪ "Solutions that Work Project" (Ministry of Municipal Affairs)</li> <li>▪ Training and Education Strategy (Ministry of Municipal Affairs)</li> <li>▪ Core Service Review (City of Nepean)</li> <li>▪ City of Nepean: Operational Audit</li> <li>▪ City of Ottawa: Recreation and Parks Services Review</li> <li>▪ City of Niagara Falls: Museum Board Organizational Review</li> <li>▪ Province of Nova Scotia</li> <li>▪ Federal, Provincial/Territorial Sport Council</li> <li>▪ Ministry of Health Promotion (Ontario)</li> <li>▪ Ministry of Municipal Affairs and Housing (Ontario)</li> </ul> | <ul style="list-style-type: none"> <li>▪ Operational review and organizational restructuring of the Sports &amp; Fitness branch.</li> <li>▪ Assessed the financial and service implications of various options for amalgamating municipalities.</li> <li>▪ Participated in a research program and developed training and educational modules addressing municipal experience with restructuring.</li> <li>▪ Province wide consultation program with municipal and provincial staff and NGO's to identify a training strategy for municipal staff dealing with restructuring.</li> <li>▪ Developed a broad-based community program to involve all municipal stakeholders in a discussion of City budget and service priorities.</li> <li>▪ A detailed assessment of operational efficiencies in the Recreation Division.</li> <li>▪ Assessed appropriateness of integrated structure for social, recreational and cultural services in amalgamated City.</li> <li>▪ Recommended the restructuring of the Museum Board, a new relationship with the municipality and improved operating procedures and policies.</li> <li>▪ Review of funding and provincial support for community museums.</li> <li>▪ Assessed opportunities across Canada for innovative funding solutions for recreation and culture infrastructure.</li> <li>▪ Prepared an active living manual for use by municipalities in preparation of their active living (Active Living 2010) plans.</li> <li>▪ Prepared an Education and Training Strategy to assist municipal staff and elected officials following the adjustments from the "Who Does What" initiatives that resulted in numerous municipal amalgamations, staff reductions, and provincial downloading to municipalities.</li> </ul> |
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## Selected Projects / Client

## Description

- Government of Northwest Territories
  - Prepared a "Change Management" Training Manual and conducted training events throughout the NWT in advance of the division of the Territories into the NWT and Nunavut.
- Town of Essex and Town of Lakeshore: Departmental Restructuring
  - In both of these recently amalgamated municipalities we recommended a new staffing and departmental structure, policies, and a mandate for parks and recreation.
- Town of Port Hope: Organizational Review – Parks and Recreation
  - Recommended new staffing and organizational structure.
- County of Essex: Restructuring Study
  - Evaluated implications of amalgamating parks, recreation and library services in the restructuring of twenty-one municipalities in Essex County.
- Tay Township, Lakeshore, Essex, Tecumseh: Operational Review
  - Reviewed and recommended new organizational and staffing structures to improve the delivery of parks, recreation and library service delivery.
  - Created operating structure for newly amalgamated municipalities.
- Ottawa-Carleton: Restructuring Study
  - Reviewed and commented upon projected cost savings from amalgamating parks, recreation and library services.
- City of Burlington Parks and Recreation Department: Review of Future Service Directions
  - Designed and facilitated a search conference to review future service needs and a workshop to set budget priorities tied to the municipality's Master Plan.
- Canadian Standards Association (CSA) – Standards for an Aging Society
  - Designed a self-directed workbook and assisted with the facilitation of workshops involving a wide range of professionals working with older adults. Requirements for new or improved CSA standards for products and services were identified.
- Oxford County - Oxford Regional Centre (ORC) Future Uses Study
  - Designed and facilitated a process to reach consensus on future uses for the ORC. The process brought together representatives from all sectors of the community including government, business, labour, environmentalists, health and social service providers, recreation and leisure interests, education, etc.



**Selected Projects / Client**

- Town of Belle River: Operational Review
  
- City of York: Long-Range Planning Program for the Parks and Recreation Department

**Description**

- Reviewed existing staffing and job descriptions and recommended changes to create a more efficient operation with a stronger focus on the management of all parks and recreation services.
  
- Recommended an approach for long-range planning tied to the municipality's computer capabilities and provided staff orientation and training.