Bradley Beach Strategic/Long Range Planning Guide
2018-2023

Overview

Strategic Planning is a tool that sets a vision and clear path for future and proactive leadership and management with flexibility to change. Strategic planning defines the mission and vision, and sets up goals, strategies, and action plans to achieve vision. Strategic Planning succeeds when there is full support, inputs and enthusiasm of the Mayor (Executive), Council (Legislative Body) and Administration. Incorporated in 1893, Bradley Beach proposes to create a strategic plan for 2018-2023 or its 125-130th anniversary.

Strategic Plan Elements

1. Background-Internal and External Assessment (Strengths, Weaknesses, Opportunities, Threats-SWOT)
2. Mission
3. Vision
4. Values
5. Goals-Strategies-Objectives-Action Plans-Accountability
6. Municipal Service Plan
7. Governance/Staff Structure
8. Master Plan
9. Capital Plan
10. Financial Plan
11. Measures of Success
12. Strategic Plan Monitoring/Updating

Expectations and Benefits of Strategic Long Range Plan

*Strategic Planning Expectations

- Strategic Plan is developed with stakeholder input (residents/businesses/influencers) but is owned and approved by the Mayor and Council.
- Strategic Plan encompasses Master Plan, Capital Plan and Annual Budgets, but these are separate planning systems – though aligned with the Strategic Plan – requiring separate work plans.
- Strategic Plan is implemented by Administration, but is overseen and monitored by the Mayor and Council.
Strategic Planning Benefits:

* Strategic Planning Yields Results
  - Framework, milestones, continuous improvement.
  - Accountability for operational and financial health.

* Strategic Planning Is a Management Tool
  - Daily and long range balance in actions and decisions.
  - Resource allocation.

* Strategic Planning Adapts to Changing Environment
  - Flexibility to ensure mission focus, with ongoing updates.

* Strategic Planning Is Responsive to Residents/Business Inputs
  - Inputs, engagement of year-round and summer residents.
  - Inputs, engagement of commercial/other entities.

* Strategic Planning Is a Communications Tool
  - Two-way exchange of ideas and priorities.
  - Framework for ongoing stakeholder communications.

* Strategic Planning Is Integrated and Aligned for Bradley Beach
  - Alignment of Town (Borough Wide) and Commission/Board Plans.
  - Accountability of Administration Objectives based on Budgets

* Strategic Planning Is Participatory
  - Fosters teamwork and ownership within Bradley Beach Governing Body and Administration, reflecting public inputs (residents/business owners) and key stakeholders (other towns, influencers).
  - Data-Based Surveys to support Plan.
  - Public Forums to present plan.
Steps in Bradley Beach Strategic Long Range Planning

*Form Bradley Beach Strategic Planning Team

- Mayor
- Council
- Administrator

*Readiness Preparation

- Strategic Planning Team-Leadership Support
- Process/Procedural Agreements
- Stakeholder Identification and Input Process
- Benchmarking Other Towns-Asbury Park, Ocean Grove (Neptune City), Avon, Belmar, Manasquan, Sea Girt
- Resource Evaluation-Data collection/analysis, Technology, Administration
- Public Involvement Plan (Open/Sunshine Laws)
  - Residents
  - Business Owners
  - Other
- Financial Parameters
  - Borough, County, State, Federal, Private
- Plan Announcement Decision

*Strategic Plan Development

Timeline

November-December 2018

- Planning Process Design
  - Mayor, Council, Administration Interviews
  - Readiness Preparation (Initial Data Collection) - Town Benchmarking, Resource Evaluation, Financial Parameters.

January 2019

- Bradley Beach Strategic Planning Guide - Planning Team Review and Process Agreements
- Mayor/Council/Administration Survey
- Readiness Preparation (Stakeholder Identification, Public Involvement Plan, Announcement Schedule)
- Internal/External Assessment (Document)
- Governance Review
February 2019

- Bradley Beach Strategic/Long Range Planning Session and Framework (2/2/19)
  - Mission
  - Vision
  - Values

Note: Review Bradley Beach slogan/position as "New Jersey's Family Resort" and International history.
  - SWOT-Based on Internal/External Assessment
  - Issue Identification
  - Overarching Goals
  - Measures of Success

- Public Announcement
- 2019 Budget Preparation and Alignment

March-May 2019-Strategic Long Range Plan Development

- Public Engagement/Surveys and Public Forums
- Stakeholder Reviews
- Strategic Plan Development/Completion
  - Mission, Vision, Values
  - Goals, Strategies, Objectives, Action Plans
  - Municipal Services Plan
  - Governance/Staff Structure
  - Master Plan
  - Capital Plan
  - Financial Pro formas
  - Measures of Success
  - Tracking and Monitoring

- Plan Approval, Announcement and Communications
Bradley Beach Strategic Planning Process

Approach

The basic elements of strategic planning (mission, vision, goals, strategies, and objectives) comprise the strategic plan framework. The Strategic Plan framework integrates and aligns with the Municipal Service Plan, Governance Plan, Master Plan, Capital Plan and Financial Plan, defining the Measures of Success. This plan is the way your governing path is communicated to residents. Its implementation and results monitoring/tracking is the way you insure that your vision is achieved. Periodic feedback from residents/stakeholders is needed to assess if, in fact, the services are responsive to their needs and concerns. The Communications strategy for the Strategic Plan is a critical element of success.

We will ask and answer key questions for Bradley Beach:

1. Where are we currently?
2. Where do we want to be in the future?
3. How do we get there?
4. How do we measure and monitor progress?

A strategic plan is only as strong as its advocates. Successful strategic plans have strong governance/management support and commitment that is embraced by all in the organization.

Because government is accountable for what it spends and the results achieved, it is imperative that the strategic plan be comprehensive, realistic and fiscally responsible, from a taxpayer point of view.

Strategic Plan Process Agreements

The strategic planning team will utilize these process agreements to guide the project.

**Decision Making**-
How will the mission, vision, goals, strategies, objectives, and action plans be decided upon?

Consensus will be the goal but simple majority vote will be used if consensus not achieved.

**Involvement/Inputs**-
How will the public be engaged?

The Bradley Beach Strategic Plan Framework, developed at the 2/2/19 Strategic Planning Team meeting, will be presented in February to Commissions and Boards and then at a Council meeting, including a plan for public inputs from a survey and public forums. The survey of residents, businesses, and key stakeholders will occur in March. Public Forums will be held with
appropriate Commissions and Boards in April/May. The Bradley Beach Strategic Plan will be reviewed and approved in May at the Council meeting, with a public hearing.

**Communications**
How will we communicate the plan and progress?

We will post the Bradley Beach Strategic Plan on the website after approval. We will use electronic and print media such as newsletters, Internet, newspaper, and public announcement to share the Strategic Plan.

**Results Monitoring/Reporting**
What will we track, how often and how will we report progress on the Strategic Plan?

We will develop a tracking tool ("balanced scorecard") for the Mayor/Council/Commissions and Boards, Administration and the public, posting on the website.

**Strategic Plan Assessments**

Assessments will be accomplished by conducting an analysis that looks at Strengths, Weaknesses, Opportunities, and Threats (SWOT) that could affect Bradley Beach.

**Internal Assessment:** Complete an inventory of Bradley Beach’s internal operations to identify services your government currently provides and current quality of services as well as the financial history.

**External Assessment:** Complete an inventory of data about residents, businesses, and other stakeholders plus conduct and analyze a survey to all. Complete benchmarking of all local shore towns and document other local town development plans. Identify governmental mandates as well as any key financial and legal requirements.

**Survey:** Create and administer a survey of Mayor/Council/Administration and all full-time and summer residents, commercial entities, and other key stakeholders.

Survey Questions:

1. What is your description of Bradley Beach’s mission?
2. What is your vision for Bradley Beach?
3. What are the top 3-5 issues facing Bradley Beach?
4. How can we unite Bradley Beach on its mission and vision?
5. What are key measures of success for Bradley Beach as the "best Jersey Shore town"? (What are the current ratings?)
Mission, Values, Vision, Goals, Strategies, Objectives:

**Mission:** Why are we here? A mission statement is a written statement of purpose that describes what Bradley Beach is, and for whom. Inherent in a mission statement are an organization’s values.

**Vision:** Where do you want your organization to be in the future? A vision takes today’s situation and explains what tomorrow should be like – a promise. It is generally seen as the result of implementing a strategic plan. The vision will help you define your goals. By knowing where you want to be at a certain period of time, you will be better able to design how to attain that future vision.

**Values:** Values articulate what is important and often serve as the cornerstone for all activities.

<table>
<thead>
<tr>
<th>MISSION/VISION</th>
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<tbody>
<tr>
<td>Goals</td>
</tr>
<tr>
<td>“What result do we want?”</td>
</tr>
</tbody>
</table>

**Goal:** A goal is a broad outcome of what you want to achieve.

**Strategy:** Specific targets need to be specified and translated into actions and accomplishments with quantifiable data and timeframes.

**Objective/Action Plans:** Based on goals/strategies, define specific objectives and steps to achieve them, plus accountability and timeline.
The relationship among goal, strategy, and objective is illustrated by the following example:

<table>
<thead>
<tr>
<th>Goal</th>
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<tbody>
<tr>
<td>To Make Municipal Services More Effective</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objective</th>
<th>Action plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create municipal parking lot</td>
<td>Increase number of parking spots by 30 by the end of the year</td>
<td>Identify land and create action steps to build/implement parking lot</td>
</tr>
</tbody>
</table>

**Measures of Success and Monitoring**

<table>
<thead>
<tr>
<th>MISSION/VISION</th>
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</thead>
<tbody>
<tr>
<td>Goals</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>“What result do we want?”</td>
</tr>
</tbody>
</table>

**VALUES**

**Measures of Success:** Define measures of success for Bradley Beach.

**Strategic Plan Monitoring and Tracking:** The strategic plan is an evolving document. While the core values and goals remain unchanged, the plan for bringing such designs to life requires routine oversight and, in most cases, fine-tuning. By monitoring our progress at regular intervals, we will adapt the plan to a changing environment, while simultaneously maintaining your original vision and core values. Monitor goals, strategies, objectives, action plans quarterly or at least twice a year, with annual review.

**Communicating Results:** Openness on all fronts (internal and external) is good practice. By opening the lines of communication not only among the Mayor, Council, Commissions/Boards and Administration (all team members), but also with the public and media as well, we create trust and goodwill. Since the strategic plan is, ultimately, the public’s plan for Bradley Beach, it is beneficial if the plan is seen as the foundation of dialogue.

Consistent monitoring and tracking is another proactive technique that can ease the tension considerably when you are forced to make decisions in a reactive manner.
Certainly, the strategic plan cannot fend off all uncertainties, but periodic course corrections and adjustments may be the next best defense.

**Bradley Beach Strategic Plan: The Final Product**

<table>
<thead>
<tr>
<th>Strategic Plan Document</th>
<th>MISSION/VISION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals</td>
<td>Strategy</td>
</tr>
<tr>
<td>“What result do we want?”</td>
<td>“How do we want to do it?”</td>
</tr>
<tr>
<td>Objectives/Action Plans</td>
<td>Monitor</td>
</tr>
<tr>
<td>“What deliverables (product or services) are provided? How do we do it?”</td>
<td>“How are we doing? Are we meeting goals?”</td>
</tr>
<tr>
<td>Future</td>
<td></td>
</tr>
<tr>
<td>“Where do we want to be at Year X?”</td>
<td></td>
</tr>
</tbody>
</table>

The Bradley Beach Strategic/Long Range Plan will define the municipal wide plan and align with appropriate Department and Commission/Board Plans, as well as the Municipal Service Plan, Master Plan, and Capital Plan:

*Mission*: Define the mission.

*Vision*: Define the vision for 2023.

*Goals*: Define goals to achieve the vision.

*Strategies*: Define specific and realistic targets.

*Objectives*: Set specific objectives to achieve strategies.

*Action Plans*: Identify what actions, who is accountable, and timeline.

*Municipal Service Plan, Governance Plan, Master Plan, Capital Plan and Financial Plans*

*Measures of Success*: Set goals and tracking plans.
Communication Imperative

The Communications Plan will ensure that all stakeholders (including residents/commercial/other) understand what the strategic plan is about. In constructing the strategic plan, it is imperative that we plan announcements and inputs, as well as publish and track the Bradley Beach Strategic Plan.

Conclusions

Legacy

The Bradley Beach Strategic Plan is an opportunity to build on a successful history of 125 years with a positive path and support of our community as we approach the 130th anniversary. There is unity in community.

Patience

Patience is a virtue in this process. Not every strategy will be fulfilled 100 percent. This is not to suggest that your actions were wrong. It just means that you may have to adjust your tactics in an annual review of the strategic plan.

Another point to keep in mind is that the first time a new process is undertaken, implementation will be challenging. We are all on a learning curve. Perfection is not a necessity.

Achieving Success

Coordination, consensus building and all of the other related elements associated with designing and implementing the strategic plan take time and effort. The Mayor and Council will own this plan but it will reflect inputs of all key stakeholders.

The strategic planning process is a circular, rather than linear, planning tool. It goes beyond a traditional cause-and-effect progression and instead takes an interrelated look at the bigger picture. By taking a holistic approach to problem-solving, accomplishing your goals becomes much more feasible and lasting.

The ultimate goal in implementing strategic planning is that Bradley Beach needs and future visions are met in a way that is efficient and equitable. By investing time and resources today, we are ensuring that these visions are a reality tomorrow for Bradley Beach.

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Developed by Paula Gavin, Volunteer (Pro Bono Facilitator/Consultant) 12/31/18. Based on multiple Mayor, Council, Administrator, CFO, Department Head Reviews
Adapted from the Office of New York State Comptroller - Local Government Management Guide - Strategic Planning
Appendix 1. Definitions

Customers: people, internal or external to the organization, who receive or use what an organization produces. Customers are also anyone whose best interests are served by the organization’s actions. Residents, commercial, other.

Environmental scan: an analysis of key external elements or forces that influence the conditions under which an organization functions.

Facilitator: that person who keeps the discussion flowing during meetings. A facilitator does not express personal options, but instead ensures that each of the meeting participants’ views and opinions are heard and considered.

Goal: results-oriented broad statements of policy or intention and representing particular aspects of the vision.

Mission: a statement outlining an organization’s purpose. It describes what the organization strives to do and for whom it’s done. It is the way you communicate to your customers (citizens to whom services are provided) and other stakeholders (those with a vested interest) why your local government exists, how they benefit or are impacted.

Objectives: specific products or services that are needed to attain a goal.

Organization: local government or functional part (department, program, unit) for which a strategic planning initiative is applicable.

Performance measures: a tool that assesses work performed and results achieved.

Stakeholders: organizations, groups or individuals that have a vested interest or expect certain levels of performance or compliance from the organization. Stakeholders do not necessarily use the products or receive the services of a program. Customers are one group of stakeholders.

Strategic planning: an ongoing, systematic process that takes a forward-looking approach to an organization’s goals and objectives.

Strategic plan: a results-oriented blueprint consisting of goals, objectives and strategies in order to achieve a desired vision.

Strategy: key steps (milestones) in achieving an objective.
Appendix 2. Developing Elements of the Strategic Plan

“Mission” and “Vision” are two distinct terms that we have used throughout the chapter. However, by the time you reach this stage, it is imperative that you recognize the key differences between the two.

A **mission statement** declares your purpose. Why the organization exists and whom it serves should be answered in the mission. A mission is on-going and stays with the organization as long as it is in existence. A **vision statement**, on the other hand, has a specific time frame in which it operates and is essentially a **verbal picture of what you want your organization to be**. It takes the mission (purpose) and uses it as a foundation.

**Mission Statement**

A mission statement, as noted, clearly states what our organization does, which services and programs it provides, why you provide them, and for whom. It is a comprehensive statement that articulates a clear purpose. Generally, mission statements are already in place well before business is conducted. However, the changing times often dictate that the existing mission statement be, at a minimum, reviewed. In most cases, certain enhancements or clarification is needed to ensure that the mission meet the needs of its customers and stakeholders, while also remaining true to its original design.

The mission statement is the foundation upon which the strategic plan rests. Therefore, it is critical that you have a solid, current and agreed-upon mission statement in place before you initiate the subsequent steps.

How do you decide whether your mission statement meets these criteria? The easiest way to address this is to convene the strategic planning team and as a group, determine whether your mission statement can pass this test:

<table>
<thead>
<tr>
<th>Mission Statement</th>
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<tbody>
<tr>
<td>Does it clearly state what business you are in?</td>
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<tr>
<td>Does it answer the questions: “who we are, what do we do, for whom (or to whom) we do it, and why it’s important?”</td>
</tr>
<tr>
<td>Is the ultimate rationale for existence clear?</td>
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<tr>
<td>Is the mission broad enough to accommodate current times?</td>
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<tr>
<td>Can the mission survive changes in administration?</td>
</tr>
<tr>
<td>Is it easily understandable to anyone who reads it?</td>
</tr>
<tr>
<td>Can we justify the dollars we spend on executing the mission?</td>
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</table>

If any of the answers are “no,” then the question merits further investigation. Simply, the more checks you can put in the “yes” column, the more solid your strategic plan will be.
The vision statement takes its lead somewhat from the mission statement. A vision articulates where you and your colleagues want your organization (program, department, unit or municipality) to be at the end of a certain time period. It builds upon the organization’s identity and takes those elements that are unique and that coincide with the mission, and crafts a long-term picture of a desired future. Similar to the mission statement test, it is helpful if the strategic planning team sees that the following criteria are met when deciding on what should be included in the vision statement:

<table>
<thead>
<tr>
<th>Vision Statement</th>
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<tbody>
<tr>
<td>Does the vision statement provide a clear picture of the organization’s future?</td>
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<tr>
<td>Is the vision statement challenging and inspiring?</td>
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<tr>
<td>Is the vision statement believable?</td>
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<tr>
<td>Will achieving the vision positively contribute to our overall mission?</td>
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Goals

Goals are created in tandem with the vision statement. They are the desired results that fulfill the organization’s mission and also contribute to attaining the vision. Like their counterparts, goals need to be realistic and results-oriented. However, there are some differences that exist when dealing with goals.

<table>
<thead>
<tr>
<th>Goals</th>
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<tbody>
<tr>
<td>Do the goals support the mission?</td>
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<tr>
<td>Are goals consistent with your legislative authority?</td>
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<tr>
<td>Do the goals represent a measurable result?</td>
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<tr>
<td>Do the goals provide direction for action and results?</td>
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<tr>
<td>Are the goals challenging, but realistic?</td>
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<tr>
<td>Is there at least one key goal for each program and subprogram that you can reasonably manage?</td>
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<tr>
<td>Do the goals reflect the organization’s priorities (both legislative and administratively)?</td>
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<tr>
<td>Are the goals important to management, policy-makers and customers?</td>
</tr>
<tr>
<td>Will your goals reflect your program budget?</td>
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<tr>
<td>Would someone unfamiliar with the program understand what the goals mean?</td>
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Appendix 3. Challenges and Solutions

There are always a number of challenges involved in such efforts. The following are a few of the more common challenges and possible solutions:

**Challenge: Achieving consensus**

**Solution:** Getting everyone to agree may be difficult at times, but certainly not impossible. Compromise is the key word. Because consensus is as much of a vital component as any other tool, it is imperative that you reach a level of compromise that retains the mission, vision and goals, but also integrates the group’s ideas. Brainstorming, surveys, prioritization, SWOT analysis and in-depth dialogue are promising solutions for working toward clearing any impasse.

**Challenge: Working with unions**

**Solution:** Unions, like other interested parties, are stakeholders. Include union representatives in the process and consider their points of view. Working within legal and contractual parameters should not pose a problem if you have a well-crafted strategic plan.

**Challenge: This is just another management fad**

**Solution:** Management fads come and go. “Management by Objectives” (MBO), “Zero-Based Budgeting” (ZBB) and a host of other management techniques have been justly retired to the alphabet soup hall of fame. However, strategic planning, by its very construction, is designed to be long-term. The decisions you make today directly affect the outcomes tomorrow and the tomorrows after that. In contrast, fads have short life spans and are replaced by another trend. Also remember that when you use strategic planning, you and your colleagues have a considerable influence shaping the direction of your local government in the years ahead.

**Challenge: We tried this years ago and it didn’t work!**

**Solution:** Times change. People change. Attitudes change. And most importantly, internal and external environments change. You need to look at all of these factors in an historical context and understand why strategic planning was not conducive to your operations at the time. Timing is everything. Perhaps the time was not optimal before. Is it right now? Reference your preparation checklist, comparing “then” and “now” in order to make sound and honest decision.
Appendix 4. Monitoring via Performance Measurement

A successful strategic plan is not static. It needs to be consistently monitored to ensure that goals and objectives are being met and that the original mission and vision are still being adhered to. "Performance measurement" is the term used to describe this part of the process. Performance measures are just one tool used to assess how the action phase and results from the actions are progressing.

What should be evaluated and measured?

As a basic rule, you should regularly review goals, strategies, objectives, and action plans. Look at whether the steps within your implementation plan are progressing according to schedule, if they are within budget (if applicable) and if they are helping you achieve your goals and objectives as you work toward your ultimate vision.

If your action plan seems to be in line with your goals and objectives, but your desired outcomes are not being achieved, then you may want to review your goals and objectives. In some cases, the problem is not necessarily how to get there, but what you’re trying to do to get to the right place. Ask whether the goals, objectives, and strategies need revision. Quite often, simple language clarification turns out to be the needed remedy.

How often should you measure?

Bradley Beach will employ a best practice to conduct quarterly and annual evaluations and reports. Annual evaluations are important components of the strategic planning process. The annual evaluation is a good opportunity to see if we have achieved short-term goals, and also to make any course corrections for the next year. This annual evaluation should be aligned with the Bradley Beach charter.

Who should measure?

The Bradley Beach Administrator will develop and publish monitoring tools for goals, strategies, objectives, action plans, and measures of success.