

ITE District Strategic Plan Development Guidelines and Sample Framework

Consistent with the ITE International strategic planning process, each District is encouraged to develop their own strategic plans that align with their own values and guiding principles. Strategic planning is the organizational process that leverages institutional knowledge and fresh perspectives to document the intended direction of the District. This process is used to prioritize efforts, effectively allocate resources, align members with the District goals, and ensure those goals are backed by sound reasoning. A District strategic plan aims to answer three fundamental questions:

- Where are we now?
- Where are we going?
- How do we get there?

Ideally, a District strategic plan would be started after the ITE International strategic plan update and be developed on three-year increments. This would allow each District to consider goals and objectives that align with the themes and trends outlined by ITE International. While the ITE International strategic plan has a global focus across the entire membership, a District strategic plan should consider the regional perspectives consistent with their own identity.

The components of a strategic plan should consist of the following:

- **Mission Statement:** A concise statement based in the present that defines the meaning and purpose of the District.
- **Vision Statement:** A written declaration of what the District aims to achieve.
- **Themes:** Outlines the future trends that the District would like to focus on in the strategic plan update.
- **Goals:** The outcomes the District intends to achieve, providing vision and direction.
- **Objectives:** Specific and measurable steps to achieve the stated goals.

The following documents provide a sample agenda and outline for a strategic plan update. It is suggested that a Strategic Planning Committee chair be nominated by the President prior to the update cycle to lead the effort. A Past-President is the likely choice as this person has the experience and perspective through serving on the District Board. The Strategic Plan committee chair, with support from the committee members and the District Board, would also serve as a key advocate to ensure that goals and objectives are followed through the plan lifecycle. Each year, the strategic plan should be reviewed as part of regular or special Board meetings to ensure that the District is on track to meet the stated objectives. Upon completion, it is recommended that the District share the strategic plans with the membership either through a newsletter publication or on the District website. Clear communication of the stated goals not only helps the membership understand the District's vision but also provides each Section and Chapter with a consistent blueprint for the future.

Institute of Transportation Engineers (ITE)
_____ District
Strategic Plan Development
date

Place District
Logo Here

INTRODUCTION

This document is intended to be utilized by ITE Districts to kick-off their strategic planning process. It provides a sample agenda for a half-day planning session along with an outline of activities that can be utilized to guide the initial process for plan development. This planning session should ideally be conducted in person and should include the District Board, Committee Chairs, and other senior leaders from within your District and ITE International. An ideal time to conduct this session is in conjunction with your Annual Meeting because most of the key individuals will already be traveling to the same location.

SAMPLE AGENDA

Welcome Remarks & Icebreaker	1:00
Plan Timeline and Session Goals & Objectives	1:20
District Mission & Vision Activity, Discussion	1:30
Break	2:00
Advanced Reading Discussion	2:10
Strategic Plan Outline Review	2:30
Break	3:00
District Themes Discussion	3:10
Themes Breakout Groups, Discussion	3:30
Break	4:00
Theme & Goals Champions	4:10
Timeline Review, Action Items, & Single-Voice Check-Out	4:50
Adjourn & Happy Hour	5:00

Planning Session Outline

Welcome Remarks & Icebreaker

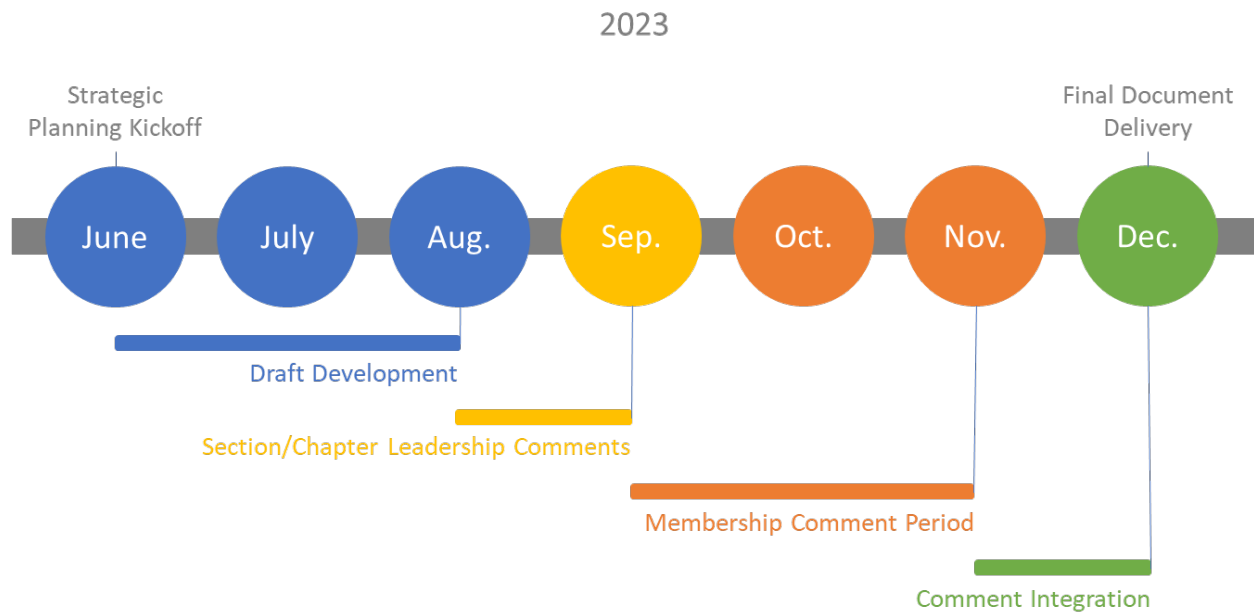
Session leader welcomes the team and gives an overview of the purpose of the working group and the planning session, then facilitates the icebreaker/introduction activity.

Icebreaker Activity

Please give your name, role in ITE, and tell us what you're most excited about in developing the District Strategic Plan.

Plan Timeline and Session Goals & Objectives

Session leader will present the anticipated timeline along with the session's goals and objectives. An example six-month timeline is provided below, although a twelve-month timeline may be more realistic for most Districts.



Session Goals

- Prepare draft Mission & Vision statements for the District
 - Possibly present the Mission & Vision statements in the President's address at the annual meeting, or in the next district newsletter
- Confirm the strategic plan outline – team buy-in
- Generate 2-4 Themes on which the District will focus in the three-year Strategic Plan
- Assign Champions for each theme who will develop district-level goals

District Mission & Vision Activity, Discussion

In this session we can present the mission and vision statements generated by other districts and the International organization, or initiate an activity to produce mission/vision statements for our district. Example draft language is provided in the tables below.

Mission Statements

To provide the global community of transportation professionals with the knowledge, practices, skills and connections to serve the needs of their communities and help shape the future of the profession and transportation in the societal context.

International



To provide the Canadian Transportation Community opportunities to learn, connect, contribute and grow to best meet the needs for safe and healthy mobility in Canada.

Canada



Draft Mission Statement:

To join transportation professionals operating in the Mountain West with opportunities to learn, grow, and connect as we deliver safe, equitable, and robust transportation solutions to the communities we serve.

Mountain District



Vision Statements

To be the transportation organization of choice

International



Our members are making their communities a better place – safer, more efficient and livable – through meaningful careers in transportation

Western



Draft Vision Statement:

Connecting transportation professionals to the very best resources to deliver safety, innovation, and equity solutions for their communities.

Mountain District



Advanced Reading Discussion

In advance of the work session, distribute the ITE International, and example district strategic plans to the attendees with the request that they review them and come prepared to discuss the following prompt questions:

1. What did you respond positively to in your review of the sample strategic plans?
2. Were there any parts that you disliked or would like to see us avoid in our plan?
3. What was missing in the sample plans that you'd like to see included in our work?
4. Do you think the membership of these districts would see their own priorities reflected in these plans?

Strategic Plan Outline Review

- Organizational Mission/Vision
- Purpose Statement

- District Themes/Principles
 - Goals/Strategies for each theme

District Themes Discussion

In this discussion we can discuss the themes/priorities included in the sample plans. Prompting questions might include:

1. Which themes are applicable to our role at the district-level?
2. How may these themes either enhance or constrain the ways we serve our members?

<ul style="list-style-type: none"> • Membership • Technical Knowledge • Institutional Sustainability 	International	
<ul style="list-style-type: none"> • Membership Growth • Membership Value Retention • Value of our products and services • Organizational Strength 	Canada	
<p>Draft Themes:</p> <ul style="list-style-type: none"> • TBD 	Mountain District	

Themes Breakout Groups, Discussion

Break the group into pairs/triads to generate a diverse set of lists for possible district-level themes. This activity would be followed by a group discussion where we identify overlaps in the respective lists of themes and determine if there are 2-4 clear directions, or if more discussion is required.

Theme & Goals Champions

In this discussion we will finalize our district themes and identify champions or small groups to take on the task of developing goals for each. We can propose deadlines to the group for returning their goals for integration into the draft plan. We should also build in time for executive review and comment integration before distributing the plan to the Section and Chapter leadership for review and comment.

Timeline Review, Action Items, & Single-Voice Check-Out

In this wrap-up time, session leader can revisit the plan timeline with the group. Delineate action-items and their champions, and review in brief the progress we've made together in our first session.