

# Workshop on Strategic Planning

## Workshop Summary

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The main function of strategic analysis is to identify issues that are likely to become critical in the future, to identify data and analysis techniques to deal with these issues, and to analyze alternative courses of action.

The major components of strategic analysis are

1. Sensing and analyzing the environment,
2. Anticipating changes and assessing their implications,
3. Specifying objectives,
4. Identifying and evaluating means for attaining objectives,
5. Providing direction, and
6. Allocating resources.

Although strategic analysis is generally thought of as a high-level, long-range activity, it is needed and should be applied (at an appropriate scale) at all levels of program and project analysis. Therefore, it should permeate all aspects of planning.

The methodology of strategic planning consists of a large number of technical activities, listed below:

1. Socioeconomic and demographic forecasts;
2. Data-management and evaluative information;
3. Performance monitoring;
4. Traditional urban transportation planning process, consisting of (a) trip generation (change in socioeconomic variables), (b) mode choice, and (c) assignment of traffic and peak hour and design elements;
5. Alternative scenarios;
6. Sketch planning for systems and for corridors (policy assessment and facility options);
7. Agency management planning and policy direction;
8. System policy planning;
9. Freight study, such as commodity flows (state);
10. Goods movement (urban);
11. Pavement management;
12. Revenue forecasting at state and area levels;
13. Impact assessment of short-range planning or project on long-range plan;
14. Impact assessment of change in exogenous variables;

15. Behavioral demand modeling and demand modification; and

16. Market segmentation.

Although many of these activities are often applied to higher-level contexts, most are also applicable, in principle, to other contexts as well.

The Workshop on Strategic Planning concluded that, for the most part, methods appropriate for strategic analysis are available. The major failings are not in methods but in lack of an institutional climate receptive to the strategic-planning function and availability of data relevant for strategic analyses.

The workshop recommended that planning agencies at all levels allocate some resources to strategic planning but insisted that issues addressed in the strategic function be relevant to the agency [e.g., strategic analysis at the U.S. Department of Transportation (DOT) would embrace a far wider scope than that of an individual MPO]. Results of strategic studies should be made available to agencies at other levels and illustrated with examples of successful applications.

A process for monitoring, analyzing, and describing the societal contexts should be established. It should include and analyze forecasts from other fields (individual and institutional behavior, technology, economy, physical environment). The process should maintain, monitor, and analyze multiperiod data related to perceptions, tastes, and values as they relate to travel behavior. It should also observe and analyze the effects of changes in institutional structures, impacts, and distributional effects. Technical work on methods to support this process includes

1. Further work on causal models relating travel behavior to tastes, values, and attitudes;
2. Basic work on travel response to pieces and other constraints;
3. Analyses of financial policies, especially those of private institutions;
4. Better understanding of causal factors influencing private investment; and
5. Simplified applications of demand-analysis techniques with special attention to techniques suited to high levels of aggregation.

Finally, the workshop recognized the need to spur interest and communication between practitioners and decisionmakers on the subject of strategic planning.