City of Phoenix
Human Services Department
Senior Services Division
Strategic Plan 2009

Agenda

8:00 a.m.   Networking Breakfast

8:15 a.m.   Welcoming Remarks:
Doris Marshall, Deputy Human Services Director
Reginald Ragland, Strategic Plan 2009 Project Manager

Introductions
- What uniqueness do you bring to the Strategic Planning Team?
- What end do you have in mind? How will you know if the process adds value?

Break

Visioning Exercise

Mission Development Exercise

Lunch

SWOT Analysis

Break

Goal-Setting

Next Steps
- Responsibilities over the next 4-week interim
- Expectations for April 2 Strategic Planning Session

4:00 p.m.   Clean-up and Adjourn

Facilitator Role

- ❑ Like to be involved but avoid having a stake in it

- ❑ Conceptual/teaching, i.e. active listening, problem solving processes, etc.

- ❑ Coaching (looking at things a different way)

- ❑ Process observations

- ❑ Confidential listener

- ❑ Advisor

- ❑ Individual feedback if asked

- ❑ Making the implicit explicit

- ❑ Ask stupid questions

- ❑

- ❑

- ❑

Ground Rules

❑ Participate in the process, i.e. get your own voice heard

❑ Speak for yourself

❑ Tell the truth, with respect

❑ Truth above harmony

❑ One voice at a time

❑ No side-bars

❑ Discussion, not debate—use active listening skills

❑ See solutions, not just problems

❑ Stay on track

❑ There is no right or wrong, it just is—because you are in a safe environment

❑ Ask stupid questions

❑ Have fun!

❑

❑

❑

City of Phoenix, Human Services Department
Strategic Plan Highlights[1]

Statement:

Human Services Department provides comprehensive social services to improve the quality of life of Phoenix residents.

Vision:

Excellence in Human Services – We Make Phoenix Better!

Core Values:

- ❑ Respect
- ❑ Trust
- ❑ Teamwork
- ❑ Work Ethic/Professionalism
- ❑ Customer Driven

Strategic Choices:

1. HSD will use technology to facilitate the achievements of the strategic goals
   "Technology achieves strategic goals"

2. HSD is a nationally recognized model for "best practices"
   "Model Best Practices"

3. HSD is committed to developing its workforce
   "Develops workforce"

4. HSD is committed to allocate resources to implement key strategies
   "Allocate resources, implement key strategies"

5. HSD is committed to promoting effective communication and collaboration
   "Effective communication and collaboration"

6. HSD is committed to providing customer services in a seamless integrated environment
   "Customer service, seamless and integrated"

---

[1] 2002 Strategic Planning, January 22-24, 2002.

City of Phoenix
Senior Services Strategic Plan 2009 – Plan-to-Plan

Phase 1 **Plan-to-Plan**	Create project timeline Create monitoring web site	Jan. 22-27
Phase 2 **Environmental Scan** (Gather information)	Review and analyze documents: • Internal employee surveys, 2001-03 • Customer satisfaction surveys, 2001-03 • Measuring the Benefits of Senior/Adult Centers (ASU West, R. Gitelson and others) • Human Services Dept. 2003-04 Operating Budget	Jan. 15-Feb. 9
Phase 3 **Focus Groups** (Gather information)	Eight facilitated focus groups: • Senior Services Committee • Community leadership • Clients • Senior Center leadership • Social services providers • Volunteers & Companions • Transportation & food service workers • Senior Services Division senior staff	 Feb. 11 Feb. 23 Feb. 23 Feb. 23 Feb. 24 Feb. 24 Feb. 24 Feb. 25
Phase 4 **Strategic Planning Team** (Make decisions)	Three 1-day facilitated working meetings: • Envisioning the future state • Establishing strategic outcomes • Implementation Planning	 Mar. 5 Apr. 2 Apr. 30

Phase 5
Communications
	• Discuss project at full staff meeting
	• Strategic Planning Team interim communications
	  • Visioning and Outcomes
	• Strategic Planning Team interim communications
	  • Outcomes and Implementation
	• Strategic Planning Team communications
	  • Implementation leadership
	• Report to management for approval
	• Final Strategic Plan and Year 1 Action Plan
		Feb. 27
		
		Mar. 8-Apr. 1
		
		Apr. 5-29
		
		May 3 ongoing
		May 14
		Jun. 10

Phase 6 **Implementation**	Implementation Selection & training for Strategic Work Groups Quarterly update reports Strategic plan adjustment meetings Strategic Work Group rotations	Jul./04-Jun./09 Jul./04 Sep./04 qtrly. Dec./04-09 ann. Jul./05-09 ann.

Communicating the Vision[2]

The essence of leadership is building support for your future departmental success. This takes place through dialogue, and the most compelling dialogue we can have is about our vision. **Leadership is keeping others focused on the vision, and this means that we have to get comfortable talking about it.** We can talk about the vision in ways that help command others' interest (and buy-in).

Optimism: we need to communicate hope and optimism. Even though we have doubts about how to reach the vision, it is a statement of a preferred future. **Talking about the vision frequently has the effect of reducing doubts and allowing us to be more optimistic.**

Emotional Charge: We need to feel free to use color and excitement in our language. The unique contribution that leaders provide is to keep us focused on a deeper set of values than simply costs and productivity. **We have to believe that most people are searching for meaning, compassion, and integrity at work and that if we are willing to talk about those things, awkward as it may be, it increases our possibility of finding them.**

Metaphors: Using metaphors, parables, picture images is also helpful. We need an image that has meaning to us, an image that gives others a picture of our vision.

Specific picture of the future: The more we can see what the future will look like, the easier it is for us to understand and communicate it to others. **The vision is a lighthouse giving us a direction rather than a specific destination.**

---

[2] Peter Block, *The Empowered Manager: Positive Political Skills at Work,* Jossey Bass, San Francisco, 1987.

Mission Statement

A mission statement is a brief, concise statement which defines the business your team is in, for whom, and why. It is your team's purpose and reason for its existence and it defines your team's unique contribution.

The mission statement clarifies from each member's point of view the focus and direction of the team. Accomplishing the mission of the team should take the team toward its vision. The mission statement should be somewhat uplifting but more practical and here and now than a vision, and should be no more than a paragraph in length. Only team members should be involved in its development.

The purpose of the mission statement is for each member to be very clear on what the team is about. Each member can then make independent decisions when necessary; knowing that each person's decisions will help the team move in the right direction. Therefore, a clear consensus process and opportunity for discussions are essential is writing a useful mission statement.

Mission Statement Work

In order to create the mission statement for the team, first consider the following:

❑ Who is your customer?   _____
❑ How does the customer benefit from your products and services? _____
_____
❑ What do we do for the customer that is unique?_____
❑ Why does the customer need us? _____

Complete the following:

The _____ exists
      (team, department, organization, etc.)

for whom?_____
       (customers)

helping them how?_____
        (benefits)

why?_____

The Seven Rules of Change[3]

Strategic Plan

ENDING

NEUTRAL OR WILDERNESS ZONE

BEGINNING

1. You have to end before you begin.

We don't talk very much about this fact, because endings aren't a comfortable subject. We sometimes act as though we won't have to let go of anything—or as though we may have to but don't care. The fact is that no one can develop a new identity or a new purpose until he or she has let go of the old one. It is also true that if you can deal with these endings realistically and gain closure on the past, you will be able to move forward more readily and take advantage of what the future has to offer. If you forget everything else in this class, remember Rule 1.

2. After the ending and before the new beginning, is a confusing in-between time called "The Neutral Zone."

In between letting go of the old way and taking hold of the new, there is a difficult time that we have no name for in the English language. We call it the "neutral zone," because it is not like the old or the new. Others have called it a "journey through the wilderness" or "a time in between trapezes." It is a dangerous time when our lives don't work very well and we lose heart easily. We need temporary sources of support and control to get through this time. And we need to understand that it is normal to go through a chaotic interim between letting go and taking hold again.

3. That confusing neutral zone can also be a time of great creativity.

The same forces that make the in-between time difficult, mean that our normal resistance to new ideas and new behaviors don't work well either. For that reason, the neutral zone is a potentially creative time. This is a time to step back and take stock, a time to try new things, and a time to view every problem as a chance to abandon outmoded ways and create more adaptive and effective ones.

---

[3] William Bridges, Transitions: Making the Sense of Life's Changes, Perseus Books, 1980.

4. While change can occur randomly, transition is developmental and full of personal meaning.

What ends in a transition is often not just a particular situation but a whole chapter and stage of development in one's life. "Behind the scenes," a whole new life may be taking shape. This pattern is easier to see in retrospect than it is at the time, but it's worth remembering at the time that there is a meaning to all the distress and disturbance. Whatever the "old way", it was fine for its time; but it belonged to a world which is gone. A new chapter is needed for a new day. That's the only way for you to protect and carry forward the parts of your past that are valuable and viable.

5. Transition is also the primary source of personal and organization renewal.

Life moves forward, not gradually, but with occasional "jumps." These jumps are like comparable "leaps" in nature, which release energy**. That is why individuals and organizations so often come out of a painful crisis with new energy and new focus.** "Renewal" for individuals or groups comes from going through transition successfully, not going off for rest somewhere. Such renewal requires you to re-prioritize your activities and your commitments. It will probably require you to unload things that no longer are relevant to your life and career.

6. People go through transition at different speeds and in different ways.

There is a basic underlying pattern to transition that is common to all situations, but individuals deal with it differently. People move through transition at different speeds, so that in any particular change they get strung out along the path of a transition like runners in a marathon. Some of these "lead runners" had a head start; they are likely to be people who feel more in control of their fate than the slower ones do; and they probably aren't as personally affected by the change as are those behind them. So concentrate on using your own best strategies for getting you through, not on trying to be somebody else.

7. Most individuals are running a "transition deficit" most of the time.

This is a serious problem. Too often we don't have time to complete the transition cycle before the next change strikes. This leaves us with unfinished business to carry along, and the next uncompleted transition leaves us with still more unfinished business. Sooner or later the load will get too heavy, and some apparently small changes will bring our whole lives crashing down around our ears. The good news is that every time of transition is a chance to go back and finish up some unfinished business.

Every beginning is a consequence
Every beginning ends something.
—Paul Valery

Purpose of Group Development

"We judge others by their actions,
We judge ourselves by our intentions."

The purpose of group development is to increase the productivity of the group while decreasing wasteful, unproductive behaviors in the group, such as gossiping, rework due to lack of communication, redundancies, *etc*. The benefits of development sessions are best described in reference to the Johari Window, created by Joseph Luft and Harry Ingham in 1955. In any group development process, group members bring the following behaviors with them to the group. The purpose of the group building process is to increase the area of "free activity" so that group members can bring **all** of themselves and their competencies to the group to enhance the performance of the group. This purpose is accomplished by members learning about their blind spots and becoming more familiar with one another, resulting in group members feeling comfortable enough to reveal "hidden agendas" and learn about their "mystery area." These revelations in turn will increase the communication process within the group to alleviate many unproductive behaviors.

	Known to self	*Unknown to self*
Known to others	I Area of free activity	II Area of Blind Spots
Unknown to others	III Area of hidden agendas	IV Mystery area

Goal-Writing

Definition: A *goal*…

❑ Defines *outcomes* or *results*: What effect will we have on clients or the community?

❑ Describes the *direction of change:*

  o   increase or decrease?
  o   raise or lower?
  o   guarantee or eliminate?

❑ Measurable, but not necessarily measured

  o   Example: "To improve the health of seniors."
  o   Example: "To be recognized as the best-quality Adult Services Provider in the U.S."
  o   Example: "To rebuild every Center built before 2000."

❑ Not necessarily time-bound

Write goals:

"To"	*change verb*	*change what?*	*for whom?*

Rewrite for context:

_____

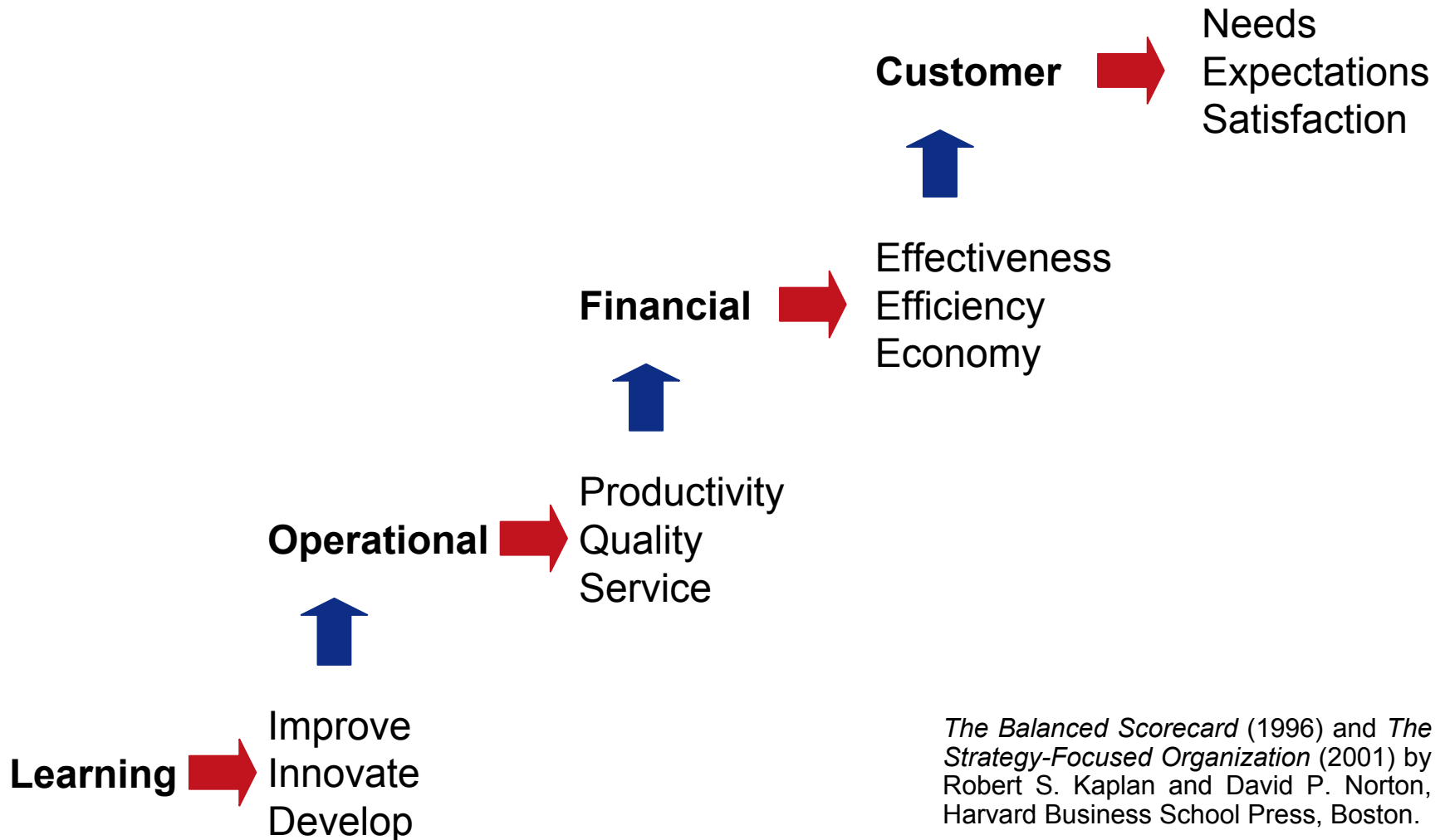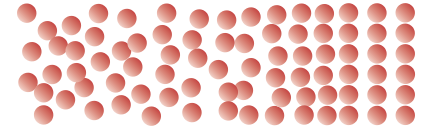| "To:"	*change verb*	*change what?*	*for whom?*

Rewrite for context:

_____

Change Verbs

- to close
- to create
- to decrease
- to degrade*
- to destroy
- to diminish
- to eliminate
- to empower
- to enhance
- to eradicate
- to guarantee
- to improve
- to increase
- to lower
- to open
- to prevent
- to protect
- to raise
- to reduce
- to solve
- to stop
-
-
-

Process or Product Verbs

- to build
- to benefit
- to deliver
- to give
- to invest
- to process
- to program
- to provide
- to serve
-
-
-

Perspectives

Customer ➡️ Needs
Expectations
Satisfaction

⬆️

Financial ➡️ Effectiveness
Efficiency
Economy

⬆️

Operational ➡️ Productivity
Quality
Service

⬆️

**Learning** ➡️ Improve
Innovate
Develop

The Balanced Scorecard (1996) and *The Strategy-Focused Organization* (2001) by Robert S. Kaplan and David P. Norton, Harvard Business School Press, Boston.

17   3/4/2004.
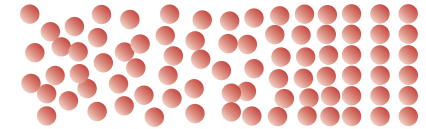
SSD Learning Factors
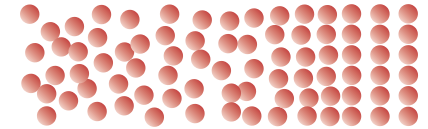
Employee Survey 2003

- Job Training has highest value, 2nd most improved in 2003

- All values are below "good" or "agree"

- Three Learning Factors have lowest values of 16 Diversity Factors

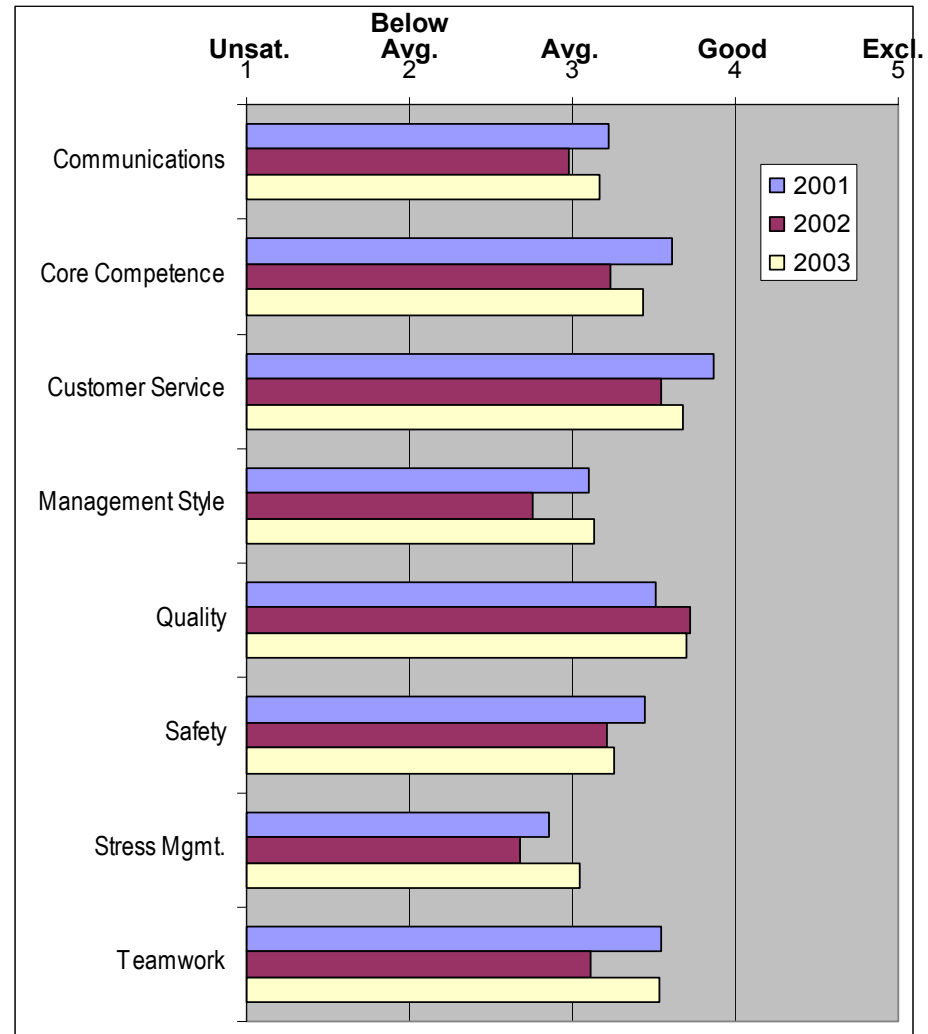- Little change since 2001; culture supports the *status quo*

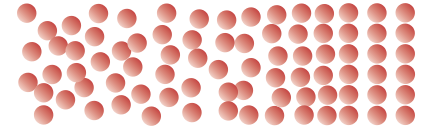3/4/2004.
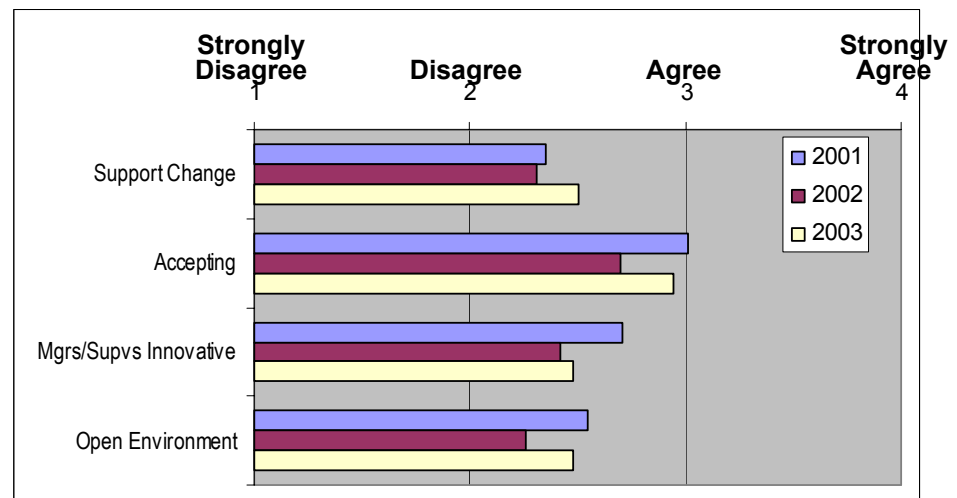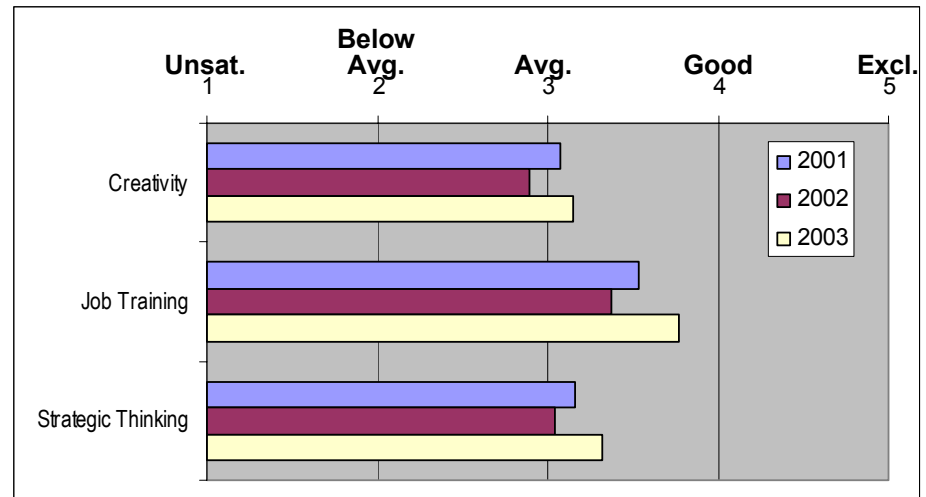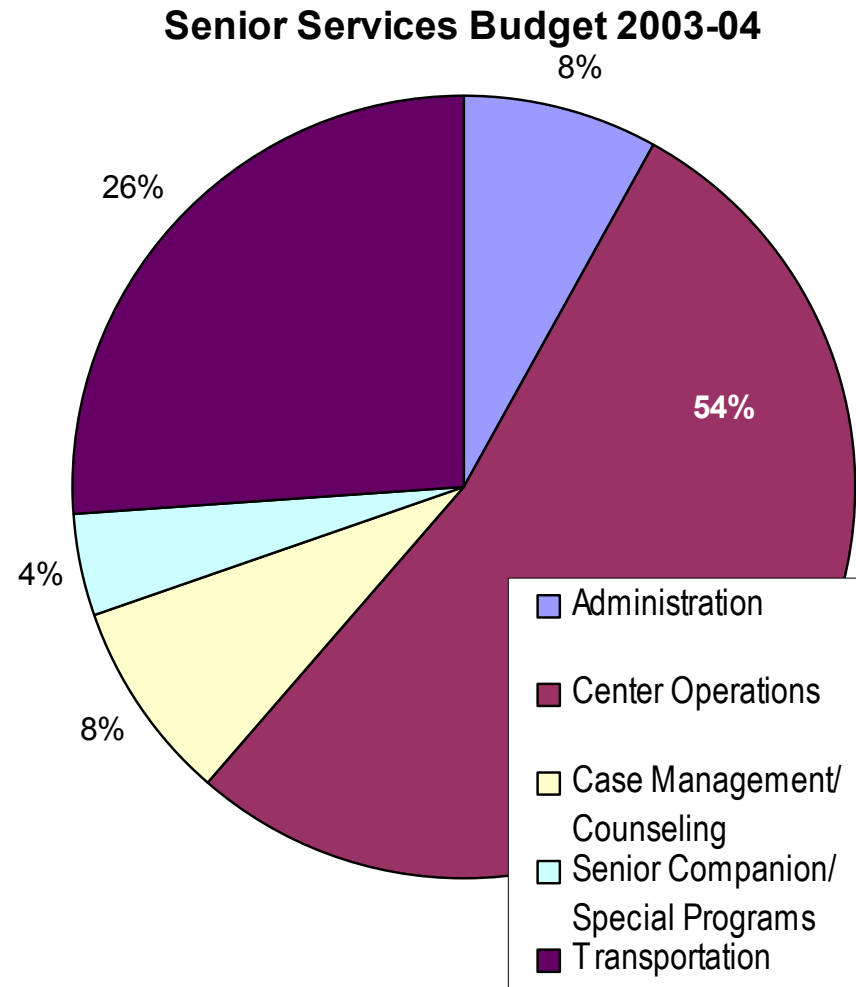
SSD Operational Factors

Employee Survey 2003

- Best factors are customer service, quality
- All factors are below "good"
- 2003 not significantly above 2001
- No significant change over two years

3/4/2004.

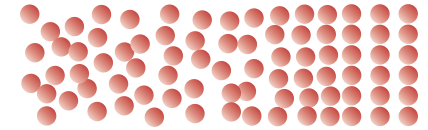# Financial Perspective

- Administration is a small part of the program; 92% is field client services

- New facilities to meet growing client base, but staff positions frozen at 165.6
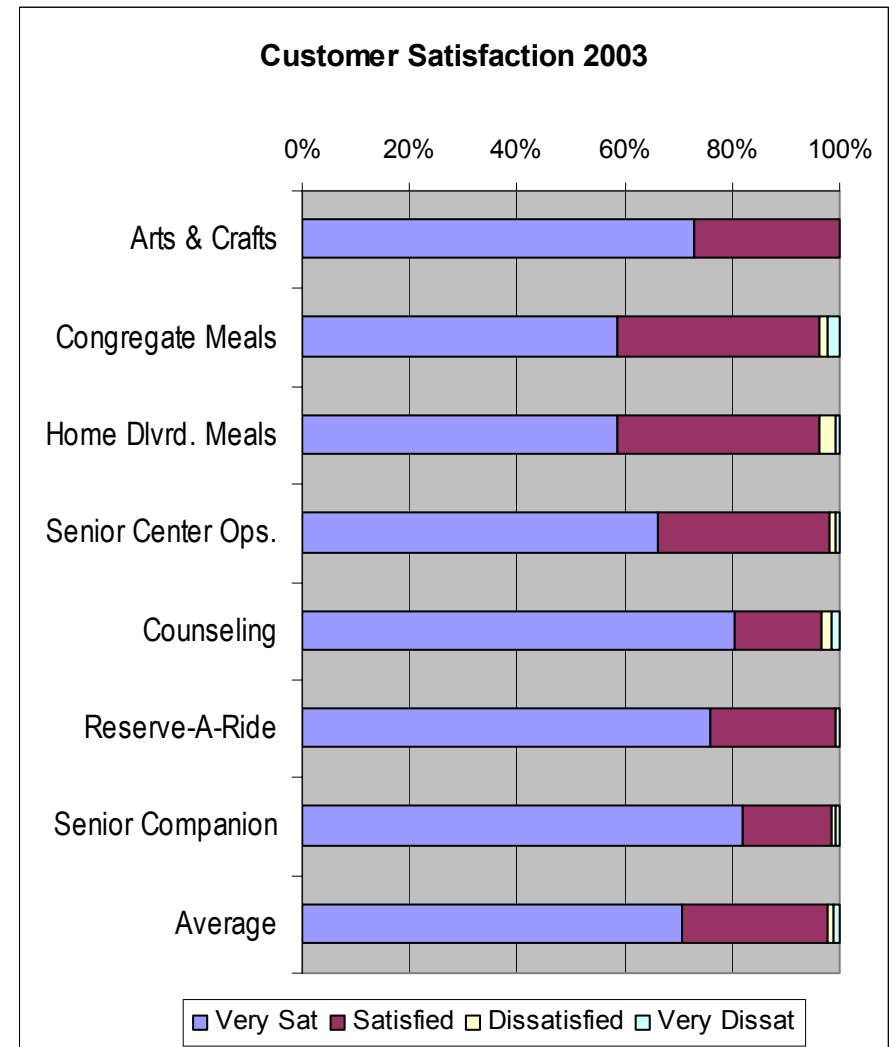
Senior Services Budget 2003-04

Legend:
- Administration
- Center Operations
- Case Management/ Counseling
- Senior Companion/ Special Programs
- Transportation

Pie chart values: 8%, 54%, 8%, 4%, 26%

3/4/2004.

Customer Perspective

Customer Satisfaction Survey 2003

- Satisfaction rate = 94-98%

- Very Satisfied = 58-80%

- Dissatisfaction rate = 4% or less

- Counseling satisfaction rate grew most, from 74% in 2001 to 97% in 2003

- Meals have lowest scores

- Paradox: internal survey *vs.* customer satisfaction

Customer Satisfaction 2003

Categories: Arts & Crafts, Congregate Meals, Home Dlvrd. Meals, Senior Center Ops., Counseling, Reserve-A-Ride, Senior Companion, Average

Legend: ☐ Very Sat ■ Satisfied ☐ Dissatisfied ☐ Very Dissat

3/4/2004.

Customer Perspective
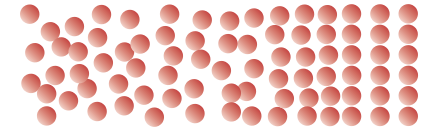
ASU Study 2002 - Gitelson
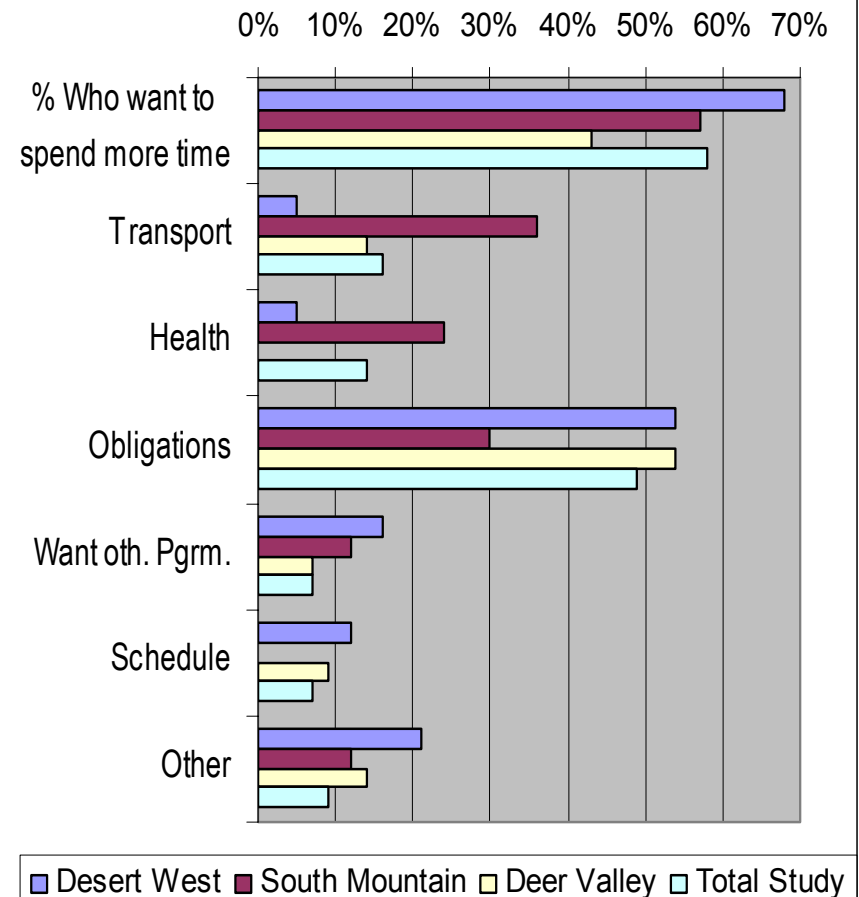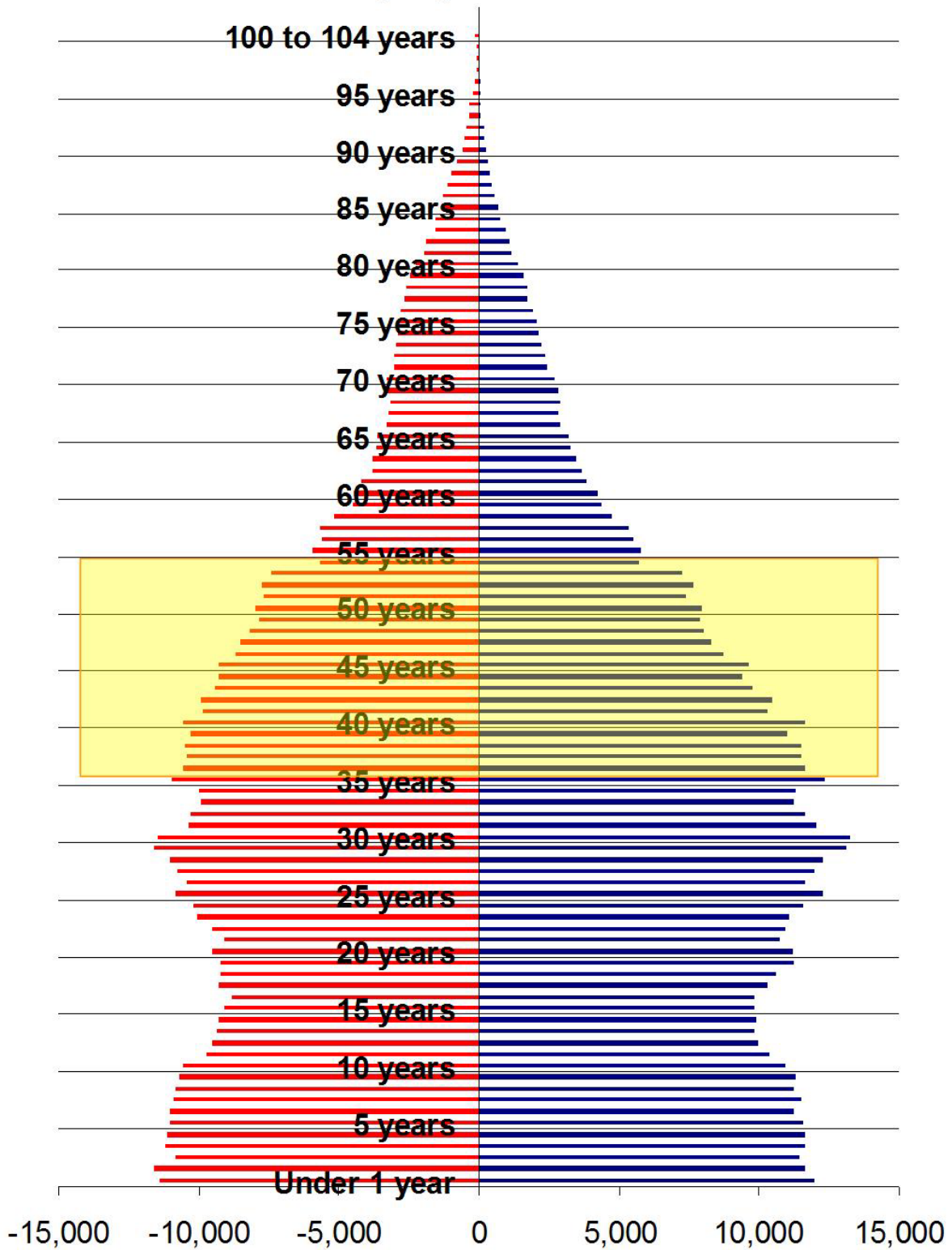
- 43-68% of clients want to spend more time at the Center

- Participants are busy, active people

- Lots of variability by Center

- South Mountain: transportation issue

Reasons for Not Spending More Time at Center

Legend: Desert West, South Mountain, Deer Valley, Total Study

3/4/2004.

Phoenix City Age Distribution 2000

Chart axis labels (right side, top to bottom):
- 100 to 104 years
- 95 years
- 90 years
- 85 years
- 80 years
- 75 years
- 70 years
- 65 years
- 60 years
- 55 years
- 50 years
- 45 years
- 40 years
- 35 years
- 30 years
- 25 years
- 20 years
- 15 years
- 10 years
- 5 years
- Under 1 year

Horizontal axis: -15,000   -10,000   -5,000   0   5,000   10,000   15,000

Strategic Planning Team Members

Job Classification	Organization	Staff Representative
Consultants	Blackerby Associates	Lynne Brown Phillip Blackerby
Division Deputy Director	Division Management	Doris Marshall
Program Coordinators	Division Management	Cathy Walsh Jerlene Malone Jose Mercado Maxine Anderson
Admin I	Division Management	Linda Anderson
Admin II Facilitation	Division Management	Reginald Ragland Anissa Olguin
Secretary	Division Management	Sally Roberts
Dietician	Nutrition	Joanne Cherry
Case Worker III	Counseling Services	Sonja Spell
Case Worker II	South Mountain Squaw Peak	Carmen Hernandez Marty Koellner
Assistant Transportation Supv.	Reserve-a-Ride	Robin Licata
Center Supervisors	Marcos de Niza Goelet Beuf	Becky Franco Johnny Riggins
Community Worker	Manzanita Shadow Mountain	Luci Mancuso Wendy Rudick
Full-time cook	Deer Valley	Lorey Thomas
Part-time cook	South Mountain	Mary Bass
Meal Delivery Aide	Paradise Valley McDowell Place	Roger Reesor Patty Flores
Meal Delivery Sup.	Desert West	Lindy Garewal
Laborer	Warehouse	Ed Bennett

Attributes for Strategic Planning Team Members

❑ Possesses strong written and verbal communication skills

❑ Exhibits leadership skills; i.e.: takes initiative to solve problems; thinks "outside the box;" takes a positive approach; and deals well with ambiguity.

❑ Acts as an "opinion leader;" i.e.: considered an informal leader among his/her peers.

❑ Able to carve out enough time from present role (5-10 hours per week, average) to take part in strategic planning process on an ongoing, continuous basis for at least one year to do the following:

- o Attend three full day sessions in March and early April and regularly scheduled meetings throughout the upcoming year.
- o Gather information from constituents he/she represents to include as part of the strategic planning process.
- o Feed back information from strategic planning process to these constituents.
- o Research "best practices" for possible inclusion in strategic plan.
- o Help lead implementation of strategic planning goals and action plans.

Major Topics for Future Strategic Planning Sessions

Session 2: Establishing Strategic Outcomes (April 2, 2004)

❑ Identify Measurable Outcomes: SMART objectives (Specific, Measurable, Achievable, Relevant, Time-based) that will contribute to the accomplishment of SSD's goals

❑ Identify strategies—methods, approaches—to achieve the objectives

Session 3: Implementation Planning (April 30, 2004)

❑ Develop action plans to implement the strategies and advance toward the SSD's "future state" vision.

❑ Develop an implementation timeline, appropriately sequencing the strategy action plans, and structuring them with in the expected availability of resources.

❑ Agree on a process for regularly measuring and reporting progress in achieving objectives and implementing strategies.

❑ Outline a communications plan to convey SSD's new strategic direction and progress to staff, customers (clients) and other stakeholders.

Assignments for Interim

❑ Report to constituents about activities and results of this session

    o   People at your Center.

    o   People at Centers not represented here.

    o   People at other Centers in your job category.

    o   Pro-active outreach:
- Request Center Director to call a meeting to discuss the *Strategic Plan 2009.*
- Initiate talk about *Strategic Plan 2009* in informal conversations.
- Initiate phone calls to peers at other Centers..
- Respond to requests for presentations at other Centers.

❑ Solicit other peoples' considered responses to activities and results of this session.

    o   Write down the names of people you speak to, and what they say in response.

    o   Ask questions to clarify what they say; don't assume; be sure you understand.

    o   Prepare to report back to the Strategic Planning Team on the feedback you hear.

Deliverables for April 2 Session

❑ Report to Strategic Planning Team on the feedback you hear from constituents.

❑ _____

_____

❑ _____

_____

❑ _____

_____