



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

**Strategic Planning Session 2:
Establishing Strategic Outcomes
Agenda – April 2, 2004**

8:00 a.m. Networking breakfast

8:30 a.m. Welcoming remarks

Introductions: What did you do to generate input from constituents during the interim? How did it go?

Report of Vision Team; clarifying questions

Report of Mission Team; clarifying questions

Pick 10: Make ten tally marks next to the common themes that have the biggest impact on customers, now and in the future

Pick 5: List top 5 common themes

Reality check: any common themes that *must* be added to list?

Break

Write Goals in small groups

Lunch

Write SMART Objectives in small groups

Exercise

Break

Brainstorm strategies in small groups

Assignments for April 5-29

Review and Session Feedback

5:00 p.m. Clean-up and adjourn





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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Envisioning the future state • Establishing strategic outcomes • Implementation Planning 	Mar. 5 Apr. 2 Apr. 30
Phase 5 Communications	<ul style="list-style-type: none"> • Discuss project at full staff meeting • Strategic Planning Team interim communications <ul style="list-style-type: none"> ♦ Visioning and Outcomes • Strategic Planning Team interim communications <ul style="list-style-type: none"> ♦ Outcomes and Implementation • Strategic Planning Team communications <ul style="list-style-type: none"> ♦ 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.

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
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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!
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-
-



Interim Reports

What did you do to generate input from constituents during the interim since March 5?

How did it go?



Report of Vision Team

Senior Services—the heart of our community for optimizing maturity:

- ♥ Choices
- ♥ Opportunities
- ♥ Cooperation
- ♥ Resources



Report of Mission Team

The Senior Services Division is committed to promote independence, maintain dignity, and maximize quality of life for eligible customers in Phoenix through socialization opportunities, supportive services, and resource referrals.



City of Phoenix, Human Services Department Strategic Plan Highlights¹

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.



Goal-Writing

Definition:

A *Goal* is a statement of intended outcome that...

- Defines outcomes or results: What effect will we have on customers or the community?
- Describes the direction of change:
 - increase or decrease?
 - raise or lower?
 - guarantee or eliminate?
- Is measurable, but not necessarily measured
 - *Example:* “To improve the health of seniors.”
 - *Example:* “To increase the number of seniors participating in Center programs.”
 - *Example:* “To increase awareness of services available to seniors.”
- Not necessarily time-bound

BHAG: “Big, Hairy, Audacious Goal”²

- Extensive time frame: 10-30 years
- Clear, compelling, easily expressed, plain English
- Consistent with values & purpose
- 50-70% likelihood of success

Examples:

- “...this nation should commit itself to achieving the goal, before this decade is out, of landing a man on the Moon and returning him safely to the Earth.” (JFK, 1961)
- “Become a \$125 billion company by the year 2000.” (Wal-Mart, 1990)
- “Become number one or number two in every market we serve...” (GE, 1980s)
- “Crush Adidas” (Nike, 1960s)
- “Become the company most known for changing the worldwide poor-quality image of Japanese products” (Sony, early 1950s)
- “Become the Harvard of the West” (Stanford Univ., 1940s)

² James C. Collins and Jerry I. Porras, “Building Your Company’s Vision,” *Harvard Business Review*, September-October 1996, reprint 96501.



Write Goals

“To”	<i>change verb</i>	<i>change what?</i>	<i>for whom?</i>
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Rewrite for context:

“To”	<i>change verb</i>	<i>change what?</i>	<i>for whom?</i>
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Rewrite for context:

“To”	<i>change verb</i>	<i>change what?</i>	<i>for whom?</i>
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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
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-
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SMART Strategic Objectives

Definition

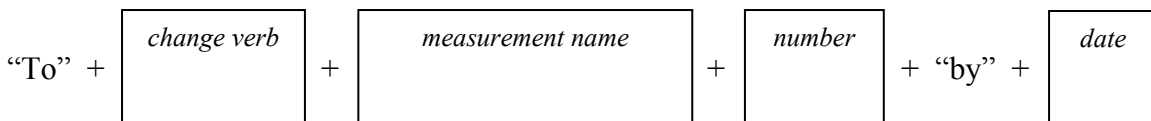
A *SMART Strategic Objective* is a statement of an intended outcome that is also:

- **Specific:** Clearly defined, precise outcome
- **Measurable:** Progress and achievement can be measured; data source is identified
- **Achievable:** Can be accomplished, given conditions, resources
- **Relevant:** Supports vision, mission, goals
- **Time-bound:** States clearly when goal will be achieved

Strategic

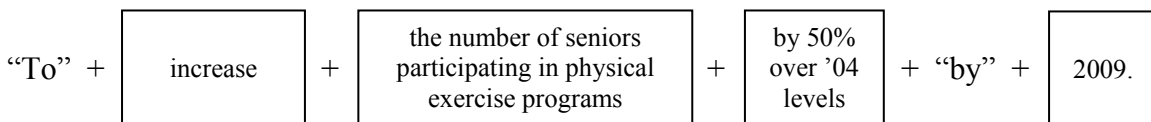
- Outcome-based: all about the results of what you do,...
 - Not what to do
 - Not how you do it
- Externally focused: all about customers and how they change.
- Change-oriented: describes how the customers change over time, from now to then

Formula



Edit for syntax:

Example: “To increase the number of seniors participating in physical exercise programs by 50% over 2004 levels by 2009.”



“To increase senior participants in physical exercise programs by 50% by 2009.”



Write SMART Strategic Objectives

“To” + + + + “by” +

Edit for syntax:

“To” + + + + “by” +

Edit for syntax:

“To” + + + + “by” +

Edit for syntax:

“To” + + + + “by” +

Edit for syntax:



Strategies

Definition

Strategies are alternative methods or approaches for achieving a Strategic Objective. They describe: *how* you will achieve the objective; what you will *do* to achieve the objective.

For a good outcome-based Strategic Objective you will typically see several alternative ways to achieve the result.

Example:

Strategic Objective: To increase senior participants in physical exercise programs by 50% by 2009.

Strategies:

- Advertise: Distribute flyers about exercise classes all over the neighborhoods
- Bribe: Extra fruit treat for exercise class participants
- Competition: Post City-wide Center Teams' outcomes in all Centers
- Competition: Host Senior Olympics
- Customize: Separate classes for men and women, each decade,...
- Endorsement: Focus a series of lectures and health clinics about benefits of exercise
- Fun: Create games with a point, that have exercise side-benefits
- Incentive: Offer prizes for most attendance, weight lost, improved, miles walked, *etc.*
- More classes: Offer wider range of classes to accommodate people of all ability levels
- Personality: Celebrities lead classes; news anchors, business leaders, politicians
- Personal trainers: Work with Parks & Rec. to rotate personal trainers among Centers
- Smoke-free: Sponsor Phoenix Smoke-Out activities in November
- Social: Help participants recruit their best friends



Mind-Mapping

Mind Mapping is a powerful technique for invoking the creative part of the brain. It encourages you to make associations and to look for new paths of thinking. It allows you to get information down on paper the way your mind handles it.

Mind Mapping works with words, colors, symbols and images to promote visualization of ideas rather than the evaluation through logic. It uses color because color activates the brain. Images and symbols are shorthand to the brain and help to communicate your message.

How to Create a Mind-Map

1. Clearly define the topic.
2. Put a **KEY WORD** or **PHRASE** representing the topic in the center of the paper.
3. As ideas come to mind, record them around the Key Word or Phrase. Connect each idea to the Key Word or Phrase with a line.
4. Use colors and symbols to stimulate creativity.
5. Continue process until you run out of ideas.
6. Group ideas with common themes by drawing a color line around them.

Create Your Mind-Map

1. The topic is your SMART Strategic Objective. Your goal is to identify as many Strategies for implementing that Strategic Objective as possible in the time allowed.
2. Write your SMART Strategic Objective in the center of the paper.
3. As ideas for Strategies are suggested by team mates, record them around the Objective. Connect each idea to the Objective—or to another idea—with a line.
4. Use colors and symbols to stimulate creativity.
5. Continue the process until you run out of ideas, or time.
6. Group ideas with common themes by drawing a color line around them.



Strategic Planning Team Members

<i>Job Classification</i>	<i>Organization</i>	<i>Staff Representative</i>
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



Major Topics for Next Strategic Planning Session

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 and other stakeholders.



Assignments for Interim

- Report to constituents about activities and results of this session
 - People at your Center.
 - People at Centers not represented here.
 - People at other Centers in your job category.
 - 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.
 - Write down what people say in response.
 - Ask questions to clarify what they say; don't assume; be sure you understand.
 - Prepare to report back to the Strategic Planning Team on the feedback you hear.

Deliverables for April 30 Session

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