



City of Phoenix Human Services Department
Senior Services Division
Strategic Planning Process
Plan-to-Plan

Introduction

The City of Phoenix Human Services Department, Senior Services Division (SSD), has engaged Blackerby Associates to facilitate development of a strategic plan covering the five years from July 1, 2004 through June 30, 2009. Additional deliverables include a more-detailed action plan for the first year, July 1, 2004 through June 30, 2005.

This Plan-to-Plan document will serve as a guide to SSD's strategic planning process. It is subject to change over time, as dates and participants are firmly established. Key elements of the Plan-to-Plan will also be tracked on the project web site, at www.BlackerbyAssoc.com/Senior/. This Plan-to-Plan satisfies the required submission of a Project Timeline, RFQ sec. 3.1.

Project Goals and Objectives

SSD has established key goals for this project:

- Produce a strategic plan and organizational direction for the SSD, and
- Deliver an action plan that includes processes and mechanisms to drive and support implementation of the strategic plan.
- To ensure that every voice is heard.

SSD has also established several specific objectives for this project, to ensure that the goals are accomplished in a timely manner:

- Submit a Summary Report, within 30 days of the planning sessions, containing, at a minimum, the results of the planning sessions with internal and external customers.
- Submit a Draft Five-Year Strategic Plan, within 120 days of contract commencement (January 22, 2004), containing: communication plan; vision, goals and objectives; analysis and recommendations regarding organizational structure to support the new vision and goals; implementation plan.
- Submit a Final Five-Year Strategic Plan within 15 days of approval of the Draft.

Project Scope

The SSD Strategic Plan will address all activities under the purview of the SSD, including the City Hall staff, 17 Senior Centers, advocacy and counseling (PACE), arts & craftmobile, reserve-a-ride, senior companions, food service, food delivery, volunteers, and all support services for these activities throughout the City of Phoenix government and the community. SSD management has identified no specific constraints on the scope of the project.

Project Timeline

The SSD strategic planning process will include the following key events and activities (Note: all dates are 2004 unless specifically noted):

Proposed Project Timeline

Event/Activity	Responsibility	Target Date	Proposed Date	Actual Date
Kick-off meeting	SSD project team Blackerby Assoc.	Jan. 13	Tue., Jan. 13	Jan. 13
Conduct environmental scan	Blackerby Assoc.		Thu., Jan. 15 – Mon., Feb. 9	Feb 9 Feb 13 (rev.)
Request volunteers for focus groups	SSD project team SSD employees		by Fri., Jan. 30	
Conduct focus groups	Blackerby Assoc. and...	by Feb. 29	See detail below:	
• Senior Svcs. Comm.	Senior Svcs. Comm.		Wed., Feb. 11	Feb. 11
• Community leadership	Community leaders		Mon., Feb. 23	
• Clients	Clients		Mon., Feb. 23	
• Senior Center leadership	Senior Center leaders		Mon., Feb. 23	
• Social services providers	Social services providers		Tue., Feb. 24	
• Volunteers & Companions	Volunteers and Companions		Tue., Feb. 24	
• Transport/food service workers	Transportation & food service workers		Tue., Feb. 24	
• SSD senior staff	SSD senior staff		Wed., Feb. 25	
Request volunteers for Strategic Planning Team (meet certain attributes)	SSD project team SSD employees		After focus groups selected, about Feb. 11-13	
Strategic planning session 1	Strat. Plng. Team Blackerby Assoc.	by Mar. 19	Fri., Mar. 5	
Interim communications with stakeholders	Strat. Plng. Team	by Mar. 19	Mon., Mar. 8 – Thu., Apr. 1	
Strategic planning session 2	Strat. Plng. Team Blackerby Assoc.	by Apr. 15	Fri., Apr. 2	
Interim planning activities with stakeholders	Strat. Plng. Team	by Mar. 30	Mon., Apr. 5 – Thu., Apr. 29	
Strategic planning session 3	Strat. Plng. Team Blackerby Assoc.	by May 15	Fri., Apr. 30	
Submit summary report within 30 days after strategic planning sessions	Blackerby Assoc.	by May 28	Fri., May 14	
Draft year 1 action plan within 120 days of contract commence	Blackerby Assoc.	by May 21	Fri. May 21	
Submit final year 1 action plan and strategic plan documents	Blackerby Assoc.	by Jun. 10	Thu., Jun. 10	
Management approvals	SSD & Human Svcs. Dept. mgmt.	by Jun. 30	Wed., Jun. 30	
Strategic plan implementation	SSD	Jul. 1, 2004 - Jun. 30, 2009	Thu., Jul. 1, 04 – Tue., Jun. 30, 09	

Key Participants

Responsibility for each step in the Project Timeline is assigned to a group of individuals. In general, the Blackerby Associates Project Manager (Mr. Blackerby), acting in concert with the SSD Coordinator (Mr. Ragland), will prompt these groups and individuals to accomplish their responsibilities in a timely manner. The key participants include:

SSD project team consists of the Deputy Human Services Director for Senior Services (Doris Marshall), the SSD Coordinator (Reginald Ragland), the SSD Administrative Assistant (Anissa Olguin) and any other individuals they may designate from time-to-time.

Blackerby Associates includes Phillip Blackerby, Principal and Project Manager, and Lynne Brown, Senior Consultant and Facilitator. In most cases, Mr. Blackerby and Ms. Brown will work together as a team.

SSD Employees includes all approximately 300 paid employees of the Senior Services Division. All SSD Employees are encouraged to provide input into the strategic planning process, so that every voice is heard.

Strategic Planning Team members are a selected group of approximately 20 SSD employees and other stakeholders who agree to take a leadership role in their participation in the strategic planning process. Strategic Planning Team members will participate in all three full-day Strategic Planning Sessions, make decisions about the future development of SSD, and communicate the Team's discussions and decisions back to constituent SSD employees. Team members will gather feedback and additional input, and keep constituents advised of the progress of the strategic planning process. Strategic Planning Team members must meet specific criteria, to ensure that, taken together, Strategic Planning Team members broadly represent SSD employees, including hierarchical levels, delivery of services and geographic service areas. Thus, Strategic Planning Team members represent a "diagonal slice" across all SSD employees.

Focus Groups are groups of people—8-12 individuals per group—who will participate in group discussions, giving their input into the strategic planning process. Each focus group session will begin with a brief review of key themes derived from the environmental scan, followed by a facilitated discussion. Focus group participants are volunteers who meet the qualifications for each group; the SSD Project Team will invite potential participants to volunteer, and will then select participants from the list of volunteers. Each focus group will be facilitated by a consultant (Ms. Brown), while another consultant (Mr. Blackerby) takes detailed notes on the discussion.

The eight focus groups include:

Senior Services Committee is an advisory board that helps SSD set policy through its monthly meetings. It is made up of community members concerned about the delivery of services to seniors.

Senior Center Leadership members are the directors of the 17 Senior Centers administered City-wide by the SSD.

Clients are interested individuals who receive SSD services, at Senior Centers, or transportation services, advocacy and counseling, meal delivery, or senior companion services.

Community Leadership includes interested individuals who lead other related organizations in the Phoenix area. They may be leaders of social services delivery organizations, educational institutions, religious congregations, political organizations or other groups.

Social Services Providers include SSD employees who actually provide social services to seniors, such as advocacy and counseling services, shopping assistance, telephone reassurance, consumer & health education, recreational programs, wellness activities and other services, except meals and transportation services.

Transport/Food Services Workers include SSD employees who provide Reserve-a-Ride, deliver meals to homes, or prepare or serve meals at Senior Centers or for home delivery.

Volunteers and Companions are individuals who volunteer their services to work with seniors through any of the SSD programs. Senior Companions meet certain qualifications, and may receive a small stipend.

SSD Senior Staff are key SSD employees charged with managing, overseeing, evaluating and allocating resources within the Senior Services Division.

SSD & Human Services Dept. Management includes the Deputy Human Services Director for Senior Services (Doris Marshall), and the Director of Human Services (Gloria Hurtado) and others whom they may name.

Environmental Scan

The environmental scan will focus on the previously-developed materials provided to Blackerby Associates, which include:

- 2003 Customer Satisfaction Survey, Report on Results, Senior Services Division, May 2003.
- 2002-03 Annual report, City of Phoenix Human Services Department.
- Human Services Department Diversity Survey, October 15, 2002.
- Human Services Department Organizational Report Card, 2001-2003, undated.
- Measuring the Benefits of Senior/Adult Centers, 2003 NCOA/ASA Workshop on Senior Centers, by Richard Gitelson, Jim McCabe, Tanya Fitzpatrick, Arizona State University West, College of Human Services, and Alan Case, Coastal Carolina University.
- Human Services Department Strategic Plan, January 2002
- Human Services Department 2003-2004 Operating Budget
- Site Assessment Report for 02-03, Human Services Department/Senior Service Division, undated.
- Various brochures and marketing materials, undated.

Events Management

Throughout the process, SSD will be responsible for inviting participants to all scheduled events, reserving and configuring meeting locations, ordering catering for breakfast, breaks and lunch (as appropriate). Blackerby Associates will coordinate with the SSD Administrative Assistant on these logistical issues.