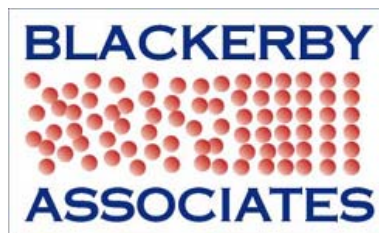




**City of Phoenix
Human Services Department
Senior Services Division**

***Senior Services Division Strategic Plan 2009
Summary Report***

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Transforming Organizations

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**City of Phoenix Human Services Department
 Senior Services Division**

**Senior Services Division Strategic Plan 2009
 Summary Report**

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**City of Phoenix Human Services Department
Senior Services Division**

**Senior Services Division Strategic Plan 2009
Summary Report:**

Introduction

In January 2004, the City of Phoenix Human Services Department (HSD), Senior Services Division, (SSD) engaged Blackerby Associates, Inc., to: “...produce a strategic plan and organizational direction for the SSD...[and] an action plan that includes processes and mechanisms to drive and support implementation of the strategic plan.” This charge also requires: “5.1 Within 30 days of the planning sessions, Contractor shall submit a Summary Report that contains, at a minimum, the results of the planning sessions with internal and external customers.” This report is submitted under that requirement.



Strategic Planning Process

Blackerby Associates facilitated SSD personnel through a structured process to develop its strategic plan. The following sections describe the key elements of that process.

Kick-off Meeting

The Senior Services Division Strategic Plan 2009 began with a kick-off meeting January 13, 2004, involving the Deputy Human Services Director for Senior Services, the two project managers for the strategic planning project, and the Blackerby Associates project manager. This team reviewed the project objectives, the major elements of the process and the key participants, and SSD provided a set of target dates for the major elements of the strategic planning process. Key factors included SSD’s intention that every voice be heard, and that the resulting plan be consistent with and contribute to the strategic choices in the HSD strategic plan.

Plan-to-Plan

Based on the target dates from SSD staff, Blackerby Associates developed a Plan-to-Plan document that outlined: project goals and objectives; project scope; project timeline; key participants, including characteristics of participants in various focus groups; environmental scan; events management, submitted January 27. A version of this Plan-to-Plan was also posted on the special web site established for this project, at www.BlackerbyAssoc.com/Senior/. The web-based version also included a section on project management. Blackerby Associates also developed a one-page summary of the Plan-to-Plan, which is included as Appendix A.

Environmental Scan:

Blackerby Associates reviewed and analyzed documents to develop insights into SSD’s internal strengths and weaknesses and its external opportunities and threats. These documents included:

- 2003 Customer Satisfaction Survey, Report on Results, Senior Services Division, May 2003.
- 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.
- 2002-03 Annual report, City of Phoenix Human Services Department.
- Site Assessment Report for 02-03, Human Services Department/Senior Service Division, undated.
- Various brochures and marketing materials, undated.

Blackerby Associates summarized key findings of this documentary review, and presented these findings to the Director of Human Services, the Deputy Human Services Director for Senior Services and the two SSD project managers on February 9. Based on participant feedback, Blackerby Associates updated the presentation materials February 13. Those presentation materials are included in Appendix B.

Focus Groups

SSD Staff implemented a process to recruit volunteers to participate in a series of focus group discussions. Different populations of stakeholders comprised each focus group. In general, management selected the employee focus groups, taking some care to include the voices of dissident employees. All focus group discussions were confidential.

Blackerby Associates conducted eight focus group discussions. Each focus group session started with a brief overview of the strategic planning process and a presentation of findings from the environmental scan to stimulate participant discussion. The discussion was structured around a standard set of open-ended questions. One member of the Blackerby Associates consulting team facilitated the participant discussion, while another recorded detailed notes. The focus groups, dates and number of participants included:

<i>Focus Group</i>	<i>Date, 2004</i>	<i>Participants</i>
Senior Services Committee members	February 11	9
Community leadership	February 23	7
Clients	February 23	19
Senior Center leadership	February 23	15
Social services providers	February 24	17
Volunteers and Companions	February 24	15
Transportation/Food Service workers	February 24	14
Senior Services Division senior staff	February 25	11
<i>Subtotal, Focus Group Participants</i>		108
<i>Duplicated Focus Group Participants</i>		-2
<i>Total, Unique Focus Group Participants</i>		106

Blackerby Associates also interviewed the Deputy Human Services Director for Senior Services on March 1, using the same questionnaire that guided the focus groups. These information-gathering activities therefore engaged 107 individual voices in this phase of the SSD Strategic Plan 2009 process.

After the focus groups concluded, Blackerby Associates analyzed the comments from detailed notes, and compiled four lists of issues raised by multiple participants (issues raised by just one participant, and not seconded by other participants, were ignored): Internal Strengths, Internal Weaknesses, External Opportunities and External Threats (SWOT analysis).

Strategic Planning Team

SSD staff selected a cross-section of SSD employees to serve on the Strategic Planning Team. A list of the Strategic Planning Team members is included as Appendix C. The participants included key members of SSD's management team, and also drew a "diagonal slice" of other employees, including every job description, and representatives from several different Senior Centers in all parts of the City. While some employees noted that the same people are routinely selected for these types of intra-divisional efforts, the actual discussions of the Strategic Planning Team indicated a wide diversity of opinions among members.

Strategic Planning Sessions

Blackerby Associates facilitated full-day strategic planning sessions for the Strategic Planning Team on March 5, April 2 and April 30. Agendas for each session are included as Appendix D.

Strategic Planning Session 1: Envisioning the Future

Key activities in the first strategic planning session included:

Vision

In small groups, participants drew images representing their vision of the future of SSD on large-format paper, using colored markers. Each group presented its creation to the full Strategic Planning Team. The consulting team recorded notes and facilitated discussion of the different visions. Each small group designated one member to participate in a Vision Team, which would meet before the next Strategic Planning Session to develop a single vision statement. Members of the Vision Team included: J. Cherry, W. Rudick, R. Reesor, R. Licata and J. Riggins

Mission Statement

The Strategic Planning Team received training in mission statement development, including definition and questions the mission statement should address. Small groups of participants each developed a mission statement for SSD, then presented and explained their mission statements to the full Team. Some facilitated discussion followed. The small groups then re-formed to develop a second draft mission statement. Each group then presented and explained its second draft to the larger Team, followed by a facilitated discussion. Each small group then designated a member to participate on a "Mission Team," which would meet before the next Strategic Planning Session to develop and recommend a single mission statement. Members of the Mission Team included: J. Malone, L. Mancuso, S. Roberts, A. Olguin and L. Thomas.

SWOT Analysis

Starting with the SWOT analysis compiled from the focus groups, participants had an opportunity to edit the four lists, by adding or changing items. In general, the participants added several new items to the lists; clarified some items; and moved some items from one category to another. A full listing of the resulting SWOT analysis is included as Appendix E, including all the issues raised by both internal employees and external customers.

Between Strategic Planning Sessions 1 and 2

Assignments for Communications with Constituents

Participants were encouraged to return to their constituent groups (other employees in the same job classifications; other employees working in the same Senior Center; other employees working in nearby Senior Centers) to review the vision exercise, mission exercise and SWOT analysis; to ask for additions, deletions and ideas about these elements; to ask what issues will be most important over the next five years; to feed back responses to the SSD project coordinators.

In general, the members of the Strategic Planning Team did discuss the activities of the first Strategic Planning Session with most of SSD's employees. In the April 2 session, the members reported that many employees appreciated the feedback, remained skeptical of the process, and provided valuable reactions and other input for the process.

SSD Staff Survey

The SSD staff turned the SWOT analysis into a survey questionnaire, asking respondents to identify and rank the top ten issues on each of the four lists. The staff received 146 responses out of a potential population of just under 200 employees, or about 74%. Time constraints precluded analyzing the data fully before the next Strategic Planning Session.

Strategic Planning Session 2: Establishing Strategic Outcomes

Key activities in the second strategic planning session included:

Vision Statement

The Vision Team reported to the full Strategic Planning Team the results of their intersession meeting, and recommended a draft vision statement:

Senior Services—

The heart of our community for optimizing maturity:

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

In facilitated discussion participants suggested: changing “cooperation” to “collaboration” or “working together;” changing “maturity” to “life spans;” adding “volunteerism.” The Team reached no consensus in this second Strategic Planning Session; it reached consensus on a modified version of the vision statement at the third Strategic Planning session (see below).

Mission Statement

The Mission Team also reported to the full Strategic Planning Team the results of their intersession meeting, including their recommended mission statement:

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.

In facilitated discussion Strategic Planning Team members raised concerns about “customers,” which may imply payment; others infer a freedom of choice; members agreed “clients” is inappropriate and suggested “participants” or “eligible individuals.” Members discussed “supportive services;” the Mission Team reported it rejected “social services” because it implies welfare services like food stamps; “supportive services” include self-help and support groups. The Team also discussed “eligible;” some members feared it would imply a means test; others countered that not all citizens may participate in Senior Center activities. The Team reached no consensus.

Common Themes

Based on constituent feedback, Strategic Planning Team members made some minor changes to the SWOT analysis. Partial results from the employee survey had been tabulated for internal weaknesses, and these data were added to the SWOT analysis. Team members then selected the top ten issues—in terms of impact on SSD customers—as the most important common themes. This process yielded 13 issues that received six votes or more (of a possible 23). In facilitated discussion, Team members combined related issues, winnowing the list to eight common themes.

Goals

Strategic Planning Team members received some training in writing goals, including the definition of goals, a five-step process and a list of “change verbs” useful in writing goals. They also discussed the use of BHAGs (“Big Hairy Audacious Goals”). In small groups, participants turned each of the eight common themes into goal statements.

Strategic Objectives

Strategic Planning Team members received some training in writing SMART strategic objectives (statements of intended outcomes that are **s**pecific, **m**easurable, **a**chievable, **r**elevant and **t**ime-bound). In small groups based on goals, participants wrote strategic objectives contributing to achieving a goal. The participants wrote 14 strategic objectives under the eight goals.

Strategies

Participants received some training on developing alternative strategies for implementing strategic objectives and using mind-mapping techniques to brainstorm alternatives and capture relationships among them. Small groups then brainstormed alternative strategies for each strategic objective under a goal, and mapped those alternatives onto large-format sheets. Then, each group visited each of the other groups’ mind-maps, and suggested additional alternative strategies.

The vision, mission, goals, strategic objectives, strategies and tactical objectives are not included in this report; rather, they will be published in a separate *SSD Strategic Plan 2009* report.

Between Strategic Planning Sessions 2 and 3

Assignments for Communications with Constituents

After the second strategic planning session, participants were encouraged to meet with their constituents, and generate conversations about the elements of the strategic plan developed so far.

Several Strategic Planning Team members discussed the vision, mission, goals and strategic objectives with constituents, and found a warmer reception. They also had additional data on the

results of the SSD staff's SWOT survey questionnaire. They reported that field employees appreciated being consulted on these issues, and were more open in providing feedback.

Strategic Planning Session 3: Implementation Planning

Key activities in the third strategic planning session included:

Strategies Prioritization

Blackerby Associates had compiled the mind-mapped strategies developed in the previous session into lists of strategies associated with each SMART strategic objective, and posted them on oversize paper on the walls. Strategic Planning Team members went to each strategic objective, in two separate passes, voting for the strategies they thought were (a) "low-hanging fruit" (strategies that could be implemented easily within six months without significant new resources), and (b) "most effective" (strategies that would have the biggest impact on customers).

Tactical Objectives

Strategic Planning Team members received some training on writing tactical objectives, which are statements of intended outputs, still meeting the SMART criteria. In small groups, Team members wrote tactical objectives for each strategic objective, emphasizing the most effective strategies and the "low-hanging fruit" strategies identified in the previous exercise. With few exceptions, the tactical objectives reflected primarily the most effective strategies. Selection of strategies and tactical objectives was further constrained by requirements that the objective either be achievable in the first year, or must be started during the first year in order to be completed in a timely manner during the five-year planning horizon.

In facilitated discussion of the tactical objectives, the Strategic Planning Team edited some of the associated strategic objectives. The Team also decided to move some strategic objectives under different goals, to eliminate one goal and to cut one strategic objective that became redundant. In the end, the Team produced seven goals, with 13 strategic objectives and 25 tactical objectives.

Implementation Planning

For each tactical objective, the Strategic Planning Team, in small groups, developed an implementation plan, identifying: (a) the performance measure, or indicator that the tactical objective has been achieved; (b) the accountable person, individual nominated to be in charge of ensuring the tactical objective is achieved; (c) estimated costs of achieving the objective, in internal staff time and expenditures; (d) time frame, including the start date for the project and the end date.

Master Time Line

Each small group wrote their tactical objectives and start and end dates on a sheet of glued paper, then placed the objective on a master time-line sheets pasted to the wall. The result showed how skewed the start dates were to the beginning of the new fiscal year; an assigned small group within the Strategic Planning Team changed some of the start and end dates of the tactical objectives in order to balance the overall plan consistent with available resources.

Progress Reporting Procedures

Another small group within the Strategic Planning Team developed a set of procedures for tracking progress in implementing each of the tactical objectives. An outline of the procedures is

included in Appendix F. In general, it anticipates a single point of coordination, assisted by computerized project tracking capabilities in MS Project and an automated reminder and reporting capabilities available through Lotus Notes. Compiled monthly project status reports will be distributed throughout the division, and highlights communicated through the SSD newsletter.

Communications Planning

A third small group within the Strategic Planning Team developed a communications plan to ensure that all employees and other stakeholders were aware of SSD Strategic Plan 2009. This communications plan is included in Appendix G. Key elements of the communications plan are:

- Who needs to know about the plan? Who are audience or stakeholders?
- What message do they need to know? What will you tell them?
- Who will tell them?
- How will you tell them? 1:1 meetings, e-mail, newsletter, etc.?
- On what dates? Completed by when? How often do you tell them?

Vision Statement Revisited

The Strategic Planning Team revisited the vision statement, and reached consensus on a modified version, deleting reference to “optimizing maturity” and changing “cooperation” to collaboration.” The final vision statement is:

Senior Services—the heart of our community:

- ♥ Choices
- ♥ Opportunities
- ♥ Collaboration
- ♥ Resources

Mission Statement Revisited

The Strategic Planning Team also revisited the mission statement. Many of the same discussion points were raised again, and no consensus was achieved. The Team agreed that the Mission Team should reconvene and resolve these issues.

Summary of Findings

Primary findings of the environmental scan process overall include:

- The division’s customers are very pleased with the quality of services they receive.
- Data regarding opinions of potential customers are not available.
- SSD resources have been held constant for several years, even though overall workloads have increased, including increases in facilities financed by bonds. The lack of resources adds stress to employees who are dedicated to excellent service and performance.
- Communications both up and down within the SSD hierarchy are minimal and incomplete; this lack of communication frequently manifests as distrust between senior management levels and field staff levels.
- The strategic planning process is itself an intervention in the management of SSD, and has laid a foundation for improved communications throughout the organization.

Appendix A
Summary Plan-to-Plan



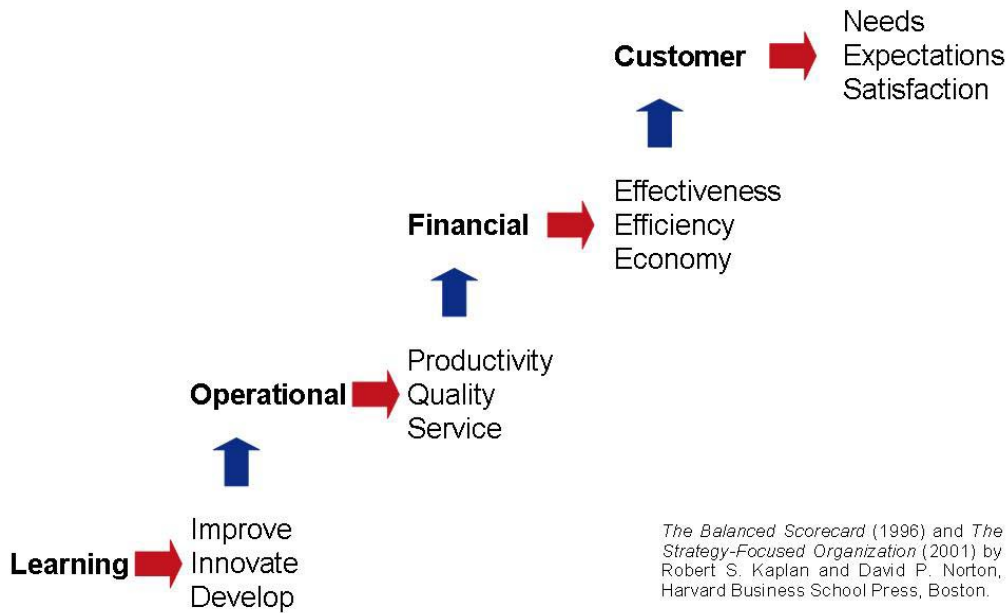
City of Phoenix
Senior Services Strategic Plan 2009 – Plan-to-Plan

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.

Appendix B

Environmental Scan Presentation Materials

Perspectives

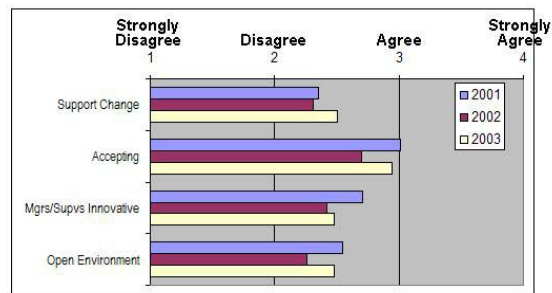
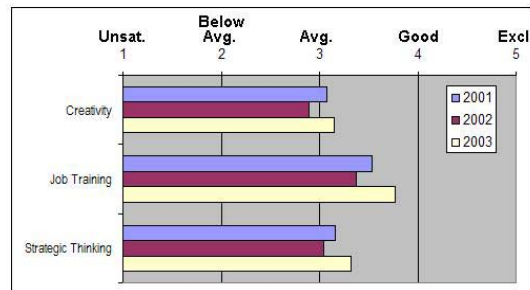


SSD Learning Factors



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*

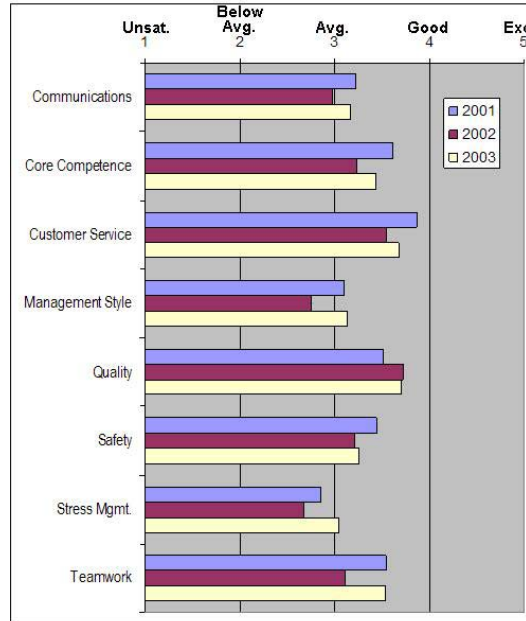


SSD Operational Factors

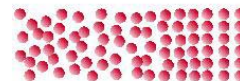


Employee Survey 2003

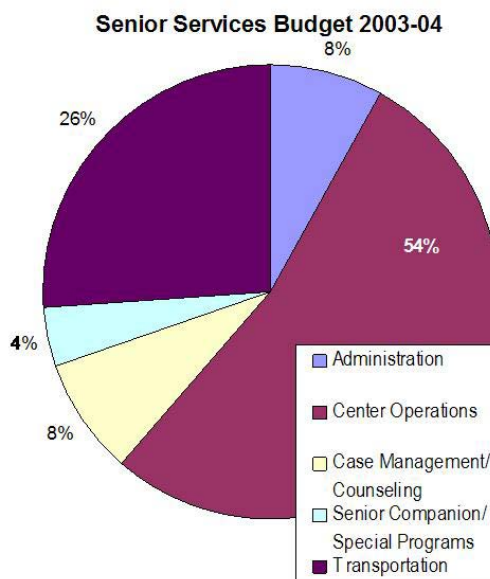
- Best factors are customer service, quality
- All factors are below “good”
- 2003 not significantly above 2001
- No significant change over two years



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

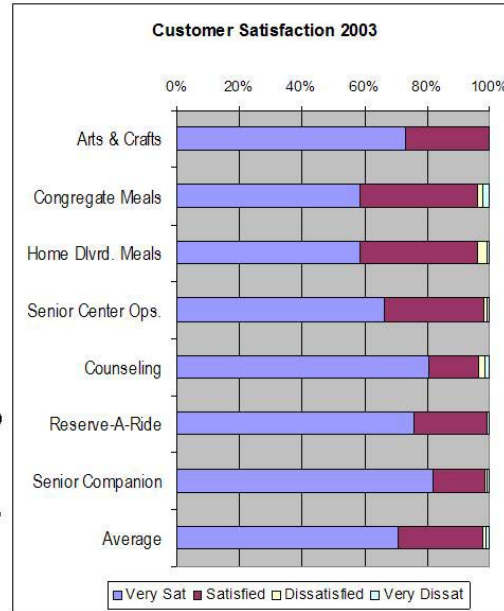


Customer Perspective

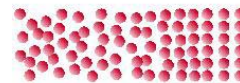


Customer Satisfaction Survey 2003

- 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

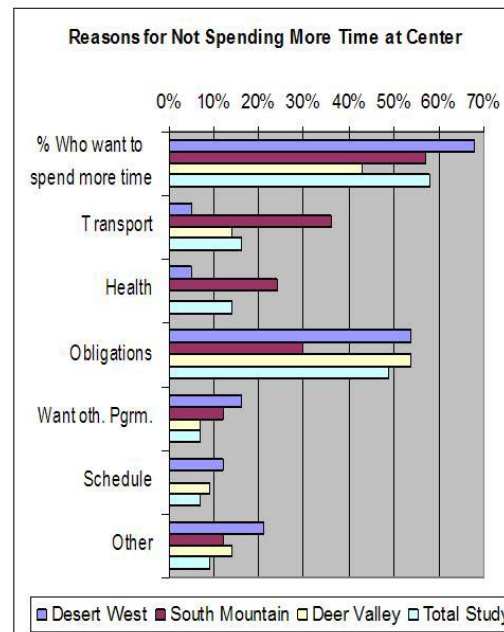


Customer Perspective



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



Appendix C

Strategic Planning Team Members

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
Senior Program Supervisor	Division Management	Linda Anderson Luci Mancuso ¹
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
Administrative Assistant I	Reserve-a-Ride	Robin Licata
Center Supervisors	Marcos de Niza Goelet Beuf	Becky Franco Johnny Riggins
Community Worker	Shadow Mountain	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 Tom Eber
Meal Delivery Sup.	Desert West	Lindy Garewal
Laborer	Warehouse	Ed Bennett

¹ Formerly Community Worker at Manzanita Senior Center.

Appendix D
Strategic Planning Sessions Agendas



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

**Strategic Planning Session 1:
Envisioning the Future
Agenda – March 5, 2004**

- 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



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

**Strategic Planning Session 3
Implementation Planning
Agenda – April 30, 2004**

8:00 a.m. Networking breakfast; seat by Goal Groups from last time

8:30 a.m. Welcoming remarks

Review where we've gone so far

Introductions:

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

How did it go? Tell about:

- SWOT Feedback
- Mission and Vision
- Goals & Objectives

Review comments from previous discussion and from the field, to see if goals or objectives need additions or changes

Pick Strategies:

(a) Pick Champion for each Goal, to stand by and answer questions.

(b) Go to each station, and draw a tally mark (|) by the “low hanging fruit” (strategy or project that can be easily accomplished in 6 months or less with few or no new resources).

(c) Go to each station a second time, and draw a tally mark (|) by the top TWO among only the remaining strategies, in terms of the ones with the biggest impact on accomplishing the Goal.

(d) Champions make a quick circuit to vote under steps (b) and (c).

Break

Goal groups review strategy picks. Reality check:

Any strategies that *must* be added to list? ...that *must* be deleted from list?

Self-select new groups: Select next-favorite goal area to work on, with new team members – mix it up rather than just rotating.

Training in Tactical Objectives and Performance Measures

Write Tactical Objectives and Performance Measures in small groups

Small group reports

12:00 noon Lunch

1:00 p.m. Master Time-Line Group | Progress Reporting | Communications
(1 from each goal group) | Procedure Group (8) | Planning Group (8)

Master Time-Line Group report

Progress Reporting Procedure Group report

Communications Planning Group report

Assignments for May-June deliverables: Execute communications plan

Process Check: How did the day go?

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

Appendix E
SWOT Analysis

Appendix F
Progress Reporting Procedures

Progress Reporting Procedures

<i>Project Coordinators</i>	<ul style="list-style-type: none"> • Primary: A. Olguin • Backups: R. Ragland, S. Roberts, L. Anderson.
<i>Accountable Individuals</i>	Each tactical objective has one primary accountable individual assigned.
<i>Project Control Systems</i>	<p>Tactical objectives will be controlled using two systems:</p> <ul style="list-style-type: none"> • All goals, strategic objectives and tactical objectives will be loaded into an MS Project file. Primary users of this planning tool will be the primary project coordinator; network access granted to all backup project coordinators. • All tactical objectives will be loaded into Lotus Notes project management data base. The project coordinator will assign a Lotus Notes task to each accountable individual for each tactical objective. Accountable individuals will accept the task for tactical objectives assigned to them.
<i>Progress Reports</i>	<p>Accountable individuals will report progress of tactical objectives:</p> <ul style="list-style-type: none"> • Reports are due either the 5th business day of each month or weekly depending upon the timeline of the project. • Progress reports will follow a standard form created in Notes.
<i>Progress Report Prompts</i>	Notes will prompt each accountable individual to file a status report based on standard template, to be returned by email by the 5 th business day of each month, or other schedule for projects requiring weekly reports.
<i>Monthly Master Report</i>	The project coordinator will compile a master report monthly by 15 th of the month, and will submit the report to the Deputy Director for approval by the 17 th of the month.
<i>Master Report Distribution</i>	<p>The approved report will be distributed as follows:</p> <ul style="list-style-type: none"> • To all key staff in the Senior Services Division (SSD). • To Human Services Department (HSD) management. • As the internal web site is implemented, the approved master report will be posted on the web site.
<i>Highlights Distribution</i>	<p>The project coordinator will prepare a highlights report for:</p> <ul style="list-style-type: none"> • Publication in the SSD monthly newsletter. • Bullet points for SSD submission to HSD annual report.
<i>Management Review and Action</i>	<p>Management will review progress regularly, and take action to ensure that tactical objectives are achieved.</p> <ul style="list-style-type: none"> • Progress on achieving tactical objectives will be reviewed at weekly direct reports meetings. • An SSD program coordinator will be assigned to facilitate progress and remove obstacles to achieving tactical objectives. • Successful achievement of tactical objectives will be celebrated at quarterly all hands meetings; successful accountable individuals will be recognized and presented with incentive awards.

Appendix G
Communications Plan

Communications Plan for Strategic Plan

Who needs to know about the plan? Who are audience or stakeholders?	What message do they need to know? What will you tell them?	Who will tell them?	How will you tell them? 1:1 meetings, e-mail, newsletter, etc.?	On what dates? Completed by when? How often do you tell them?
SSD Staff	Everything about it	Different presenter each quarter	PowerPoint presentation and oral presentation	May: All staff meeting. Updates at all of them.
Advisory Board and Seniors	Vision; Mission; Goals	Center supervisors and Strategic Planning Team members	Oral and handouts	TBD possibly July 04?
G. Hurtado and Management Team	Private meeting with G. Hurtado for approval, and separate meeting for management	D. Marshall, or 1 or 2 passionate Strategic Planning Team members are presenters	With G. Hurtado: oral, personal and private message and presentation	July 04?
City Council and Manager's Office	Vision; Mission; Goals; Process and how it worked to improve communications and teamwork	G. Hurtado and D. Marshall	TBD by presenters	TBD by presenters
Funding Sources	High level report. Summary group	D. Marshall	TBD by D. Marshall	TBD by D. Marshall
Senior Services Committee	Vision; Mission; Goals; Strategies	D. Marshall	PowerPoint presentations and handouts	June 04
Focus Groups	Summary Group.	Strategic Planning Team members; P. Blackerby and L. Brown; D. Marshall	Hand-outs	June 04