



**Strategic Planning Follow-up Meeting
Part 3: Fine-Tuning and Selecting Strategies
Detailed Agenda – August 13, 2004**

8:00 a.m. Networking breakfast

8:15 a.m. Introductions

Team-building exercise

Current Division activities list: Update

Group A

Cluster strategic objectives: Silently rearrange the strategic objectives into clusters.

Merge current Division activities into the lists of strategies under each strategic objective

Report to larger Group

Break

Regroup by cluster: choose which cluster you wish to champion

Analyze *goals* in your cluster:

- Are the goals still appropriate and congruent with the strategic objectives?
- Do the goals require editing? If so, edit them
- Should any goals be eliminated?
- Should any new goals be added?

Analyze *strategic objectives* in your cluster:

- Are the strategic objectives still appropriate and congruent with the goals?
- Do the strategic objectives require editing? If so, edit them
- Should any strategic objectives be eliminated?
- Should any new strategic objectives be added?

Group B

Merge current Division activities into the lists of strategies under each strategic objective

Cluster strategic objectives: Silently rearrange the strategic objectives into clusters.



Strategies: Each cluster group select the top strategies they feel they can work on this year (FY 2004-2005), or start this year; what is real for CSD to work on and what is not?

Cluster groups debrief to larger group.

Next steps in the process: Cascade information to the other CSD employees

11:55 a.m. Process check

12:00 noon Adjourn



Facilitator Role

- Like to be involved but avoid having a stake in it
- Conceptual/teaching, i.e. problem solving processes, etc.
- Coaching (looking at things a different way)
- Process observations
- Confidential listener
- Making the implicit explicit
- Facilitate to the ground rules
- Ask stupid questions

Ground Rules

- Participate in the process, i.e. get your own voice heard
- Speak for yourself
- Tell the truth but with respect, i.e. be candid.
- Truth above harmony
- Confidentiality
- One voice at a time
- No side bars
- Discussion not debate—use active listening skills
- No lobbying
- Stay on track
- There is no right or wrong, it is just the way you see it from your perspective
- Ask stupid questions





City of Phoenix

**Community Services Division
Strategic Plan 2007**

Plan-to-Plan

Phase 1 Plan-to-Plan	Create project timeline Create monitoring web site	May 11-19
Phase 2 Environmental Scan (Gather information)	Review and analyze documents: <ul style="list-style-type: none"> • Internal employee surveys, 2001-03 • Community Services Committee Survey • Human Services Dept. 2003-04 Operating Budget • Human Services Dept. 2004-05 Draft Budget • Service Delivery Model • Internal communications • Brochures and marketing materials 	May 12-24
Phase 3 Focus Groups (Gather information)	Four facilitated focus groups: <ul style="list-style-type: none"> • Community Services Division senior staff • Service delivery employees (group A) • Service delivery employees (group B) • Community Services Division Executive Mgmt. 	May 26 May 26 May 26 May 27
Phase 4 Strategic Planning Team (Make decisions)	Two-day facilitated strategic planning retreat: <ul style="list-style-type: none"> • Mission and issues • Goals and objectives 	June 29 June 30
Phase 5 Communications	<ul style="list-style-type: none"> • Draft Strategic Plan • Final Strategic Plan and Year 1 Action Plan • Other communications activities 	July 14 August 5 June 30 (plan)
Phase 6 Implementation	Implementation Selection & training for Strategic Work Groups Quarterly update reports Strategic plan adjustment meetings	Jul./04-Jun./07 Jul./04 Sep./04 qtrly. Dec./04-07 ann.





**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.



CSD Strategies
Developed June 30, 2004
Strategic Planning 2007 Retreat

Goal 1. To decrease homelessness in Maricopa County area.

Strategic Objective 1.1. Partner with 5 Homeless Activities by 2007.

Most impact

- Increase homeless contract staff

Low hanging

- Riann should supervise homeless CW's. Fragmented process with service delivery out of centers – not consistent

Other ideas

- Build collaborations
- Separate as specialty program—more time—dedicate staff and resources full time
- Veterans homeless program
- Address causes for chronic issues
- COP Channel 11 information to public
- Network
- Consider levels of service plans based on accomplishments of goals
- Voc rehab
- Outreach team
- Research best practices
- Educate people about homeless population
- Community councils
- Comprehensive case management with individuals and families
- Partnership with COP Housing, Police, NSD
- Partner with drug and alcohol programs to eliminate homelessness
- ID activity
- Clothing bank
- Develop expertise in dealing with homeless family
- Year round homeless team
- Host special events or homeless symposium
- Coaching
- Find resources
- Mentor
- Council approval
- Partner with training/employment



Goal 1. To decrease homelessness in Maricopa County area.

Strategic Objective 1.2. Increase homeless services provided at centers.

Most impact

- Increase homeless staff

Low hanging

- Educate center staff and front desk
- Centers serve homeless needs—need clarity on what is not being provided

Other ideas

- Partner with Veterans Homeless Program
- Voc Rehab
- More follow up to see what is working
- Collaborations locally
- Assess/address the substance addiction
- Delegate staff
- Mentor
- COP Channel 11
- Training
- Coaching
- Outreach team
- Advocacy (lobby)
- Secure funding for more staff
- Partner with Value Options
- Year round worker
- Integrate services
- Involve center community councils



Goal 1. To decrease homelessness in Maricopa County area.

Strategic Objective 1.3. Provide year round shelter by 2007.

Most impact

- Council approval
- Increase homeless staff

More ideas

- Find resources \$
- Mentor and coaching
- Collaborating
- Community activist awareness
- Only move people into permanent housing who achieve basic case plan goals
- Purchase housing in partnership with Value Options
- Mental health counseling
- Partner with COP housing
- Incentives
- Training
- Homeless specialty team
- Fund raising spokesperson
- Find location
- Low demand?
- Integrate services
- Upgrade facility
- Drug counseling



Goal 2. To empower supervisors to effectively address employee performance issues.

Strategic Objective 2.1. Reduce number of employees with performance issues by 10% by 1/07.

Most impact

- 360 evaluation
- Survey
- Incentives
- Meetings among supervisory staff re: personnel issues

Low hanging

- Determine root of the problem/issues then deal with it
- Improve personnel support
- Labor relations training
- Mentoring
- PMG measurements
- Supervisory training
- Coaching for supervisors to improve morale
- ID specific performance measures

Other ideas

- Do not allow problem staff transfers from other divisions
- Employee to employee support
- Employee training
- Monitor supervisors who favor staff and don't address issues
- Do not social work your staff
- Employee morale team
- Employee recognition



Goal 3. To create consistent operational and personnel management guidelines that are followed by all supervisors.

Strategic Objective 3.1. To increase number of CSD staff following same operational procedures by 75% by 1/06.

Most impact

- PMG
- How many are not following?

Low hanging

- Mystery client evaluation
- Monthly meeting
- Seminars
- Employee recognition
- Staff survey of supervisors

Other ideas

- Monitor for fairness
- Coaching
- Communication
- Consistent and ongoing updates
- Use developed monitoring process
- Incentives
- Mentoring
- Develop measures to ensure operational measures are followed
- Training
- Surveys
- CWIII meetings



Goal 3. To create consistent operational and personnel management guidelines that are followed by all supervisors.

Strategic Objective 3.2. To achieve 80% of supervisors following same personnel procedures/guidelines by 1/06.

Most impact

- PMGs
- Standard procedures guide/manual

Low hanging

- Process personnel issue at center manager and CW III meeting monthly to ensure equity
- Anonymous client evaluations
- Incentives

Other ideas

- Monitor for consistency—not all supervisors hold staff accountable
- Accountability
- Monthly meetings
- Training
- Increase to 100%
- Surveys
- Coaching



Goal 4. To empower customers to achieve their goals.

Strategic Objective 4.1. To baseline and then improve customer satisfaction with the service delivery model by June 2007.

Most impact

- Develop and administer surveys: baseline and ongoing
- Analyze surveys
- Make changes based on results
- Conduct staff training based on results

Low hanging

- Phone intake system

Other ideas:

- Determine whether financial services provided
- Create a longer term follow up tool
- Satisfaction?
- Satisfaction vs. improvement
- Client focus groups
- Why only clients?
- Community focus groups
- Incentives
- Mystery customers: walk in and phone
- Agency (partners) focus groups
- Citywide department evaluation
- Client Needs Assessment
- Satisfaction with our system vs, what needs they identify



Goal 4. To empower customers to achieve their goals.

Strategic Objective 4.2. To improve the number of CS Active Managers carrying identified case loads to 80% by June 2007.

Most impact

- Define case management
- Conduct skills gap
- Do staff training
- Community needs assessment

Other ideas

- All vs. a number
- Develop marketing strategy as to what we do for clients
- Client focus groups
- Uniform implementation: supervisory practices: refine PMG's
- Weekly management staffings
- Increase 80% to 100%
- Mandatory job specific employee orientation (1 week) prior to assignment
- Check monthly CM log and address/coach
- Take referrals from other service providers within the Human Service Centers, i.e. Headstart, Salvation Army, AWEE, CASS
- 3 years to begin doing what we already committed to do?
- Develop reports
- Standardize CM
- Mentoring
- Monitoring
- Accountability (PMG)
- Understand and engage staff attitudes



Goal 5. To increase the quality and capacity of community-based service delivery systems.

Strategic Objective 5.1. To implement at least 7 community initiatives with desired outcomes by 6/30/06.

Most impact

- Measurement tool
- Develop COP Food Policy Council
- Community focus groups
- ID community needs
- ID existing community needs assessments
- Community council involvement

Low hanging

- Need additional CI staff
- ID community needs
- ID outcomes
- Meet with NSD, Housing, Parks, and Mayor's office
- Obtain in kind contributions from graphic designer
- ID church partners
- Develop food security task force

Other ideas

- Celebrate and market successes
- ID initiative partnerships
- Childcare
- Bring counseling services to centers
- Coaching
- Mentor
- Volunteer
- Recruitment effort
- Training to community
- Broaden and increase coalitions
- Life skills
- ID CSD/HSD service gaps
- Food stamp awareness
- Classes in centers
- Mental health
- Implement financial literacy programs
- Community gardens
- Network
- Private sector
- Diet and nutrition
- Assist the disabled
- Explore outside—other states' resources
- ID new EITC tax prep sites
- Teach community to advocate for themselves



Goal 6. To guarantee fair hiring practices by implementing fair and consistent criteria, and ensuring that City of Phoenix hiring practices are followed.

Strategic Objective 6.1. To increase the level of staff satisfaction to 70% on the employee survey questionnaire related to hiring/promoting opportunities by June 2005.

Most impact

- Develop employee morale team
- Independent review committee to review all hiring decisions to ensure fairness.
- Remove director's veto power

Low hanging

- Inform staff about current hiring plan/procedures
- Feedback when you don't get a job (honest)
- Promote based on seniority and performance

Other ideas

- Independent hiring agency (other city department)
- Should not be based on relationships
- Create annual CSD staff survey
- Eliminate "de facto" affirmative action hiring practices
- Staff accountability for interview improvement
- Define what is the best candidate
- Supervision equal
- Training to enhance job interviewing skills
- Market information
- Bring staff up to date with COP personnel hiring practices
- Train staff on criteria on hiring rules
- Allow supervisory hiring—need to have input
- Focus group --brainstorming
- Community input
- Promote based on merit



Goal 7. To ensure competent and effective staff.

Strategic Objective 7.1. To develop core training and ensure that 100% of staff complete by 2007.

Most impact

- Consider a training center for new struggling staff
- Separate case management from financial
- Develop calendar of training

Low hanging

- Identify needs
- Coordinator involvement
- Training and curriculum
- Develop core training
- Make sure not duplicating with things that at exist (HSU)

Other ideas

- Build in orientation/training for new staff
- Coaching
- Mentor
- Create classes from waitlists
- Policy/procedure manual
- Location—centralized training
- Mandatory deadlines
- Build in quarterly designated times
- Who will do training
- Curriculum
- Designate 2% of the budget for training



Goal 7. To ensure competent and effective staff.

Strategic Objective 7.2. To ensure that ___% of employees meet ongoing education requirements by June 2007.

Most impact

- Increase training funds
- Equal training funds for all staff
- Mentor coaching
- Cross pollinate with outside trainers

Low hanging

- Onsite education
- In service training
- Identify needs

Other ideas

- Include on PMG
- Allow time
- Specific education/training tools
- HSU
- Job related
- Credit courses offered through HSU
- No. o hours per three year period
- ID mandatory training
- Educate on what regulations are
- What requirements



Goal 8. To increase the application of staff expertise, talents, experience and skills.

Strategic Objective 8.1. Delegate decision making or planning to the appropriate task level for 90% of CSD staff by 7/1/07

Most impact

- Create standard procedure how to ID the lowest level for staff decisions
- Baseline current decision making: management vs. line staff
- Develop parameters for staff input
- Survey (define) task levels: baseline: ask –start—at lowest level

Low hanging

- Eliminate time wasting by workers seeking approval for trivial matters...unnecessary staffings for rent and utilities
- Trust people that you hire

Other ideas

- Measure for EI
- ID key staff
- Committee process in decisions
- Training
- Community involvement
- Type of complaints to mayor/council/staff
- Start from top down
- Allow time for staff involvement
- Train and educate staff on parameters



Current CSD Activities:

- A. 2005 5-year Plan
- B. CAP Plan modifications
- C. Care Connections / SHP
- D. Case management Model
- E. Center Manager's PMG
- F. Citywide Food Security Council
- G. Evaluation Tool for SHP
- H. Family Transitional Living Center
- I. Food Security Outreach
- J. HMIS
- K. Homeless unit assessment
- L. Laborer's PMG
- M. Monitoring Tool
- N. New Family Services Center's
- O. NSD Collaboration (Phone Call)
- P. Phone System
- Q. SMART system
- R. Marketing case management
- S. Make time in lobby more productive



Strategic Planning Team Members

Phyllis Aro-Trejo
Riann Balch
Pamela Ball
Trang Blanco
Julie Bosshart
Jacqueline Ciccolo
Lance Craw
Phyllis Crawford
Shirley Crawford
Tammy Fields
Jane Forino
Ernie Foulentfont
Moe Gallegos
Jessica Gonzalez
Pamela Griffith
Anette Hall
Heidi Hastings
Sandra Hernandez
Grace Hernandez-Bernal
Jeff Jamison
Sandra Jones

Deanna Jonovich
Beverly Keita
Joe Kress
Yvonne Maestas
Margo Mance
Carol Montes
Jeannette Neal-Diggs
Joely Nelson
Robert Parra
Anamaria Quintanilla
Billy Rhymes
Briselda Rodriguez
Carolyn Ross
Terri Taylor
Wayne Tormala
Marcia Widmer

Facilitators

Phillip Blackerby
Lynne Brown



Suggested CSD Employee Feedback Process

Objective: To inform other employees of tentative choices by the Strategic Planning Team, and to solicit their feedback about those choices.

“Trade fair” approach:

- Cluster Champions in three rooms conducting simultaneous discussions with about 20 employees for 1:10;
 - Then participants switch rooms for 1:10 with a different cluster
 - Then participants rotate to the third room for 1:10 with the last cluster.
- In about four hours, all employees will have heard and given feedback in all three clusters.

Typical agenda:

- Cluster Champions will present data (0:20), allowing only “clarifying” questions. Then divide participants into four groups:
- Each group addresses key questions below (0:30).
- Then the small groups report back to the larger group (0:05 each, or 0:20 total).

Key questions:

- What is OK for CSD to do, and when should we do it?
- What isn't OK for CSD to do; should we ever do it?
- What have we forgotten that we need to do? And when should we do it?

Report to full Strategic Planning Team

- Cluster Champions will record the feedback on flip-charts
- Cluster Champions will report to the full Strategic Planning Team at the next meeting.

Next meeting date:

