



**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



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.



Common Themes

Internal Strengths

- Senior Services fulfills an important need within the community
- Hard working, committed employees
- Common vision among employees to do what is in the best interest of seniors
- Employees love working for city: good benefits (for full time employees), work, and environment
- Growth of Senior Services Division throughout the years—this is a fact that may not necessarily be a strength. It could be viewed as a weakness as well as strength (without proper resources to support the growth.)
- Support from current City Council with General Fund budget and from people of Phoenix with bond funds.
- In spite of limited staffing, we get the job done.
- Diverse experiences and cultures.
- Work well as a TEAM when given opportunity.



Common Themes

Internal Weaknesses

- Lack of clarity around who key customers should be. (Title XX customers need to be taken into account also)
- Lack of clarity around decision making authority
- Lack of information, i.e. communication cascading to all levels of employees and to customers (and the reverse)
- Delineated standards and procedures are not followed consistently across centers
- Lack of role clarity for every job category as well as job descriptions that don't fit roles that people are in
- Minimal synergy among centers; minimal learning of best practices, *i.e.* no cross-center meetings for various functions (community workers, former PACE counselors, advisory boards, senior companions) so they can share what goes well for them and what doesn't.
- We/they mentality between field and downtown; between Parks and Recreation and Senior Centers
- Problem-solving, performance management conducted by “blanket policy” rather than targeted specifically
- No process in place for problem resolution, *i.e.* employees may not know to whom to go to get problems **listened to** as well as solved.
- Planning is conducted by only the same few people; no opportunity for new, different voices to be heard...and there may not be enough planning!!!
- Bureaucratic and slow hiring practices for the field; causes overwork for staff
- Bureaucratic, questioning and slow procurement process
- Some employees (and volunteers) do not feel valued or treated as professionals—ask for examples of this from people (so these issues can be corrected.)
- Some employees do not feel supported—ask for examples of this from people (so these issues can be corrected.)
- Employees do not understand need for, justice in, rotation



- Part time employees have no benefits, unless grandfathered under old policy
- No career path for employees: inform people of career options; mentoring may be needed, review job descriptions with them.
- Inadequate management information systems: ask employees what existing management systems are in use, what training is needed to use these existing systems, and what new systems are needed.
- There is more work with the same amount of staff
- City owned buses cannot be used for intercity transportation
- Changes occur without the necessary information to understand the change.



Common Themes

External Opportunities

- Impact of light rail system on Center transportation system—although this system will just go down Central.
- Growth in numbers of seniors—this can also be seen as a threat if there is not a corresponding growth in staff to meet these needs
- Flatten management decision making process, incorporate autonomy within the division at the level it needs to be; *i.e.* identify the decisions that can be made at the centers and those that can't. Make sure everyone knows this.
- New housing developments create new markets for senior centers
- Conduct needs analysis of population, market segments and needs assessment (two purposes: act as input for future services and act as “outreach”)
- Politics can get in the way of center mergers or it can help the process; therefore, use large senior population in stronger advocacy role
- Can baby boomers be used to Senior Services Division advantage? Can they be used as advocates? Form a Baby Boomers Advisory Council to help design what services should be put in place to attract baby boomers.
- Increase grant writing to expand current and future programming.
- Spend money for center activities rather than staff and volunteer big events. Check with customers and volunteers to make sure of the meaning behind this statement, *i.e.* would they prefer to spend money that is now being spent for volunteer recognition on center activities instead?
- Create different funding and/or budget opportunities: diversify revenue sources; cut costs; maintain quality
- More joint ventures with Parks and Recreation?
- More joint ventures with Library (especially due to potential baby boomer influx)
- Team with Workforce Connection for “Job Services”
- Conduct work process flow to simplify and eliminate waste and variation. Walk through work activities and ask if the work needs to be done as it is being done, or should it be done at all, and if so, is there a more efficient or a better way to do it?



- Reduce paperwork and work time with use of technology
- Home delivery meals service: look for waste that may occur in preparation and delivery process. For other meals service, is it necessary for customers to put food on their plate that they are allergic to? The food may be wasted.
- Do some creative marketing, *i.e.* put information about Senior Services on the food service and transportation vehicles.
- Create new opportunities for collaboration
- Partner with public and private organizations
- Partner with outside agencies to transition participants to a higher level of care (that the Senior Services may not be equipped to provide.)



Common Themes

External Threats

- What is the competition (especially for baby boomer services) and the response to it? Can we create an opportunity for collaboration with this competition? All competition needs to be investigated, including faith-based organizations.
- Inability to get volunteers to help at centers. Recruit new volunteers and this can result in new opportunities.
- Food delivery truck does not keep hot food hot and cold food cold. Senior Services has been approved funding to purchase a new truck but there is still a problem when a truck has to be substituted with a van.
- Inadequate focus on outreach and marketing of services; there is no time to do this any more.
- Age range so wide now, *i.e.* frail aged to baby boomers
- Senior centers being used as “day care” centers and “babysitters”
- Fear of potential violence at centers due to lack of adequate protection
- Lack of adequate coverage of staff for absences and turnover throughout the division!
- General Fund may not recover from recession quickly enough to avoid budget cuts
- Lack of operating funds for new facilities built with bond fund, *i.e.* we have a beautiful new building and kitchen with no cook! We may have the buildings but not enough staff.
- Potential for competition for the attention of City Council; their focus is economic development, public safety
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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

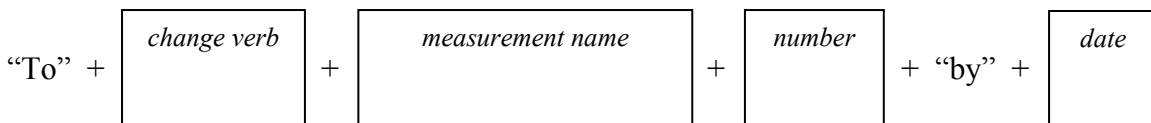
A *SMART Strategic Objective* is a statement of an intended outcome that is also:

- **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

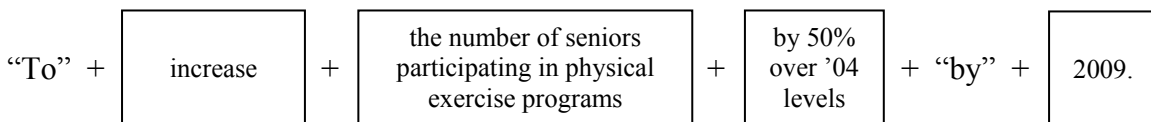
- Outcome-based: all about the results of what you do,...
 - Not what to do
 - Not how you do it
- Externally focused: all about customers and how they change.
- Change-oriented: describes how the customers change over time, from now to then

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.
- _____

- _____

- _____

