

## Notes from Strategic Planning Team, April 2, 2004 and Instructions for April Feedback Sessions

### **First of all....**

Wendy Rudick shared the written overview of the feedback she and Marty received from the Squaw Peak Center with the consultants. People at the Squaw Peak Center were concerned about the SWOT format, that there were no blank boxes for them to complete. We will be sure to include blank boxes on survey questionnaires in the future. The feedback from these sessions was intended to add any new themes not already captured. Please tell people at the Squaw Peak Center that “management” did not “place their well-worded opinions for us to choose;” rather, the consultants did based on what was heard at the focus groups. We summarized the “common themes” from the focus groups—based on what more than a few people state (never repeating what just one or two people say, to protect their anonymity)—and listed them under strengths, weaknesses, opportunities or threats to the organization; therefore, if the themes or their placement is not accurate, please give feedback (as Squaw Peak did) to where they should be.

### ***Instructions for discussion of this concern:***

- Tell employees to blame the SWOT and the “well-worded opinions” on the consultants’ attempt to protect individuals’ anonymity.
- Tell employees that the purpose for running the SWOT by them in March was to make sure that what the consultants heard was what they had said in the focus groups. If they were not in the focus groups, then their words were not part of the SWOT.

### ***Another thought...***

Just as important, the remarks from the Squaw Peak Center reflect a lack of trust that this planning project is being done in the employees’ best interest. If this issue—lack of trust—arises, ask employees how they believe trust can be built within the Division.

## Vision Statement Creation

### **Definition:**

A vision is a mental image of the team's ideal. Creating a vision statement is the process of looking into the future and creating the most desirable scenario for the team. It requires getting outside the day-to-day perspective, examining the organization from a different perspective, and deciding what your team *could* look like, how it would operate and what it would be doing when it is at its optimum. The team vision tells or shows what the team would ultimately like to become. The purpose of the vision is to free up and liberate team members from the routine and imperfection of present operations, and to create an inspiration for what to make come true. The more we can see what the future will look like, the easier it is for us to understand and communicate it to others. **The vision is a lighthouse giving us a direction rather than a specific destination.**

### **Previous visioning work by the Strategic Planning Team March 5:**

#### *Team: Maxine, Reginald, Joanne*

Picture was a rainbow with lots of services "under the rainbow."

"It's not over until it's over."

No bingo

Gathering place

Intergenerational

Seniors volunteer

Travel club

Library: life-long learning

Nutrition: healthy options: Starbucks, Atkins. Seniors determine what is at the café; so long as it's healthy. At 80, seniors can choose to eat what they want.

Dancing: keeps me up, gives me energy

For everybody; inviting

Multi-colors: people come from different places; single, married, faiths, genders; emphasis on valuing differences; no form of discrimination; a place for everyone

Not restrictive; contemporary, no prescription; choices. Appeal to baby boomers.

#### *Team: Becky, Doris, Wendy, Marty, Linda*

Picture was a circle with different categories.

Not boxed in

Seniors don't want to be called that; not Senior Services; many services; Wellness Centers

Diverse: lots of colors of flowers. Represent people

We are the best-kept secret; people in crisis come to us. We need a marketing plan.

Allow us to be pro-active, not reactive, we are putting out fires all the time; this plan will require money and staff.

Medicare, Medicaid, Social Security: educate; advocate.

Fitness, health education; older adults are parenting

Seniors have other things going on in their lives

Holistically serves entire family

Health, mental health; transportation.

Helping hands

We can't provide all services; leverage other agencies' resources, both internal and external.

Frail elderly and others, too

Senior services is focal point in community. "Senior" a bad word.

Two populations—frail and younger—inclusive; use "participants," not "seniors."

Diversity: ethnic culture; gender; religion: if we don't deal with it, we have conflict; lots of conflict now.

Staff respect staff respect clients reflect staff

Our world that seniors come to.

Community will help.

*Team: Lorey, Ed, Roger, Cathy, Tom*

Picture was a ball park with a person hitting a home run to the community in the stands.

People represent us and seniors

Perfection is out of the question, but we can hit a home run.

Transportation services; everyone makes for success

We will have problems, but we will find a solution.

Satisfy staffing, department/division issues, seniors: home run!

More responsive, more time, responding more accurately to seniors' needs.

Put our heads together. Come up with a solution; no perfect situation

Faster implies lack of quality.

We will be more efficient, not just more hurried.

*Team: Robin, Luci, Sally, Anissa, Jerlene*

Picture was the sun with its rays, each ray represented a different service.

Brighter place to go: sun, warmth

Multi-generational

Part of community, and part of senior clients

Arts & crafts; mentoring, lots of options: no limits; not a set idea; lots of opportunities; more ideas; if it doesn't work, fall back to another opportunity.

Collaboration, such as with businesses.

Lots of money issues

Provide the best; possibilities grow

Ray of sunshine; people want to come

Services flow in and out; open doors

Not limited

Diversity

Not just a center; lots of services

Adult community (not "senior")

Single seniors

Acceptance of variety.

*Team: Johnny, Jose, Mary, Lindy*

Picture was shaped in a Pie form: 5 years.

Do activities, expand activities; update for younger seniors

Transportation; more seniors in future; expand; more load

Staff resources: expand

Nutrition:

Outlived “senior center?” Change term; stigma.

Home delivered meals: health-related meals

What to do with frail in senior centers? Offer more variety; let seniors be involved in making decisions that affect them; they are adults; treat them as adults.

Keep people in their homes. Red Mountain has adult day care in the same building; may be an option; also, may provide some in-home care, such as housekeeping.

Parks & Recreation facility: look to future; wall between senior services and Parks, but not at Johnny’s center; Parks owns building. We are growing together; we share; learn from each other. Parks & Recreation has staff, time. Facility is open 6:00 a.m. to 10:00 p.m. plus weekends.

Partnership

Don’t restrict services to the ambulatory

More than just a place to spend the day.

*Vision Team’s (Joanne, Johnny, Wendy, Robin) Discussion* on April 1, 2004, and their thought process behind the creation of the final decision. Brainstorming included the following:

- Something for everyone; everyone for something.
- Should the name be “Senior”—need think about boomers/zoomers/multi-gen centers/needed/adult day care?
- What are the trends nationally for names, *i.e.*, Senior vs. what?
- Making the most of maturity
- It’s not just downtown, it’s all of us.
- Offering choices as community focal point; places are inviting; ambassador program at each center
- You need to be connected (through technology)
- Lifelong learning will be important
- Need to do fact finding with state of the art senior communities, *i.e.*, Anthem, etc. and other cities’ communities.
- Need to conduct focus groups with the community outside the centers, *i.e.*, do a needs analysis to find out what people who are not coming to the centers need in order to come to the centers.
- Access people who are no longer coming to the centers to find out why they stopped coming.
- Look at the vision that was created five years ago.
- Look at the senior companion program and expand it, *i.e.*, don’t make it limited to a certain income level.
- We need a good marketing plan—why not use other city services for advertising, *i.e.*, water bill, buses, paychecks, etc.

- Have different committees of our employees work on specific processes—use people who are closer to the work itself—they know better than anyone else.
- Get quality volunteers
- Put together a grant writer committee
- Optimizing opportunities: a community playing and working together
- Streamlining of services through cooperation (and communication)
- Use Workforce Connection at centers; learning technologies
- The focal point for optimizing maturity; offering choices, opportunities, resources, and cooperation.

***The recommended Vision Statement for Senior Services is:***

Senior Services—

The heart of our community for optimizing maturity:

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

**Note:** During the planning team discussion on April 2, some people expressed concern with the word “maturity,” one person recommended “lifespan,” one person recommended highlighting volunteerism under “opportunities”. Another was concerned with the word “cooperation”—to one person this meant that “people weren’t behaving;” one person suggested “collaboration”, another suggested “working together.”

Overall, most planning team members liked the vision a lot as it is!

***Instructions for vision presentation and discussion with employees:***

1. Walk through the definition of “vision.”
2. Remind them of the previous vision pictures that were created by the planning team members. These were taken into account by the Vision Team when creating the final vision recommendation.
3. Walk through the brainstorming the vision team did.
4. Present the recommended Vision Statement.
5. Ask for their reactions. Ask them if they can live with this statement or are there parts of it that just will not work at all for them. Let them know that their thoughts will be heard but the final decision will be made by the planning team based on everyone’s input.

## Mission Creation

**Definition:** A mission statement is a brief, concise statement that defines the business you are in, for whom, and why. It is your purpose and reason for existence and it defines your unique contribution. It should be somewhat uplifting but more practical and “here and now” than the vision, and should be no more than one paragraph in length (so that people can remember it.)

### *Previous mission development work by the Strategic Planning Team March 5:*

#### *Mission: 1<sup>st</sup> Draft*

- The Senior Services Division exists for the programmatically eligible citizens of Phoenix by providing multiple services to improve the quality of life.
- The Senior Services Division exists for qualified customers by assisting them through a variety of life changes that will enhance and maximize their quality of life.
- The Senior Services Division exists for those who seek our services to improve or maintain their quality of life.
- Senior Services exists for City of Phoenix 60+ population to provide resources/services to promote independence and enhance the overall quality of life.
- The Senior Services Division exists to promote the dignity, well-being and quality of life of the mature adult population through a diverse range of services.

#### *Discussion*

Look at internal customers, too.

#### *Mission: 2<sup>nd</sup> Draft*

- Senior Services collaborates with internal and external customers in our communities to provide resources and services promoting independence and enhancing the quality of life.
- Senior Services Division provides services and opportunities for seniors promoting dignity, well-being and enhanced quality of life.
- The Senior Services Division exists for the programmatically-eligible citizens of our community by providing multiple services to enhance and maximize their quality of life.
- The Senior Services Division functions as a unit that exists for qualified customers by assisting them through a variety of life changes that will enhance and maximize their quality of life.
- The Senior Services Division exists to promote the dignity, well-being and quality of life of the mature adult population through a cross-utilization of resources.

*Mission Team's (Luci, Sally, Anissa, Lorey) Discussion* on 4-1-04 and their thought process behind the creation of the final decision. Brainstorming included the following:

- Review of previous mission statements created by planning team, analysis of important words to include, etc.
- Sally's compilation of the planning team mission statements into the following:

- The Senior Services Division is committed to promoting the independence, maintaining the dignity, and maximizing the quality of life of mature adult clients in the City of Phoenix through the provision of comprehensive social services and resource referrals.
- A lengthy discussion about
  - The unpopularity of the words “mature adults.”
  - The definition of “clients” (they have to be there) vs. “customers” (they choose to be there.)
  - Using the word “eligible” to let the public know there are some “eligibility” requirements and to establish “boundaries” for the centers.
  - Using “resource referrals” to reflect that not all of the services are provided at the centers but can be referred to the correct service delivery source.
  - Changing “social services” to “supportive services” to denote “being helpful” vs. assisting the “needy.”
  - The need to shorten the statement.
- The team’s first compilation:
  - The Senior Services Division is committed to promote independence, maintain dignity, and maximize quality of life for eligible customers in Phoenix through comprehensive social services and resource referrals.
 Then it became...
  - The Senior Services Division is committed to promote independence, maintain dignity, and maximize quality of life for eligible customers in Phoenix through socialization opportunities, diverse range of services, and resource referrals.
 Then it became...

***The Mission Team’s Recommendation for the 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.

**Note:** there were also some neat recommendations on how to “graph” this on a website and each part could be “clicked” to each of the services corresponding with it, *i.e.*, socialization, supportive, referrals.

***Instructions for mission presentation and discussion with employees:***

1. Walk through the definition of “mission.”
2. Remind them of the previous mission statements that were created by the strategic planning team members. These were taken into account by the Mission Team when creating the final mission recommendation.
3. Walk through the brainstorming the mission team did.
4. Present the recommended Mission Statement.
5. Ask for their reactions. Ask them if they can live with this statement or are there parts of it that just will not work at all for them. Let them know that their thoughts will be heard but the final decision will be made by the planning team based on everyone’s input.

## **Feedback from SWOT Discussion**

*Note:* Not everyone had a SWOT discussion but instead asked employees to prioritize the SWOT items and return the list to them.

- Laborers not consulted.
- Envision customer perspective.
- Process credibility.
- Referral – roles and communication.
- Unrealistic expectations.
- Multi-gen – need something new.
- Procedural flexibility.
- Misconceptions.
- Pretend to be inclusive.
- SWOT not flexible.
- Home delivery is one of the largest groups of employees but did not have representation to reflect this (at the focus groups)—there are more home cooked meals than congregate—part timers do not receive benefits. We don't have enough emphasis on home cooked meals.
- Reserve-a-Ride forgotten
  - Working conditions
  - Authority
- R and R delivery – customer contacts
- People are at different levels
- Opinions and plan goes somewhere
- Focus groups short
- Confidentiality concerns
- Apathy
- What is Strategic Plan – the effect?
- Communication channels

## ***Instructions for SWOT Feedback Presentation***

1. Walk through feedback items listed above.
2. Tell employees that these items were taken into account when creating the Division's goals and objectives for the next five years.
3. Tell employees that their survey results for weaknesses were also included when creating the goals and objectives but that the rest of their survey responses will be taken into account during the next session (to be scheduled) in the creation of the goals and objectives and action plans.

### Instructions for Goals/Objectives Discussion

1. Distribute the Goals and Objectives document BEFORE THE MEETING so that people have a chance to think about it.
2. During the meeting, ask people if they have any questions about the material. Answer as best you can. Then ask people to add their own suggestions.
3. Bring these questions and suggestions to the next meeting.

### Process Check for the Meeting

What went right	What needs improvement
<ul style="list-style-type: none"><li>• Mind mapping</li><li>• Good process/information</li><li>• Good mission and vision</li><li>• Good food</li><li>• Good discussion—everyone open</li></ul>	<ul style="list-style-type: none"><li>• Too long</li><li>• Do team feed back sessions together—closer to “your” centers (combine them)</li><li>• Seniors not included</li><li>• Think of another date and not on Friday</li></ul>