

# Strategic Planning & Balanced Scorecard Initiative

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City Council Overview  
September 9, 2016



# Presentation Overview

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- Strategic Planning Overview
- Priority Based Budgeting
- Balanced Scorecard Approach
- Mission, Vision, Values
- Keys to Success
- Timeline/Next Steps



# What is the value of strategic planning?

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“We have never specified long-range goals on an urgent time schedule, or managed our resources and our time so as to insure their fulfillment.”

“I believe that 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 earth.”

- President John F. Kennedy



# What does strategic planning do?

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- Creates compass to guide activity
- Articulates what's most important
- Breaks down silos
- Produces a written plan
- Management system
- Call to action



# Why is strategic planning critical?

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- High Performance Organization
- Shared Purpose
- Autonomy & Accountability
- Performance Measures & Targets
- Empowered & Engaged Employees
- Collaborative Environment
- Data Driven Decisions



# How does this change the budget development?

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## Traditional Budgeting

- Across the board allocations
- Across the board cuts
- Measures/performance isn't generally considered

## Priority Based Budgeting

- Allocations tied to strategic priorities
- Priorities focus on measurable results
- Programs/projects are scored to evaluate efficacy
- Resources allocated accordingly



# Why Balanced Scorecard and what is it?

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More than just a plan...it's a Management System

## Resource Perspectives:

- Organizational Capacity  
*Employee engagement, training, succession planning, collaboration*
- Business Processes  
*Tools, efficiencies, policies, programs*

## Outcome Perspectives:

- Fiscal Stewardship  
*Financial performance, resource allocation*
- Constituents/Stakeholders  
*Satisfaction, needs, experience*



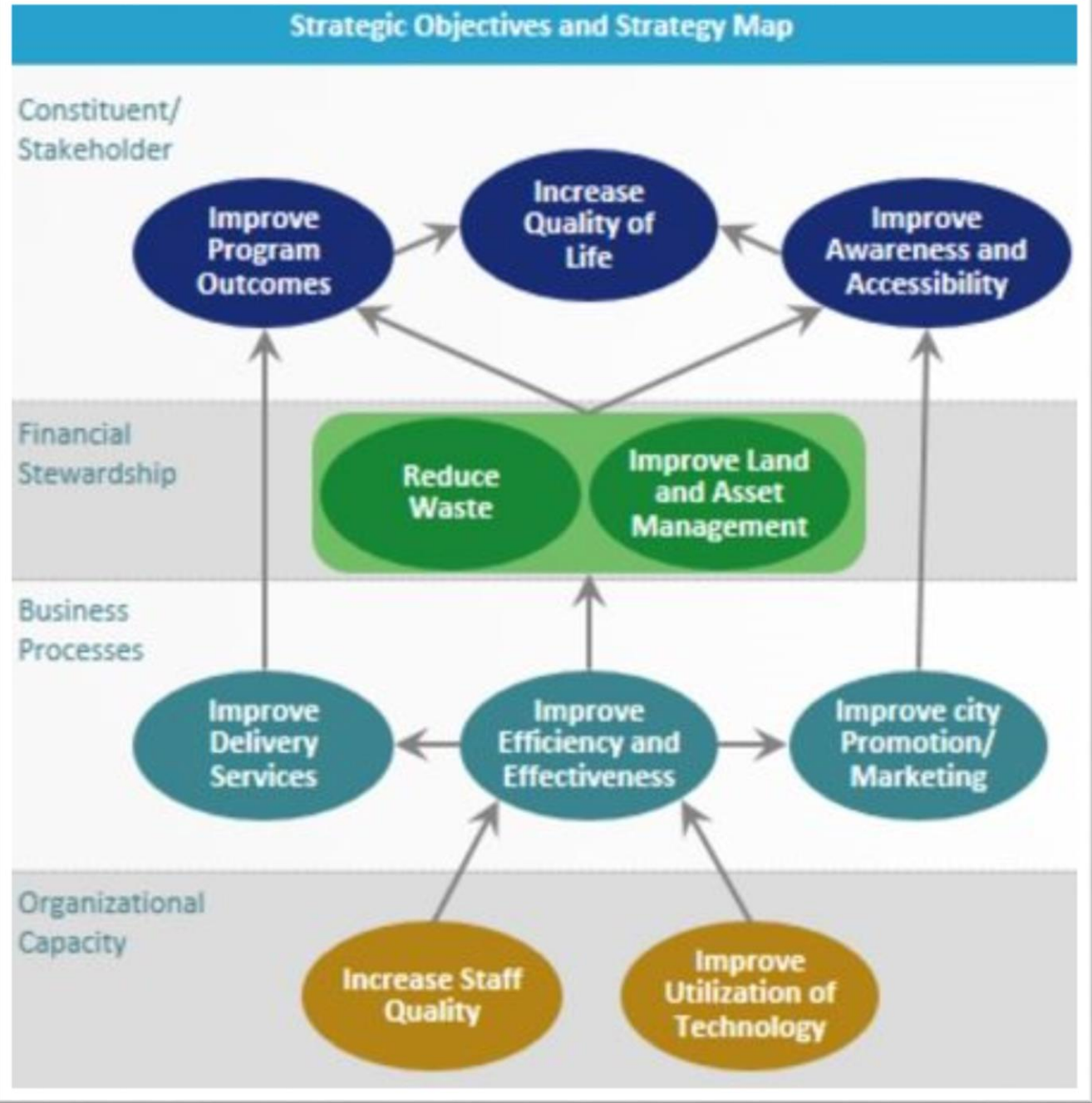
# What organizations use Balanced Scorecard?

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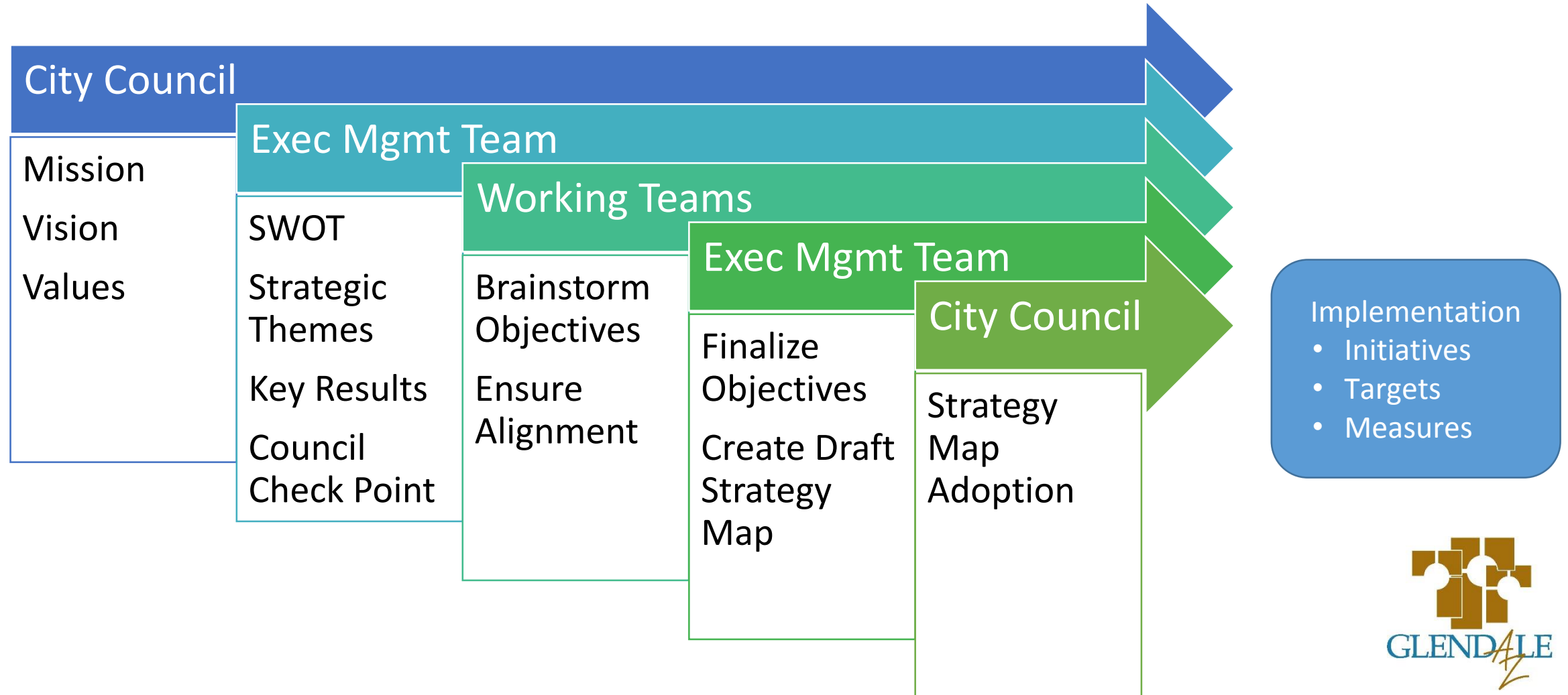
- San Diego, CA
- Miami, FL
- Austin, TX
- Portland, OR
- Charlotte/Mecklenburg County, NC
- Town of Hillsborough, NC
- Olathe, KS
- Colleyville, TX
- Verizon
- Wells Fargo
- Mobil North America Marketing and Refining
- Philips Electronics
- Thomson Reuters
- National Marrow Donor Program/Be the Match Registry
- Veolia Water North America
- Tolko Industries Ltd.







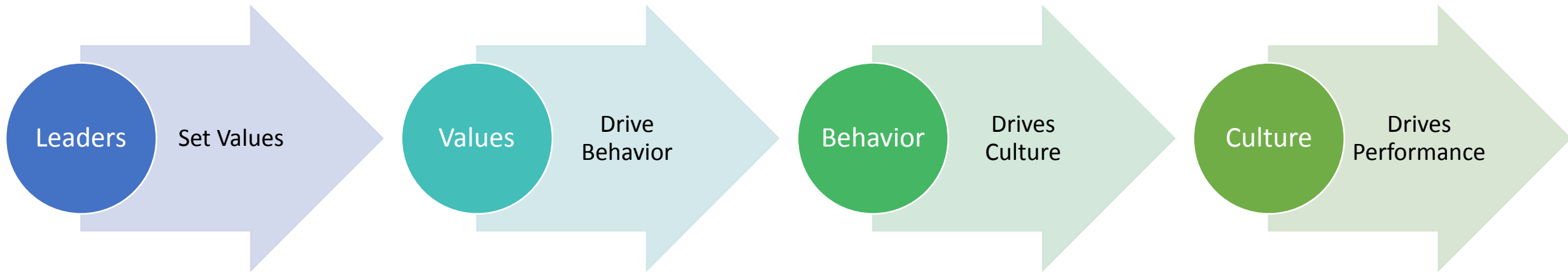
# How do you develop a Balanced Scorecard?



# Where do we start? Mission, Vision, Values

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- Mission – defines purpose
- Vision – imagines a future state
- Values – articulate desired behaviors



# Austin, TX

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- Mission:
  - To be the best-managed City in the country.
- Vision:
  - We want Austin to be the most livable city in the country.
- Values:
  - P – Public Service and Engagement
  - R – Responsibility and Accountability
  - I – Innovation and Sustainability
  - D – Diversity and Inclusion
  - E – Ethics and Integrity



# Google

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- Mission
  - To organize the world's information and make it universally accessible and useful.
- Vision
  - To maintain the open culture often associated with startups in which everyone is a hands-on contributor and feels comfortable sharing ideas and opinions.
- Values/Value Statements
  - Focus on the user and all else will follow
  - It's best to do one thing really, really well
  - Fast is better than slow
  - Democracy on the web works
  - You don't need to be at your desk to need an answer
  - You can make money without doing evil
  - There's always more information out there
  - The need for information crosses all borders
  - You can be serious without a suit
  - Great just isn't good enough



# National Marrow Donor Program Be the Match

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- Mission:
  - We save lives through cellular therapy.
- Vision:
  - Meeting the needs for 10,000 transplants a year by 2015.
- Values:
  - We value diversity
  - We embrace learning
  - We live our core values – commitment, resourcefulness, compassion, collaboration, excellence, integrity



# What are the keys to overall success?

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- Planning
- Communication
- Execution
- Rewards & Incentives
- Celebrate Success

TRUST THE PROCESS



# Estimated Timeline/Next Steps

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- Sep-Nov
  - Facilitated Council study sessions (mission, vision, values)
  - Facilitated current state assessments:
    - Key stakeholder groups (community/business leaders)
    - Executive leadership team
  - Identify Strategic Themes
  - **Council Check Point**
- Dec-Feb
  - Identify Strategic Objectives
  - Create draft Tier 1 Strategy Map
  - **Council Check Point**
  - Refine/Adopt Strategy
- Mar-Apr
  - Identify Strategic Initiatives
  - Establish targets and measures
  - **Council Check Point**
- May-Jun
  - Implement activities
  - Monitor Performance
  - **Council Check Point**
- July
  - Kick-off Tier 2 development
  - **Council Check Point**

