

# Strategic Planning & Balanced Scorecard Initiative

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City Council Workshop  
May 2, 2017



# Value of Strategic Planning

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- Shared vision/purpose
- Accountability
- Alignment
- Performance management
- Engaged workforce
- Collaboration
- Data-driven decisions

# Activity to Date

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- Resource Planning & Training
- Council Program Launch
- Virtual Stakeholder Feedback Sessions
- Reformulated Mission, Vision, Values
- Executive Team Assessments
- Theme Team Recruitment & Training

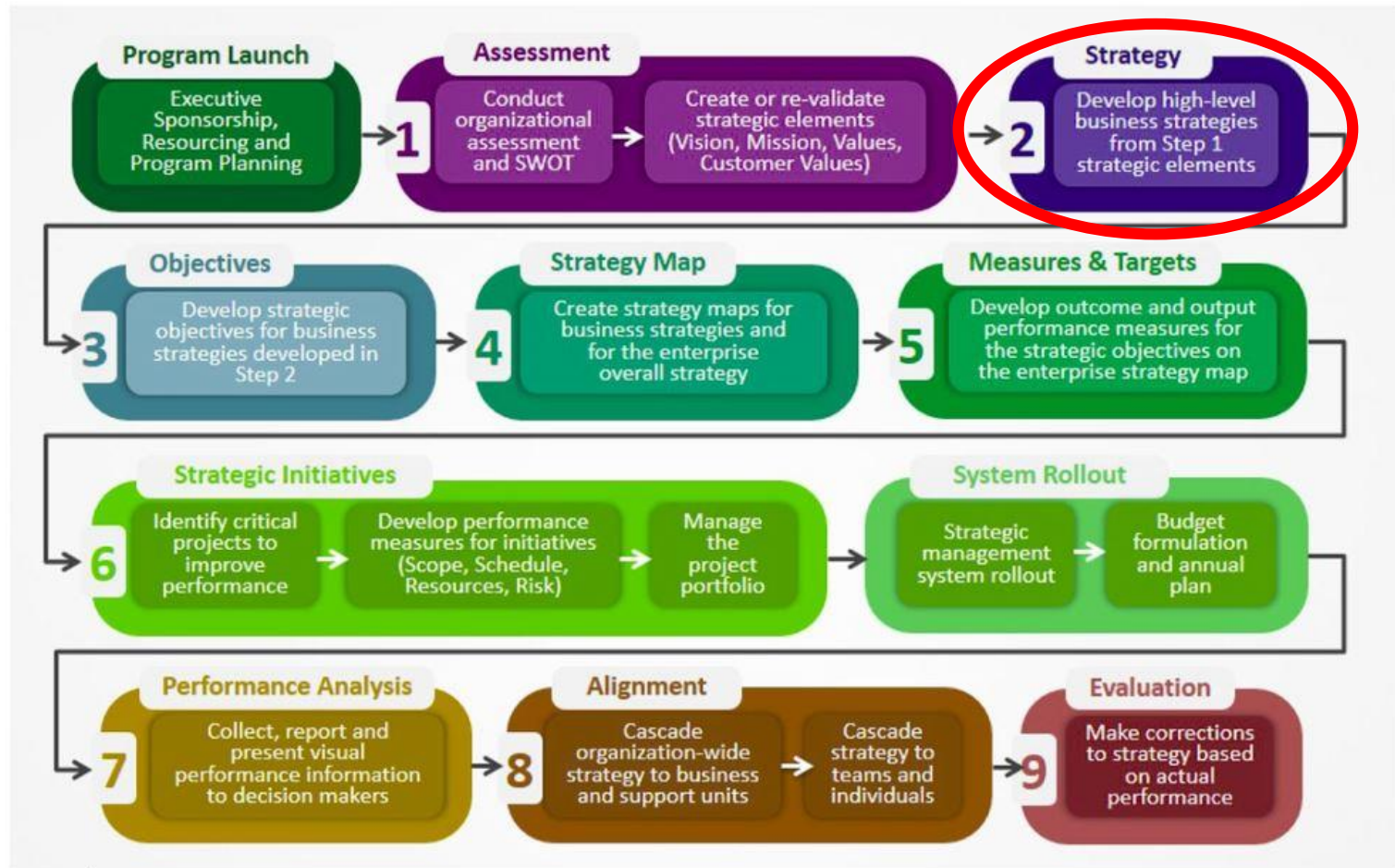
# Executive Team Work

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- SWOT Analysis
- Customer Value Proposition
- Strategic Differentiators
- Risk Analysis
- Strategic Theme Development

# Balanced Scorecard

## Balanced Scorecard – The *Nine Steps to Success*™ Framework



# Government Strategic Planning and Management System Example

**Vision:** Be a world-class model for a successful urban community

**Mission:** Provide effective and fiscally responsible services in a manner that promotes high standards for community life

Strategic Themes:	Government Reform	Nurturing Children and Families	Public Safety	Economic Abundance
Strategic Results:	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.

## Strategic Objectives and Strategy Map

Constituent/  
Stakeholder



Financial  
Stewardship

Business  
Processes

Organizational  
Capacity

## Measures

## Targets

## Initiatives

<ul style="list-style-type: none"> <li>• Livability satisfaction score</li> <li>• Program satisfaction score</li> <li>• Per capita service utilization</li> <li>• Business permits and licenses</li> <li>• Per capita income</li> <li>• Tourism revenue</li> </ul>	<ul style="list-style-type: none"> <li>• &gt;90% this year</li> <li>• &gt;85% this year</li> <li>• 65% this year</li> <li>• ↑9.5% each quarter</li> <li>• ↑3% this year</li> <li>• ↑10% this year</li> </ul>	<ul style="list-style-type: none"> <li>• Green space program</li> <li>• New business startup program</li> <li>• Community engagement committee</li> <li>• Partnering program</li> </ul>
<ul style="list-style-type: none"> <li>• Controllable expenses</li> <li>• Asset value</li> <li>• Strategic projects on time and budget</li> </ul>	<ul style="list-style-type: none"> <li>• ↓5% this year</li> <li>• ↑8% this year</li> <li>• 100% this year</li> </ul>	<ul style="list-style-type: none"> <li>• Simplify tax payments</li> <li>• Asset resale program</li> <li>• Energy savings program</li> </ul>
<ul style="list-style-type: none"> <li>• Index of program results</li> <li>• Shared systems</li> <li>• Response time changes</li> <li>• A score of customer satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>• 85% this year</li> <li>• 85% this period; 50% this year</li> <li>• ↑5% this period</li> <li>• &gt;90% this period</li> </ul>	<ul style="list-style-type: none"> <li>• Partner recruitment program</li> <li>• City marketing program</li> <li>• Satisfaction surveys</li> </ul>
<ul style="list-style-type: none"> <li>• Retention effectiveness</li> <li>• Training effectiveness</li> <li>• Employees use of appropriate technology</li> </ul>	<ul style="list-style-type: none"> <li>• &gt; 80% this period</li> <li>• 92% this year</li> <li>• &gt;93% this period</li> <li>• ↑45%</li> </ul>	<ul style="list-style-type: none"> <li>• Customer service training</li> <li>• Individual development plans</li> <li>• Program evaluation process</li> </ul>

• Integrity-Based Leadership • Ethics • Accountability • Commitment to Excellence • Citizen-Centered • Mutual Respect

# Strategic Themes

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- Stakeholder Engagement
- Community Livability
- Accountability & Fiscal Responsibility
- Superior Service Delivery

# Next Steps – Theme Teams

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- 48 employees
- 14 departments
- Volunteer basis
- Role:
  - Strategic Objectives
  - “Theme” Map
  - Candidate performance measures
  - Alignment with perspectives



# Next Steps

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- Draft strategy map (**Council checkpoint**)
- Performance measures/targets
- Strategic Initiatives
- Final strategy map (**Council adoption**)
- Implement activities
- Establish performance dashboard
- Monitor/report
- Tier 2 Departmental Scorecards