



Legislation Details (With Text)

File #:	17-186	Version:	1	Name:	STRATEGIC PLANNING & BALANCED SCORECARD INITIATIVE
Type:	Workshop	Status:			Agenda Ready
File created:	4/25/2017	In control:			City Council Workshop
On agenda:	5/2/2017	Final action:			
Title:	STRATEGIC PLANNING & BALANCED SCORECARD INITIATIVE Staff Contact: Jean Moreno, Executive Officer Strategic Initiatives and Special Projects				
Sponsors:					
Indexes:					
Code sections:					
Attachments:	1. Exec Team Assessments, 2. Advanced Strategy Center Transcript, 3. POWERPOINT				

Date	Ver.	Action By	Action	Result
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STRATEGIC PLANNING & BALANCED SCORECARD INITIATIVE

Staff Contact: Jean Moreno, Executive Officer Strategic Initiatives and Special Projects

Purpose and Policy Guidance

The purpose of this presentation is to provide an update on activities to date associated with the development of the city's Balanced Scorecard; to request City Council feedback on the draft strategic "themes" which are to be used as the basis for the development of specific strategic objectives; and, to provide an updated timeline and next steps.

Background

This is the fourth City Council study session regarding the Strategic Planning & Balanced Scorecard Initiative which is designed to guide the process for the development of a city-wide strategic plan. Several activities have taken place to date including:

- Resource planning and organizational alignment;
- Core team assembly and training;
- City Council program launch session;
- Five virtual stakeholder feedback sessions with key stakeholder groups (82 participants) representing employees, business leaders, non-profit/education leaders, and boards and commissions;
- Two City Council study sessions to develop and finalize mission, vision, and value statements for the organization;
- Four executive team strategy meetings to conduct various assessment exercises and to identify proposed organizational strategic theme areas to create focus for the organization; and,
- "Theme Team" recruitment and training for 48 employees who will be responsible for developing proposed strategic objectives that will create the organizational strategy map.

Analysis

Since the last City Council study session on February 7, 2017, four strategy meetings have been held with the executive management team to conduct very specific organizational assessments. These assessments were designed to synthesize the feedback from the external stakeholder sessions along with internal analysis to formulate 3-4 strategic focus areas for the organization. These focus areas are called “strategic themes” and are intended to guide the next phase of the development of the strategic plan. The assessments conducted by the executive team included: a SWOT analysis to explore strengths, weaknesses, opportunities, and threats; Customer Value Proposition to identify what unique benefit or relationship can the city provide for its customers; Strategic Differentiators exercise to identify what the city could do to stand out when compared to other communities; and, a Risk Analysis to determine what risks might there be to the city when it comes to fulfilling the vision and what potential controls might mitigate the risk. See attached for details on those assessments.

The final exercise was facilitated by Advanced Strategy Center and was designed to achieve two outcomes: 1) to gain valuable insights regarding the executive team’s perceptions about the organization’s readiness for change; and, 2) to think about a future where we were wildly successful at achieving the vision of being the community of choice for residents, businesses, and employees and asking, “what did we do that led to that success” and “what was the strategic focus that moved us forward”. The transcript from that session is also included as an attachment to this report. The result of that session was the development of four proposed strategic themes for the organization and the description of the hopeful strategic result for each. The recommendation from the executive team is to strategically focus in these areas in order to be the community of choice for residents, businesses, and employees.

Strategic Theme/Results:

STAKEHOLDER ENGAGEMENT:

Glendale ensures a sense of genuine and consistent engagement with all stakeholders. Our employees feel respected/valued and part of the process, citizens feel that their voices matter, and businesses feel like partners in the economic development of the city. All stakeholders have an opportunity to guide decision making and problem solving. The organization is fully aligned with the overall direction and decision making.

COMMUNITY LIVABILITY:

Glendale creates a safe environment, is inclusive, and provides a great blend of amenities that support a work/life focus. The organization is focused on community events that matter, being family oriented, promoting the attractive amenities and venues in the city, and maintains excellent parks/open spaces. The organization creates a focus on effective infrastructure development in transportation, water/wastewater, technology, and other services; and, has an effective asset and capital project management system.

ACCOUNTABILITY & FISCAL RESPONSIBILITY:

Glendale cultivates accountable leadership and business functions delivered with long term fiscal stewardship that effectively manages the community's resources. There is a focus on transparent, accurate, and timely communications; and, openly assessing and reporting performance.

SUPERIOR SERVICE DELIVERY:

Glendale provides the highest quality services delivered in an easy format using a combination of in person and technology driven solutions that create an overall efficient and effective city government. Leadership sets the expectation of a culture of continuous improvement looking at the services and how to improve them; creates supporting tools and systems; and, establishes acceptable risk parameters.

These themes will serve as the basis for the development of specific continuous improvement activities (strategic objectives) that will make the city's mission, vision, and value statements actionable and create a focus on strategic results. The development of the strategic objectives will be done by the Theme Teams which includes a cross-departmental, cross-functional team of 48 employee representatives.

Previous Related Council Action

On February 7, 2017, the City Council provided consensus direction on final mission, vision, and value statements for the organization.

On October 31, 2016, the City Council held a Special Workshop where they participated in a facilitated discussion to identify core concepts and ideas that would be used to create the city's value, mission, and vision statements.

On September 9, 2016, the City Council held a Special Workshop where staff presented an informational overview of strategic planning, why it is important for our community and organization, and an introduction to the Balanced Scorecard management system.

Community Benefit/Public Involvement

The development of a comprehensive and focused strategy for municipal service delivery is critical for the development of a high-performance organization that has a shared purpose, operates with autonomy and accountability, sets and achieves performance measures and targets, has empowered and engaged employees that work collaboratively, and uses data and evidence for decision making. All of which adds value to service delivery and enables the ability to create a positive impact for the community. It provides the opportunity for the city to be specific and deliberate in the allocation of resources and ultimately, improves overall quality of life for our citizens.

To inform the initial steps of the process, the city engaged key stakeholder groups including employees, business leaders, boards and commissions, and the non-profit community to provide their insights into what the city is doing well and where improvement is needed in order to guide the full development of the strategic plan.