# ORGANIZATIONAL STRATEGIC PLAN

CITY OF PEORIA, ARIZONA

*"One of the most important practices of leadership is giving life and work a sense of meaning and purpose by offering an exciting vision."*

James M. Kouzes and Barry Z. Posner
*The Leadership Challenge*

The City of Peoria Organizational Strategic Plan
Created, Written and Published by City of Peoria Employees
March 2010

**Foreword**


A municipal government is a big, complex operation. The City of Peoria provides dozens of services, offers dozens of programs, and at any given time is building dozens of projects. With so many things happening all at once, it is easy for an organization like ours to feel a bit disconnected.

The Organizational Strategic Plan is a tool to reconnect the organization. It provides a common foundation upon which each department can develop particular goals, strategies and performance measures. It allows each employee insight into our long-term vision, organizational values and day-to-day service standards.  It is a guide for how we will serve the community and our other customers, both inside and outside the organization.

As you read through the five focus areas: Customer Service; Information Sharing; Organizational Development; Sustainability; and Civic Engagement, I encourage each of you to think about how the work you do helps support these tenets and continuously strive for exceptional results.

Thank you to all who took the opportunity to participate and shape this plan.  This is a plan that was developed 100% by city employees, for city employees – no outside consultants were used.  It is thoughtful, it is strategic, and it is our future.


**Carl Swenson**
**City Manager**

# ORGANIZATIONAL STRATEGIC PLAN

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# CITY OF PEORIA ORGANIZATIONAL STRATEGIC PLAN

## INTRODUCTION

Organizational success does not just happen. To succeed, particularly in today's volatile environment, an organization must be thoughtful and intentional about its direction. To gain this clarity and guide future decisions, the City of Peoria employed a customized methodology to refresh the organization's vision, mission, values and to set strategic direction.

The result is the City of Peoria Organization Strategic Plan (OSP), a blueprint upon which the organization will build its activities over the years ahead.

The City of Peoria Organizational Strategic Plan enables the organization to:

1. Face the future with clarity and purpose
2. Shape and chart the desired future
3. Focus efforts and resources on what is most important
4. Make daily decisions part of an integrated process
5. Increase employee commitment and engagement

## BACKGROUND AND PROCESS

The City of Peoria embarked on a six-month project to create an organizational strategic plan in February of 2009. The purpose of this plan is to identify an operating foundation for future organizational success, as well as the steps necessary to get there.

Although a small group of staff was assigned to an OSP Committee that was ultimately tasked with producing the final plan, its development was considered an organization-wide project from the outset. Everybody in the organization would have an opportunity to provide ideas during the plan's construction.

To that end, the OSP Committee developed a process that engaged the workforce at all levels. Steps in this process included assessing the organization's current state; coalescing visions of the desired future; identifying gaps between those; assessing strengths, weaknesses, opportunities and threats; determining areas of future organizational focus; and setting forth goals and objectives to move the organization forward within those focus areas.
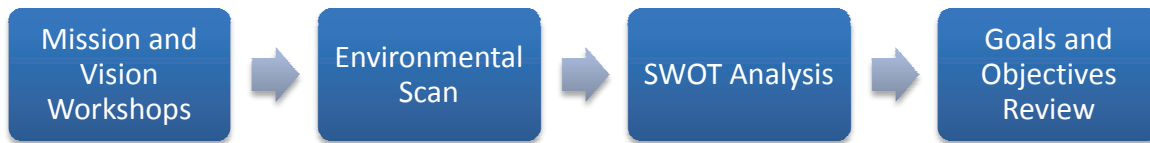
**Figure 1 – Key Organizational Interactions During the OSP Process**

## Vision and Mission Workshops

The process kicked-off with an initial exercise that asked questions related to the city's vision and mission. All employees were invited to this event, and nearly 200 participated.

Separate events were held at the two primary municipal work campuses. A drop-in, open house format allowed employees to participate as their schedules allowed. Participants were asked to respond to questions posed on six distinct writing surfaces. The questions posed were:

1. Why do we exist?
2. Who do we serve?
3. How do we serve?
4. What characteristics does a model (municipal) organization embrace?
5. What does your ideal job environment look like?
6. What would create positive changes for this organization?



*About 200 employees provided input during vision-mission workshops.*

These questions aimed to detect core values and ideal organizational components as expressed by city employees. From this input, draft statements were created and finalized through discussion with executive management and department directors.

During this process, employees expressed a desire to hold onto the existing employee values (**P**rofessional, **E**thical, **O**pen, **R**esponsive, **I**nnovative, **A**ccountable). These values were complemented with a new mission statement, and the addition of a values statement that rounded out the employee values with an expressed emphasis on recognizing diversity and valuing integrity.

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**Environmental Scan**

The OSP Committee then formed employee teams to conduct an environmental scan. Each group was assigned a specific area within which they assessed information available inside and outside the organization. Teams analyzed information in these areas:

1. Formal Documents
2. Demographic Trends/Forecast
3. Organizational Structure
4. Operational Efficiency /Capacity
5. Organizational Culture
6. Economics Forecast / Financial Indicators
7. Benchmarking Analysis

Each team developed a summary report that outlined the common themes that emerged within each area. From that, the OSP team looked across the areas of analysis to determine focus areas for the next steps of the OSP process.

**SWOT Analysis**

Focus areas were determined based upon the results of this environmental scan. New employee teams were then created and asked to complete an analysis of the organization's strengths, weaknesses, opportunities and threats (SWOT) for each focus area. On a parallel track, department directors conducted a similar SWOT analysis exercise.

The work of these distinct groups was then consolidated into a single SWOT analysis of each focus area.

**Goals and Objectives**

The OSP Committee took all of the data and feedback gathered to that point and created draft goals, objectives and key outcomes for each focus area. The committee then facilitated a half-day event where approximately 50 managers from across the city reviewed and strengthened the work done to date.

As a final step, the committee took a fresh look at each focus area and its associated goals, objectives and outcomes. Seven focus areas were subsequently folded into five strategic goals – which make for a much more manageable plan in terms of understanding and implementation by the organization.

| City of Peoria Organizational Strategic Goals | | | | |
|---|---|---|---|---|
| Provide Excellent Customer Service | Enhance Organizational Development | Increase Information Sharing | Promote Sustainability | Promote Civic Engagement |

**OSP**

## How the Pieces Fit Together

The Organization Strategic Plan (OSP) is a guide that departments, divisions and workgroups will use to develop particular goals, strategies and performance measures. The OSP aligns resources with strategic directions to keep the organization looking forward and anticipating future challenges, rather than reacting to unexpected obstacles or changes in direction.

It is part of an overall emphasis on strategic planning across the organization. The City Council Goals and Organizational Strategic Plan combine to set direction, priorities and create the operating foundation upon which the organization moves toward achieving its goals.

**Figure 2: How the Pieces Fit Together**

# VISION, MISSION AND VALUES

Peoria's Organizational Vision, Mission and Values were created through interactive discussions and exercises with employees, management and leadership.  Nearly 200 employees participated in an initial event to gather ideas. From this input, draft statements were created. The final statements and values were then crafted through discussion with executive management and department directors.

## VISION STATEMENT

City of Peoria team members provide unmatched quality of life and excellent customer service for our community.

## MISSION STATEMENT

The City of Peoria provides excellent municipal services by anticipating community needs, creating partnerships, promoting sustainability and embracing diversity.

## VALUES STATEMENT

We serve with integrity, embrace diversity, and are responsible stewards of taxpayer dollars and the natural environment.

## CORE VALUES

**We are:**

**P**   Professional
**E**   Ethical
**O**   Open
**R**   Responsive
**I**   Innovative
**A**   Accountable

## STRATEGIC GOALS AND OBJECTIVES

The Organization Strategic Plan identifies strategic goals and objectives that guide the internal and external activities of the organization.

These strategic goals are:

- Provide Excellent Customer Service
- Enhance Organizational Development
- Increase Information Sharing
- Promote Sustainability
- Promote Civic Engagement

The job of city employees is to consistently provide efficient, professional, high-quality service to the residents, businesses, and visitors of Peoria.  To achieve this, we must have a well trained workforce, establish customer service and performance standards, consider new ways to use technology and increase our accessibility to our customers.  **The Customer Service** Goal focuses on how well the organization is able to constantly and consistently exceed the needs of the customer.  This includes internal and external customers at the City.

Employees of the City expressed a desire to know that their experience, skills, opinions, innovations and perspectives were recognized and valued by the organization.   The **Organizational Development** Goal focuses on improving the effectiveness and productivity of the organization through innovation and values-based employee development.

Employees of the City also provided significant feedback indicating that many of them did not feel that important information was reaching all levels of the organization.  As a result a major focus area was developed to place emphasis on the importance of disseminating information from the top down and the bottom up.  The **Information Sharing** Goal stresses the importance of the intentional sharing of timely, accurate and relevant information among all employees, departments and City leadership so that employees are informed of important information and thoughtful decisions can be made.

The concepts of fiscal and environmental stewardship and sustainability are increasingly important values to the organization.  There are a number of organizational initiatives that have been launched to provide more specific direction and support for these concepts, and employees play a key role in the success of these initiatives.  The **Sustainability** Goal focuses on the City's efforts to reduce harmful effects on the environment, maintain strong and sustainable fiscal management, build a strong local economy, and enable the development of a social, economic and environmentally sustainable community.

The City recognizes our partners in the community we serve.  A renewed focus on **Civic Engagement** is an effort to intentionally connect with residents to contribute ideas, energy and action on proposals that impact the community. This combination of efforts is intended to cultivate a feeling of belonging to the greater community.

Each department, division, work group and employee should focus efforts toward achieving these goals – whether designing and delivering programs, projects and services, or simply in the day-to-day conduct of city business.

Each strategic goal is discussed in detail in the following pages. With each goal is a descriptive statement to clarify its aim; this is supported by a key outcome that will indicate organizational progress toward achieving the goal. This is followed by a list of strategic objectives.

To further assist departments, the Appendix lists ideas for turning these goals into meaningful targets for specific work groups.

## STRATEGIC GOAL #1:  PROVIDE EXCELLENT CUSTOMER SERVICE.

Foster a customer service culture based on PEORIA's established values (Professional, Ethical, Open, Responsive, Innovative, and Accountable).

> **Key Outcome:**  *The city will receive a favorable score in a citywide survey of all customer service objectives.*

**Strategic Objectives:**

a) Develop citywide standards and measures for customer service.
b) Provide training to all employees on delivery of excellent customer service.
c) Expand access to information, programs and services through increased utilization of technology.
d) Increase access to city programs by providing bilingual and ADA-compliant services.

## STRATEGIC GOAL #2:  ENHANCE ORGANIZATIONAL DEVELOPMENT.

Improve the effectiveness and productivity of the organization through innovation and values-based employee development.

> **Key Outcome:**  *The city will receive a favorable score in a citywide survey of all organizational development objectives.*

**Strategic Objectives:**

a) Promote a work culture that fosters inclusion and values diversity.
b) Develop methods to increase efficiency and effectiveness.
c) Develop leaders within the organization.
d) Provide learning opportunities for all employees.
e) Emphasize integrity in departmental practices.
f) Encourage innovative ideas and actions that promote positive change.

## STRATEGIC GOAL #3:  INCREASE INFORMATION SHARING.

Increase effectiveness of communication through the sharing of timely, accurate and relevant information.

> **Key Outcome:**  *The city will receive a favorable score in a citywide survey of all information sharing objectives.*

**Strategic Objectives:**

a) Improve exchange of information throughout the organization.
b) Expand employee knowledge of organizational and departmental goals, policies, and planning documents.
c) Employ cross-functional teams for multi-departmental initiatives.

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## STRATEGIC GOAL #4: PROMOTE SUSTAINABILITY.

The city will position itself as a leader in sustainable actions

> *Key Outcome: The city will earn regional or national recognition, such as the ICMA Sustainable Community award, for the organization's sustainability actions*

**Strategic Objectives:**

a) Design and deliver cost effective services that reduce the impact on the environment.
b) Employ sustainable practices and technologies.
c) Educate and involve the community in sustainable practices.
d) Employ strong fiscal management practices that encourage sustainable fiscal decision-making.

## STRATEGIC GOAL #5: PROMOTE CIVIC ENGAGEMENT.

Develop relationships that build a sense of community.

> *Key Outcome 1: The city will receive a favorable score in a citywide citizen survey regarding citizen perception of our actions towards building a sense of community.*
>
> *Key Outcome 2: The City will receive a favorable score in a survey of local and regional stakeholders regarding the city's effort to build and maintain strategic partnerships.*

**Strategic Objectives:**

a) Establish standards for civic engagement for all major City projects, programs, and initiatives.
b) Develop strategic partnerships with private business, local, regional, and national organizations.

# GLOSSARY

| | |
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| Civic Engagement | Intentionally connecting with residents and community stakeholders to contribute ideas, energy and action on proposals that impact the community. |
| Core Services | Those services that are deemed essential to the organization, departments and divisions to serve Peoria's customers. |
| Core Values | Values are the overall priorities in how the organization will operate; they suggest overall priorities in how people ought to act. |
| Comparative Analysis | Item by item comparison of two or more comparable alternatives, processes, products, qualifications, sets of data, systems, etc. |
| Cost Avoidance | An action taken in the present designed to decrease costs in the future. |
| Customer | Anyone who uses or experiences the services of another. |
| Customer Service | A series of activities designed to enhance the level of customer satisfaction. The feeling that a product or service has met the customer expectation. |
| Demographic Trends | A compilation of currently available census data on both resident/workforce within Peoria. Includes residential and commercial growth trends over the next several years and relevant analysis on regional trends. |
| Department Operating Plan | A planning document used to anticipate trends and determine the best strategies and resources needed to achieve organizational, departmental and workgroup goals and objectives. |
| Disenfranchised Groups | Members of the community whose views are not readily apparent to the dominant culture. |
| Diversity | Valuing the concerns and desires of both the workforce and customers and promoting a climate of mutual understanding and respect for differences and similarities among members of different groups. |
| Economic Forecast | The process of making predictions about the economy as a whole or in part. |

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| Economic Indicators | Statistics about the economy that allow for an analysis of the economic conditions. (ie. housing starts, consumer price index, unemployment rate, etc.) |
| Environmental Scan | An analysis and evaluation of internal conditions and external data and factors that affect the organization. |
| Goals | Goals are general statements of themes or directions, either measurable or not measurable as stated. They represent a commitment to broad intentions and aspirations. |
| Inclusion | A practice that ensures that people in the organization feel they belong, are engaged, and connected through their work to the goals and objectives of the organization. |
| Information Sharing | The collaborative exchange of information throughout the organization to ensure access to timely and accurate information. |
| Mission Statement | The mission is the key building block in the entire strategic planning process. It states clearly, simply, and explicitly what the work unit wants to do or be and can do or be. It reflects opportunities, capabilities, and values. |
| Objectives | Objectives are specific statements that contribute to the achievement of "bigger" goals. |
| Operational Efficiency | Executing service transactions that provide the best value for the dollars spent. |
| Organizational Culture | A collection of values and norms that are shared by people and groups in an organization and that control the way they interact with each other and with stakeholders outside the organization. |
| Organizational Development | An ongoing, systematic process to implement effective change in an organization. |
| Organizational Structure | The concept of reporting relationships and organizational charts that are designed to support departmental/organizational goals. |
| Organizational Strategic Plan | A planning document that identifies where an organization is going over a set period of time, identifies strategies for how it is going to get there, and establishes indicators to know if it achieved its goals or not. |

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| Outcome Measures | A determination and evaluation of the results of an activity, plan, process, or program and their comparison with the intended or projected results. |
| Performance Management | It is a results-oriented system that allows local governments to set appropriate targets and assess whether they are being met, distinguish success from failure, highlight accomplishments and demonstrate results. |
| Stewardship | An ethic that embodies cooperative planning and management of resources with organizations, communities and others to maintain long term sustainability. |
| Sustainability | Improving the quality of human life while living within the carrying capacity of supporting environmental, social and economic systems. |
| SWOT Analysis | SWOT stands for: strengths, weaknesses, opportunities, and threats. A SWOT analysis is a tool for auditing an organization and its environment. It is the first stage of planning and to focus on key issues within the organization. |
| Vision Statement | A vision expresses a compelling image of the desired future. It provides an inspiration and challenge to all members toward an ideal future. It should purposefully bridge the present and future and to serve as a critical impetus for change. |

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# APPENDIX:
## STRATEGIC GOALS AND OBJECTIVES
## ACTION PLAN

The Organizational Strategic Plan Implementation Toolkit is a listing of the organizational goals with suggested action items identified during the development of the Organizational Strategic Plan. The action items below are suggestions that were identified by employees that could be undertaken by the organization.

These can be used as a basis for implementing the Organizational Strategic Plan within specific departments, divisions and work groups. These lists are not all-inclusive; additional action items that help support the achievement of the goals and objectives may be added as necessary.

## STRATEGIC GOAL #1:  PROVIDE EXCELLENT CUSTOMER SERVICE.

*Foster a customer service culture based on PEORIA's established values (Professional, Ethical, Open, Responsive, Innovative, and Accountable).*

### OBJECTIVES

a) Develop citywide standards and measures for customer service.
b) Provide training to all employees on delivery of excellent customer service.
c) Expand access to information, programs and services through increased utilization of technology.
d) Increase access to city programs by providing bilingual and ADA-compliant services.

#### ACTION ITEMS:

1) Evaluate and expand e-government based on public feedback.
2) Evaluate and expand accessibility (i.e. flexible scheduling, shifts, remote sites, etc).
3) Increased bilingual services through hiring.
4) Increased bilingual services through training.
5) Establish procedures to update other departments on changes to programs or service delivery.
6) Provide education and cross training opportunities for employees to understand other departments' core services.
7) Collect feedback from internal and external customers (i.e. anonymous surveys).

## STRATEGIC GOAL #2:  ENHANCE ORGANIZATIONAL DEVELOPMENT.

*Improve the effectiveness and productivity of the organization through innovation and values-based employee development.*

### OBJECTIVES

a) Promote a work culture that fosters inclusion and values diversity.
b) Develop methods to increase efficiency and effectiveness.
c) Develop leaders within the organization.
d) Provide learning opportunities for all employees.
e) Emphasize integrity in departmental practices.
f) Encourage innovative ideas and actions that promote positive change.

### ACTION ITEMS:

1) Develop policies and programs supporting inclusion and diversity.
2) Recognize departments and individuals demonstrating ethics, leadership and stewardship of resources.
3) Implement a structured mentoring program.
4) Establish supervisor and leadership academies that support a continual learning environment.
5) Increase cross-training and succession planning.
6) Design and review benefits packages that are flexible in order to support the diverse needs of our employee population
7) Establish family-life-friendly culture
8) Develop and implement a comprehensive wellness program.
9) In meeting environments, group leaders should ensure that roles, expectations and timelines are clearly stated, and that all action items are assigned and monitored.
10) Develop methods for recognition of innovative ideas.
11) Screen for innovative qualities in new hires and evaluate innovation and risk-taking competencies in employee performance.
12) Establish an environment of shared risk-taking.
13) Review established business processes.
14) Use analytical tools such as Return on Investment (ROI) and Cost Avoidance to prioritize and justify implementation of new ideas.
15) Develop an Innovation Program that establishes funding for innovative ideas, programs and services.
16) Seek grant funding for implementation of new ideas and programs.

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## STRATEGIC GOAL #3:  INCREASE INFORMATION SHARING.

*Increase effectiveness of communication through the sharing of timely, accurate and relevant information.*

### OBJECTIVES

a) Improve exchange of information throughout the organization.
b) Expand employee knowledge of organizational and departmental goals, policies, and planning documents.
c) Employ cross-functional teams for multi-departmental initiatives.

### ACTION ITEMS:

1) Publish minutes from meetings, such as director and department meetings.
2) Advertise resources, events, programs and activities in the City.
3) Implement department suggestion boxes, publish suggestions and associated decisions.
4) Provide more cross-departmental networking, idea exchange and training.
5) Develop productive meeting guidelines.
6) Provide opportunities for bottom-up communications.
7) Create a central database listing general information used City-wide, i.e., population and square miles in the City, budget, number of building permits issued to date, significant partnerships, etc.
8) Inform employees of available technological resources and provide training on its use; offer annual training on any changes.
9) Provide a referral / reference manual of City functions.
10) Provide training on communication "etiquette" at New Employee Orientation.
11) Develop and implement Peoria Employee Leadership Institute (PELI); video tape and stream on Intranet.
12) Invite new employees back to a second New Employee Orientation to avoid information overload at the first Orientation.
13) Leverage technology to improve access to information, such as Intranet webinars, video conferencing, and electronic workflow processes.
14) Conduct regular updates between departments and executive management to assess status of departmental goals and objectives and communicate progress to organization.
15) Utilize new employee orientations to articulate organizational expectations.

## STRATEGIC GOAL #4:  PROMOTE SUSTAINABILITY.

*The City will position itself as a leader in sustainable activity.*

### OBJECTIVES

a) Design and deliver cost effective services that reduce the impact on the environment.
b) Employ sustainable practices and technologies.
c) Educate and involve the community in sustainable practices.

### ACTION ITEMS:

1) Facility design, operation and maintenance will use the best sustainable practices that are fiscally prudent.
2) The City vehicle fleet will be as fuel-efficient as possible; alternative fuel technologies will be used wherever appropriate.
3) New office equipment will be as energy/resource efficient as possible (i.e. duplex printing, workgroup printers, management software).
4) City operations will be assessed to identify and implement sustainable practices (i.e. idling policy for city vehicles, green procurement, alternate work schedules, employee accountability).
5) Electronic capability, such as videoconferencing or webinars, between city facilities (and with other agencies) will be expanded and policies to mandate its use adopted.
6) Engage state legislators and educate them about Peoria's sustainable goals & practices.
7) Promote the city's sustainable practices and accomplishments to the community.
8) Host a regional sustainability forum to bring local, regional and state leaders together on the topic.
9) Adopt city policies and ordinances to mandate sustainable practices in the community (i.e. require Xeriscape for new homes, expanding uses for reclaimed water in existing developments, etc.).
10) Develop and introduce legislation that enhances Peoria's and Arizona's ability to compete globally for sustainable industries.
11) Develop city infrastructure (data, water, transportation, trails, parks, open space, existing environment) to attract targeted companies.
12) Encourage employee strategies for developing cost saving measures.
13) Use technology to provide enhanced and cost effective services.

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## STRATEGIC GOAL #5:  PROMOTE CIVIC ENGAGEMENT.

*Develop relationships with stakeholders that foster a sense of community.*

### OBJECTIVES

a) Establish standards for civic engagement for all major City projects, programs, and initiatives.
b) Develop strategic partnerships with private businesses and local, regional, and national organizations.

### ACTION ITEMS:

1) Form civic engagement teams to improve relationships and outcomes for the community.
2) Identify and promote community events.
3) Promote an environment that is inclusive of the diverse perspectives of Peoria's citizens, visitors, workforce, business owners, and other stakeholders.
4) Identify and maintain partnerships with local, regional and national organizations such as schools, neighborhood associations, non-profit entities, arts and entertainment groups, business associations, faith-based organizations, and leadership groups.
5) Proactively establish dialogue with disenfranchised groups.
6) Develop interdepartmental teams to share the benefits of our partnerships.
7) Develop and/or improve communications strategies that reach underserved populations.
8) Seek employee feedback on initiatives that impact diverse populations.
9) Partner with other cities, non-profits, military and businesses (with a common goal).
10) Forge a marketable identity of Peoria to instill community pride and promote involvement.

The City of Peoria Organizational Strategic Plan
was created, written and published by city employees.

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