



MEMORANDUM

Office of the City Manager

To: Honorable Mayor and Members of the City Council
From: Tom Williams, City Manager
Subject: Strategic Planning Process – Agenda Item No. 5
Date: May 29, 2013

The City of Milpitas is coming out of the economic downturn, having weathered the most challenging aspects of the recession. As a result of reorganizing and cost cutting and now realizing a slowly improving economy, the City is moving closer to actually balancing expenditures with revenue. As the economy continues to improve and with City operational costs contained, the City is in a prime position to redefine itself by undertaking a strategic planning process to chart a new path forward.

The City has retained the services of Shawn Spano, PhD, to help design and facilitate the city-wide strategic planning process. Shawn is President and Senior Consultant with the Public Dialogue Consortium (www.publicdialogue.org) and a faculty member at San Jose State University. At the June 4 meeting, Shawn will discuss the proposed design of the strategic planning process with City Council, receive comments and feedback, and elicit recommendations for engaging community groups, organizations and individuals as part of the planning process. Shawn will conclude the segment by outlining the immediate next steps in the process.

Strategic Planning Process Design

The Strategic Planning Process will be structured into four separate but related phases. Each phase is designed to achieve specific outcomes while establishing the conditions, context and content for the phases that follow.

Phase I: Getting Started



Phase II: Vision, Mission and Values



Phase III: Strategic Goals/Objectives and Strategies



Phase IV: Work Plans, Implementation and Ongoing Assessment

Phase I: Getting Started

This phase is designed to engage City Council and the Management Team in helping to shape the Strategic planning process. It also includes brief launch presentations with City employees, the Management Team and City Council. This Phase is crucial for laying the groundwork for future success. Phase I events will consists of the following:

- A. Launch Presentations to City Council, the Executive Management Team and employees
- B. Engagements with the Executive Management Team
- C. Engagements with City Council

Desired Outcomes of Phase 1:

- Council and the Management Team have a shared understanding of the strategic planning process and are invested in it.
- The community groups, organizations and individuals who will be engaged in Phase II are identified.
- The employee engagement team members who will convene in Phase II are identified.
- The final document that describes the strategic planning process (phase, outcomes, timeline, resources, personnel, etc.) is compiled and formally approved.

Phase II: Vision, Mission and Values

The second phase will focus on developing the vision and mission for the City, and identifying the underlying values that will lay the foundation for the rest of the strategic plan. Phase II events consist of the following:

- A. Engagements with the Community
- B. Engagements with Employees
- C. Updates with Management Team
- D. Updates with City Council

Desired Outcomes of Phase II:

- Data from the community and employees will be analyzed and used to craft a vision, mission and values document.
- The vision, mission and values will be captured and communicated in a format that is compelling, meaningful and visually appealing (i.e. text and graphics).
- The final Vision, Mission and Values document will be launched with Council, Managers, employees and external stakeholders in a celebratory recognition event.

Phase III: Goals/Objectives and Strategies

The third phase will involve the Management Team and other managers, supervisors and employees in developing *citywide* goals/objectives and strategies. What is envisioned at this point is a relatively small number of goals/objectives that emanate from the vision, mission and values. Each of the goals/objectives will have multiple strategies that outline how the goals/objectives will be achieved and the metrics used to measure success. Phase III events consist of the following:

- A. Engagements with the Management Team and Managers/Supervisors
- B. Engagements with Employees
- C. Updates with City Council
- D. Updates to the community

Desired Outcomes of Phase III:

- Citywide goals/objectives and strategies are developed, discussed and revised through several iterations with the Management Team, employees and Council.
- The community is aware of the goals/objectives and strategies and are supportive of them.
- All stakeholders have a shared understanding of the goals/objectives and strategies are invested in them.

Phase IV: Work Plans and Implementation with Ongoing Assessment

For the final phase, department teams and cross-department teams will create work plans to implement the strategies that were developed in Phase III. Implementation will take place on a short-term, mid-term and long-term basis, depending on the strategy. Assessment activities to measure success and progress will be ongoing, as developed in the work plans.

Council Comments and Feedback

- What questions, comments and feedback does City Council have in response to the proposed strategic planning process?

Recommendations for Community Engagement

- What community groups, organizations and individuals does City Council recommend for engagement in the strategic planning process?

Immediate Next Steps for Council Involvement

- Proposed one-on-one interviews with Mayor and Members of the City Council to elicit additional feedback and recommendations.
- Schedule additional update session, or perhaps an extended session with City Council in preparation for engaging community groups, organizations and individuals.



Milpitas Strategic Planning Process: Getting Started

June 4, 2013

Preview

- ▣ Strategic Plan design and overview
- ▣ City Council comments and feedback
- ▣ Identifying community groups, organizations and individuals
- ▣ Next steps for City Council involvement

Strategic Plan Context

- The City is coming out of the economic downturn
- Weathered the most challenging aspects of the recession
- The City is now in a prime position to undertake a planning process
- Need to define the path and move down it together

Strategic Plan Phases

- Phase I: Getting Started
- Phase II: Vision, Mission and Values
- Phase III: Goals, Objectives & Strategies
- Phase IV: Work Plans, Implementation and Ongoing Assessment

Phase I – Getting Started

- Launch Presentations
- Engagements with City Council
- Engagements with the Executive Management Team
- Desired Outcomes of Phase 1

Phase II – Vision, Mission and Values

- Engagements with the Community
- Engagements with Employees
- Updates with Management Team
- Updates with City Council
- Desired Outcomes of Phase II

Phase III – Goals, Objectives & Strategies

- Goals & objectives derived from vision, mission and values
- Strategies derived from goals & objectives – will outline how they will be achieved, metrics used to measure success
- Continue to engage employees, management staff and Council

Phase IV – Development of Work Plans

- Work Plans developed by Department Teams
- Implementation will occur in a series of short, mid and long-term stages
- On-going assessment check points

Comments and Feedback

What questions, comments or feedback does City Council have in response to the proposed strategic planning process?

Recommendations for Community Engagement

What community groups, organizations
and individuals does City Council
recommend for engagement in the
strategic planning process?

Next Steps for Council Involvement

- One-on-one interviews with Mayor and Members of the City Council
- Next update session, perhaps an extended session?