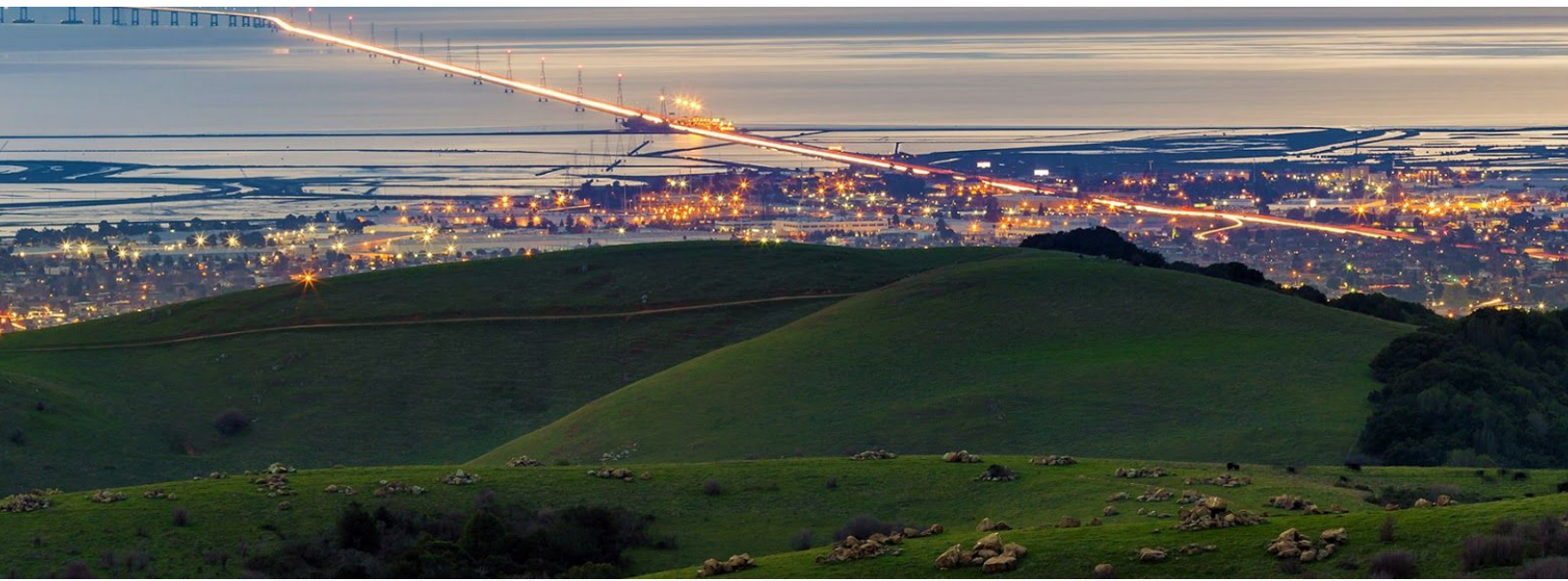




Scope of Work
City of Hayward
Strategic Plan Phase 2, Version 2

(RFP #1915-031519)

July 9, 2019



Scope of Work

00 Glossary

Key Terms to Understand

- **Mission** - A statement of why the organization exists at its most meaningful level.
- **Vision** - A clear, specific, compelling and shared picture of what the organization will look like in three to five years.
- **Strategic Priorities** - The top areas of focus to achieve the vision.
- **Projects** - The main items within each strategic priority that need to occur in order to achieve the vision.
- **Year 1 Objectives** - Specific outcomes for the first year that need to be achieved in order to stay on track toward accomplishing a project.
- **Metrics** - How we keep track of progress toward achieving priorities and projects.

01 Planning & Assessment

July and August 2019

Deliverables

- Phase 2 work plan and budget
- Focus group agenda for Executive Team
- Interview protocols for department heads and staff
- Synthesis of staff engagement findings

1.1 Phase 2 kick-off meeting & work plan. In this meeting, we will discuss what we learned from phase 1, and what we would change for phase 2. In addition, we will discuss project goals, deliverables, timeline, key stakeholders, project roles, terminology, and project team communication norms. We will share a work plan and timeline based on this scope of work and the strategic planning approach outlined in this document.

1.2 Review of background documents. This includes the prioritization sprints, employee performance evaluations, the employee engagement survey, and the latest community survey.

1.3 Focus group with executive team (14 people in one group). During an E-Team meeting, we will conduct a focus group with all department heads to determine their vision and priorities for the next three to five years. In addition,

we will use this time to uncover any challenges to implementing previous plans and/or to prioritizing work. We may also use these conversations to gather input on the best ways to engage staff which could vary by department.

- 1.4 Interviews with staff from across departments and levels (10 - 12).** We will interview select staff (representing all departments and levels in the organization), either individually or in groups, to determine their vision and priorities for the next three to five years. We will also use this time to uncover any challenges to implementing previous plans and/or to prioritizing work. Some of these conversations might be 1:1 meetings while others could be part of existing meetings such as the quarterly management team meeting, monthly meeting for analysis, monthly secretarial staff meeting, etc...
- 1.5 Synthesis of staff engagement findings.** We will summarize our initial findings from focus groups and interviews with staff and use this to inform the priorities and projects, pre-workshop survey, and workshop design.

02 Priorities and Projects Workshop

September & October 2019

Deliverables

- Priority-setting workshop design, agenda, and facilitation
- Gallery walk design, collateral and staging (up to 3)
- Community pop-up design, collateral, and facilitation (up to 3)
- Draft summary of priorities and projects

- 2.1 Pre-workshop limited survey to department heads and staff interviewees.** After our interviews, we will conduct a brief follow-up survey to the staff we interviewed asking them to vote and rank specific aspects of the mission/vision/priorities. For example, we might ask them to read the vision Council crafted during its retreat and ask department heads to rate their agreement to this vision. If staff is in alignment, then we know we can use our workshop time to discuss other matters. By doing a brief survey ahead of the workshop, we can focus our time during the workshop on coming to consensus around areas of disagreement.
- 2.2 Priority and project-setting workshop for Council and department heads.** After analyzing the data from our interviews and the survey, we will create and facilitate a custom workshop that will set the direction for Hayward in the next three to five years. Our goal is to get to specific issues (priorities and projects) as

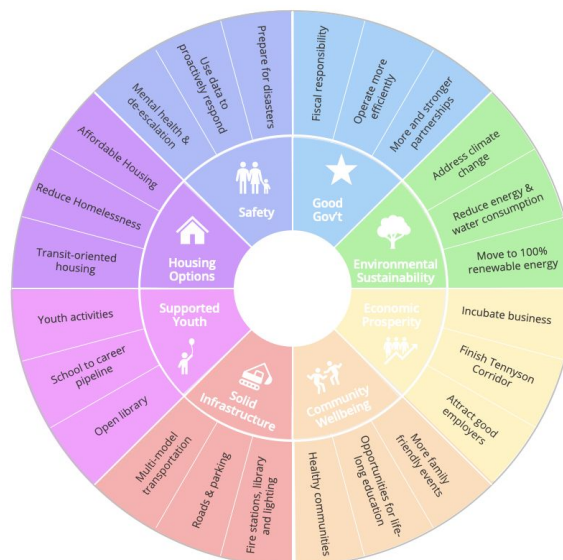
quickly as possible. However, the agenda of this workshop will depend on the existing alignment between department heads and Council. For example, if we find that staff has different priorities than Council, or an entirely different vision altogether, then we may spend more time on uncovering why and coming to a new shared consensus. If we find agreement on vision and priorities, then we may spend more time on the specific programs and projects.

While this task includes sufficient budget for mission development, developing a mission may not be necessary given the City's interest in discussing priorities.

2.3 Gallery walk for staff. After the workshop, we will share the results by setting up a 'gallery walk' for staff in up to three locations across the city, including offsite satellite locations. The purpose is two-fold: 1) to share the results of the workshop and 2) to gather their feedback. We may kick these off with a 'pop-up' where we have staff present to share information and receive questions and feedback. We would then leave the informational and interactive materials up on walls or easels for staff to see and interact with over time.

2.4 Community pop-up events (3). CivicMakers will prepare three community pop-up events to conduct dot voting and collect comments on our priority wheel (see concept below). Pop-up events are community engagement activities where we go to the public. We will 'pop-up' at different community settings, be it the farmers market, BART station, or main street, where we will ask participants to vote on their top priorities. We envision creating a visualization of the City's strategic priorities, such as the draft shown below, and inviting community members to dot vote and add comments.

NOTE: Below is a rough mock-up. This is not a final map of priorities.



- 2.5 Draft summary of priorities and projects.** Incorporating the feedback from the workshop, gallery walks, and community pop-ups, we will revise and summarize our findings in a draft summary document. Once approved by city leadership and City Council, this will become the foundation of the strategic plan and will be used as the starting point for our objectives and work plan workshop.

03 Objectives & Work Plan Workshop

October & November 2019

Deliverables

- Objectives & work plan workshop agenda, materials and facilitation
- Prototype of a new prioritization sprint based on the strategic plan
- Draft summary of year 1 objectives and work plans

- 3.1 Explore prioritization sprint integration into work plan.** We will work with the City Manager's office to investigate how previous prioritization work may inform work plan development.

- 3.2 Year 1 objectives and work plan workshop for staff.** Working with department heads, division leads, and select analysts, we will get into the details of what needs to occur in the next year in order to keep on track with the strategic plan. We break up into groups based on each of the strategic priorities. Often, this means representatives from different departments are working together at the same table. Together, they will decide what needs to happen in year 1 to keep the City on track towards its goals.

The work plan is where the rubber meets the road. During this workshop, each department breaks off into its own group. There, departmental representatives decide the details of achieving each yearly objective - who needs to do what and by when. The result is a gantt chart (or similar) of tasks, task owners, due dates, and progress. Below is an example:

PROJECT TITLE	OPERATIONS WORKPLAN	COMPANY NAME	IHSF
OWNER	BRITT	DATE	9/5/18

PRIORITY	OBJ	TASK	TASK OWNER	START DATE	DUE DATE	DURATION	COST	PCT OF TASK COMPLETE
1.4		HR Support (Distinct from Finance)		1/2/19	3/30/19	88	\$0	10%
	1.4.1	Quarterly Meetings with upper management to check-in on Finances, completion/progression in achieving identified work goals, and over-all staff health i.e. have we had any losses in staff, or new hires. Does there seem to be a trend of turnover in any positions	New GM	1/2/19	3/30/19	88	\$0	0%
	1.4.2	HR Handbook - onboarding, PTO processes	New GM	1/2/19	3/30/19	88	\$0	0%
	1.4.3	A process for staff to securely submit work related complaints plus follow up process	New GM	1/2/19	3/30/19	88	\$0	0%
	1.4.4	A schedule for Annual reviews	New GM	1/2/19	3/30/19	88	\$0	0%
	1.4.5	Quarterly reports on company shares	New GM	1/2/19	3/30/19	88	\$0	0%

In addition, the group develops cross-departmental shared **metrics** to measure its results. Example worksheet below.

Pick your best fit measures

What strategic priority is this for? _____

Generate possible measures for the priority
➔
Rank Against Criteria
➔
Develop how and when you'll measure it
➔
Circle the top measures

<ul style="list-style-type: none"> What are the most important components of this priority that need to be measured? How would you measure it? What's your target? 	<ul style="list-style-type: none"> Is the measure a sufficient proxy? Is it something we can control? Does it motivate desired behavior? Is it practical/easy to measure? 	<ul style="list-style-type: none"> Pick a good metric <ul style="list-style-type: none"> Absolute number, ratio, percentage, rating, ranking When will you measure it? <ul style="list-style-type: none"> Yearly, monthly, daily, etc 	<ul style="list-style-type: none"> Of all the possible measures, which one measures it best? CIRCLE IT!

CivicMakers

Finally, we investigate the behaviors that staff need to learn or unlearn in order to achieve the work plan and understand their priorities. For example, if the success of the work plan depends on more cross-department collaboration, then we would identify that as a system and skill set that needs to be improved.

Improve your **enabling skill sets**



Key question: Which of the following need to be optimized to enable you to deliver on your critical few initiatives while still doing your daily work with quality?

Drivers of Team Performance	Definition	Examples of Possible Team Improvements
Leadership	How we inspire, engage others	Do we need to strengthen our leadership abilities? Do we need to promote a different type of leader? Do we need to adjust our leadership roles?
Culture	Our norms and behaviors	How are we working together as a team? What gets rewarded?
Systems & Processes	HR, procurement, IT, etc.	Do we need new technology? Do we need to improve accountability? Does the org structure work for this strategy?
Competencies	What we know and are able to do	Do we need to acquire or increase our skills? Should we change how we develop internal talent?

What are yours?	Your New Enabling Skill Sets
Leadership	
Culture	
Systems & Processes	
Competencies	



3.3 Align staff prioritization sprints with work plans. We will work with the City Manager’s office to investigate how the new department work plans influence the staff prioritization sprints. Questions to explore include:

- How aligned are the tasks and criteria in the staff prioritization sprints to the priorities and projects in the strategic plan? How do we ensure the two are aligned?
- How should future sprints be recalibrated to include the prioritization work within the strategic plan?
- How do the priorities and projects of the strategic plan affect the results of previous prioritization sprints?
- How can the sprints keep staff members on track with the strategic plan?
- How might input from the sprints help to continually revise the strategic plan?

We envision conducting an exploratory meeting with the City Manager’s Office to investigate these questions.

In addition, we will circle back with leadership at their E-Team or quarterly management meeting to discuss how to align staff assignments to the strategic plan. Suggestions might include how to use staff meetings, job performance reviews, dashboards, weekly check-in or quarterly reviews to keep staff working towards their highest priorities.

- 3.4 Draft summary of year 1 objectives and work plans.** After department heads have disseminate their work plans for staff feedback, we will summarize their results and integrate them into the outputs of the workshop. This will be incorporated in the citywide strategic roadmap report (Task 4.1 below)..

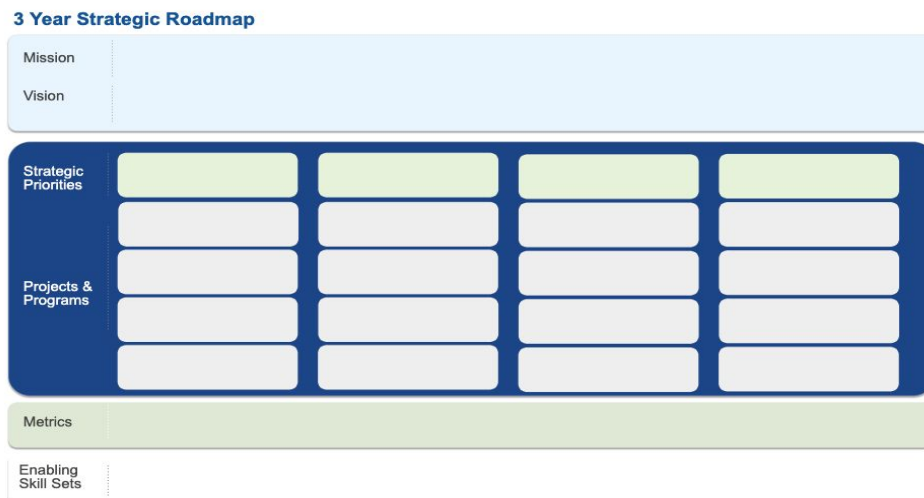
04 Reporting & Implementation

December 2019 to February 2020

Deliverables

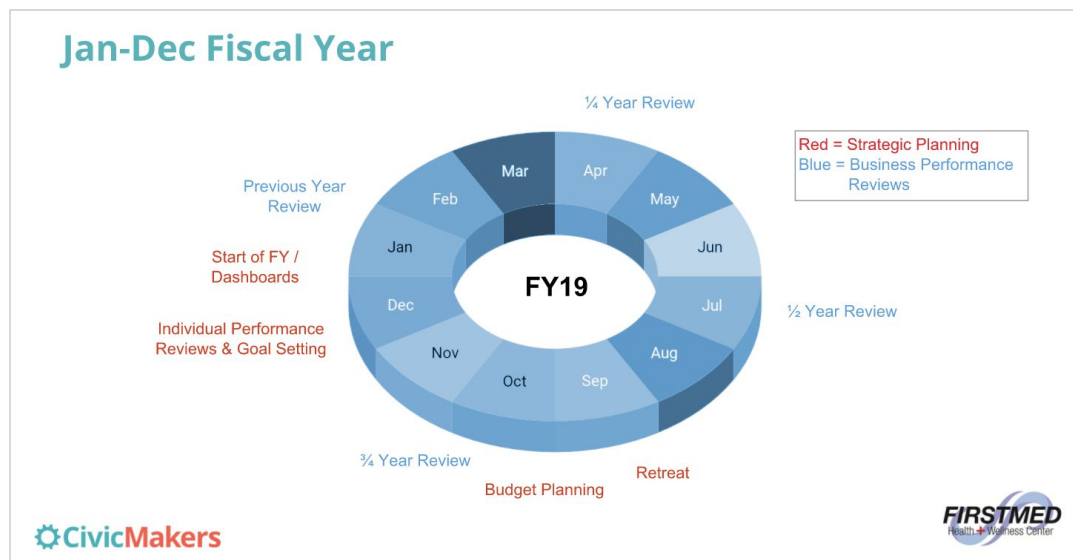
- Draft and final 3-5 Year Strategic roadmap
- Presentation to City Council
- Dashboard recommendations
- Budget integration recommendations
- Organizational cadence recommendations
- Staff input recommendations

- 4.1 3 - 5 Year Strategic roadmap report.** Putting it all together, we report back to Council and staff the results of their hard work. We visually depict a strategic roadmap where one can see the linkages between mission and vision, strategic priorities, yearly objectives, and metrics. Our findings are shown in a graphically-designed presentation deck. The deck will also include information about how the roadmap was developed. Below is an example of a high-level summary sheet for a Strategic Roadmap.



- 4.2 Presentation to City Council.** After the strategic plan has been finalized by the city manager, we will present it to City Council for their final ratification.

- 4.3 Dashboard recommendations.** We will consult with your IT department about strategies to build upon your existing online dashboard infrastructure to incorporate our newly devised strategic priorities and metrics. We will also work with the City to identify databases, monitoring and reporting that we will use to create and regularly update the dashboard.
- 4.4 Budget integration.** CivicMakers will work with budget officers to rethink how resources are prescribed by strategic priority. We will look at project codes, labor codes, expense reporting and payroll to move toward performance-based budgeting.
- 4.5 Organizational cadence development.** Strategic planning should not be a ‘one-and-done’ affair but ingrained in the weekly and quarterly habits of the organization. CivicMakers will share best-practices for creating a strategic organizational cadence that regularly measures and tweaks performance. This adaptive process is key to ensuring that the plan remains relevant and is continually informed by new opportunities and any unexpected challenges.



- 4.6 Codification of continued staff input.** The development of the strategic plan offers ample opportunity for staff and Council to work together. How might we continue these collaborations over the next five years, such that Council and staff are continually learning from one another and improving on the strategic planning process? CivicMakers will make recommendations about how to codify staff input on the strategic plan moving forward.

Hayward Strategic Plan - Phase 2	Lawrence Grodeska	Jim Rettew	Cristelle Blackford	Variable	Expenses*	Estimate	Not to Exceed
	Project Director	Project Manager	Engagement Lead	Associate			
Tasks	\$195	\$185	\$175	\$125			
1. Planning & Assessment	15	51	59	10	\$250	\$24,185	\$28,127
Kick-off meetings		6	6		\$100	\$2,260	\$2,712
Revised project plan	1	8	8			\$3,075	\$3,690
Council survey & synthesis (carry over from Phase 1)		10	15			\$4,475	\$4,475
Document review	4	4	4			\$2,220	\$2,664
Dept head focus group prep	4	4	1	2		\$1,945	\$2,334
Dept head focus group	4	4		1	\$50	\$1,695	\$2,034
Staff interview prep		4	4	2		\$1,690	\$2,028
Staff interviews		2	12	2	\$100	\$2,820	\$3,384
Synthesis & analysis		4	4	2		\$1,690	\$2,028
Project management	2	5	5	1		\$2,315	\$2,778
2. Priorities & Projects Workshop	19	61	48	38	\$1,300	\$29,440	\$35,328
Pre-workshop limited survey	1	3	3	1		\$1,400	\$1,680
Workshop prep	4	10		2	\$50	\$2,930	\$3,516
Workshop facilitation	10	10		1	\$50	\$3,975	\$4,770
Gallery walk prep		4	8	8	\$500	\$3,640	\$4,368
Gallery walk facilitation (up to 3)		10	10	10	\$100	\$4,950	\$5,940
Community pop-up prep		4	8	10	\$500	\$3,890	\$4,668
Community pop-ups (up to 3)		12	12		\$100	\$4,420	\$5,304
Draft summary	3	4	3	4		\$2,350	\$2,820
Project management	1	4	4	2		\$1,885	\$2,262
3. Objectives & Work Plan Worksh	25	37	8	20	\$200	\$17,310	\$20,772
Work plan development research		4	4		\$50	\$1,490	\$1,788
Workshop prep	4	10		5	\$50	\$3,305	\$3,966
Workshop facilitation	10	10		8	\$50	\$4,850	\$5,820
Align prioritization sprints	6	10	4	2	\$100	\$4,070	\$4,884
Draft summary	3	4	3	3		\$2,225	\$2,670
Project management	2	3	1	2		\$1,370	\$1,644

Reporting & Implementation	17	63	19	16	\$250	\$20,545	\$24,654
Strategic roadmap draft		16	8	4		\$4,860	\$5,832
Strategic roadmap final		8	6	2		\$2,780	\$3,336
Presentation to Council	3	5	3		\$50	\$2,085	\$2,502
Dashboard recommendations	3	8		2	\$50	\$2,365	\$2,838
Integrate with budget	3	8		2	\$50	\$2,365	\$2,838
Develop organizational cadence	3	6		2	\$50	\$1,995	\$2,394
Codify continued staff input	3	6		2	\$50	\$1,995	\$2,394
Project management	2	6	2	2		\$2,100	\$2,520
Total	76	212	134	84	\$2,000	\$91,480	\$108,881