



City of Independence, Ohio

"THE HEART OF CUYAHOGA COUNTY"

6800 BRECKSVILLE ROAD

INDEPENDENCE, OHIO 44131

(216) 524-4131

MEMORANDUM

To: Mayor Gregory P. Kurtz
Members of Council

From: Finance Director Vernon Blaze

Date: Friday, January 21, 2022

Re: Finance Office Updates

Planning Meeting Primer

The Finance Office is looking forward to tomorrow's annual planning session, which will only begin to scratch the surface as far as charting a course towards an even better future for Independence. But it is an important 1st step as **Proper Planning Prevents Poor Performance!**

Although *Management* is very important, which by its most basic definition is ensuring that existing processes, procedures and policies get implemented on a daily basis as flawlessly as possible, the equally important other side of the organizational coin is *Leadership*.

Whereas the *Management* side of the equation focuses more on perfecting the existing, the focus of *Leadership* is more forward-looking. *Leadership* helps answer the questions:

- *Where* does our organization need to be or want to be in the future?
- *What* does our organization need to be or want to be in the future?
- How can our organization move from the currently comfortable *Good* to the even *Better* in the future?

A summary Planning Outline that was provided to Directors recently to help them answer some of the above questions on a departmental basis, may be of use to Mayor Kurtz and Council not only tomorrow, but going forward as well. It was provided by Jon Jenson, a long-time Independence resident that was the head of the Precision Metalforming Association.

This Planning Outline really helps to synthesize the focus of the entire planning process into a very manageable, non-intimidating format that most anyone can follow and utilize advantageously in any type of organization.

Jon Jenson's Organizational Planning Process Outline

- **Step 1 Develop a Mission Statement (Why?)**
 - Or re-visit and re-evaluate an existing one for continued applicability



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Planning Meeting Primer – Continued

- A Mission Statement is short and succinct and answers the most basic question “*Why does the organization (department, company, etc.) exist?*”
- Step 2 – Perform a SWOT Analysis
 - What are the organization’s Strengths, Weaknesses, Opportunities and Threats?
- Step 3 – Develop a Vision Statement
 - Or re-visit and re-evaluate an existing one for continued applicability
 - A Vision Statement describes the Ideal Future State of the organization
 - If all of the organization’s strengths and opportunities could be capitalized on and if all of the organization’s weaknesses and threats could be attenuated, what would the organization look like then?
 - That’s the organization’s Vision!
- Step 4 – Develop Goals (What?)
 - Goals should focus on:
 - Capitalizing on the organization’s Strengths and Opportunities
 - Attenuating the organization’s Weaknesses and Threats
 - This will focus the goals to help them achieve the Vision and fulfill the Mission of the Organization
 - Goals should be as “SMART” as possible
 - Specific (Eg. Purchase two lawn tractors by the end of March)
 - Measureable (Two)
 - Actionable (Purchase)
 - Reasonable (Want to purchase two tractors, not 22 of them!)
 - Timeframe Oriented (By March 31)
- Step 5 – Develop an Action Plan to achieve each Goal
 - What steps need to be taken to achieve each Goal? (**How?**)
 - Who is going to take responsibility/ownership for each Step? (**Who?**)
 - What are the key dates/timeframes/deadlines attached to each Step? (**When?**)
- Step 6 – Measure Progress/Success/Lack Thereof
 - What are the Key Performance Indicators that will be measured for each Goal?
 - These will determine if each Goal is on track of being met within its outlined timeframe
 - If not on track, what step(s) need to be taken to re-group, re-focus and re-evaluate to get back on track? Or change the Goal and/or Action Steps?