

City of Schertz 2016 Strategic Plan



Approved on March 8, 2016

City of Schertz Strategic Planning Meeting

January 14 & 15, 2016

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Executive Summary

Schertz Vision for Excellence

WHY

The City of Schertz developed this Strategic Plan to provide overall direction in achieving our desired future state by outlining our aspirations, actions, and motives. By regularly referencing the document, we can better align City Council, Boards and Commissions, and City Staff toward a common goal while providing for a more balanced approach. The continued use of this document will increase alignment and help maintain a steady course despite possible economic changes, limited financial resources, evolving leadership, or other changing environments. The Schertz Vision for Excellence Model (See Appendix C) is how we integrate our leadership aspirations in a way that is readily understandable both within the organization and outside to our citizens and stakeholders, and it will be used not only to chart our course but to also measure our success.

HOW

The Strategic Plan was developed with input from City Staff, City Council, and community stakeholders. Through a series of meetings the various groups discussed and refined each chapter and tailored it to our current conditions, needs, and objectives. It is important to keep in mind that all strategic plans are living documents that are continuously improving. As soon as the initial plan is final, a process of review, reconsideration and refinement must begin. The breadth of responsibilities facing the City and the ever-changing world guarantees that in order to stay relevant, any strategic plan must be evolving with the pace of that change.

WHAT

The Strategic Plan document was developed in Fall 2015 and early 2016. It is comprised of our City's Vision, Mission, and Value statements (Core, Policy and Operational), SWOT framework and next steps.

Collectively these documents develop the fundamental building blocks that will be used to help strengthen our City by declaring our community's aspirations, summarizing our core purposes, articulating our guiding principles, establishing behavioral targets, helping us to honestly look at areas where we can improve, and identifying our measures for success.

Chapter 1: Vision/Mission/Values

WHY

The Vision, Mission and Values are important because they frame the City's identity and brand, they set defined direction for achieving the City's objectives, and they provide clarity when making important organizational decisions. They define our true north, guiding us toward the right path. Adoption and implementation of these philosophies by City Staff, City Council and community stakeholders will facilitate critical alignment that is necessary for organizational success.

HOW

The City last updated our Vision and Mission statements in 2011. This year, the City took a fresh look at our Mission statement in order to have it aligned more closely with our new values. In an effort to re-evaluate the relevance of the Policy Values adopted by Council in December 2013, all departments were tasked with selecting three values (most applicable to their operations), and conducted a question-based analysis called Is/Is Not/Why. Each of the values were described by What It Is, What It Is Not, and Why the value was relevant or important to the City. The results were compiled and reviewed, and then over the course of several workshops in Fall 2015, Staff concluded that the City would be best served by splitting the values into three groups:

- Policy Values – Values driven by capabilities, competencies and priorities
- Operational Values – Behavioral-driven values
- Core Values – Foundational values

WHAT

The Vision provides a meaningful statement of the City's desired future state, expresses our aspirations, and sets strategic direction for our growth. This is the broadest, most overarching statement that must be equally true amongst all of our departments. **(CONTINUED ON PAGE 3)**

Chapter 1 Continued

The Mission describes the City's purpose and answers the question, "What are we attempting to accomplish?" It provides the framework or context within which our goals are formulated.

The Values are beliefs which City Staff and Council hold in common. They are the guiding principles that drive behavior necessary to fulfill the City's vision and mission. Values shape our organizational perspective as well as our actions.

Vision

Community. Service. Opportunity.

Mission

Leading, improving, and serving a livable, sustainable and financially sound community

Policy Values

- Safe Community
- High Quality of Life
- Economic Prosperity
- Essential Services
- Attractive Community
- Fiscally Sustainable

Operational Values

- Systems Management
- Innovative
- Service Oriented
- Engaged Workforce
- Proactive

Core Values

- Do the right thing
- Do the best you can
- Treat others the way you want to be treated
- Work cooperatively as a team

Chapter 2: Policy Values

WHY

In December 2013, City Council developed and adopted a set of Policy Values. The idea of adopting formalized Policy Values arose from the Council's desire to provide a framework for future Councils to help them make consistent and informed decisions for the City as a whole when projects and issues were brought before them. The Policy Values are intended to be a reminder of what we are trying to accomplish as a community and to provide a series of benchmark values for examining the benefits and drawbacks of any project or policy decision in a methodical, consistent manner. Having a tool of this sort in place helps steer leadership toward the projects and decisions that are most likely to accomplish the City's mission and move closer to its vision.

HOW

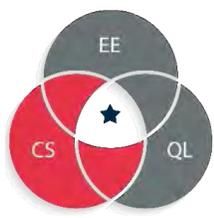
On the surface, the Policy Values appeared clear-cut and self-explanatory, but continued use of them revealed to Staff that they needed an agreed upon description. In Fall 2015, Staff undertook the task of examining and truly understanding what each Policy Value meant and why each was important to the City. This was accomplished through the use of the Is/Is Not/Why analysis. Staff determined that some Policy Values were actually Operational Values, while others could be combined together. Upon completion of the exercise, there were six remaining Policy Values, which are reflected in this chapter. Within the analysis, Council and Staff each developed their own Why Statements which are identified as Policy and Operational, respectively.

WHAT

It was the consensus of Staff that Policy Values are those driven by capabilities, competencies and priorities. They are the natural extension to one of the Core Values, "Do the Right Thing." Additionally, when looking at the Schertz Complete City Model (See Appendix A) it can be noted that the Policy Values purposely fit within each of the three areas.

Once the analysis was complete, the Policy Values were presented to Council. After Council's assessment and input, the final version of the Policy Values are presented in this document and are intended to be used as the touchstone against which all decisions should be tested. These values will act as a guide to current, as well as future, elected officials and staff.

Core Service Policy Values



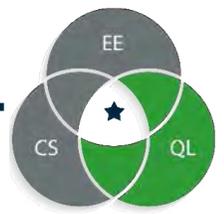
Safe Community

IS	IS NOT
<ul style="list-style-type: none"> •Proper planning, design and construction •An informed, engaged community •Being prepared for seen and unforeseen incidents •Adequately investing in and maintaining the built community •Having appropriate staffing levels to support essential services •Proactive 	<ul style="list-style-type: none"> •Crumbling infrastructure •Solely the blind reliance on enforcement of codes, ordinances and laws •Having staff who are not mindful of their day to day impact on the safety of the community •Being afraid of letting your kids walk to school •Reactive
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •Providing a safe yet flexible environment allows people to live their lives and pursue their dreams (foundational to the whole community). <p>OPERATIONAL</p> <ul style="list-style-type: none"> •Safe communities are attractive to businesses and families and are necessary for meeting citizen expectations and for continued growth. 	

Essential Services

IS	IS NOT
<ul style="list-style-type: none"> •Functions that address basic community needs such as security, life safety and infrastructure 	<ul style="list-style-type: none"> •Frivolous •Functions that enhance quality of life but do not address basic community needs •Services that satisfy only a small niche of the population
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •Foundation of why we exist and it is what the community expects. <p>OPERATIONAL</p> <ul style="list-style-type: none"> •Essential Services provide for the most basic needs of our community. 	

Quality of Life Policy Values



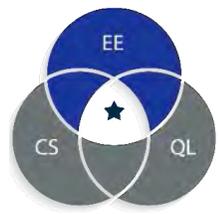
High Quality of Life

IS	IS NOT
<ul style="list-style-type: none"> •A well planned community that creates convenient living •Having a variety of recreation, leisure, cultural and access opportunities for all ages •A safe community •Having good schools and access to higher education •A friendly city 	<ul style="list-style-type: none"> •Unwelcoming •Limited options for work, live and play •Poor schools and no access to higher education •The lack of enforcement of city codes and ordinances •Poor maintenance of infrastructure and services/amenities
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •A High Quality of Life creates an environment conducive to people enjoying their lives while pursuing their dreams. <p>OPERATIONAL</p> <ul style="list-style-type: none"> •A High Quality of Life attracts people to the City who are looking for more than just a place to live. 	

Attractive Community

IS	IS NOT
<ul style="list-style-type: none"> •Clean and tidy •A well planned, well landscaped, well built and well maintained community •Having aesthetically appealing places and buildings 	<ul style="list-style-type: none"> •Dirty and unkempt •Poorly planned, poorly landscaped, poorly built and poorly maintained •A concrete jungle
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •Attractive Communities create a positive environment for businesses and families - quality begets quality. <p>OPERATIONAL</p> <ul style="list-style-type: none"> •Attractive Communities appeal to businesses and residents, increase property values and provide for happier, healthier residents. 	

Economic Engine Policy Values



Economic Prosperity

IS	IS NOT
<ul style="list-style-type: none"> •A high bond rating •Wealth generation •A diverse and resilient commercial base •Maintaining an advantageous ratio between commercial and residential tax bases •A stable commercial base 	<ul style="list-style-type: none"> •A non-diverse and a volatile commercial base •Lack of opportunity for economic growth •High foreclosure rates •Fiscally challenged
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •Economic Prosperity gives us the opportunity to execute on all of our goals and provides the leverage for good decision making. <p>OPERATIONAL</p> <ul style="list-style-type: none"> •Having Economic Prosperity is critical to fostering a long-term future for our residents and business community. 	

Fiscally Sustainable

IS	IS NOT
<ul style="list-style-type: none"> •Knowledge of municipal financing including revenues as well as expenses •The integration of appropriate public and private sector best practices •Having adequate reserves •Staying within budget •Long-term planning •Requiring the ability to say no to lower priorities 	<ul style="list-style-type: none"> •Overly optimistic or inflated projections •Irresponsible, impulsive or frivolous spending •Using reserves for unintended purposes •The failure to establish priorities
WHY	
<p>POLICY</p> <ul style="list-style-type: none"> •Fiscal Sustainability mitigates our risk of failure to continually provide core services and quality of life enhancements and keeps us positioned to seize upon and maximize all potential opportunities. <p>OPERATIONAL</p> <ul style="list-style-type: none"> •A fiscally sustainable organization is equipped to navigate changing economic conditions and inspires trust among our various stakeholders. 	

Chapter 3: Operational Values

WHY

The Operational Values help the City achieve more by focusing on its people and customers while always looking for ways to improve. These values foster a professional work environment that will help us to have an engaged workforce and greater customer focus. In order to be successful, there must be ever improving systems in place so we can achieve greater results and efficiencies.

HOW

Through an Is/Is Not/Why analysis of the 2013 Policy Values, Staff determined that some of the values were actually more operational in nature. As a result, the two categories of values, Policy and Operational, were developed. These five Operational Values are our pillars for running a professional organization.

WHAT

Operational Values are behavioral-driven and are the natural extension of the Core Value “Do the Best You Can.” The Operational Values drive the Schertz Management Model (See Appendix B), a model comprised of our desired best management practices, in order to meet and exceed our internal and external requirements and aspirations.

Operational Values



Systems Management

Systems Management aligns and integrates all components of the organization as a unified whole to achieve the mission, ongoing success and performance excellence.

IS	IS NOT
<ul style="list-style-type: none"> •Integrated, interconnected, whole •A continuous cycle of improvement •A focus on data and analysis of results •Aligned processes to achieve results towards performance excellence •A continuous journey 	<ul style="list-style-type: none"> •About the individual, a department, a unit or their individuals goals •About repeating failures •Random •Static or unchangeable •Based on assumptions
WHY	
<p>OPERATIONAL</p> <ul style="list-style-type: none"> •Systems management allows us to integrate and consolidate our resources, share best practices, and achieve greater results and efficiencies across the organization rather than settling for the results we get at the individual or departmental level. 	

Engaged Workforce

Valuing people is the framework for building and sustaining an Engaged Workforce, who in turn are committed to serving customers and making a positive difference in their lives.

IS	IS NOT
<ul style="list-style-type: none"> •One that is inspired and encouraged to contribute •Where staff has opportunities for growth •Having leadership that listens with the intent to understand 	<ul style="list-style-type: none"> •Having employees conform to a mold •Reacting prematurely to a concern •Favoritism •Just punching the clock
WHY	
<p>OPERATIONAL</p> <ul style="list-style-type: none"> •An engaged workforce provides better service to our internal and external customers and is the foundation for continuous growth and progress. 	

Operational Values



Innovative

An organization manages for innovation by creating new value through meaningful change.

IS	IS NOT
<ul style="list-style-type: none"> •Finding better ways to do things •Willing to take chances to make changes •Being creative •Uncharted 	<ul style="list-style-type: none"> •Status Quo •Following the path of least resistance •Often easy
WHY	
<p>OPERATIONAL</p> <ul style="list-style-type: none"> •Being innovative seeks to create new value for our community through meaningful change. 	

Proactive

Proactive means initiating change by anticipating future situations in order to make things happen.

IS	IS NOT
<ul style="list-style-type: none"> •Continuously improving and evolving •Forward thinking •The ability to forecast and meet needs even before the customer identifies them 	<ul style="list-style-type: none"> •Reactive •Complacency or stagnant •Waiting for someone else to do it •Having to be told to do it
WHY	
<p>OPERATIONAL</p> <ul style="list-style-type: none"> •Being proactive creates a professional environment that fosters efficiency, offers greater ranges of choice and meets stakeholder expectations. 	

Operational Values



Service Oriented

In an organization that has a Service Oriented culture, there is the focus on meeting and exceeding current and future customer needs.

IS	IS NOT
<ul style="list-style-type: none">•Being flexible, adaptable and available to your customer•Being responsive with a positive attitude•Anticipating, understanding and managing our customer's needs•Everyone's responsibility	<ul style="list-style-type: none">•Self-focused•Rude, callous or unprofessional•Only providing the minimum service•By chance•Failing to keep everyone informed•Providing inaccurate information
WHY	
<p>OPERATIONAL</p> <ul style="list-style-type: none">•The City exists to provide service to our customers and they deserve our best.	

Chapter 4: SWOT

WHY

The SWOT Analysis tool helps the City to honestly look at all areas where we not only excel, but also those areas where we can do better. By looking at both internal and external factors, it requires us to look for ways we can take advantage of opportunities or mitigate potential problems.

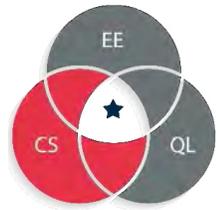
HOW

In the Fall of 2015, each department of the City met separately and performed SWOT analysis on the City Policy Values from the perspective of the department. City Staff met in January 2016 to develop a city-wide SWOT analysis for each of the City's six Policy Values. The consensus of that group is reflected in this chapter.

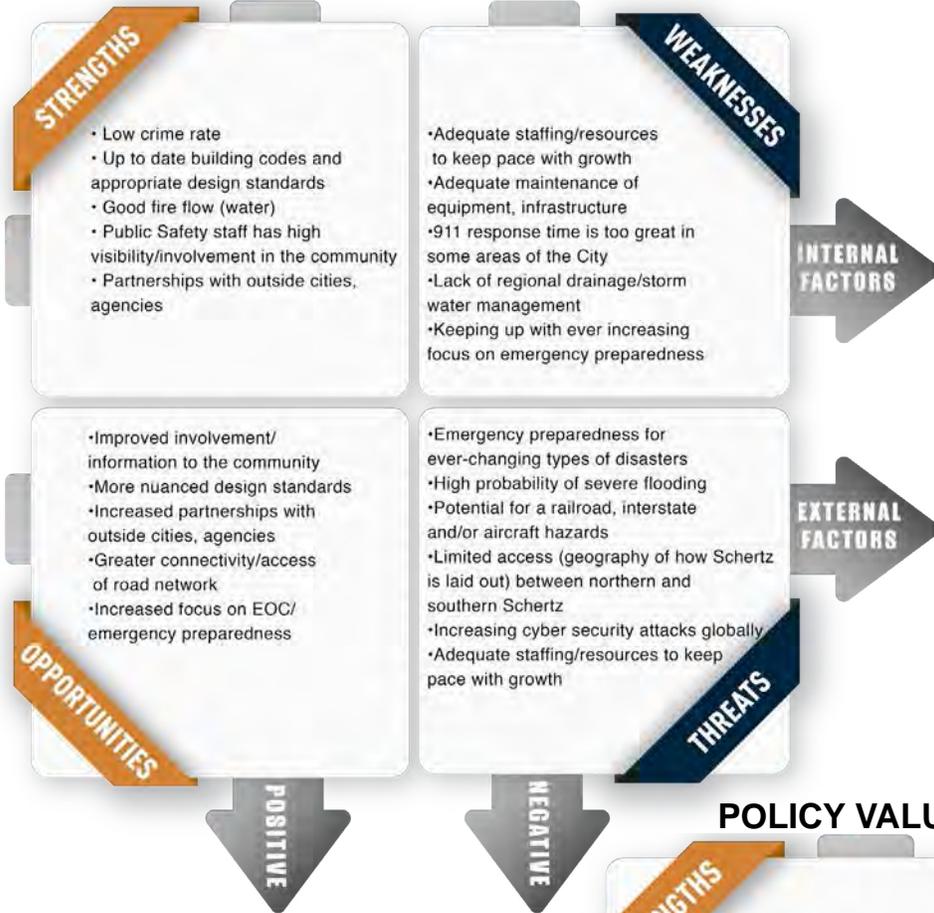
WHAT

A SWOT Analysis is a useful technique for understanding the Strengths, Weaknesses, Opportunities, and Threats that we face as a City. It detects internal factors through listing our Strengths and Weaknesses, and seeks to identify external factors by requiring us to consider any Opportunities and Threats.

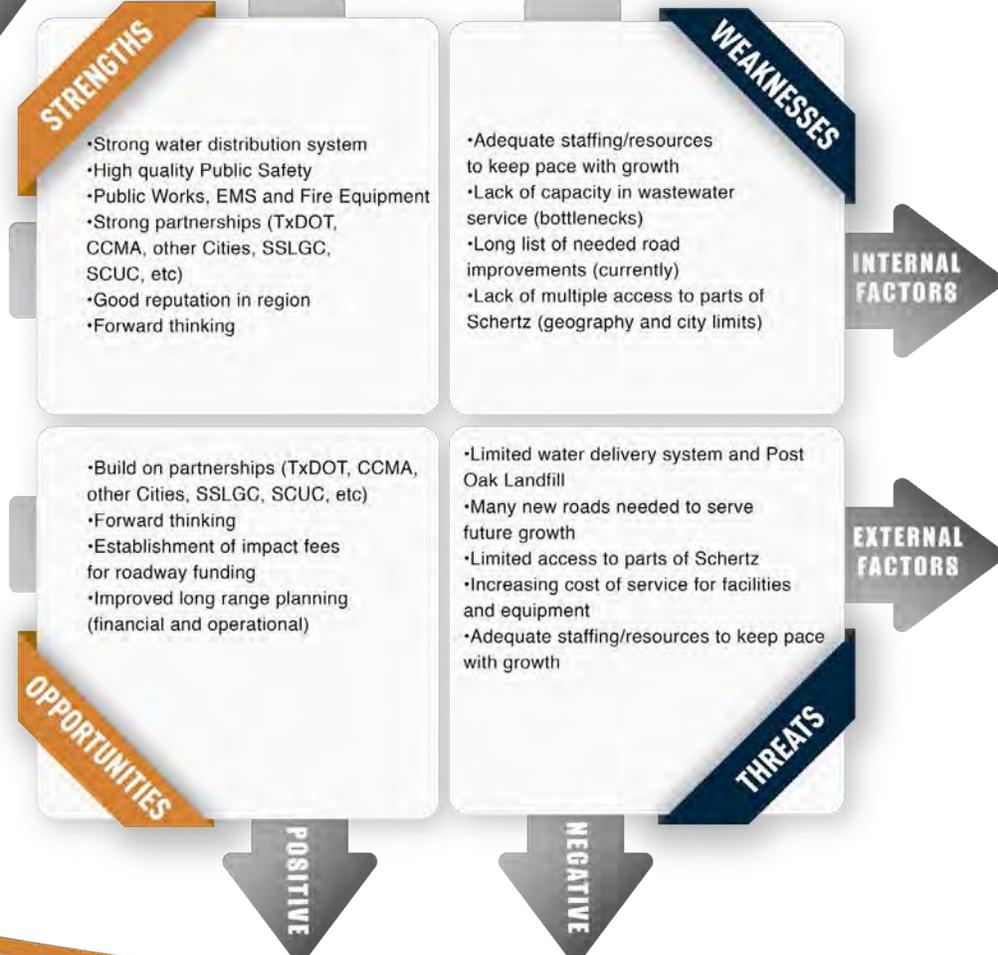
Core Service SWOT



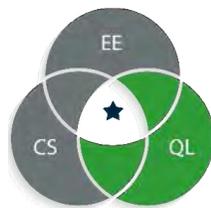
POLICY VALUE: Safe Community



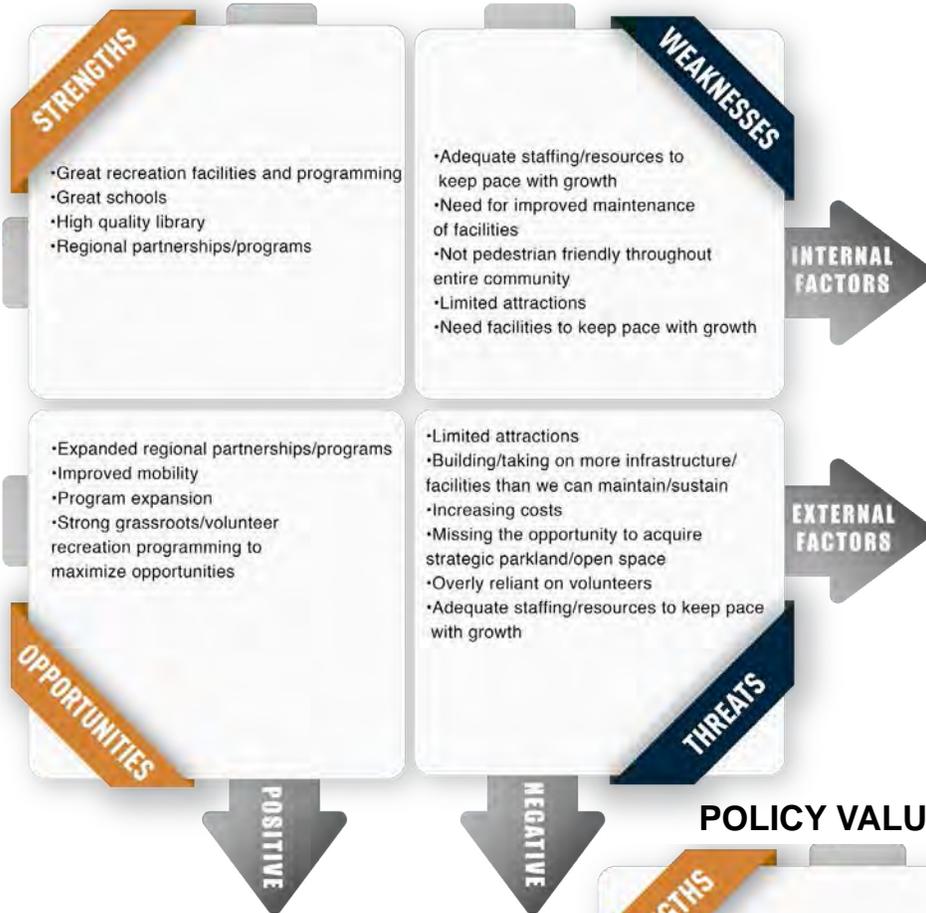
POLICY VALUE: Essential Services



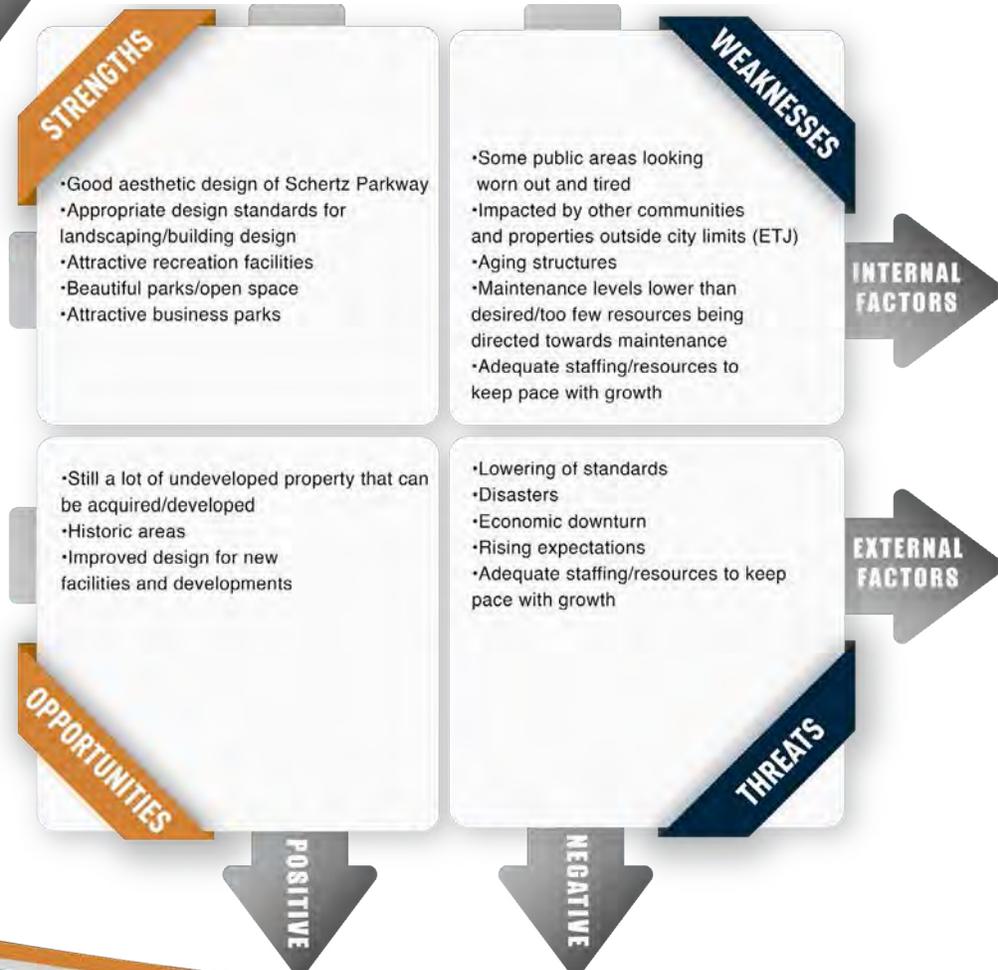
Quality of Life SWOT



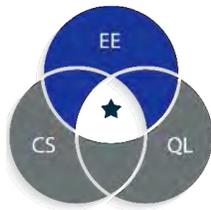
POLICY VALUE: High Quality of Life



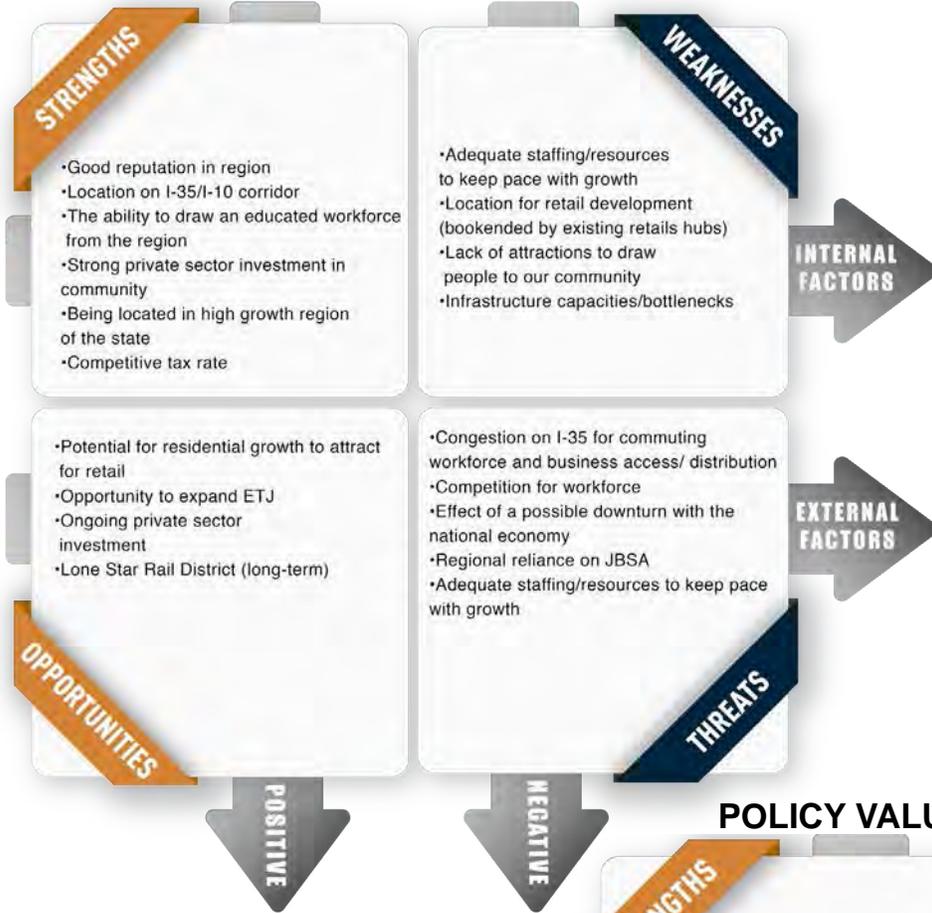
POLICY VALUE: Attractive Community



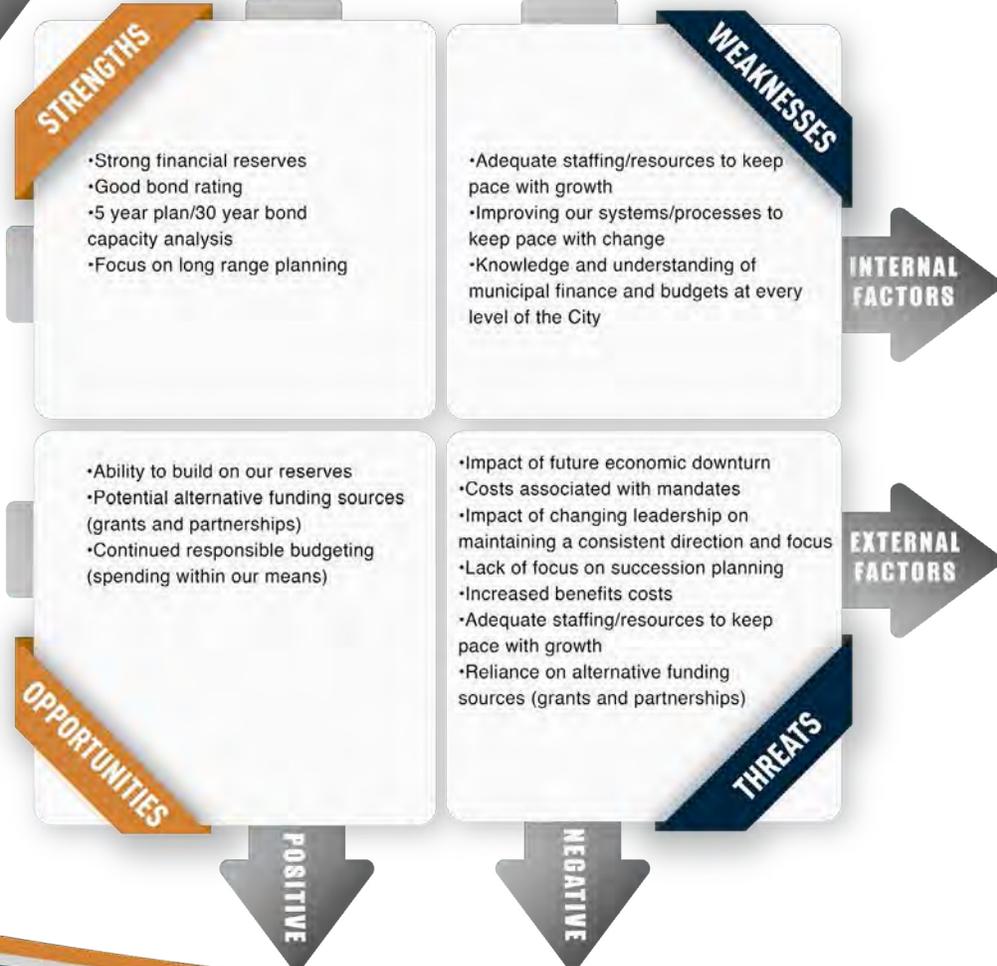
Economic Engine SWOT



POLICY VALUE: Economic Prosperity



POLICY VALUE: Fiscally Sustainable



Next Steps

WHY

The City of Schertz is facing continuous growth, new challenges, and increasing expectations of service and performance. What we do today will shape how we will be, and how we will function, as a fully developed community in the next twenty to thirty years. As a result, what we do today matters more than ever to our long term success.

HOW

The City must have three key elements in place as part of how we do business: first, we must have a meaningful Vision for the future; second, we must be Aligned in our understanding of what that means to all parts of our organization; and third, we must be willing to Execute on the essential elements of our vision at the individual level in order to move us toward achieving success. The City utilizes the *Work of Leaders* assessment tool as part of our teambuilding process to help us better understand how the leadership team performs in these three areas (Vision, Alignment, Execution).

These three key elements, Vision, Alignment, and Execution, must address our current “practical realities” in order to be effective. Taking a balanced approach to funding new roadways, new facilities, maintaining the same ratio of staff to population as we grow, and still maintaining our existing roadways and facilities, as well as training and developing our existing staff, is needed in order to realize our complete vision as a community.

WHAT

The City of Schertz 2016 Strategic Plan is intended to be a relevant and living document.

To be a relevant document it must be a meaningful guide for both our City Boards/Commissions and our City Departments. For our citizen-led bodies, there can be a clear connection between the City Council’s Policy Values and a specific master plan, such as a thoroughfare plan or parks plan, for example.

For our mission specific departments, they can see the relationship between their department programs and the overall City direction. Additionally, the Operational Values inform both the Boards/Commissions and City Departments in the value and direction of operational improvements so that our organization can continuously improve in order to better achieve our goals. **(CONTINUED ON PAGE 18)**

Next Steps Continued

To be a living document, it must be kept current by evolving to address present conditions which change for both internal and external reasons. The Strategic Plan is intended to be updated each January by City Council and Staff at the annual strategic planning retreat.

Rather than focusing on goals without first gaining clarity, this Strategic Plan places purposeful emphasis on defining and understanding our Policy and Operational Values, as well as our strategic situation (where we are today). If we don't first understand and agree on where we are as an organization and where we should go, it is only by chance that we will prioritize our most important goals. On the other hand, if we gain clarity and alignment first, we have a much more impactful understanding of what matters most and the direction we need to go.

Additionally, the Boards/Commissions and City Departments are encouraged to participate in the development of these annual updates by working on their own strategic plans, both formally and informally. Furthermore, the Committee of Committees Advisory Board holds a unique place amongst the City. As representatives from each of the Boards/Commissions, this Council-appointed Advisory Board has the ability and opportunity to coordinate and create alignment between the Strategic Plan and their respective Boards/Commissions.

As expressed, the City of Schertz Strategic Plan seeks to create alignment within our organization. Communicating our Vision, Mission, and Values at every level requires an ability to explain the rationale behind them and to engage our entire organization in a genuine exchange of perspectives. This can then lead to inspiring the entire team to champion execution of our plan.

Resources

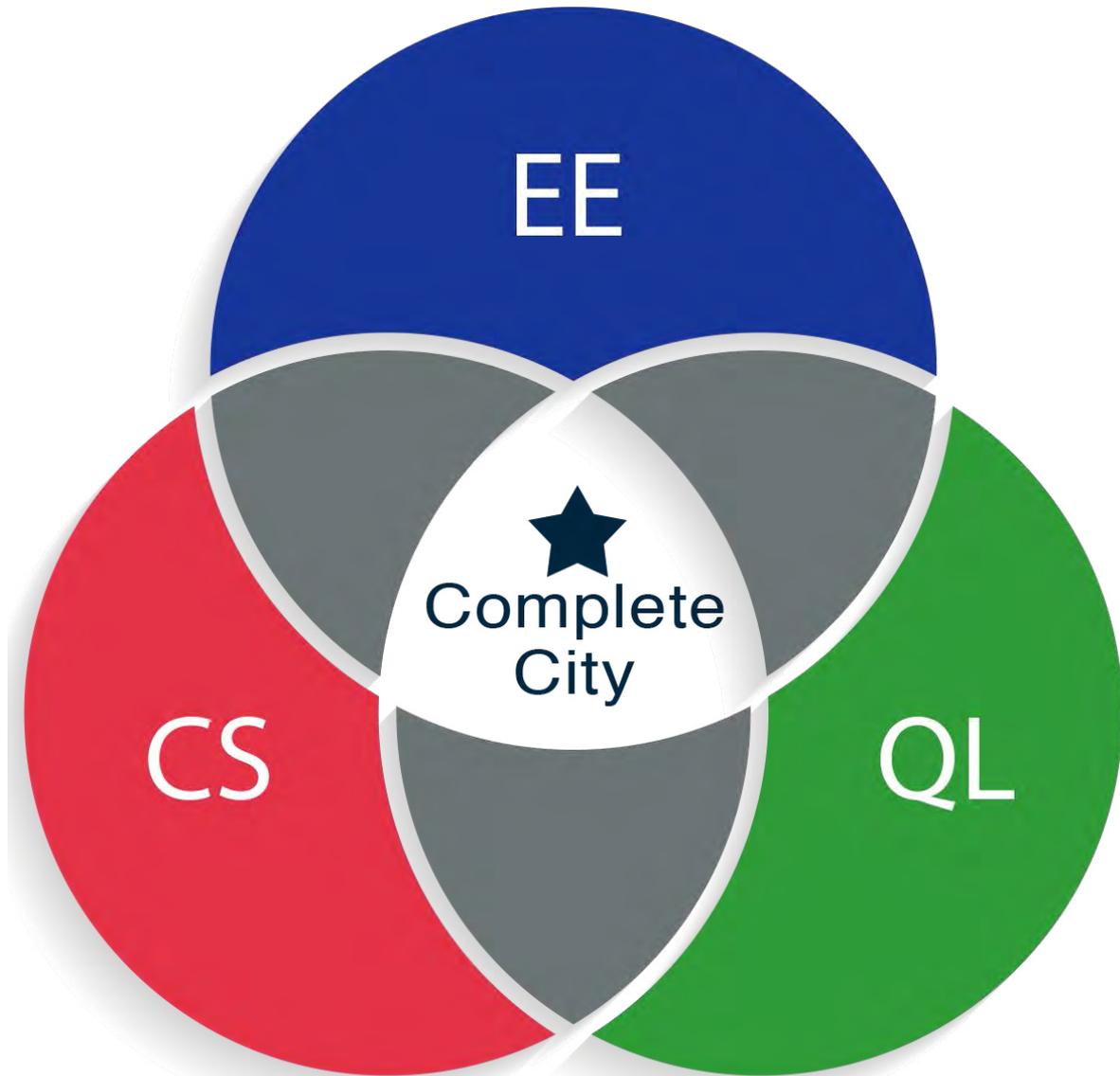
Learn More

- [Start with Why - How Great Leaders Inspire Action \(Simon Sinek\)](#)
- [Work of Leaders: Building Alignment \(Julie Straw\)](#)
- [The Five Dysfunctions of a Team \(Patrick Lencioni\)](#)
- [Great by Choice \(Jim Collins\)](#)

A: Complete City Model

B: Schertz Management Model

C: Schertz Vision for Excellence Model



Complete City Model

The Schertz Complete City Model is a visual depiction of three areas:

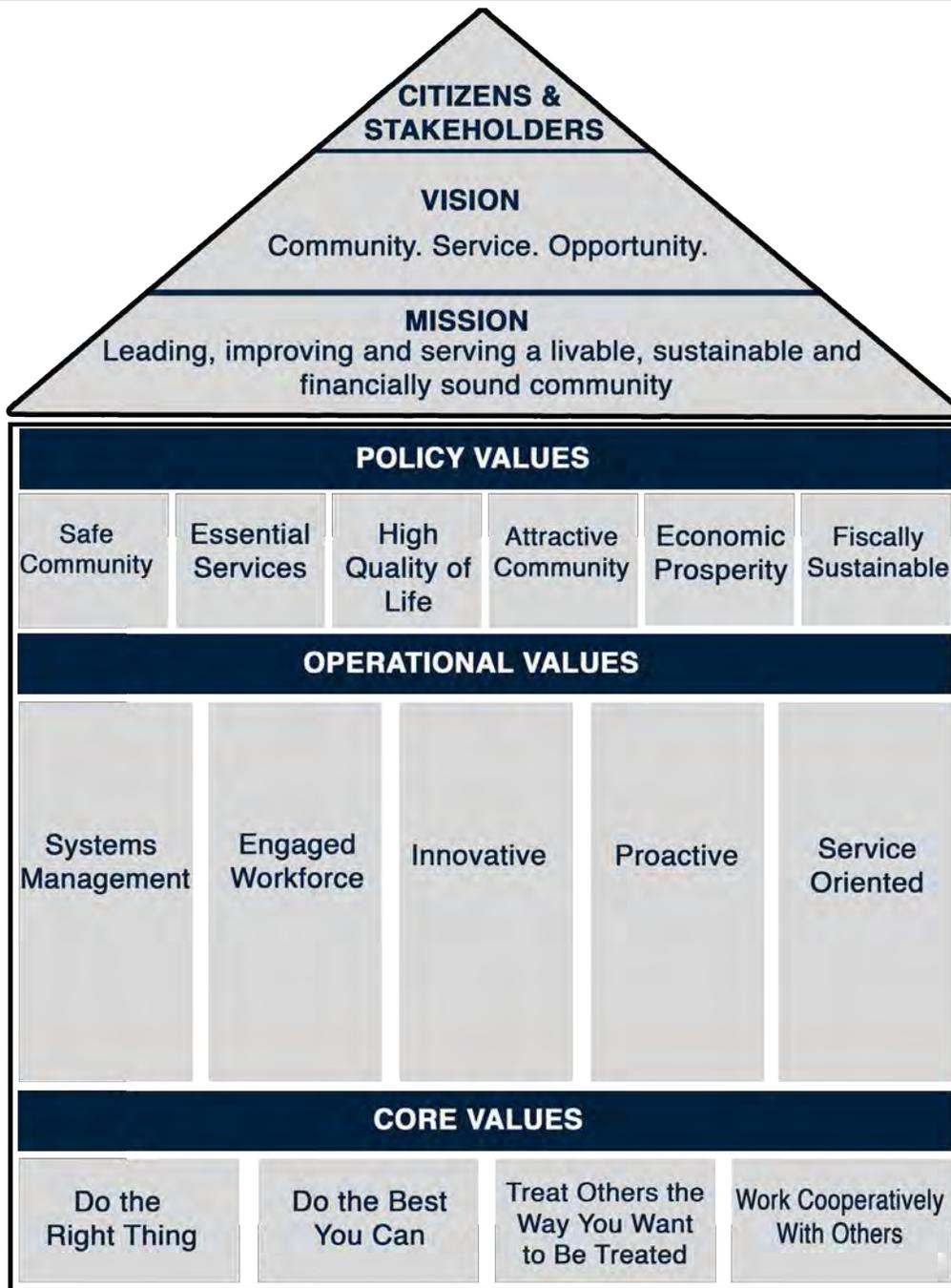
- 1) What we must provide to be a city (Core Services),
- 2) What we want to provide to be a desirable city (Quality of Life); and,
- 3) What drives our ability to provide adequately for each (Economic Engine)

When we accomplish all three simultaneously, we are a Complete City. Additionally, each area is further defined by two Policy Values: Core Services is comprised of "Safe Community" and "Essential Services"; Quality of Life includes "High Quality of Life" and "Attractive Community"; and Economic Engine is made up of "Economic Prosperity" and "Fiscally Sustainable." These six Policy Values are a reminder of what we are trying to accomplish as a community and add clarity in achieving our vision for being a complete city.



Schertz Management Model

The Schertz Management Model incorporates our five Operational Values, each of which represents an essential component of our desired best management practices. As identified by the South Texas Excellence Partnership, “These principles and concepts are embedded in high-performing organizations. They are the foundation for integrating key performance and operational requirements within a results-oriented framework that creates a basis for action, feedback, and ongoing success.” South Texas Excellence Partnership (STEP) is a community partnership that utilizes the beliefs and behaviors of high-performing organizations. The Schertz Management Model is how we envision managing the City to achieve the highest and most sustainable results.



Schertz Vision for Excellence Model

The Schertz Vision for Excellence Model incorporates our Vision, Mission, and Values with our Policy Values, Operational Values, and Core Values into an easily recognizable and meaningful model. As reinforced by STEP, “Senior Leaders set a vision, model expectations, and empower others to ensure sustainable success and continuous improvement.” The Schertz Vision for Excellence Model is how we integrate our leadership aspirations in a way that is readily understandable both within the organization and outside to our citizens and stakeholders.

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