



Strategic Planning

City of San Jose Police & Fire Department Retirement Plan Board

Office of Retirement Services/ORS

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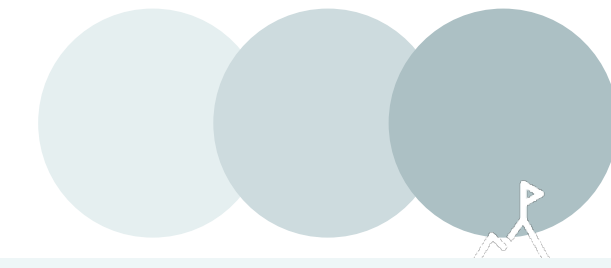
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Why Engage in Strategic Planning?

- 1** Allows all ideas to be heard and given due consideration
- 2** Creates a structure to recognize opportunities and avoid mistakes
- 3** Makes planning a process-driven effort
- 4** Promotes the efficient use of Board time, Staff resources, and the budget
- 5** Encourages Board and staff to work together cooperatively
- 6** Provides focus and a clear path for all to follow
- 7** Establishes guidelines for measuring success

Mission

All the strategies and action plans in the strategic plan should support the Plan's mission.

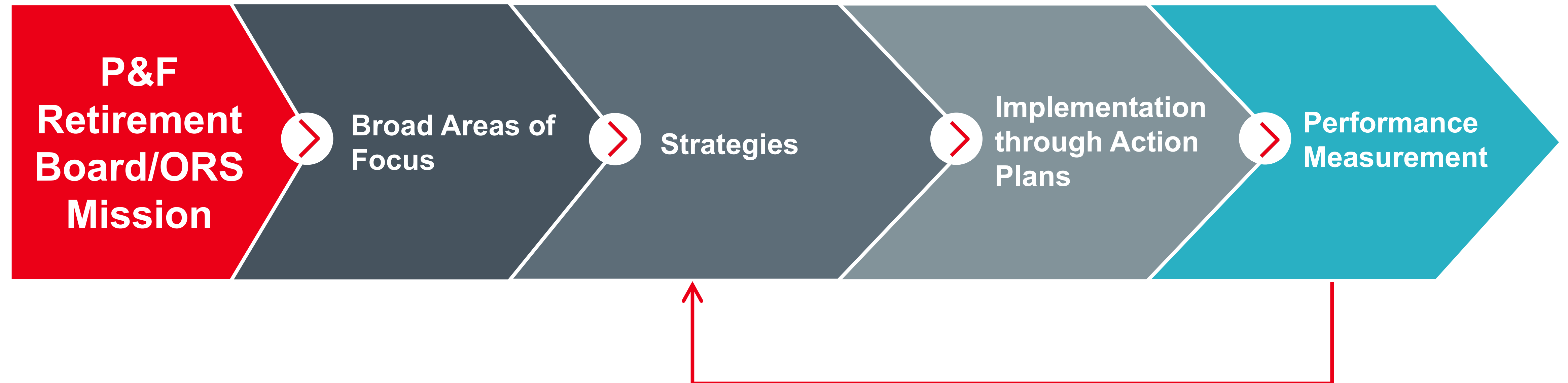


Our mission is to ensure prompt, professional delivery of services and benefits to our members, and to collect, invest and expend system assets in a prudent, fair, and timely manner.

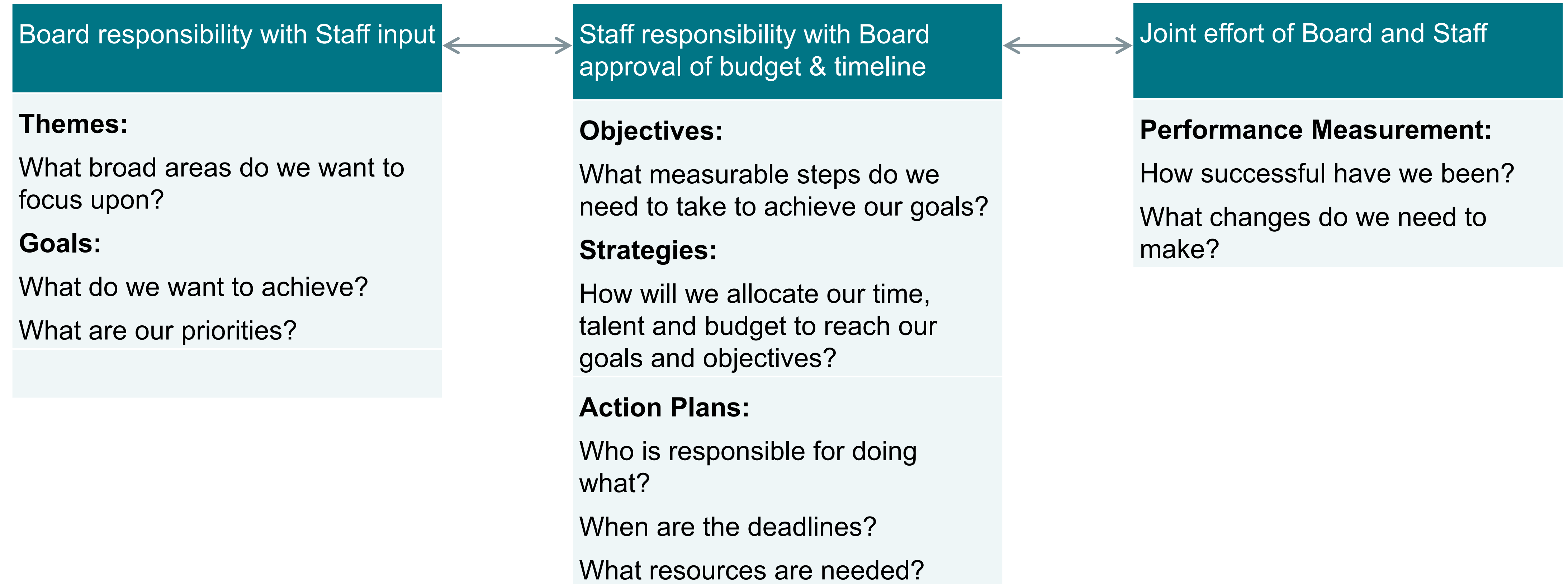
Is the mission statement understood by all?

Is the mission statement still relevant?

Strategic Planning: A Continual Process



Roles in Strategic Planning



Strategic Planning Principles

- Seek input from all Trustees, key Staff and significant stakeholders
- Honestly evaluate the organization's current strengths and weaknesses
- Carefully scan the external environment to identify opportunities and threats
- Hold candid discussions about the issues to be addressed
- Be reasonable and practical in setting priorities
- Make commitments to follow the plan, meet the deadlines, and work cooperatively
- Evaluate progress, milestones, successes and failures
- Maintain the strategic plan as a rolling 3–5-year road map for the organization
- Encourage Staff to contribute to the System's success

What are the Critical Issues?

Examples:

- Sustainability of DB Plans
- Funding
- Communication, Outreach, and Services
- Board Governance
- Others



Creating Goals and Objectives

Strategic plans typically have five to seven goals that focus on matters that will be:

- costly to resolve
- involve significant staff effort
- require the Board's attention
- span several years
- be a significant change for the ORS or P&F Plan in any way

Goals

- state what you seek to accomplish
- state what you want to change

Objectives

- identify measurable steps you need to accomplish goals
- create focus and motivation toward goals

Next Steps After Strategic Planning Discussion

- 1** Interviews to assist in developing themes
- 2** Strategic Planning meeting, if preferred
- 3** Staff discusses the Board's goals and priorities to further develop action plans
- 4** Aon and Staff update the strategic plan
- 5** Board approves the strategic plan along with the appropriate budget
- 6** Board and staff review progress regularly
- 7** The plan rolls forward through annual reviews of progress and updates

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