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Solutions



Case Study



Human Resources Department



TRANSFORMING HUMAN RESOURCES AT THE CITY OF BURLINGTON – TAKING A BALANCED SCORECARD APPROACH TO BUILDING A STRATEGY-FOCUSED HR DEPARTMENT

Background

The City of Burlington is an innovative and progressive municipality that is in the process of making the transition from a suburban municipality to an urban municipality and has been facing the challenges associated with rapid growth. A key goal in the City of Burlington’s strategic plan is to be recognized as an employer of choice in the municipal sector - a goal that directly recognizes the importance of the City’s employees as a critical foundation for strategic success. The Human Resources Department at the City of Burlington plays an important role in building the strong culture and people foundation targeted by the City.

In 1996, the HR Department completed a planning exercise designed to move the human resources function “up the ladder” into the role of active business partner and change agent within the corporation. The primary strategic objective of the 1996 plan was to help the City of Burlington achieve its corporate/business goals and objectives. While the overall goal of the HR Department has remained relatively stable since 1996, the underlying issues and challenges have changed significantly over time. As a result, the time was right to review and renew the direction and business plan for the City of Burlington’s HR Department. The consensus was that doing so would ensure that the HR Department continues to play its part in ensuring the achievement of the City’s strategic plan.

A search team was formed to locate a consultant who could partner with the HR Department in this important activity. While strategic planning expertise and hands-on human resources sector knowledge were fundamental requirements, the team was also looking for a partner who displayed compatible values and approaches to completing the project. That is, it was important to find a consultant who would focus on both the process and people aspects of the strategic planning project. After a comprehensive RFP and interview process, the search team selected Strategy Focused Business Solutions Inc. and Sandy Richardson as their strategic planning partner.

Reflecting on their selection of Strategy Focused Business Solutions Inc., Roy Male, Director of Human Resources says: ***“Choosing Strategy Focused Business Solutions Inc. as our consultant was an easy decision. At the proposal presentation, it was obvious that Sandy did the homework necessary to design a customized planning process that would meet our needs. In fact, an attention to detail, quality, and client needs are hallmarks of the work done by Strategy Focused Business Solutions Inc. and Sandy Richardson.”***

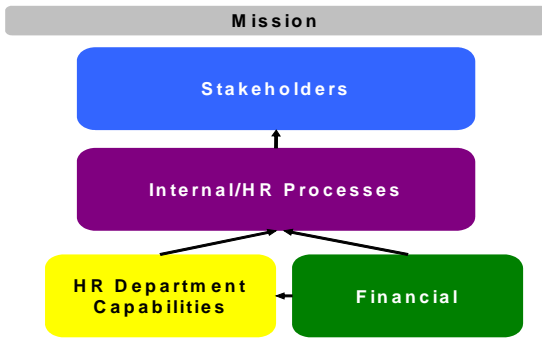
Initiating The Strategic Planning Process

The first step in ensuring a successful strategic planning experience for the City of Burlington’s HR Department was to meet with the strategic planning steering committee. This group included Leo DeLoyde (General Manager, Corporate Services), Roy Male (Director of Human Resources), and Laura Boyd (Human Resources Representative). The role of this team included defining the planning approach and parameters, liaising with City stakeholders to ensure a smooth and effective process, and resolving the challenges/issues that would inevitably crop up during the project.



Taking a Balanced Scorecard Approach to Strategic Planning

Balanced Scorecard Framework



The most important objective of this initial steering committee meeting was to agree to take a **balanced scorecard approach to strategic planning** and to select the balanced scorecard perspectives and framework that best suited the HR Department. As Roy says, *“The balanced scorecard approach provides us with the best framework to incorporate all of the important elements that must make up our strategic plan.”*

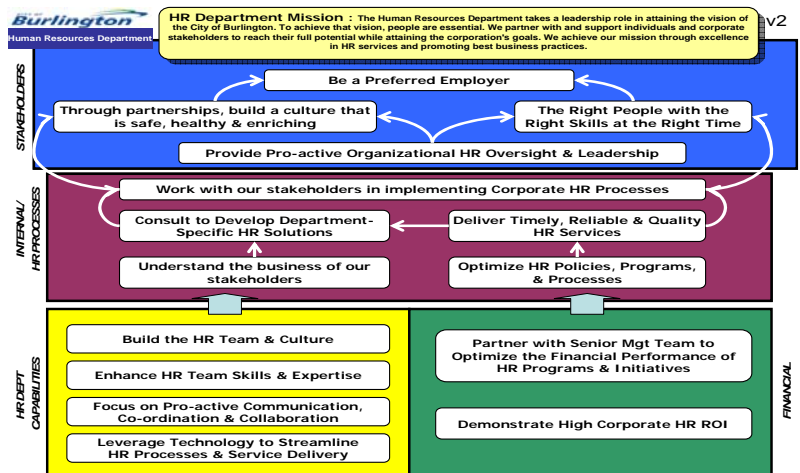
The next step was to engage the entire HR Team in the strategic planning process - a critical first step in building the team’s ownership for the department’s strategic plan. A half day workshop was held where the team was provided with an overview of the strategic planning process and the targeted timelines. In addition, the team was put to work developing an initial internal SWOT (strengths, weaknesses, opportunities, threats) Analysis, creating a list of key HR processes and critical HR projects, and defining a prioritized list of the department’s key stakeholders (including the HR Department team members themselves).

Armed with the list of HR Department stakeholders, the next step in the planning process was to gather feedback on each stakeholder group’s human resources needs, service and performance expectations, and perspectives on current HR Department performance levels. This information was collected through a combination of surveys, one on one interviews, and focus group sessions. The results were collated and analyzed by Sandy, and presented back to the HR team in a detailed report that included a prioritized list of stakeholder human resources needs and expectations.

A key component of the strategic planning process included scanning the external operating environment. This included the completion of a traditional external environment scan as well as a comprehensive human resources best practices review. This information was gathered by Sandy and presented to the HR Team in a report format. As Roy says, *“Sandy produced several valuable resource documents for the team to use in the planning process and beyond.”* After reviewing the external scan information provided to them (the stakeholder feedback, external environment scan, and best practices material), the HR team members met to revise the initial SWOT Analysis and create a comprehensive picture of the current situation.

The next, and perhaps most intense, step in the HR Department’s planning process was a three day strategic planning workshop that included the participation of all members of the HR team.

Day 1 included reviewing and discussing the stakeholder feedback, defining the HR Department core values, mission, role statement, and 2009 vision, and developing the HR Department’s strategy map (including detailed strategic objectives, and cause and effect relationships).



Day 2’s session began with the drafting of strategic objective definitions, and continued with process and project alignment and capability assessment activities. The team completed the day by integrating the process and project capability information into the SWOT Analysis and completing a gap assessment (i.e. current state versus the 2009 vision state).

On Day 3 of the strategic planning workshop, the HR team focused on defining and designing critical gap-closing HR projects. The day, and the workshop, ended with a presentation of the HR Department’s preliminary strategic plan by members of the HR team to various key stakeholders for initial feedback and comment. The fact that several of the HR Department team members were able to present and discuss their strategic plan easily and eloquently by the end of the workshop showed that they were truly invested in the plan that they had created - an important indicator of strategic planning success!

Completing the Strategic Planning Process

The next step in the planning process was to review and redesign the HR Department organizational structure to support service delivery and strategy execution. To prepare for the one day workshop, the HR team inventoried the current department tasks, determined which of the current tasks were relevant under the strategic plan, and defined any new tasks required to support the execution of the HR strategic plan. Once the “future state” task list was defined, HR team members identified a preliminary list of tasks that were candidates for outsourcing (either internally within the corporation or externally). During the workshop, the HR team jointly finalized this “start, stop, continue and outsource” task list, and created draft organizational design structure recommendations for further consideration by senior management. Using the output from this workshop, a series of follow up meetings with the strategic planning steering committee focused on finalizing the organizational structure recommendation.

The last step in the strategic planning process included presenting the HR Department’s strategic plan to additional stakeholder groups and receiving their feedback. It was very satisfying to hear stakeholders say that they could clearly see their needs and expectations represented in the HR Department strategy map, strategic objectives, and planned strategic projects. The final output of the planning process was a draft HR Department strategic business plan document.

Reflecting on the strategic planning process, Roy comments, *“The planning process we used was thorough, very focused, and it met the needs of all of the stakeholders in the process. The entire experience was very intense, however, this intensity was needed to complete the process and achieve the results we were looking for.”*

Key Strategic Planning Outcomes

The tangible outcome of this process has been the development of a transformational, stakeholder-focused strategic plan for the HR Department that aligns with the City of Burlington’s strategic plan. Roy states, *“The linkages to our corporate plan, the internal and external environment, and stakeholder needs are critical attributes of the HR Department strategic plan.”* As a result, the HR Department is well positioned to build the people foundation required to achieve the corporation’s strategic goals.

Moving forward, the HR Department will engage in a dynamic strategy management process were the team will: execute its strategy and monitor results, assess the plan’s impact on stakeholders as well as the success of the strategy, and use these learnings to continuously improve and refine the HR strategy. The planning capabilities and relationships that have been built through the HR Department’s strategic planning process will help ensure the success of these future strategic management activities.

Reflecting on the strategic planning project and Sandy’s contribution to the HR Team’s success, Roy says, *“Sandy’s skill at listening to and interpreting the team’s comments during group sessions was a critical factor in helping us create a focused strategic plan. The quick turnaround on, and the quality of, draft and final documents was unbelievable and this played a pivotal role in moving us through the process efficiently and effectively. Most importantly, Sandy consistently delivered what she promised to deliver, exceeding our performance expectations and providing incredible value for our consulting investment.”*

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