



# Seeing 20/20

The California JPIA's Strategic Vision





## EXECUTIVE SUMMARY

In early 2004, the Authority began a process designed to create a strategic vision for the organization. Every staff member of the California JPIA has taken an active role in developing the vision and all that supports it, including defining the organization's core values and mission statement.

The strategic planning document that represented the Authority's effort was published and widely shared amongst the membership. Its purpose has always been to articulate the long-term vision for the Authority, and then to detail action and work plans that support the vision and ultimately find their way to the work that staff does on a daily basis.

This document represents a significant update to the Authority's Seeing20/20 strategic plan. Staying true to its original intent, the plan is a living document that is regularly reviewed, always looking three to five years into the future. Not since the plan was originally drafted, has staff undertaken an effort to make certain that each of the plan's elements remains relevant. Of course, certain foundational principles transcend time. Other factors both internal and external to the organization, however, have suggested a more complete review of the plan was necessary to make certain the Authority is focused on its vision and mission.

The California Joint Powers Insurance Authority was formed in 1977 with thirty-three members under the provisions of California Government Code, Section 6500 et seq. A board of directors, consisting of one representative appointed by each member agency from its legislative body, governs the Authority. The board, in turn, elects a president, vice president and seven at-large directors to function as the Executive Committee, which meets regularly to oversee Authority affairs.

The Authority has not forgotten these roots. Since the beginning, and by its very nature, the California JPIA has placed a strong emphasis on the needs of members. Over the years, the Board of Directors has dedicated resources for the continued enhancement of programs and services that, at their very core, seek to fulfill a long-held commitment to unparalleled risk management solutions and unequalled member services.

It is the essence of this commitment that comprises the Authority's strategic vision, and the same commitment that has again necessitated the need to ensure that plans to accomplish this vision are made with an appropriate understanding of the organization's strengths and weaknesses, and also its opportunities and risks.

## FOUNDATIONAL PRINCIPLES

### Vision Statement | one

A vision statement is sometimes thought of as a picture of an organization in its future state. For the California JPIA, it is much more than that. It is the Authority's inspiration and framework for its entire strategic plan.

We Will Exceed Our Members' Expectations

Fundamentally, it answers the question of "What do we want the California JPIA to look like?", and sets the strategic direction for the organization by capturing the Authority's passion for continual improvement.

### Mission Statement | two

A mission statement is a brief description of an organization's fundamental purpose, and answers the question, "Why do we exist?" For the California JPIA, the mission statement articulates the Authority's purpose both for work in the organization and in relations with members.

Providing Innovative Risk Management Solutions  
for Our Public Agency Partners

In reading this statement, however, one cannot miss the word "Innovative." In fact, innovation is considered fundamentally central to our mission. First and foremost, innovation is a core value of the Authority, which has long practiced the essence of innovation in its service to members. Additionally, innovation is a defining characteristic for any organization that embraces such a value, and even more distinctive for organizations in the public sector.

### Core Values | three

Values are traits or qualities that are considered worthwhile; they represent an organization's highest priorities and deeply held beliefs. For the California JPIA, they are statements about how the Authority will engage members, business partners, and those who make up the human organization, and are shown here.

#### Integrity

We hold ourselves to the highest ethical and professional standards. We pledge to fulfill our duties and deliver on our commitments.

#### Excellence

We pursue distinction with a passion. We proactively assess our performance and strive to continuously improve programs, services, and work product.

#### Innovation

We foster creativity as we explore opportunities and meet challenges.

#### Teamwork

We pursue productive relationships through communication, collaboration, understanding, and respect.

A significant part of identifying core values involved understanding and applying them in the organizational setting. In so doing, staff developed three key goals and corresponding actions that incorporate the core values as part of all organizational activities. These actions are listed here:

- We will capitalize on opportunities to impart the importance of core values in everything we do
- We will incorporate our core values into all programs and services
- We will constantly measure our success in applying our core values

## KEEPING THE PLAN RELEVANT

Annually, the Authority has provided updates to the Executive Committee and others attending the Board of Directors meeting on progress related to the specific activities contained in the plan, and refreshed yearly as part of the budget process. The plan published originally in 2005 contained six overarching initiatives that defined how the Authority was to be positioned, with each structured to support the vision and mission statements. Each initiative, summarized below, helped focus on the most important issues facing the Authority, and was necessary in their entirety for the California JPIA to fulfill its vision. The original plan also contained multiple business objectives for each initiative, and for each business objective, detailed work plans.

Better Understand Member Needs, and Respond with Appropriate Services to Promote Member Satisfaction

Improve Relationships with External Entities in Order to Ensure Effective Communications

Capitalize on Internal Strengths in Order to Improve Efficiency and Communication

Ensure Efficiency and Effectiveness by Implementing Key Processes

Enhance Productivity by Maximizing the Benefits of Technology Systems

Improve Communications Amongst Staff

Beginning in spring 2010, the Authority embarked on efforts to complete a thorough update to Seeing20/20. Much had changed since 2005, necessitating a more careful study of the plan, its initiatives, and objectives. In fact, not since the plan was first crafted had staff completed such a far-reaching review to make certain that the plan remained current and focused.

Carrying out a systematic assessment of a strategic plan requires both a look back in time and a look forward. For the California JPIA, a look into the past was invaluable for two reasons. First, it helped remind staff of important steps used in crafting the original Seeing20/20; steps that were essential in formulating the plan, and steps that would be repeated during the update. Secondly, the look back served to remind staff, and informed some for the first time of the organization's rich history, and the commitment of those who laid the foundation for the Authority's many achievements.

The timing of the update coincided with the Authority's triennial survey of member satisfaction, first undertaken in 2004 as part of drafting the original plan. The survey of member satisfaction is sent to key individuals within each of the Authority's members, and includes elected officials, primary member contacts, chief executives, department directors, and other managers. The survey has always served an extremely important purpose; that is, to provide insight into the attitudes and opinions of members about the Authority's programs and services.

With the 2010 survey underway, staff met to review the six strategic initiatives. By focusing on the relationship between the initiative and the strategic vision, staff was able to evaluate the ongoing relevance of each initiative. At the same time, staff carried out review of business objectives associated with each initiative.

Although review of the business objectives has been done annually, staff had not routinely examined the initiatives in order to make certain of continued relevance to the strategic plan. An allegory is illustrative of this examination, and can be described as making certain that constructing a house takes into account conditions unknown at the time the house blueprints were first drawn up. Proceeding blindly in sole accordance with the original blueprints would result in a finished house that never accounted for changing needs or requirements of the owner. In the context of the Authority's review of business objectives, it was determined that nine of 17 objectives were sufficiently complete, and in some instances it was suggested that strategic initiatives being supported by the business objectives were no longer relevant.

After review of the strategic initiatives and business objectives, staff put forth efforts to identify emerging or critical issues reflective of the organization's strengths and weaknesses. This was coupled with information flowing from the member satisfaction survey and input from the Executive Committee. The following high-level list is reflective of staff analysis of all internal and external issues, input, and feedback collected during this step.

- Cost of Claims
- Technology
- Workload
- Commitment to Mission
- Cost of Coverage
- Member Communication
- Strategic Partners
- Continuing Innovation
- Trust of the Authority
- Knowledge Transfer
- Finance and Economy
- Member Staff Attrition
- Commitment to Vision

## A REFOCUSED Seeing20/20

The extensive internal discussions that occurred in reviewing the plan were instrumental in developing the updated strategic initiatives and priorities associated with Seeing20/20, and reaffirm the direction the Authority is taking to adapt to member needs and requirements, fiscal concerns, risk management challenges, as well as managing workforce changes of members and Authority staff alike.

Subsequently, better focused initiative statements have emerged, promoting excellence and transparency in strategies that work to foster greater partnerships with members, more responsive programs and services, a stronger organization, and more effective functionality in how the Authority interacts with member agencies throughout the state. These areas of strategic focus are as follows:

### **Develop Relations with Members | 1st key focus**

We will develop relations with members, and specifically

- Engage members as partners
- Identify member challenges
- Understand member expectations
- Promote a culture of managing risk

### **Deliver Highly Valued Programs and Services | 2nd key focus**

We will deliver highly valued programs and services, and specifically

- Affiliate with competent partners
- Manage scarce resources
- Maintain excellence
- Measure outcomes

### **Enhance Organizational Effectiveness | 3rd key focus**

We will enhance organizational effectiveness, and specifically

- Communicate candidly
- Improve problem solving
- Invest in employee relations
- Practice core values

### **Be Efficient and Sustainable in Purpose | 4th key focus**

We will be efficient and sustainable in purpose, and specifically

- Practice innovation
- Implement technologies
- Manage capacity
- Adapt and change

## NEXT STEPS

What follows next for the Authority is for staff to reconvene in developing work plans associated with each area of strategic focus. As with the original strategic vision, the Executive Management Team will lead staff in creating detailed activities that serve as a comprehensive blueprint for carrying out the strategic vision. Among other things, work plans identify specific activities required for each key focus, determine assignment of individual responsibilities, set major milestones and schedules, define needed resources, and create supporting documentation. As these blueprints take shape, the Authority will continue to inform the membership of plan progress, always seeking to engage members in order to fulfill the promise contained in the Authority's vision statement.