



Case Study

Sahuarita
ARIZONA

The Town of Sahuarita, Arizona

has transformed the way they align, track and report on their strategic plan to work towards common goals.

Executive Summary

Sahuarita is a Town of 27,000 in Southern Arizona that was experiencing a lack of connection with the work they do and their strategic plan. They needed a way to align their work with their goals, streamline their tracking and reporting process and provide visibility on progress to staff and council.

“ *Adopting [Envisio] brought awareness and has stressed the importance that what we do every day is not in a silo and is directly tied to our overall strategic plan.* ”

Teri Bankhead, Assistant to the Town Manager

The Challenge



One of the challenges faced by **Sahuarita** was the method in which they were tracking and monitoring their strategic plan progress. Their use of various static tools, spreadsheets and memos across departments made it difficult for managers to gain a realistic perception of how much progress was being made towards the achievement of their plan. **Sahuarita's** management team was frustrated with a lack of continuity of the sharing and tracking of information between departments. Employees were working in departmental siloes without a clear understanding of how their efforts were contributing to the achievement of their overall strategic plan.

The lack of alignment between their strategic goals and the daily work of employees was a barrier which prevented **Sahuarita** from operationalizing their strategic plan to its full potential.

With a determination to improve their reporting process, **Sahuarita** sought a streamlined solution for aligning their department plans with their strategic plan for optimal performance. Their key goals for the solution included:

- @ **A user-friendly interface**
- @ **The ability to align staff's work with Sahuarita's strategic plan**
- @ **Simplified reporting for staff and council**
- @ **Capacity for increased transparency to the public**

To achieve these goals, it would require a powerful and easy-to-use software. After investigating her options, Teri Bankhead, Assistant to the Town Manager, says Envisio emerged as the best solution specific to strategic planning.

In the past, employees at the Town struggled to provide consistent and regular progress updates on their work. When it came time to put together a detailed report for Council on the achievement towards the Town's goals, it was an onerous and time-consuming process of contacting various departments and reviewing spreadsheets and memos to obtain the updated progress and performance status. Progress tracking was decentralized and fragmented, which made it difficult to gain an accurate picture of achievement towards any goal. Envisio has allowed employees at every level of the organization to easily track and monitor progress on their plan with greater consistency than ever before.

“ Envisio's Dashboards and easy updating capability makes it easy for progress to be kept current ”
Says Bankhead.

With a single, cloud-based platform, employees can provide status updates in real-time, and managers are kept apprised with contemporary information to effectively support decision making. Reporting on progress is now a much less onerous and time consuming experience throughout the organization.

The Solution



Tracking progress at every level of the organization has meant that **Sahuarita** can now gain true insight into their performance as a whole. All progress reported by employees throughout the organization rolls up and visualized with specific dashboards. Managers customize their dashboards to show the operational and strategic responsibilities relevant to them. This allows them to generate individual, departmental or organization-wide reports with ease.

“ Employees are more aware of the need to track their work more closely in relation to the Town’s goals and strategic plan. It requires them to pay more attention and to update their actions in a more timely manner versus trying to remember and recreate from months prior. ”

Says Bankhead

Bankhead recognizes the importance of communicating how your strategic plan comes to life from the ground-up with a holistic perspective. Envisio helps staff at **Sahuarita** better visualize how their strategic plan goals cascade down to operational tasks with responsibilities and timelines. Employees at every level share the priority of connecting their daily tasks to the achievement of their Strategic Plan. “For **Sahuarita**, this is an important foundation in understanding why the software is being used; how it can save time in the long-run and how the entire organization works together toward a common goal.” says Bankhead.

Envisio’s Customer Success team worked with Bankhead and her team to collect and align department plans with their strategic plan, configure Envisio according to **Sahuarita’s** requirements and populate Envisio with their planning data. Within two and a half months, all users were trained and entering their updates in Envisio.

“ The initial framework was very easy as the Envisio staff programmed it to our specs and were very interactive and responsive. We are still working through idiosyncrasies within the program and continue to learn new ways. It has been a very easy program to work with to this point. ”

Says Bankhead

The Results

Envisio provides the Town of **Sahuarita** with the straightforward and centralized solution they were looking for. Gone are the days of inconsistent and delayed progress updates in varying formats. Their once static and disconnected operations have evolved to become dynamic, collaborative and transparent. Envisio has helped the Town of **Sahuarita** to make their overall strategic plan a priority, and ensure that any task assigned to and completed by staff is clearly connected to the top-level objective it supports. This has helped staff to be more engaged with the success of the organization, and more accountable to the specific contributions they make.





Cascade Planning



Sahuarita's five key Focus Areas cascade into Goals, Objectives and Actions within the Envisio software. Customizable planning structures allow **Sahuarita** to maintain consistency with their current planning workflows and enabled a smoother adoption of Envisio throughout the organization.



Roll Up Progress Updates

Staff at **Sahuarita** save many hours generating executive and council reports with Envisio's reporting feature. Progress indicators and updates automatically aggregate to higher levels providing managers with much needed visibility into performance and ultimately more informed decision processes.



Automatic Reminders

Envisio's scheduled reporting date feature helps **Sahuarita** to achieve a consistent reporting rhythm. Automated rollups and integrated notifications keep staff engaged throughout the reporting cycle.

About the Town of Sahuarita



The Town of **Sahuarita** is located **15** minutes south of Tucson in southern Arizona and **40** minutes north of the Mexican border. Having grown **662%** since the census of **2000**, the population is now nearly **27,000** people.

About Envisio

Envisio is a cloud based Government Performance Management (GPM) software that empowers governments to accomplish goals, achieve greater transparency & accountability, and enhance the quality of life for citizens.

Envisio saves time with easy to generate stakeholder reports, increases staff engagement and collaboration and provides a framework for building trusted relationships with staff, elected officials and public.

To learn how Envisio helps your government achieve your strategic goals, contact us at:
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