AGENDA
KEYSTONE HEIGHTS CITY COUNCIL WORKSHOP
555 S. Lawrence Blvd., Keystone Heights, Florida
Wednesday, April 10, 2024   10 am – 12 pm

"Please turn off cell phones"

Invocation:

Pledge: City Manager – Charlie Van Zant

Roll Call: City Clerk – Stephanie Silva

Topics of Discussion:

1. Strategic Plan Orientation Session – Dr. Joe Saviak

15 MINUTE RECESS

2. Workshop Dates
   a. Review/Revise Dates
   b. Review/Revise Topics

Additional Documents:

3. Strategic Plan Orientation Session
4. Strategic Plan Implementation
5. Dr. Joe Saviak Introduction
6. Example of an Action Plan for an Objective
7. Strategic Plan Progress Report Example
8. Action Plan

Strategic Plan Orientation Session

Strategic Plan

- We are leading and planning for continued success for decades to come.

- The City of Keystone Heights utilizes strategic planning

- The challenge of maintaining a high level of service in our community – it's why we need this strategic plan.

"The best change is the change <u>we</u> create."

- *Peter Drucker*

"To try to make the future is highly risky.

It is less risky, however, than not to try to make it."

– Peter Drucker

Strategic Plan

- *Fail to plan and plan to fail. We perform as we plan – success and failure are usually not coincidences - long term success is never an unplanned event*

- Planning involves **identifying threats & opportunities in the future & designing plans which optimize those opportunities and reduce/thwart those threats** in the present

- **Alignment** – organize around outcomes – match means to ends

- **Create our future**

- **Develop objectives together for the strategic plan at the workshop**

Benefits to Planning
in Public Management
(Cohen & Eimicke, 1998)

- **Clarify our Mission, Vision, Values, Goals, & Objectives**

- **Unify & integrate** – 1 city government with 1 V, M, V, Goals, & Objectives

- **Optimize organizational performance**

- **Efficient allocation of limited resources**

- **Boost morale** – employees internalize the mission

- **Attract resources** – it's easier to get city stakeholders & citizens to invest in a winning plan they can see, understand, & support

- **Enhances public confidence** – with a clear plan and demonstrated outcomes, the public can understand and support what our agency is doing

- **Anticipatory government** – being prepared for the predictable and there's a lot that is capable of being predictable - limit the # of surprises, their duration, & intensity

- **Enables us to successfully introduce & lead change**

Strategic Plan

What is SP?

Given our **mission, strengths, weaknesses, opportunities, threats, stakeholders, history, capacity,** and **resources**, what should our **objectives** be and which **strategies** can we design and implement to achieve them?

Research ➜ Mission ➜ Goals ➜ Objectives ➜ Strategies ➜ Tactics ➜ Implement ➜ Evaluate

R ➜ M ➜ G ➜ O ➜ S ➜ T ➜ I ➜ E

"Oh yeah, we did that strategic planning thing." But did you?

"The temptation in many organizations is to go to a retreat, or go through a strategic planning exercise, develop the strategy, and then <u>ignore</u> it."

(Cohen & Eimicke, 1998, p. 27)

➢ **Right – you made the plan, but you <u>never</u> used it. We don't really know if the plan worked or not because we did not work it!**

➢ **Knowledge of SP may be <u>superficial</u> – SP efforts in govt. can be <u>symbolic</u> at best**

Strategic Plan

Enables us to establish:

1. Mission

2. Long-term goals

3. Annual objectives

4. Detailed action plans

5. Means of evaluation/accountability

Objectives – Strategies – Tactics – Outcomes - Evaluate

O1 – S1 – T1, T2, T3 – O1 - E1

Remember – SP is another tool of public management - all tools of public management have their strengths and limitations – the tool itself is never a panacea for all our problems – if the wrong tool is selected or it is ineffectively implemented (right tool used the wrong way) – you will not obtain the desired results

Strategic Plan – What Is it?
(Cohen & Eimicke, 1998)

- History - adopted from US military – meet "all eventualities" model

- *"a set of concepts, procedures and tools designed to help leaders, managers, and public administrators figure out what their communities and organizations should do to survive and prosper"* (Bryson and Roering, 1996).

- **<u>Achieve Alignment</u> -** *"its greatest value is in helping <u>align</u> an organization's mission, goal, and means for achieving them with its available resources."*

- **<u>Organize around outcomes</u>** – too many orgs. don't do this - with SP, you see leadership, culture, personnel, systems, policies, facilities, technology, etc. rooted in MGOs – **everything is organized around achieving specific outcomes – form follows function – structure & systems around MGOs**

- **<u>Case Study:</u> Blanchard Video – It's Always The Leader**

How do we differentiate strategic planning from daily operational activities?
(Cohen & Eimicke, 1998)

- <u>Best fit</u> **between the organization & its environment so that organizational goals are attained**

- **About our mission, our customers, our future – how we will best survive, succeed, & serve for years to come** - planning involves identifying <u>threats</u> & <u>opportunities</u> in the future & designing plans which optimize those opportunities and reduce/thwart those threats in the present

- **Enables us to be pro-active** – identifying opportunities to optimize our success - driving events instead of always being driven by them – leading change & playing offense - no longer reacting to the issue of the moment & only playing defense

- **SP facilitates success in leading and managing change** - times change & successful organizations change with them - organizations which fail to anticipate, lead, & manage change will at best compromise their performance or at worst, begin to write their own organizational obituary - *"It is futile, for instance, to try to ignore the changes and pretend that tomorrow will be like yesterday, only more so."***(Drucker, 1999)**

Guiding Principles to Strategic Planning
(Cohen & Eimecke, 1998)

- SP can create & promote **a shared mission** for the organization – **your city already has a mission and vision**

- **A shared mission is fully understood & fully embraced & actively advanced by all managers & employees in the organization should <u>not</u> be automatically assumed (not everyone got the memo or if they did they may have rejected it or misunderstood it/interpreted it differently)**

- If you called 100 managers/employees in your organization together, parked them at individual computer terminals and you asked them to each type out answers to these questions without talking to anyone else "What's our mission?" "What are our goals?" and "What are our Top 5 organizational objectives this year?", would you get 100 identical answers to all 3 questions, 10 different answers to one or more of the questions, 100 different answers to all 3? *how much would their answers be identical and how much would they vary? And if their answers vary greatly, how would that affect daily operations of the organization?* (McAllister, 1993)

- *What's life like in the agency when there is <u>no</u> shared mission?* **Believe it or not, there are organizations which operate for years without a shared mission!**

Strategic Plan – Key Concepts

- **Research** is critical to selecting the right mission, goals, objectives, strategies, & tactics – **research** is key to the **SP process**

- **Objectives select our strategy – strategy drives tactics – we implement and then we evaluate**

- *Don't confuse strategy with tactics!*

- *For example, our mission is public safety*

1. **The goal** is to lower the overall crime rate – **the objective** is specific & measurable – decrease the crime rate by ___% within 24 months

2. **The strategy** is to target the subgroup of repeat offenders who largely drive the overall crime rate

3. **The tactics** may be to create a specialized unit to target career criminals & then work with prosecutors to ensure lengthy sentences

- A **strategy** can explain how an organization will achieve its stated goals – it is a winning game plan - built upon an **accurate assessment of the organization's strengths & limitations & a strong understanding of expected changes in the organization's environment**

Strategic Plan – Key Concepts
(Cohen & Eimicke, 1998)

- **A strategy forces an organization to make critical decisions about who they are & who they are not & what they do & what they do not do** (select & succeed as opposed to mediocrity on a large range of functions) – remember the Drucker doctrine of abandonment – we can't do it all nor should we try - *tell me what you no longer will do!*

- **Strategy is a general map to guide the organization** – no longer reacting issue of the moment

- **A strategy successfully integrates the organization's goals, policies, & programs into a unified effort -** everyone rows in the same direction at the same time – *it is the difference between 100 individuals playing instruments & a symphony*

- **What is strategy?** *"Setting priorities and defining, developing, and defending organizational capacities **that society values enough to pay for."***

- **A successfully-selected strategy** <u>attracts</u> **resources** – you are doing something that policymakers and the public will pay for - it will attract investors & customers

Strategic Plan – Key Concepts
(Cohen & Eimicke, 1998)

How do we identify organizational objectives in the <u>public sector</u> - sources of objectives?

1) **Public policy decisions expressed through legislation or executive action or court decisions**

2) **Public demand – needs assessment**

3) **Self-initiated by public sector entrepreneurs/leaders** (within the core mission of the organization) – ***anticipatory government*** - identify problems & craft solutions

<u>Need to ask & answer 3 simple questions:</u>

- *What is our business?*

- *Who is our customer?*

- *What does the customer consider to be of value?*

- This is not done enough in the public sector – we have a wide range of **internal** and **external** customers – and in the public sector, people may be paying for the service who never use it – as funders, they are customers too and their views and values count, too!

SATISFIED CUSTOMERS

Strategic Plan – Key Concepts

- Discuss Vision, Mission, Values, and Goals

- Set objectives

- Objectives are SMART

- Specific

- Measurable

- Actionable

- Realistic

- Time-bound

- <u>Example:</u> The city will improve customer satisfaction by 10% in 12 months with this specific service.

Guiding Principles to Strategic Planning

- Need **leadership & organizational commitment** to the process

- **Resource constraints** are important - *"no money, no mission"*

- Strategic goals must reflect organizational capability or they will not happen – capacity is key

- SP connects ends to means – alignment

- SP helps prioritize – all possible objectives are not equal in value or priority – avoid the grocery list

Guiding Principles to Strategic Planning

Barriers to SP Success:

1. **Goal definition will have explicit trade-offs** – here's what we will do and what we don't do – may spur political opposition from internal and external groups who don't share those objectives

2. **SP can fail** – not research-driven, wrong mission, goals, or objectives selected, lack of leadership, lack of capacity, no real commitment/lack of buy in, lack of accountability, objectives not measurable or measured, action plans not well designed or effectively implemented, organizational barriers (agency culture, personnel, policies, procedures not geared towards performance), politics/external constraints, must actually drive the organization – *the same list of suspects who thwart any valuable innovation in any organization*

Strategic Planning
(Cohen & Kamieniecki, 1991)

7 Key Steps in the SP Process:

1. Problem and opportunity analysis

2. Identification and analysis of stakeholders

3. Historical analysis

4. Organizational and situational analysis

5. Concrete strategy formulation

6. Pre-implementation projection

7. Evaluation and mid-course correction

Strategic Planning

Problem and opportunity analysis

- **Who am I? What do I do?**

- **MVVGO – mission, vision, values, goals, & objectives – you already have an M and V**

- **Mission Statement** – what is the **rationale for our organizational existence? Can develop/refine/clarify during SP.**

- **Vision – what is our destination? Who can we be?**

Mission

- The mission of the City of Keystone Heights is to provide outstanding municipal services, to be financially sound, to be champions of our lakes and to carefully grow and improve our community.

Vision

- Keystone Heights is a safe, environmentally healthy and economically thriving community for all its citizens and visitors now and for future generations.

Strategic Planning

Problem and opportunity analysis

- **What services/programs do we provide and why? To whom?**

- **What do we do best? As measured by what outputs/outcomes?**

- How are we **different from 5 years ago** – how will we be **different 5 years from now?** (missions can change over time)

- What **mission** will attract what **resources**?

- *To some extent, our mission in the public sector is set for us – to some extent, we can shape it too*

- <u>Conduct Environmental Scan – SWOT Analysis</u> – **list out all specific strengths, weaknesses, opportunities, & threats -** given that analysis, what is our best mission? What are our best objectives? We will be asking you about a SWOT analysis for the city government and city during our individual interviews.

Strategic Planning

Identification and analysis of players

- **Who matters? Why and What do they want?**

- **Conduct stakeholder analysis –** internally & externally, <u>who</u> is creating problems, challenges, & opportunities for our organization? List everyone & everything out (citizens, CC, city stakeholders)

- **What are their interests and perspectives?**

- **How does that affect our mission?**

- **What mission, goals, & objectives do they each want for us?**

- **Appleby SA –** *"If I do this, who will I make mad – how mad? And if I do this, who will I make glad – how glad?"*

Strategic Planning

<u>Historical analysis</u>

- **How did we get here?**

- **Looking at the SWOT analysis, how did we get here?**

- **We will be asking you about a SWOT analysis for the city government and city during our individual interviews**

- **Search for historical analogues – are there times in the history of the organization which can be instructive to us now?** (have we dealt with this type of problem/opportunity before & what did we do or not do)

Strategic Planning

Organizational and situational analysis

- **What's my capacity?**

- **Honestly assess capacity** – <u>**strategy without capacity is a formula for failure**</u>

- **Inventory our strengths, limitations, & accomplishments**

- **ID objectives** (specific, measurable, time bound) (e.g., ensure % compliance in 24 months)

Given our **mission, strengths, weaknesses, opportunities, threats, stakeholders, history, capacity, and resources**, what should our **objectives** be and which **strategies** can we design and implement to achieve them? <u>**Objectives flow from your vision, mission, values, and goals.**</u>

Research ➜ Mission ➜ Goals ➜ Objectives ➜ Strategy ➜ Tactics ➜ Implement ➜ Evaluate

R ➜ M ➜ G ➜ O ➜ S ➜ T ➜ I ➜ E

Strategic Management
Is What Makes This Work
(Starling, 2008)

Strategic management makes strategic plans perform!

Now, we DESIGN, IMPLEMENT & EVALUATE

✓ **Concrete strategy formulation**

✓ **Create the work plan to translate intended objectives into actual**
outcomes – detailed & specific – who does what when and how with what
resources to achieve which objectives – **for each objective, detail strategy,**
tactics, resources required, timeline, person (s) responsible, metrics – **it is**
a detailed action plan

Strategic Management
Is What Makes This Work
(Starling, 2008)

<u>Pre-implementation projection</u>

Quick double-check for fit & feasibility before implementation – can we really do this? *But don't get hung up here!*

<u>Implement!</u>

<u>Evaluation and mid-course correction</u>

- **Process evaluation** – detect any **program implementation problems** & remedy them <u>during</u> implementation (program monitoring, quality assurance) – **prevent program drift** - ensure that the planned program is the implemented program

- **Outcome evaluation** – confirm that results were realized after implementation – collect & analyze data on **outcome measures** to validate impact (increased effectiveness, efficiency)

Strategic Management
Is What Makes This Work
(Starling, 2008)

Strategic Management

Involves strategic planning, implementation, & evaluation of those plans

Key characteristics which differentiate it from normal

organizational activity:

- Decisions made by top management
- Decisions involving large allocation of organizational resources
- Decisions which have a significant long-term impact
- Decisions which seek to arrive at the **best fit** between the organization
  & its environment so that organizational goals are attained

Strategic Management
Is What Makes This Work
(Starling, 2008)

4 Stages of Strategic Management in the Public Sector:

1. **Define Mission and desired outcomes** – involve stakeholders & assess environment

2. **Align activities, core processes, & resources with mission & intended outcomes**

3. **Implement**

4. **Evaluate** – apply performance measures – engage in program evaluation – make findings – reintegrate this information into process

Strategic Management
Is What Makes This Work
(Starling, 2008)

4 Stages of Strategic Management in the Public Sector:

1. **Define mission & intended outcomes**

✓ **Mission statement** explains why the organization exists, what it does, who it serves, & how it does it – strategic goals explain the purposes of the agency's programs & the goals they seek to secure – **mission & goals establish clear criteria against which performance can be measured**

✓ **Process involves:**

- ▪ **Engage stakeholders** – customers, funders, partners, service providers, etc. for assistance in defining mission & goals (realizing that 100% consensus among all stakeholders on mission & goals & outcomes is unlikely)

- ▪ **Assess the environment** – what factors in our external & internal environment will help or hurt us in fulfilling our mission, achieving our goals, & producing outcomes? An external variable can be changing citizen expectations of the agency or a new technology or mandate on the organization from legislature/judiciary – an internal variable can be the organizational culture or our service delivery processes.

Strategic Management
Is What Makes This Work
(Starling, 2008)

4 Stages of Strategic Management in the Public Sector:

2. <u>**Aligning activities, core processes, & resources with mission & intended outcomes**</u> – we need to <u>connect ends with means</u> – if our current operations don't produce our desired outcomes, need to change – there must be a clear linkage between how we operate our agency & commit our resources (HR, $, & technology) and which results we achieve (or don't achieve) – **this process <u>aligns</u> our means with our ends**

3. <u>**Implementation**</u> – **success in implementation occurs when expected outcomes are secured** – there are a host of tools available to public managers in program design & implementation – each tool has its own assumptions, benefits, & limitations - must match the right tool to the right challenge & then utilize it correctly – these are tools which structure collective action towards solving a public problem

4. <u>**Evaluation**</u> – objectives are **SMART** (%, #) - metrics for objectives - progress reports – process evaluation – outcome evaluation – **success, theory failure, program failure**

Strategic Management
Is What Makes This Work
(Starling, 2008)

4. Evaluation

✓ **Consists of: 1) Performance Measurement & 2) Program Evaluation**

➢ <u>**Performance Measurement**</u> is the ongoing monitoring and reporting of program accomplishments – **is the program progressing towards established goals?** **Use of progress reports.**

➢ <u>**Program evaluation**</u> is carefully collecting information about a program or some aspect of a program in order to make necessary decisions about the program – **able to measure the effectiveness, efficiency, & equity of a program** – **outcomes** - tests the hypothesis about whether a program achieved its intended outcomes (Kettner, Moroney, & Martin,1999).

<u>**3 program scenarios are possible**</u>:

- **Successful program** – outcomes are achieved
- **Theory failure** – outcomes are not achieved as a result of the hypothesized relationships between the causes and effects being incorrect – **program design problem**
- **Program failure** – program not implemented as designed – intervention integrity compromised – hypothesis never really tested – **program implementation problem**

Strategic Management
Is What Makes This Work
(Starling, 2008)

<u>Evaluation</u>

What are the challenges in defining outcomes in the public sector?

- **Problems collecting the performance data or agreeing upon the performance measures**

- **You are holding us responsible for outcomes which are influenced by factors we cannot necessarily control**

- **Time takes time** – results may not be evident in the short run

- **Proving the invisible** – when it comes to programs which prevent, how do we prove it worked?

Strategic Management
Is What Makes This Work
(Starling, 2008)

<u>**Evaluation**</u>

Know the distinctions between these types of measures or indicators – your definition of program success or failure may vary greatly depending on which one (s) you select! Your program may consume a lot of <u>inputs</u> & generate a lot of <u>outputs</u> but may not change <u>outcomes</u> – measuring by outputs is certain to artificially inflate program success or even mask program failure – **a program is deemed to be <u>effective</u> based on its ability to change outcomes**

- **Inputs** – various resources need to run the program
- **Process** – how the program is carried out
- **Outputs** – units of service (i.e., number of children served)
- **Outcomes** – impacts on the clients receiving services (i.e., did reading levels among children in the after-school reading program improve?)

Performance Measures

Must match measures to mission – the performance measures you select must be measuring the defined mission & goals of the organization **The wrong measures never lead to the right conclusions** – if you select the wrong performance measures, you can be led to invalid conclusions about the program which hurts your ability to make important decisions about the future of the program.

"What happens if one of the programs we do as a result of the process does not work?"

- **Successful people and organizations experience setbacks – they are normal, natural, & to be expected -** *"The man who makes no mistakes does not usually make anything."* - Edward John Phelps

- Well researched & designed programs – effectively implemented & then properly evaluated – may not achieve desired results – may not completely fail but just underperform - so what do we do?

- **Although too often we do not incentivize/reward calculated risk taking in the public sector -** *We cannot allow the fear of failure to rule our lives*

- **Use it is as a teachable moment in the organization**

- **Recognize & reward the employees** who brought forth the initiative and implemented it – do not allow anyone to think that they can never fail with a new initiative or it will be the end of their career - too often in the public sector, we quickly set aside our successes and never forget/obsess on our failures (back in 1988, so and so did that and it did not work and so no one ever wants to do it again) and **we can allow failure to govern us & our future – we do not want employees to get the message that innovation and risk taking is to be avoided**

- Absorb & teach the right lessons from the experience - Utilize the evaluation to 1) reform the program to make it successful <u>or</u> 2) terminate the program and redirect those limited resources to an effective program

- *Successful people and organizations fail up and fail forward!*

Planned Organizational Change
(Kotter, 1996)

- **Create a sense of urgency** – if the need for change is not effectively communicated and perceived as urgently needed, change may not occur

- **Build a change coalition** – create a broad coalition of internal & external actors invested in change - build support at all levels within the organization – identify and neutralize opponents

- **Create a compelling vision and effective strategy** – develop a practical game plan to inspire support by showing the benefits to be realized and how success will be achieved

- **Communicate the vision effectively** – change coalition members must repeat the change message many times & must consistently communicate the behaviors associated with the change through their words and actions

- **Empower employees to act on the vision** – identify and remove barriers to change – provide resources to facilitate action

- **Produce early and visible victories** – nothing sells like success – momentum is created by highly visible short-term victories

- **Build on progress, preserve gains & push forward** - align operations with outcomes – reward change agents (personnel is policy – change policies require change personnel)

- **Institutionalize innovation within the organizational culture** – this cements successful change – employees and stakeholders not only embrace this specific change but the culture comes to see change as a positive force in organizational life
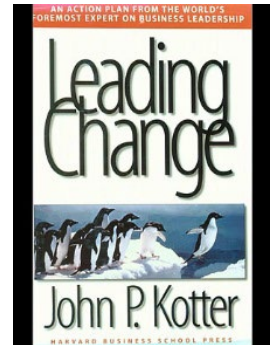
Let's Start The Process!

R,V,M,G,Os

1. Think about a **SWOT** analysis (strengths, weaknesses, opportunities, threats) of the city, organization, and your area of organizational responsibility

2. Bring a solid understanding of **the history** of your area of organizational responsibility – it helps to know the past when charting the future

3. Have a good sense of the **community and citizens** we serve and what they value

4. Have an excellent understanding of our **capacity** as city government to effectively execute (e.g., a plan divorced from the reality of our capacity to pull it off will not succeed)

Let's Continue The Process!

O,S,T,I,E

5. Identify some specific objectives for both the organization and your area of responsibility (objectives need to be **SMART** – specific, measurable, applicable, realistic, and time-bound – if it cannot be measured, it's not an objective – a generic example would be to improve customer satisfaction by 10% within 12 months)

6. Action plans O1 – S1 – T1, T2, T3 – E1

7. Means of evaluation/accountability

8. Approval & implementation & evaluation – review implementation issues checklist

Where Do We Go From Here?

The Process

✓ **Orientation**

✓ **Research on city and city government**

✓ **Interviews – SWOT Analysis, Discuss, M, V, V, G, and O – discuss implementation plans – shape electronic survey**

✓ **Electronic Survey - ID M, V, V, G, O – discuss elements of implementation plans**

✓ **Strategic Planning Workshop**

- **Overview of SP**
- **Discuss Research – SWOT, History, Community, Capacity**
- **ID & Confirm M, V, V, G, and O**
- **ID S, T, & E for each O – draft action plans for each O - address resources & capacity required for each action plan**

- **Draft Plan Review by City Manager**

- **Final Plan Approved by the City Council**

- **Implement & evaluate**

Strategic Plan – Key Concepts

- **A major focus is objectives**

- **Objectives are SMART**

- **Specific**

- **Measurable**

- **Actionable**

- **Realistic**

- **Time-bound**

- <u>Example:</u> The city will improve customer satisfaction by 10% in 12 months with this specific service.

Strategic Plan – Key Concepts

- **Please bring your M, V, V, G, and O to our interviews and be thinking of major elements of the summary implementation plan for each objective (more detailed implementation plans may be developed for different objectives by the staff team depending on the objective)**

- **Review action plan template**

- **Review sample action plan**

- **Review progress report example – report progress – ID any needs for resources to be supplied/obstacles to be removed**

The Process:

- ☑ Orientation
- ☐ Research
- ☐ Interviews
- ☐ Electronic Survey & Community Events
- ☐ Workshop
- ☐ Plan
- ☐ Implementation
- ☐ Evaluation

QUESTIONS?

Strategic Planning Process Schedule

Schedule

Orientation

Interviews

Electronic Survey/Community Events

Strategic Plan Workshop

Final Plan Due

Sources

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Strategic Plan Orientation Session

Council Meetings and Workshops

Council Meeting Date	Hard Due Date for Agenda Items
5/6/2024	4/24/2024
6/3/24	5/22/24
8/5/24	7/24/24
9/9/24	8/28/24
10/7/24	9/25/24
11/18/24	11/6/24
NO DECEMBER MEETING	

Potential Workshop Date	Hard Due Date for Agenda Items
4/10/24 Strategic Planning Seminar	3/27/24
5/20/24 Budget and Finance	5/8/24
6/19/24 Lake Level Status	6/5/24
8/14/24 Street Scapes	7/31/24
10/16/24 Christmas Events	10/2/24
NO DECEMBER MEETING	

Strategic Plan
Orientation Session
Time and Date
Location

1. **Introduction – Mayor Nina Rodenroth & City Manager Charlie Van Zant**

2. **The Strategic Planning Process – Dr. Joe Saviak**

   - **Research, Orientation, Interviews, Electronic Survey, Community Events, Workshop, Plan, Implementation, Evaluation**
   - Research
   - Orientation
   - Interviews with the City Council and the administrative leadership team
   - Electronic Survey and Community Events
   - Strategic Planning – PPT Presentation
   - Identify potential V, M, V, G, and objectives before SP Workshop
   - Develop action plans for each objective – examples
   - Progress reports on objectives – examples
   - Implementation Issues Checklist – best practices for Implementation Plans

3. **Closing Remarks - Mayor Nina Rodenroth, City Manager Charlie Van Zant**

Strategic Plan Implementation

<u>Issues Checklist</u>

All summary action plans (one page) within the strategic plan contain these major elements: strategy, tactics, resources required, timeline, person responsible, and metrics. More detailed and actionable implementation plans may be needed. Issues in summary and more detailed implementation plans which might need to be considered or effectively addressed under strategy, tactics, resources required, person responsible, and metrics could include:

- ✓ Research into best practices/model policies
- ✓ Alignment of operations with objectives
- ✓ Personnel
- ✓ Supervision
- ✓ Training
- ✓ Legal/regulatory issues
- ✓ Policy
- ✓ Budget
- ✓ Facilities/Space/Storage
- ✓ Equipment
- ✓ Technology
- ✓ Procurement
- ✓ Partnerships
- ✓ Contracts/MOUs
- ✓ Internal/External Communication
- ✓ Accreditation
- ✓ Means of Data Collection and Analysis for Metrics

<u>Key recommendations for a successful SP process:</u>

- ✓ Think through the entire production process of that specific objective and cover all major action steps
- ✓ Different objectives will require different degrees of detail – provide sufficient content for each element as needed
- ✓ Be certain about the problem/need/opportunity, the cause(s), and the right solution(s)
- ✓ Consider all potential tools/resources/options to achieve the objective
- ✓ Standardize to best practices
- ✓ Answer all potential questions
- ✓ Expect leadership, staff, and stakeholder feedback

DR. JOE SAVIAK

Dr. Joe Saviak is an experienced senior executive, leadership and management consultant, author, researcher, attorney, and college professor. He has served on senior management teams responsible for significantly improving the performance of agencies with over 1,000 employees and annual budgets in excess of $100 million. He has also worked as an executive in the private sector. He is often asked to speak to audiences of public, private, and non-profit sector executives and professionals on strategies for success in the 21st century. He teaches the principles, strategies, and skills of effectively leading and managing change. Optimizing organizational performance is the focus of his advising, teaching, and research.

He received his Bachelor of Arts Degree and Master of Arts Degree both in Political Science from the University of Florida. He earned his law degree from the Florida State University College of Law. He received his Master of Science Degree in Criminal Justice and his Ph.D. in Public Affairs from the University of Central Florida.

He has taught leadership to over 1,500 executives, managers, and supervisors in Florida and addressed thousands of leaders and professionals here and abroad at conferences. He often conducts training on a wide range of topics involving leadership, management, and organizational performance for private and public sector and non-profit entities. He has overseen studies and research for a number of clients. Dr. Saviak has co-authored several articles, a textbook, and research involving public-private partnerships (P3s) and transportation policy and co-authored a guide for state and local officials on contracting and P3s.

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Example of an Action Plan for an Objective

*this is a theoretical example – it's just to give everyone a sense of the format & content of what we are doing today

Objective: Increase participation in the Career/College Readiness Program by 20% in 2 years

Strategy: Recruitment partnerships and pipelines with organizations who serve/engage/communicate with the target population

Tactics: 1) Ask each organization to partner and enable Fostering Connections to share information with their clients/contacts/members/staff about these services 2) Ensure consistent and effective communication to these prospective clients via the partner organization's channels of communication (e.g. speak at meeting, speak to staff about referrals, social media, email/text list, direct mail, e-newsletter, etc.) 3) Meet with referred clients from these partner organizations to discuss services/facilitate recruitment

Resources Required: recruitment materials (print and electronic), recruitment budget, database to track individuals/efforts/results, etc.

Timeline: January-March – develop/produce recruitment materials, contact potential partners, March-June -

Person Responsible: CEO

Metric (s): 1) Comparison of 2019-2022 program participation with 2023-2024 program participation 2) Assessment of productivity of each partnership 3) Assessment of productivity of each recruitment tactic.

Strategic Plan Progress Report Example

DATE: April 2, 2023

TO: Board of Directors of Fostering Connections

FROM: Aubrie Simpson-Gotham, CEO, Fostering Connections

RE: First Quarter 2023 Strategic Plan Progress Report

This is a progress report on Strategic Plan Objectives 1-7 for the first quarter of 2023.

Objective #1 – Increase participation in the Career/College Readiness Program by 20% in 2 years – met with six potential partner organizations who agreed they would share information from Fostering Connections with their staff, clients, and contacts about our Career/College Readiness Program three times a year through their best communications channels reaching __# potential program clients.

Objective #2 –

Objective #3 –

Objective #4 –

Objective #5 –

Objective # 6 –

Objective # 7 –

Action Plan

Objective:

_____

_____

Strategy:

_____

_____

Tactics:

_____

_____

_____

_____

Resources Required:

_____

_____

Timeline:

_____

_____

Person Responsible: _____

Metric (s):

_____

_____