

STRATEGIC PLANNING 101

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Lake County, Illinois

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Manager for Structural Innovation
Fort Lauderdale, Florida



Let's Begin with the End in Mind

What's the Purpose of Strategic Planning?

- To provide an opportunity to establish **priorities** from the community and organization perspectives
- To connect strategic **priorities** to funding and operations
- To **inspire** staff and generate **awareness**
- To guide decision-makers and staff
- To attract residents, businesses, employees
- To articulate your **plan for success!**



**Satisfaction with the courteousness
and professionalism of
Fort Lauderdale employees
increased 10% since 2012.**

2014 NEIGHBOR SURVEY

www.fortlauderdale.gov/neighborsurvey

THANK YOU FOR BUILDING COMMUNITY!



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**Neighbor satisfaction increased
15% with enforcing codes to
maintain business property.**

2014 NEIGHBOR SURVEY

www.fortlauderdale.gov/neighborsurvey

THANK YOU FOR BUILDING COMMUNITY!



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And now...

- What strategic planning is
- What strategic planning is NOT
- What strategic planning can be

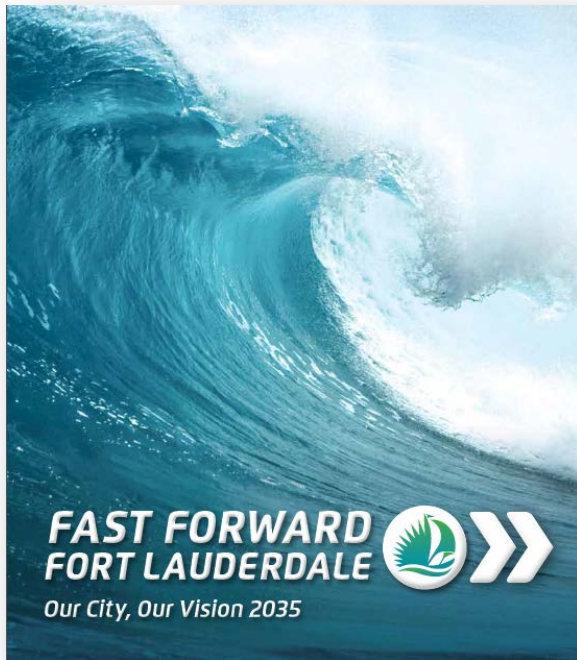
Our plan today is to provide you a foundation of strategic planning steps, with our stories and examples along the way.

What Strategic Planning is....

- Your plan for success
- Your method to tie long term goals to shorter-term actions
- Your chance to say no, we can't do that!
- Aspirational, but with actions

What Strategic Planning is....

VISION



LONG-TERM

STRATEGY



MEDIUM-TERM

ACTION



SHORT-TERM

What Strategic Planning is NOT...

- An exclusive club
- A never-ending wish list
- A plan on a shelf
- An academic exercise
- A one-time event
- Separate from operations

What Strategic Planning is NOT...



What Strategic Planning can BE...

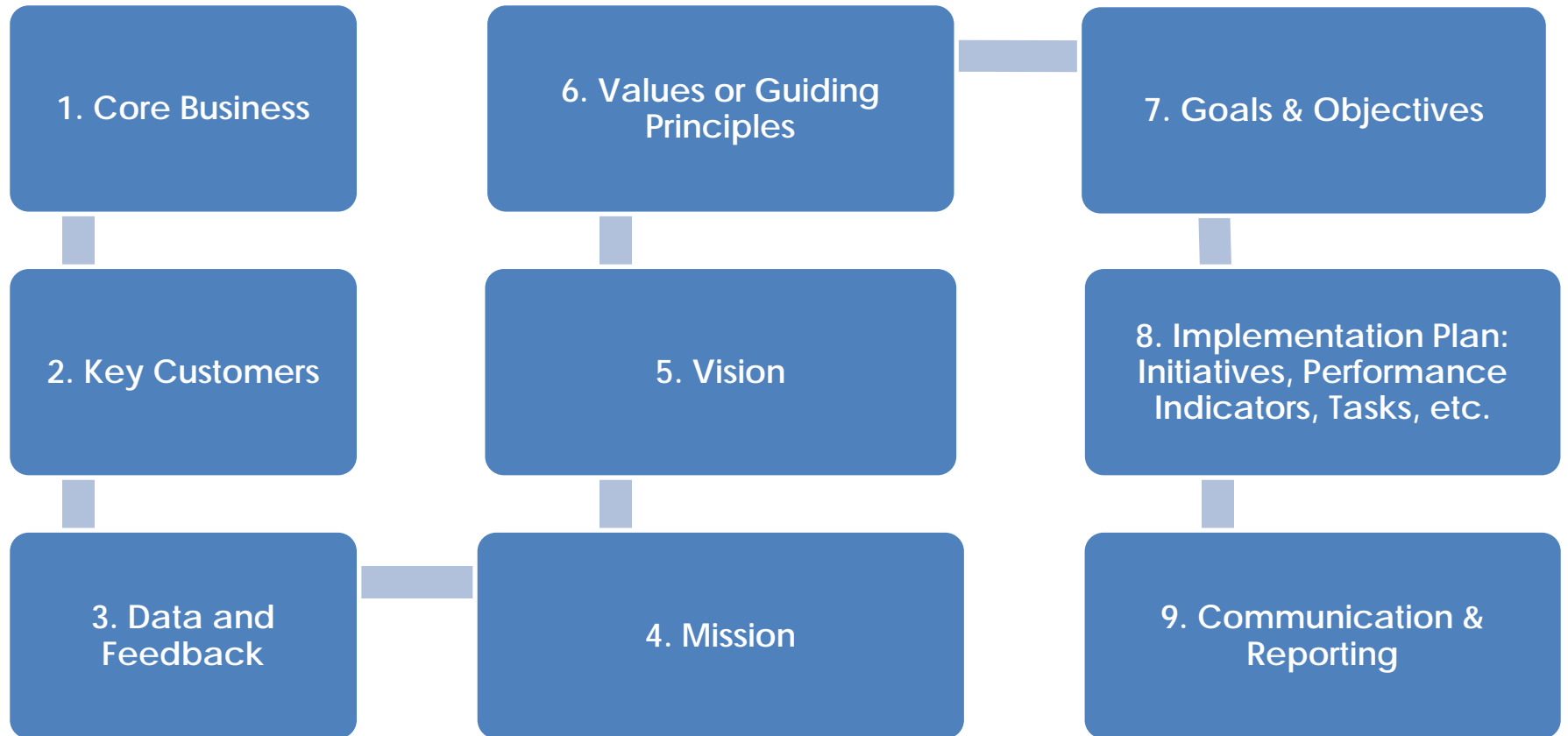
- Many different techniques to gain input & prioritize
- Vary by comprehensiveness, time needed, level of detail,
- Try a few & find what works for your community
- It's all about you!

POLL QUESTION

Tell us about your organization!

1. City
2. County
3. Consultant
4. Other

Strategic Planning Process Steps: the Fundamentals



BUT! Develop Your Approach...ask

- What do you have already?
- What data or resources can you use from other organizations?
- How & how much do you want to engage public, employees, & customers?
- How far down the 'rabbit hole' do you want to go?

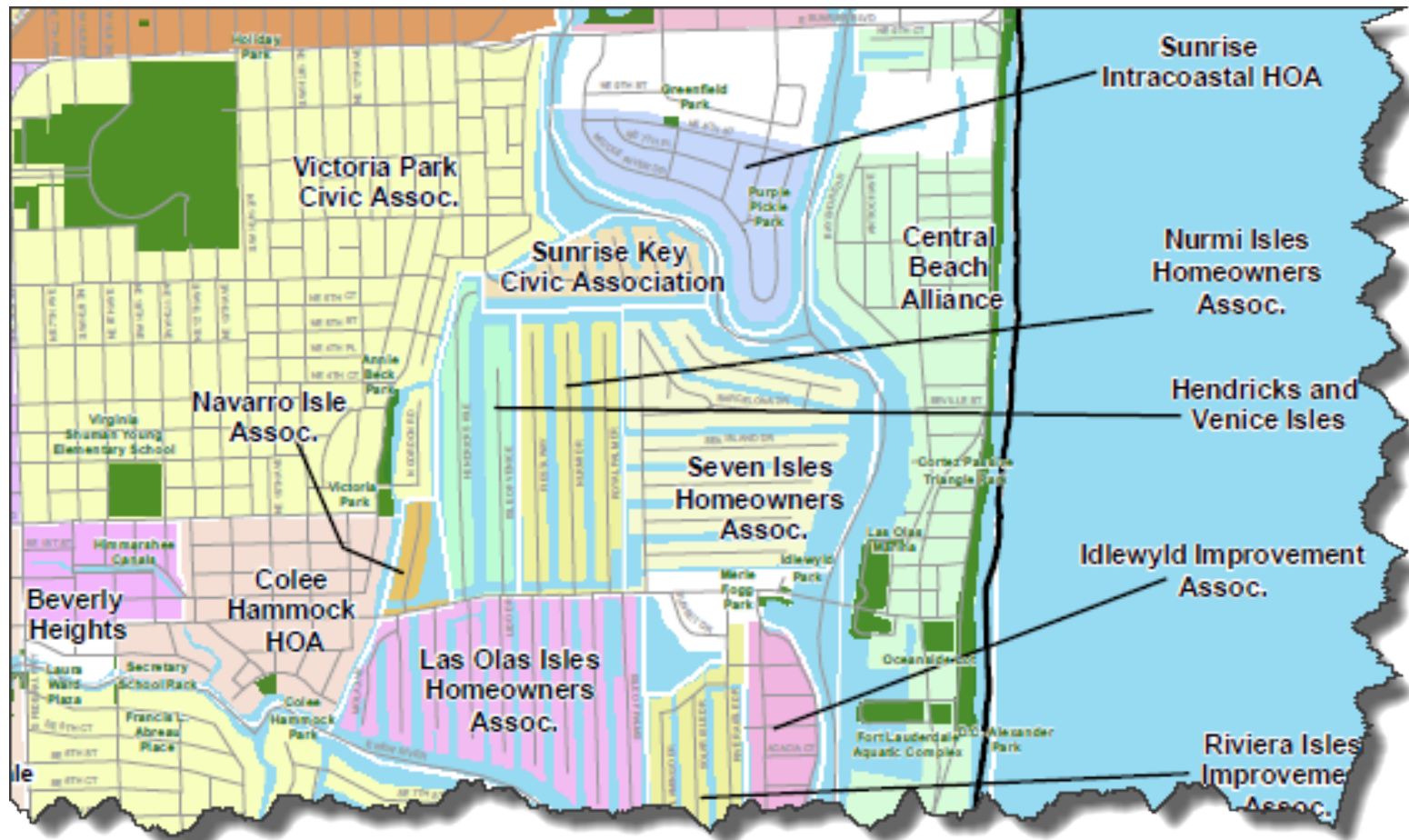
Core Business Inventory

- ✓ Elections
- ✓ Tax extension
- ✓ Records
- ✓ Licenses

Succinctly describe what your city/township/county does.

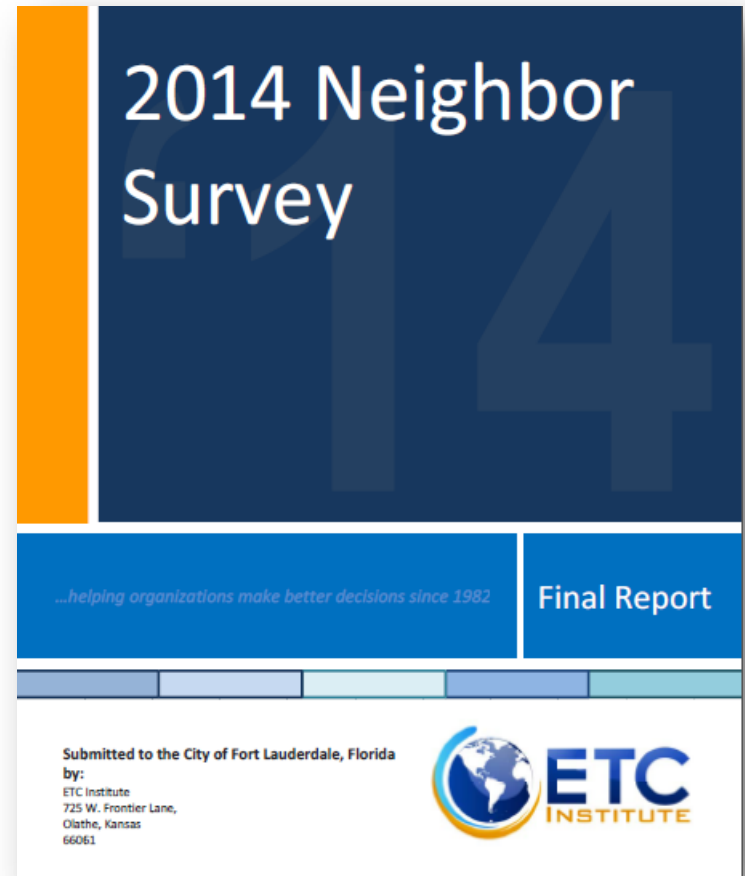


Who are your Key Customers?



What are your customer priorities and needs?

- Overall satisfaction with City Services is significantly above the national average
- Residents feel the City is moving in the right direction.
- Notable improvements from 2012 to 2014
- Issues that should continue to be high priorities for the City over the next 2 years



How to Gather Data and Input

Beginning Tools

- Techniques to start the conversation
- Encourage input & sharing ideas
- Focus the conversation

Examples:

SWOT, Cylinders of Excellence Teams, 3/3/3,
other examples

SWOT



Internal Weaknesses:



Internal Strengths:



3/3/Free



Keep It!
Things You Love

Keep It!

- List 3 things you love about your town
- Most Important to You



Kick It!
Fix This First

Kick it!

- List 3 things you want the city to fix or improve
- Fix this first

3/3/Free

Conjure - Free 3 (minutes)

- Write anything you want the City to know
- Doesn't have to be Strategic or Visionary
- Add Roundabout at 123 Maple
- Connect sidewalk from school to my neighborhood – Whispering Willows
- More shopping opportunities

Tips & Tricks – Collecting Input

- Use Technology
 - Virtual or Telephone Town Hall
 - Online Tools (budget calculator, poll)
 - Polling Devices
 - Snap and send
 - Text Polling



2013 STRATEGIC PLAN COMMUNITY FORUMS

FY 2013-2014 Budget Calculator

Lake County recently held a series of community forums and obtained input into its strategic plan. The public generally agreed with the existing five strategic goals. There was also general consensus to add new goals related to education, government efficiency, property taxes, and citizen engagement. The forum participants also wanted to see additional emphasis on transparency and communication as overarching value statements.

The Lake County Board wants your input on which priorities/strategic goals you value most.

For this exercise imagine that you have \$100 to achieve the results below. Where would you invest your money? You can allocate your \$100 in any way, but your total must always equal \$100.

The Lake County Board will consider this input, along with the input from the forums, and other means as it develops its strategic plan in the coming weeks. Therefore, this public input period will close on April 8, 2013. We will use your email address to communicate with you as this process moves forward.

Strategic Goal	Strategic Statement	Example Services	Total
Enhance Livable and Economic Opportunities	Lake County fosters balanced growth, well maintained communities, and a diverse economy to provide living wage jobs, housing, and economic opportunities for all citizens.	<ul style="list-style-type: none"> • Businesses attraction and retention • Development of shovel-ready sites • Housing assistance • Job assistance and training 	0
Promote a Sustainable Environment	Lake County preserves the health of our natural resources and our drinking water through the widespread use of sustainable and environmental management practices, effective storm water management and enhancement and rehabilitation of lakes, wetlands and other fragile ecological systems.	<ul style="list-style-type: none"> • Reduction of pollution in lakes and streams • Utilization of renewable energy sources such as wind and solar • Recycling and composting • Preservation of clean and safe drinking water 	0
Build Healthy and Resilient Communities	Lake County maintains the well-being of residents, provide access to health services for families, the aging population, and other populations in need	<ul style="list-style-type: none"> • Accessible health and wellness services (mental, dental and primary care) and prevention programs • Veterans assistance • Affordable housing 	0

Public Meeting Tips & Tricks

1. Have a strategy that requires participants to prioritize
2. Have a parking lot
3. No idea is a bad idea

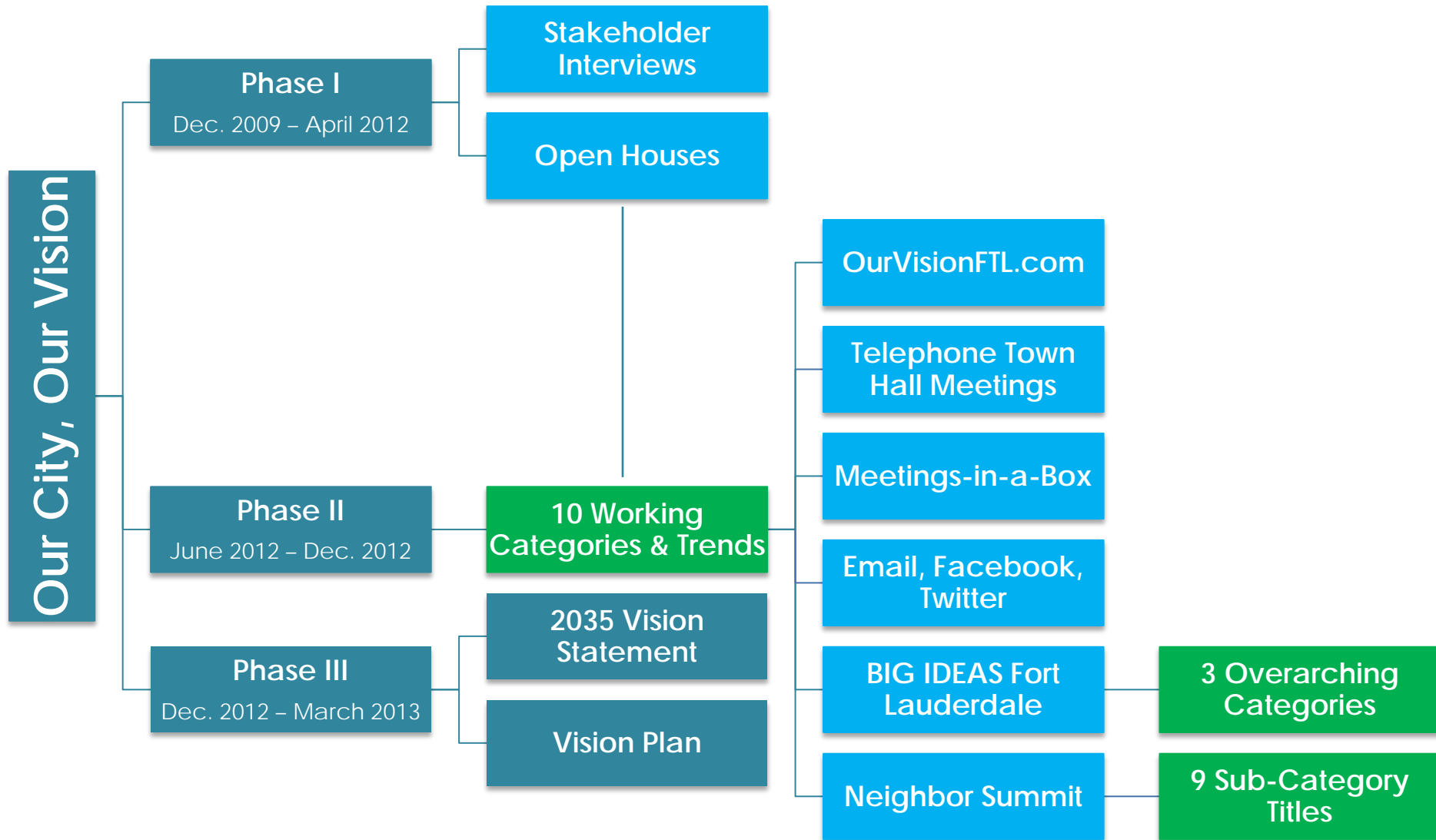


CITY OF FORT LAUDERDALE



WE BUILD COMMUNITY

Diversification of Outreach



Telephone Town Hall Meetings

2,102

20 Min.+ Callers

41,388

Total Callers

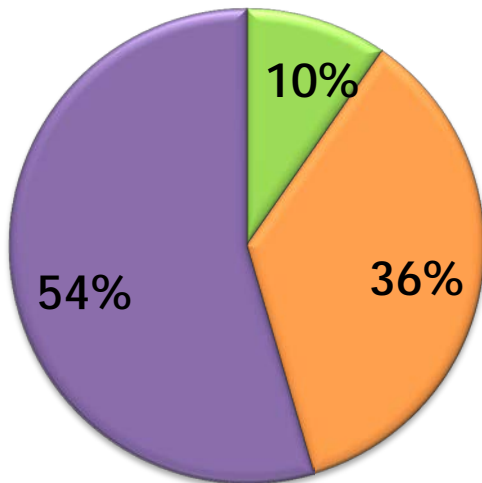
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Ideas

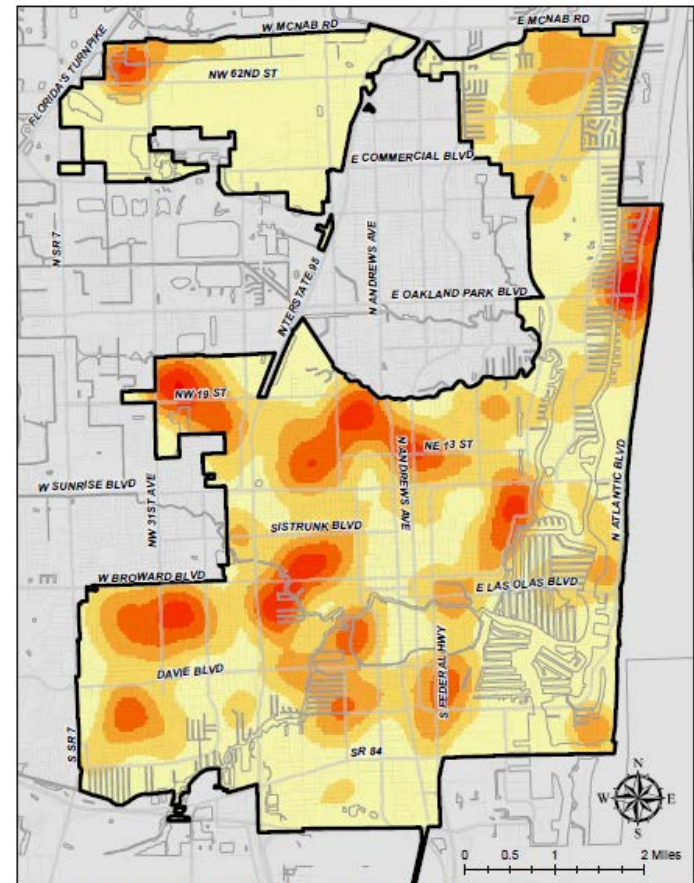


Telephone Town Hall Meetings

How Pedestrian Friendly do you Find Fort Lauderdale?



- Very Pedestrian friendly
- Certain areas are more walkable than others
- Needs a lot of improvement



TELEPHONE TOWN HALL MEETING
CALL-IN HOT SPOTS - AUGUST 1 MEETING

\\GIS\1\Projects\112_MGR_TownHall_Meeting_June\ArcMap\TownHallHotSpotAug.mxd



Meeting-In-A-Box



 **Fort Lauderdale**
our city,
our vision

SEEKING BIG IDEAS

**DO YOU HAVE THOUGHTS ON FORT LAUDERDALE'S FUTURE?
THEN HOST A "MEETING IN A BOX."**

A portable version of a community meeting, it's a chance for you to host a small gathering with your neighbors to get their input on the future of our city. Best of all, you can host the meeting at a time and a place that's convenient for you.

Call (954) 828-5289 to reserve your box today.

FOR MORE INFORMATION
JOIN US: QURVISIONFTL.COM
VISIT US: FORTLAUDERDALE.GOV/QURVISIONFTL
EMAIL US: qurvisionftl@fortlauderdale.gov
LIKE US: FACEBOOK.COM/QURVISIONFTL
FOLLOW US: @QURVISIONFTL

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600+
Participants

389
Ideas



BIG Ideas Fort Lauderdale



9

Provocateurs

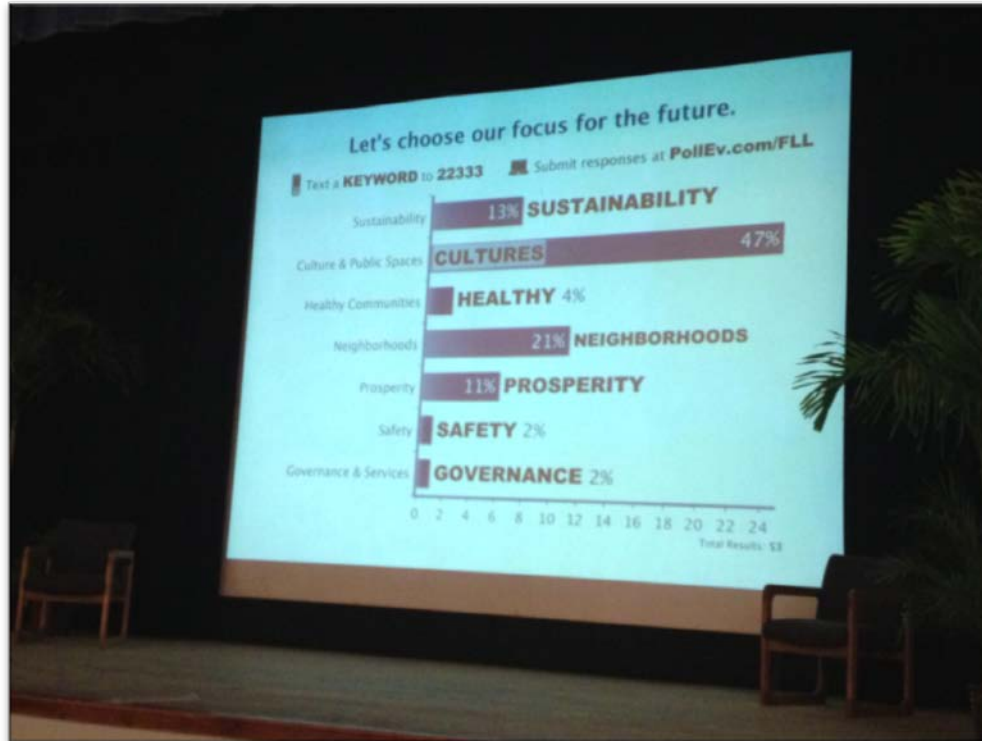
79

Participants

214

Ideas

Neighbor Summit



110

Participants

154

Ideas

11

Kids



WE ARE CONNECTED.

We move seamlessly and easily through a safe transportation system where the pedestrian is first.



WE ARE READY.

We are a resilient and safe coastal community.



WE ARE COMMUNITY.

We are a neighborhood of neighborhoods.



WE ARE HERE.

We are an urban center and a vacationland in the heart of South Florida.



WE ARE PROSPEROUS.

We are a subtropical City, an urban laboratory for education and business.



WE ARE UNITED.

We are a strong and vibrant kaleidoscope of multi-generational cultures, ethnicities, and community partners.

**We are Fort Lauderdale, a community of choice.
We are the City you never want to leave.**



POLL QUESTION

Tell us about your involvement with strategic planning:

1. My plan is in need of serious help
2. My organization is a strategic planning superstar
3. My organization has a plan, but I don't know anything about it
4. We have no plan



LakeCounty

Strategic Plan

Adopted April 2015



For more information, visit www.lakecountytill.gov.

Mission Statement

Lake County government is committed to promoting and sustaining a safe, healthy, vibrant and environmentally responsible county, while maintaining its strong financial position. In partnership with citizens, communities and all levels of government, we pledge to deliver efficient and high quality public services consistent with the community's values and priorities.

Vision

We envision Lake County as a leader in developing a thriving and robust local economy, healthy natural environment, safe and livable communities, healthy residents, and innovative public services that are responsive to the diverse needs of all residents.

Statement of Values

Lake County government carries out its mission and conducts its responsibilities adhering to the following values:

We Value Fiscal Responsibility

Uphold impact operationally all o... make performance-driven decisions based on long-term... sustainable and prudent financial... maintain strong reserves, and AAA financial... strong security and accountability for

W
D
p

Mission Statement

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Vision

We envision Lake County as a leader in developing a thriving and robust local economy, healthy natural environment, safe and livable communities, healthy residents, and innovative public services that are responsive to the diverse needs of all residents.

Guiding Principles or Values

We Value Fiscal Responsibility

Uphold fiscal integrity, make performance-driven decisions based on long-term impacts, manage priorities and maintain sustainable and prudent financial operations. This includes: a balanced budget, strong reserves, and AAA financial rating, with a commitment to transparency, honesty, reliability and accountability for all our actions.

We Value Exceptional Service

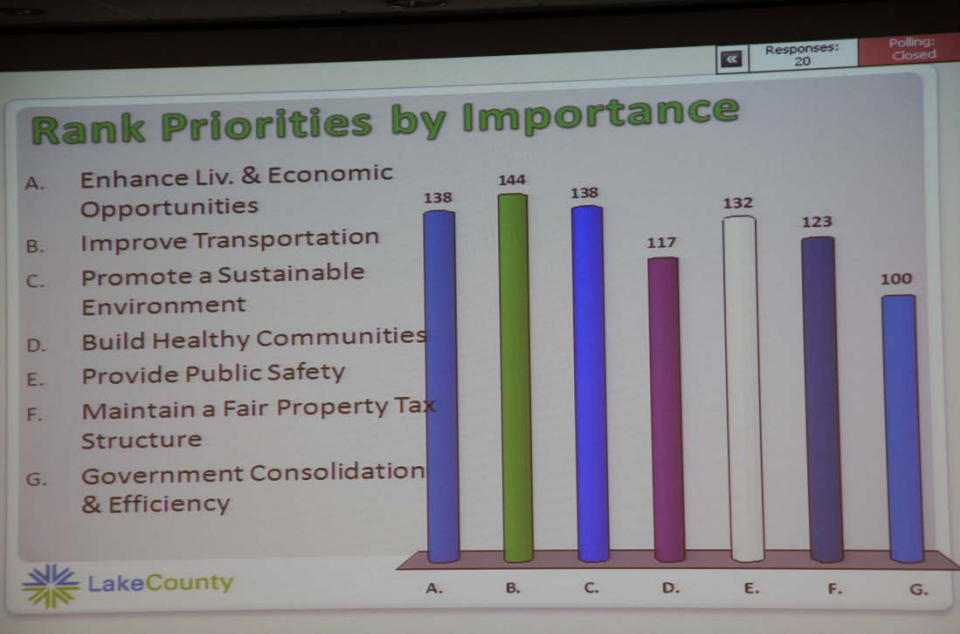
Deliver cost-effective, efficient and high quality services, placing a high value on professionalism, responsiveness and courtesy.

We Value Leadership

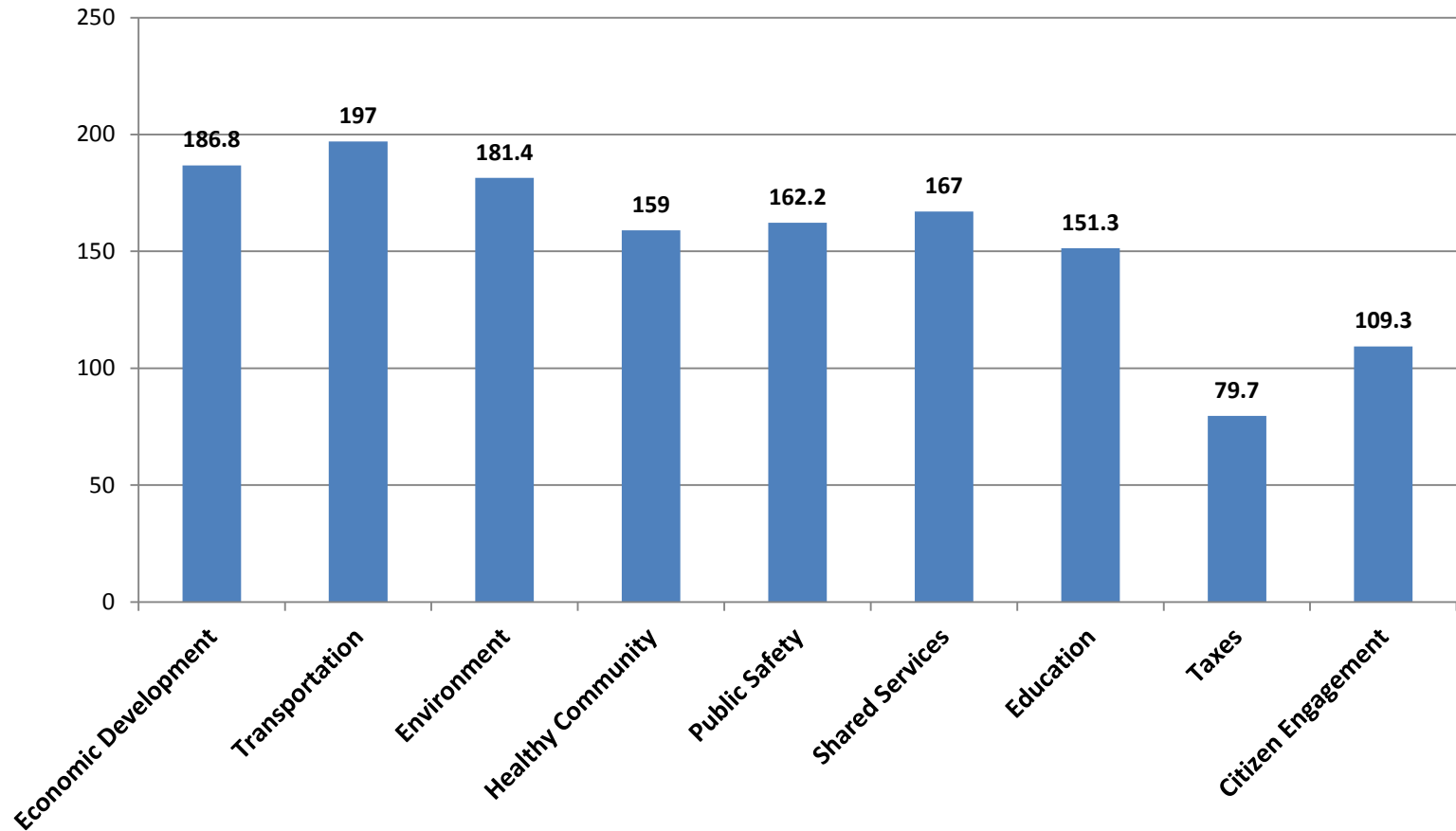
Provide leadership in communicating, interacting and cooperating with residents, businesses, other governments, and stakeholders leading to innovative regional collaboration and improved quality of life throughout Lake County. Pursue opportunities for increased efficiency and cost savings by collaborating with other government entities.

We Value Environmental Stewardship

Promote and encourage environmental sustainability.



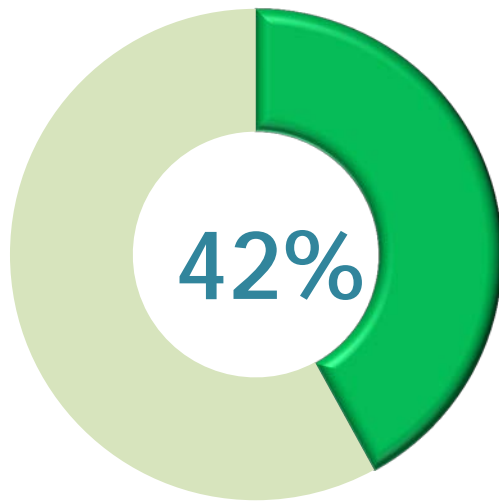
Goals



2013 Forums - Consolidated Results

Goals





of the 1,562 Vision Plan ideas are incorporated into the Strategic Plan

CITY OF FORT LAUDERDALE



WE BUILD COMMUNITY



INFRASTRUCTURE GOALS AND OBJECTIVES

1. Be a pedestrian friendly, multi-modal City.

1. Improve transportation options and reduce congestion through working with agency partners.
2. Integrate transportation, land-use, and planning to create a walkable and bikeable community.
3. Improve pedestrian, bicyclist, and vehicular safety.



2. Be a sustainable and resilient community.

1. Proactively maintain our water, wastewater, road, and bridge infrastructure.
2. Reduce flooding and adapt to sea level rise.
3. Improve climate change resiliency by incorporating local, regional, and mega-regional plans.
4. Reduce solid waste disposal and increase recycling.
5. Improve air and water quality and our natural environment.
6. Secure our community's water supply.

01

OBJECTIVE 1:

Improve transportation options and reduce congestion by working with agency partners

STRATEGIC INITIATIVES:	LEAD:	PARTNERS:
1. » Strategically route and expand the Sun Trolley as an overall complement to upcoming major transportation projects	Transportation and Mobility (T&M)	DDA, TMA
2. » Monitor All Aboard Florida implementation, and advocate for the City's best interest	T&M	DSD, DDA, All Aboard Florida, MPO, SFRTA
3. » Work with partners to construct the Wave Streetcar, including the Transit-Oriented Development (TOD) ordinances and connections to airport, port, and rail stations	T&M	DSD, DDA, BCAD, BCT, MPO, PE, SFRTA
4. » Improve bus and mass transit amenities such as shelters and incorporate green design when feasible	T&M	DSD, BCT, FDOT, MPO, TMA, Wave
5. » Work with partners to plan for the construction of Central Broward East-West Transit (light rail) Project in 2020	T&M	BCT, FDOT, MPO
6. » Partner with agencies and businesses to increase commuter car-pooling and to incentivize and encourage mass transit use	T&M	DDA, BCT, FDOT, GFLCC, SFCS, SFRTA, Tri-Rail
7. » Develop balanced public/private parking amenities that address future changes in modal share, such as motorcycles and scooters. Incorporate innovative design and sustainable practices that reduce greenhouse gas emissions	T&M	DSD, DDA, B-Cycle, Private Parking Associations,
8. Implement the Broward Boulevard Gateway project to reduce congestion and calm traffic through transit planning and investment improvements to east-west connections, including: traffic signal synchronization, streetscapes, and review of traffic flow patterns in the downtown	T&M	DSD, BCT, FDOT, MPO
9. Implement and monitor the parklets pilot program	Sustainable Development (DSD)	T&M
10. Incorporate university talent and knowledge into the planning and design of urban areas	DSD	FAU, FIU

Connect to Commission and the Budget!

City of Fort Lauderdale Transportation and Mobility Department

BUSINESS PLAN

Fiscal Year 2016

(10/1/15 through 9/30/2016)

Date: April 10, 2015

Approved by:



Diana Alarcon, Department Director



Susanne M. Torriente, Assistant



WE BUILD COMMUNITY

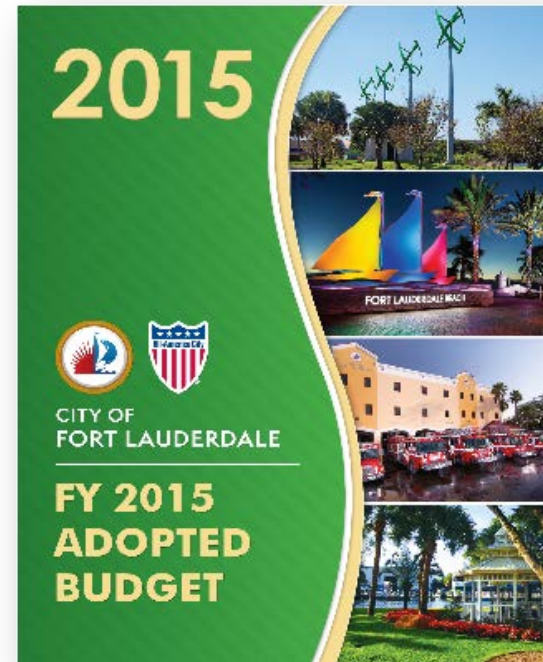
From Vision & Strategy to **ACTION**

Department & Division
Descriptions

Department Objectives to
support Strategic Plan

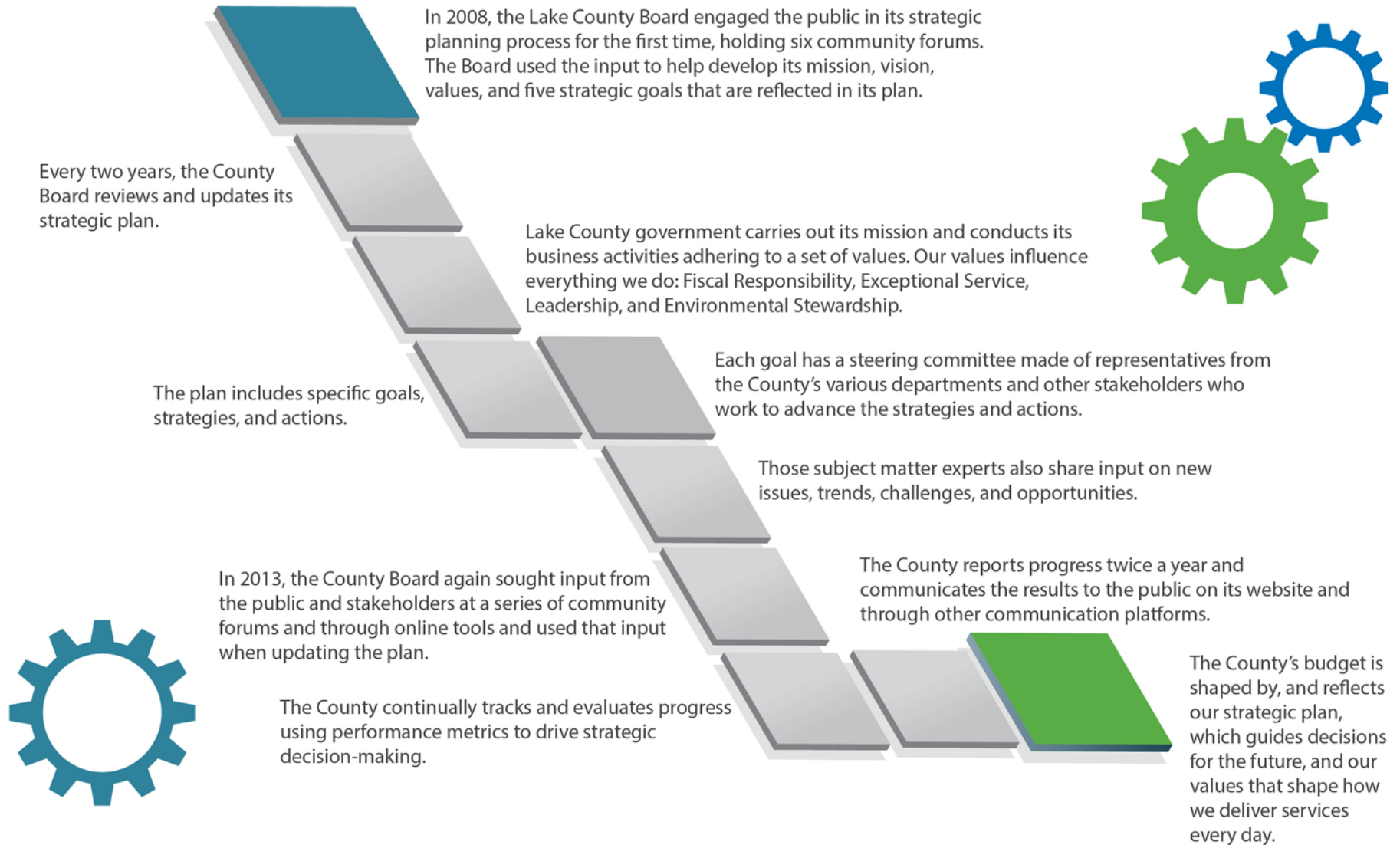
Performance Measures

Targets



Strategic Plan Road Map

The County Board adopts a strategic plan that is used to help guide the future of the County, and influence budget and policy decisions.



After the Plan

Department Operational Work Plans

Goal:

Promote a Sustainable Environment

STRATEGIC STATEMENT: *Preserve the health of our natural resources, air quality, and our drinking water through the widespread use of sustainable and environmental management practices, effective stormwater management, and the enhancement and rehabilitation of lakes and other ecological systems.*

Strategy: Implement renewable energy technologies and incorporate green practices in the delivery of County programs and services where cost effective.

Action A: Modify County purchasing policies and practices to request, where applicable, green alternatives for products and services.

Action B: Collect and share information about contractors and vendors that use or offer energy efficient, reused or recycled content products and materials, as well as those vendors who use green operational practices.

Action C: Change purchasing documentation to require vendors to report green practices (when tracked) and use that information to evaluate opportunities to be more sustainable in current and future procurements.

Action D: Draft, adopt, and implement policies and ordinances that support wind, solar, and geothermal energy facilities County-wide to encourage renewable energy technologies in appropriate locations.

Action E: Review County policies and practices and consider sustainability, along with business factors, and where appropriate, implement more sustainable alternatives.

Strategy: Provide community outreach about best management and sustainable practices for our natural resources.

Action A: Partner with other governments, businesses, and other stakeholders to share information and provide cross training on green and sustainable best management practices.

Action B: Develop joint education campaigns through the Lake County Green Partnership to provide residents, businesses and other stakeholders with education on opportunities to advance sustainability in their day-to-day life and operations.

Strategy: Implement long-term solutions for increasing waste diversion through recycling and composting, reducing the toxicity of our waste, and developing a long-term disposal option that has a positive impact on energy usage, reducing key pollutants and greenhouse gases.

Action A: Implement the recommendations from the 60% recycling taskforce.

Action B: Work with SWALCO, municipalities, and other stakeholders to implement measures to reduce total waste, increase waste diversion from the landfills, and encourage composting and recycling.

Action C: Promote sustainable waste management practices, and identify and develop solutions to eliminate or mitigate barriers to waste diversion and recycling within County facilities.



Energy

Guiding Principles

- Increasing energy efficiency and reducing energy use for optimal performance
- Renewable energy sources can increase energy diversity, reduce greenhouse gas emissions and promote community resiliency
- Incorporating sustainable land use, energy efficiency, water conservation and waste reduction reflects best practices in County development projects
- Educating employees and the community at large of the benefits of sustainable land use and development, energy efficiency design and renewable energy use can promote job creation, resource conservation and cost savings

Sustainability Goals

- Optimize efficient energy use by facility type
- Track and report energy use in County facilities and set a goal to reduce greenhouse gas emissions from County operations
- Research renewable energy options for County facilities ; make recommendations if an appropriate installation is identified



Current Successes

1. The County Tower energy efficiency retrofit project reduced electric use by 1,790,000 kilowatt hours per year, thus avoiding 1,234 tons of greenhouse gas emissions
2. The County highlighted the success of its tower retrofit project through creation of outreach materials emphasizing the benefits of energy efficient work spaces

Action Plan

1. Research county-level energy policies and plans; present findings and recommendations
2. Develop an energy management control system with weather and performance measurement reporting features
3. Continue to inventory and audit buildings and rooftops to find potential energy performance improvement and renewable investment opportunities
4. Research opportunities to request bid alternates for renewable energy in future energy supply procurements; present recommendations
5. Create a greenhouse gas inventory, tracking and reporting system to document emissions reductions from County buildings
6. Collaborate with departments (including Human Resources, Communications and IT) to develop an education and recognition campaign for energy conservation efforts at all County facilities

Measures of Success

- Energy policy and plan recommendations presented
- Energy management control system created
- Inventory completed; baseline energy usage intensity established by facility
- Renewable energy procurement recommendations presented
- Greenhouse Gas Inventory completed; tracking & reporting on a yearly basis

Snapshot from Lake County Sustainability Work Plan

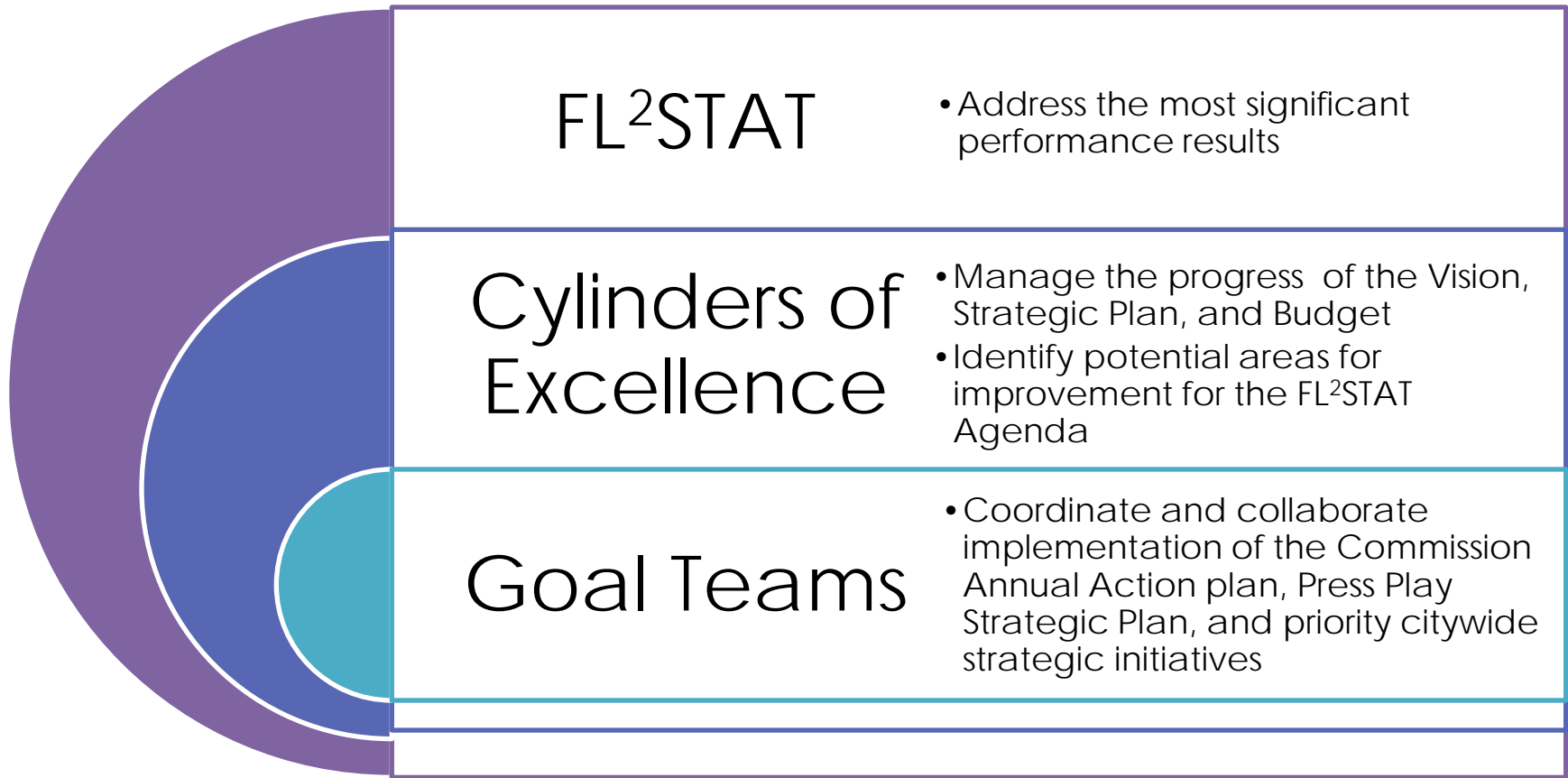


STRATEGIC OBJECTIVES AND PERFORMANCE MEASURES

- Integrate transportation land use and planning to create a walkable and bikeable community (IN 1-2)
- Reduce flooding and adapt to sea level rise (IN 2-2)

Department Objective	Performance Measures	FY 2013 Actual	FY 2014 Actual	FY 2015 Target	FY 2015 Projection	FY 2016 Target
Improve pedestrian walkability (IN 1-2)	Square feet of sidewalk replaced and repaired	*	24,953	25,000	4,520 ¹	239,000 ²
Increase resiliency to storm, tidal, and ground water (IN 2-2)	Percentage of total Phase I Stormwater projects completed (36 projects in Phase I) ³	*	15%	67%	39% ⁴	56%
	Percentage of storm drains inspected and/or cleaned twice annually	120%	107%	100%	124% ⁴	100%
	Satisfaction with the prevention of tidal-related flooding	34%	32%	33%	38%	40%
	Satisfaction with the prevention of stormwater-related flooding ⁵	34%	27%	28%	31%	33%

After the Plan: Routine, Integrated Leadership Meetings





"The best performance management programs are designed to stimulate the right kinds of conversations around the right topics."
Peter Lencioni

FL²STAT

OUR APPROACH TO EXPONENTIAL IMPROVEMENT



PUBLIC PLACES



PUBLIC SAFETY



INFRASTRUCTURE



BUSINESS
DEVELOPMENT



NEIGHBORHOOD
ENHANCEMENT



INTERNAL
SUPPORT

Monitoring and Reporting Tool: ClearPoint

City of Fort Lauderdale | Jul-13 | Default Grid

Scorecards ▾ Objectives ▾ Performance Indicators ▾ Initiatives ▾ Action Items

Default Grid
Transportation and Mobility

Objective	Performance Indicator	Initiative
↓ Increase ADA accessibility through planning and design	↓ Percentage of Sun Trolley stops that are ADA compliant.	
↑ Enhance streets to improve bicycle and pedestrian experience	↑ Number of Complete Street and Streetscape projects ready for final design.	
↑ Increase transportation options		↑ IN 1-1 WAVE Streetcar Development and Funding* Commission Annual Action Plan
		↑ IN 1-1 Monitor FEC Passenger Rail Implementation* Commission Annual Action Plan
	↑ IN 1-1 Number of B-Cycle trips from Fort Lauderdale stations	↑ IN 1-1 Trolley: Equipment, Routes, and Fares* Commission Annual Action Plan
	↑ Number of Sun Trolley riders.	↑ IN 1-2 Develop Connectivity Master Plan (Greenway/Blueway/Complete Streets)* Commission Annual Action Plan
	↓ Revenue dollars generated from TMA memberships	✓ BD 1-2 Coordinate with TMA for City Excursions for Airport Passenger Program* Commission Annual Action Plan
🟡 Foster positive interaction with the public	↑ Number of complaints received.	
🟡 Improve employee effectiveness through training (IS 1-3)	↑ Training Hours (NEW)	
	↓ Number of calls monitored with feedback provided.	
↓ Establish or update Standard Operating Procedures (SOPs) (IS 1-3)	↑ Number of SOPs completed.	
↑ Enhance the customer experience by increasing parking payment options	🟦 Annual increase in pay-by-phone transactions	
	↑ Number of multi-space meters installed.	
↑ Improve airfield infrastructure using green initiatives	↑ Number of new LED airfield lights	
	↑ Facilities constructed or converted to LEED standards (including tenant-owned)	
↑ Provide facilities and services that will help businesses prosper	↑ Total aircraft takeoffs and landings.	
	↓ Gallons of fuel sold to businesses	



Memorandum

Memorandum No: 15-092

Date: April 28, 2015

To: Honorable Mayor and Commissioners

From: Lee R. Feldman, ICMA-CM, City Manager

Re: **FY 2015 Commission Annual Action Plan - Progress Report to
Commission: Quarter 2**

I am pleased to present the second quarter report of the FY 2015 Commission Annual Action Plan (CAAP). All 19 projects are in varying stages of progress. As you will see throughout the report, my team is actively implementing the Commission priorities defined in the spring and summer of 2014 for FY 2015. This annual action plan is an important short term component of the *Fast Forward Fort Lauderdale: Vision Plan 2035* and *Press Play Fort Lauderdale: Strategic Plan 2018*.



CITY OF FORT LAUDERDALE
City Commission Agenda Memo
REGULAR MEETING

#13-1483

TO: Honorable Mayor & Members of the
Fort Lauderdale City Commission

FROM: Lee R. Feldman, ICMA-CM, City Manager

Strategic Connection

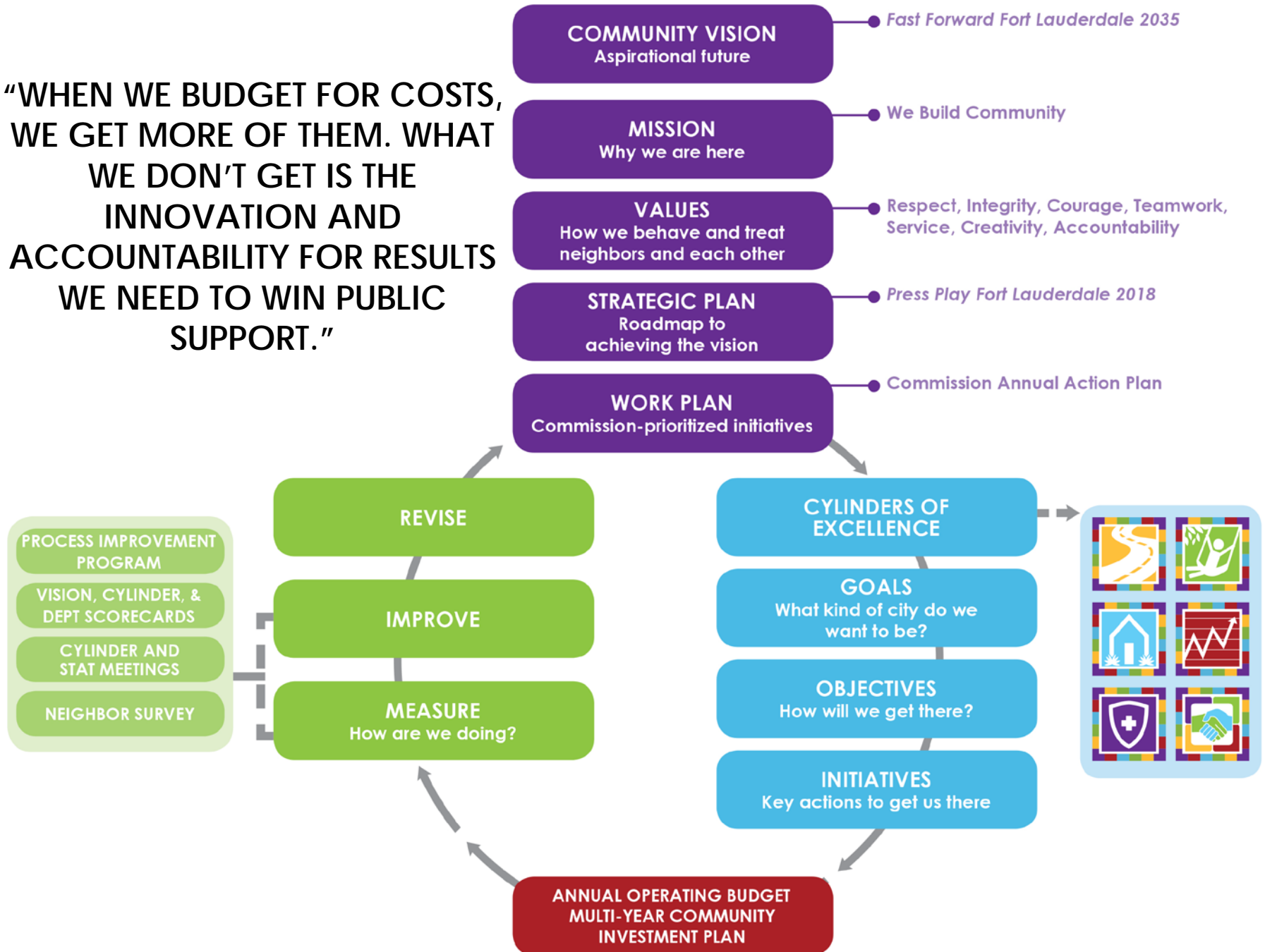
This item is a Commission Annual Action Plan priority, included within the Management Agenda, advancing the Wave Streetcar.

It is also a *Press Play Fort Lauderdale Strategic Plan 2018* initiative, included within the Infrastructure Cylinder of Excellence, specifically advancing:

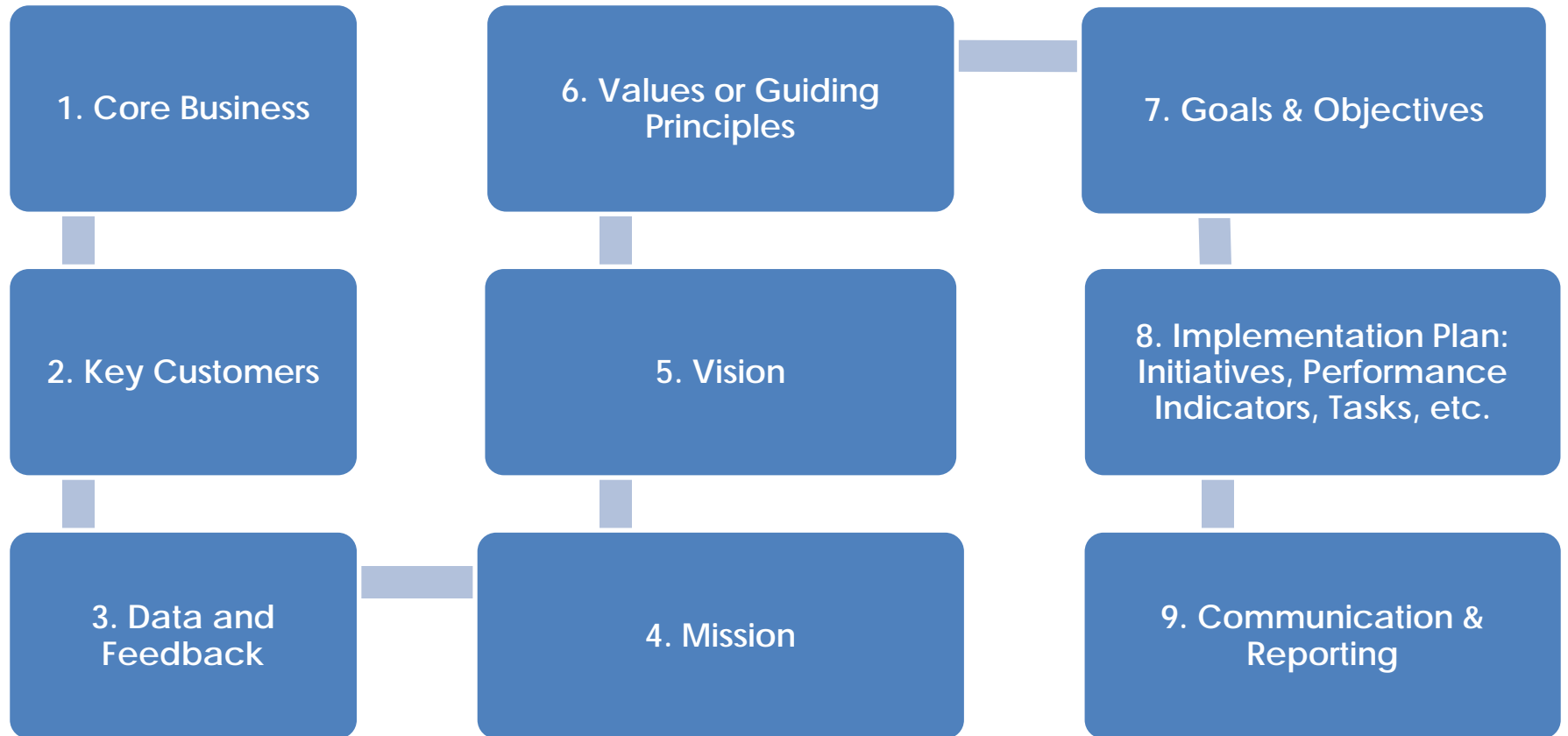
- Goal 1: Be a pedestrian friendly, multi-modal City.
- Objective 1: Improve transportation options and reduce congestion by working with agency partners.
- Initiative 3: Work with partners to construct the Wave Streetcar, including the Transit-Oriented Development (TOD) ordinances and connections to airport, port, and rail stations.

This item advances the *Fast Forward Fort Lauderdale 2035 Vision Plan*: We are Connected.

“WHEN WE BUDGET FOR COSTS,
WE GET MORE OF THEM. WHAT
WE DON'T GET IS THE
INNOVATION AND
ACCOUNTABILITY FOR RESULTS
WE NEED TO WIN PUBLIC
SUPPORT.”



Strategic Planning Process Steps: the Fundamentals



Questions/Comments?

Thank you!!!





2015 SEPT 27-30
seattle
ICMA ANNUAL CONFERENCE KING COUNTY

