



Leaders at the Core of Better Communities

## 2015 Local Government Excellence Awards Program Program Excellence Awards Nomination Form

(All programs nominated must have been fully operational for a minimum of 12 months, prior to January 31, 2015)

### Deadline for Nominations Extended to March 30, 2015

Complete this form (sections 1 and 2) and submit with your descriptive narrative.

#### SECTION 1: Information About the Nominated Program

Program Excellence Award Category (*select only one*):

- Community Health and Safety
- Community Partnership
- Community Sustainability
- Strategic Leadership and Governance

Name of program being nominated: Tamarac's Strategic Planning: Alignment and Engagement

Jurisdiction(s) where program originated: City of Tamarac

Jurisdiction population(s): 60,427 (U.S. Census, 2010)

Please indicate the month and year in which the program you are nominating was fully implemented. (Note: All Program Excellence Award nominations must have been fully implemented for at least 12 months prior to January 31, 2015, to be eligible. The start date [on or before January 31, 2014] should not include the initial planning phase.)

Month: January Year: 2010

Name(s) and title(s) of individual(s) who should receive recognition for this award at the ICMA Annual Conference in Seattle, Washington, September 2015. (Each individual listed MUST be an ICMA member to be recognized.):

Name: Michael C. Cernech

Title: City Manager Jurisdiction: City of Tamarac

Name: Diane Phillips

Title: Assistant City Manager Jurisdiction: City of Tamarac

Name: \_\_\_\_\_

Title: \_\_\_\_\_ Jurisdiction: \_\_\_\_\_

## SECTION 2: Information About the Nominator/Primary Contact

Name of contact: Laura Karpaviciute

Title: Management Analyst I      Jurisdiction: City of Tamarac

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## Strategic Leadership and Governance – Tamarac’s Strategic Planning: Alignment and Engagement

**Background/Challenges Faced:** Since Tamarac’s founding as a predominantly retirement community in 1963, the City’s demographics have been rapidly changing: resident median age has been steadily decreasing (currently 47), while cultural diversity increased. These changes require adjustments in our programs and services to ensure that we continue to serve the needs of our diverse population. Further complicating the matters, the major nationwide recession has devastated many communities, posing financial challenges and requiring that municipalities do more with less. Tamarac is 98% built-out, thus minimal opportunities for new development revenue exist. Additional challenges were posed when the City was faced with negative publicity and declining public trust in 2010 due to charges against several elected officials in Broward County, including some City officials.

**Program Implementation and Costs:** Since undergoing a nationally recognized executive leadership training program<sup>1</sup> at the University of Virginia in 2004, our senior leaders committed to building an organization that listens to its customers, empowers its employees, has a clearly defined vision, focuses on financial sustainability, strategic long-term planning, performance measurement and process improvement, and produces results. We employed a bottom-up approach to successfully develop a strategic planning process that effectively aligns our strategy, budgeting, performance management and individual employee performance into one cohesive system. It helped us create a customer-focused organizational culture that engages and responds to our internal and external customers, focuses on continuous process improvement and innovation, and is positioned to face current and future challenges. Broad engagement in strategic planning allowed us to maintain public trust, positive employee attitudes and customer satisfaction despite the external challenges.

Tamarac was engaged in strategic planning efforts long before it first developed the City vision in 2006. As a result of our commitment to continuous process improvement, in 2010 we adopted the simple yet systematic 4-step strategic planning process that we currently use. It consists of strategy input,

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<sup>1</sup> 2 week program registration costs were \$4,500 per attendee

## Strategic Leadership and Governance – Tamarac’s Strategic Planning: Alignment and Engagement

development<sup>2</sup>, deployment and ongoing execution phases. We have also taken numerous steps to facilitate systems alignment and public engagement.

[Strategy - Budget Systems Alignment.](#) Financial, market and regulatory data, performance and projections are reviewed in the strategy input phase. They impact strategy formulation. At the same time, strategic priorities drive the budget. Not only the strategic initiatives, but every new program proposed for inclusion in the budget must show how it supports the achievement of the City’s strategic goals and performance targets. Our focus on long-term planning prompted us to go beyond the state prescribed balanced 1-year budget. In 2011, we adopted an innovative biennial budget process. This year, we employed a 3-year budget process to further align our long-range strategic and financial planning.

Our approach helped us identify opportunities to diversify our revenue sources and reduce our reliance on ad valorem taxes. Despite the economic downturn, our bond rating was upgraded to AA in 2011. In 2014, Moody’s credit rating agency cited Tamarac as an example of sound fiscal management<sup>3</sup>.

[Strategy – Performance Management Systems Alignment.](#) We built our performance management system using a bottom-up approach (2010-2013). City department/division staff participated by identifying operational performance measures important to their customers. The resulting system consists of the division measures that roll up to the department scorecard; then select department scorecards measures roll up to the citywide scorecard with key indicators rolling up to the strategic plan. Regular performance reviews take place at the division, department and the Executive Team level.

In Tamarac, division level employees are actively engaged in the strategic plan by recommending and implementing process improvements based on performance data. For example, the Recycling Rewards Program developed by the Public Services staff contributes to Goal #5, A Vibrant Community, by promoting environmental sustainability, as well as Goal # 2, Healthy Financial Environment, by producing revenue

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<sup>2</sup> City staff conducts preparation and analysis. A strategic planning consultant facilitates 2 strategic planning sessions (Executive Team and Executive Team with the City Commission) at a total cost of \$3,000.

<sup>3</sup> April 14, 2014; Moody’s Investors Service, Special Comment: Shift from Property Tax to Alternative Revenues Reduces Florida Local Governments’ Financial Flexibility (p. 6).

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from the sale of recyclables and savings from the avoided disposal costs (estimated combined benefit of approximately \$107,000 annually).

In 2013, we converted from Excel to a dedicated performance management software system<sup>4</sup> to better display strategy-performance linkages. Its additional functionality provides for an easier drill down and enables the publication of key strategic performance information on our website ([view here](#)).

*Organizational Strategy –Department/ Division Activity Alignment.* In addition to owning specific strategic initiatives, departments and divisions clearly define how their mission, goals, objectives, and daily programs and services contribute to the achievement of the City’s strategic goals. These narratives along with key operational performance measures are included in the budget and posted on our website to further help illustrate strategy–budget–performance linkages, promote transparency and communication.

This ownership drives process efficiencies and improvements. For example, percent of building inspections scheduled via electronic means increased to 41% in FY14 vs. 13.5% in FY11, thus providing residents with a self-service option, while freeing staff time to assist customers with more complex issues. Parks and Recreation class attendance towards capacity increased to near 90% in FY14 vs. 72% in FY11.

*Strategy – Individual Alignment.* This bottom-up approach to systems development, promoted staff empowerment and engagement and helped us develop a customer-focused culture. Every employee contributes to strategy formulation and execution via multiple mechanisms. Each employee is involved in the organization-wide SWOT analysis. Multiple communications methods are used to deploy strategy. In 2009, the City implemented PMEDS<sup>5</sup>. Under this system, performance goals and associated actions are deployed to each employee starting with the Executive Team and cascading down to managers, supervisors, and all staff, thus further fostering ownership and accountability. Each employee carries a tri-fold card, which contains the City’s vision, mission, values, strategic goals, customer service standards and

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<sup>4</sup> The initial purchase and setup costs were covered by a grant. Annual City expenses were \$6,800 this year and will be \$6,000 in the following years.

<sup>5</sup> Initial Performance Management and Employee Development System setup cost was \$15,000. Annual maintenance fees are \$6,300.

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space where employees fill in how their job relates to the City's strategic goals. The success of these efforts is evidenced by our 2013 employee survey results: 92% of employees agreed that they knew how their jobs supported the City's Strategic Goals (4% points above 2011 and a 24% points above 2007).

Cross-functional multi-level employee teams carry out improvement initiatives in specific focus areas, e.g. high performance, employee focus, customer focus, recognition, and safety committees. Their achievements range from developing citywide customer service standards along with the corresponding transactional survey based on customer input, to development of the recognition program that is reflective of the organization's mission, vision, values and goals, to initiatives that maintain and improve workplace safety, which resulted in lower Worker's Comp Experience Modifier (0.75 for FY15 vs. 1.04 for FY12).

[Public Engagement and Communications.](#) The City systematically uses a third party vendor to conduct statistically valid resident, business and employee surveys<sup>6</sup> to identify community priorities and help us focus strategic planning efforts to address community needs. We use transactional survey data to make improvements based on customer feedback. Our Customer Response Tracking system provides a venue for residents to report a concern 24/7 and receive a timely issue resolution online. All customer data is evaluated during the strategy input stage along with the consumer and demographic trends. We use many ways to engage the public; e.g. quarterly news magazine Tam-A-Gram, strategic planning publications, website, social media, neighborhood meetings, HOA liaison program. We recently added Open City Hall to further enable engagement through online discussion of City topics. One forum user noted: *"I can't make the early or afternoon meetings because I work in downtown Miami. My lack of attendance does not reflect my interest in learning about City happenings and being able to partake in changes and discussions. I think an online forum is a convenient way to increase voter voice and open access to otherwise limited forums. Thanks Tamarac for another great move - I love being a resident of this city! :)"* Through our performance management software we publish up-to-date strategic information directly to the website.

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<sup>6</sup> The total cost for all 3 surveys is \$27,650. They are typically conducted every other year.

## Strategic Leadership and Governance – Tamarac’s Strategic Planning: Alignment and Engagement

**Tangible Results/ Measurable Outcomes:** Our systematic strategic planning process and the broad level of engagement and transparency has helped us to achieve numerous measurable outcomes. Key organizational outcomes were discussed above. Key community outcomes<sup>7</sup> include:

- 80% residents satisfaction with overall quality of services in 2013 (21% points above FL average and 23% points above national average).
- 79% residents satisfaction with community appearance in 2013 (6% points above FL average and 8% points above the national average).
- 86% of business satisfaction with overall quality of services in 2013 (6% points above 2007 results).

### **Lessons Learned:**

- Employee engagement and buy-in are key. It may take longer to build your strategy process and align your organizational systems if you take the bottom-up approach, but it pays off.
- To facilitate the planning process prepare and share materials in advance. When our leadership team arrives at the retreat, they have reviewed all of the pertinent information, which leaves more time to have a meaningful discussion about the proposed action item importance and long-term implications, as well as funding availability.
- Keep things as simple as possible. The final strategic plan should be a brief action and performance focused document. It is much easier to implement the plan, when you don't have to read 100 pages to find out what needs to be done.
- Don't be afraid to try new ways of doing things. Every strategic planning cycle we look at what went well and what we could do differently.
- Communicate with the public. Listening to what residents have to say and sharing what you do to address their concerns strategically and on the daily basis helps build the public trust.

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<sup>7</sup> Data for these measures is obtained from statistically valid community surveys that use a 5-point scale. Only the ratings of “4” and “5” are included as satisfied.