

MEMO

TO: Mrs. Lauren Johnston, Assistant City Manager, City of Palm Coast
FROM: Dr. Joe Saviak and Dr. Richard Levey
DATE: November 7, 2023
SUBJECT: Strategic Plan for the City of Palm Coast

Overview

To optimize opportunities for the long-term success of The City of Palm Coast, the organization will conduct a strategic planning process to produce a five-year plan and ensure successful implementation and effective evaluation.

Strategic plans ask and answer this question: 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?

The strategic plan will enable all operations and activities of The City of Palm Coast to attain important, specific, and measurable objectives during the next two, three, and five years. The strategic planning process would involve a SWOT and historical analysis, community research, determination of organizational capacity, identification of objectives, development of action plans for each objective, identification of means of evaluation for achievement of each objective and set a schedule for implementation. Quarterly progress reports on each objective would aid in achievement of SMART objectives (specific, measurable, actionable, realistic, and time-bound).

Executive Summary of the Strategic Planning Process

Dr. Saviak and Dr. Levey will facilitate a Strategic Planning Workshop with elected policymakers and the administrative leadership team where specific and measurable objectives are identified for the next 1-5 years.

I. Background Research

a. Review:

- i. City demographic and economic data and research - U.S. Census data and UF BEBR data on The City of Palm Coast
- ii. Any existing Mission, Vision, Values, and Goals for city government
- iii. Annual Reports and the most recent Annual Comprehensive Financial Report for county government
- iv. Current annual budget for county government
- v. Strategic plans, Capital Improvement Plan, Comprehensive Plan, and any department long range plans for city government
- vi. Any performance benchmarks/metrics/level of service standards for city government

- vii. The Annual City of Palm Coast Citizen Survey
 - viii. Any other recent resident/customer satisfaction survey results involving city government
 - ix. Recent PCCC agendas and meetings
 - x. Recent press coverage and social media communications from city government

- II. If appropriate, a 90-minute orientation for the elected and administrative leadership on strategic planning in advance of the interviews and workshop. This enables participants to come prepared to the interviews with their specific ideas for the mission, vision, values, goals, SWOT analysis, and objectives for the strategic plan.

- III. Interviews with City Council members (5) about mission, vision, values, goals, SWOT analysis, and objectives

- IV. Interviews with the City Manager, Assistant City Manager, Chief of Staff, and Department Heads (15-20) about mission, values, goals, SWOT analysis, and objectives

- V. Administration and analysis of an electronic survey to the City Council, administrative leadership, and employees on the same or some of the same topics – a key focus is objectives.

- VI. Meeting with the City Manager and Assistant City Manager
 - a. Discuss research
 - b. Workshop Prep – the City Manager should also ask City Council Members to bring their ideas on mission, vision, values, goals, and objectives to the workshop and ask Departments Directors to be ready and available to answer questions at the workshop on current/potential objectives (everyone will have these in advance)
 - c. Develop workshop agenda

- VII. Strategic Planning Workshop – Mayor and City Council, City Manager, Assistant City Manager, Chief of Staff, and Department Directors
 - a. Brief Primer on Strategic Planning
 - b. Presentation of research findings (organizational and community research, individual interviews, electronic survey)
 - c. Open discussion/consensus building on Mission, Vision, Values, Goals, Objectives, and Action Plans for each objective
 - d. Wrap up/Summary

- VIII. Draft plan production, review, revisions, and approval. Available to aid in successful implementation.

The Team

Dr. Joe Saviak and Dr. Richard Levey bring extensive experience and proven success in facilitating goal setting/strategic planning with local governments and non-governmental organizations throughout Florida. They bring a unique combination of several decades of experience in local government in Florida along with regularly teaching goal setting and strategic planning to

thousands of local government executives and professionals across Florida both in the classroom and at professional conferences.

Both Dr. Levey and Dr. Saviak regularly advise and assist local governments on a wide range of policy, administrative, operational, planning, and capital project issues. Our bios are attached. Our professional websites can be accessed at: <https://www.leveyconsulting.com/> and <https://drjoesaviak.com/>

Dr. Levey has led these similar jurisdictions through goal setting and strategic planning:

City of Leesburg (2023) – Facilitated a priority setting process for updating/revising strategic goals for the annual budget process. Conducted individual interviews with the City Council and Department Directors. The final work product was adopted by resolution by the City Council prior to the development of the FY 2024 Budget.

City of Naples (2021 – 2022): Engagement involved preparing the City Council for a retreat which would focus on CIP priorities and a SWOT analysis of the city. Utilized a digital survey to quantify opinions on CIP priorities, the SWOT Analysis, and city council governance issues. Additional services included operational management review of the Planning and Building Department functions.

Lake County/City of Clermont (2019-2021): Comprehensive evaluation of existing strategies for implementing this 15,000-acre new growth region in South Lake County. The team was charged with managing a 98-member Stakeholder Group in the refinement of pre-existing plans for the area into a Strategic Implementation Plan and Design Guidelines. Monthly Stakeholder Group meetings, agendas, and updated work products were provided in advance of each meeting. Project deliverables included an Implementation Plan, recommended Comprehensive Plan amendments, Design Guidelines, Roadway Network Plan, and the creation of new infrastructure funding mechanisms.

City of Kissimmee Strategic Annexation Plan (2019): Developed detailed forecasts of revenues and expenditures by neighborhood to determine priorities for annexation. Worked directly with city departments (police, fire, public works, parks, and recreation) to project increased demand and cost for services. Capital and operating budget impacts were forecasted. Final recommended priorities based on cost/benefit analysis.

City of Mount Dora/Lake County (2018-2021): Assisted the City of Mount Dora and Lake County in advancing the Wolf Branch Innovation District (WBID) from concept to implementation. The assignment involved a series of tasks designed to put in place specific action items to promote the orderly and successful creation of a satellite employment center within the Orlando MSA focused on businesses and industries that are components of the 'innovation' economy. The assignment resulted in two reports: The first of these is the creation of a Final Strategy report. The second is the Implementation Plan. The Implementation Plan included a recommended five-year Capital Improvement Plan, City and County Comprehensive Plan Amendments, and Design Guideline amendments to the City and County codes.

Dr. Saviak has aided with goal setting and the successful research, development, and implementation of strategic plans for these similar entities:

Flagler County Sheriff's Office (2019-2020) (2023-2028) – This office serves 110,000 citizens with over 400 employees and a \$48 million dollar budget. Dr. Saviak oversaw research, design, implementation, and evaluation of the two-year plan which produced highly successful results on

a wide range of agency objectives. Dr. Saviak is currently working with the FCSO on effective implementation of a five-year strategic plan.

City of Daytona Beach (2023) – Dr. Saviak facilitated a Goal Setting Workshop with the Mayor, City Commission, and Department Directors which was productive and efficient in achieving consensus on organizational goals for this city of 78,000.

Clay County Clerk of the Court and Comptroller (2023-2025) – This office serves 220,000 residents. Dr. Saviak is presently working with this office to build on success and optimize performance for the long term through strategic planning.

Fostering Connections (2023-2024) – Dr. Saviak worked with the CEO and Board of Directors of this non-profit organization to research and produce a strategic plan to attain a series of important objectives to best serve children, youth, and families in Florida's foster care system in St. Johns, Duval, Putnam, Flagler, and Volusia counties. He continues to advise on effective implementation.

Indian River County Government (2023) - Dr. Levey and Dr. Saviak are currently working with Indian River County Government on defining their mission, values, and goals.

Lake Region Development Corporation (2021) – This nonprofit entity is led by government, community, and business leaders coordinating social, economic, and recreational development for the City of Keystone Heights region of Clay County with the historic restoration of their two major lakes. Working closely with community leaders, Dr. Saviak generated a first ever two-year strategic plan for the lake region covering objectives such as organizational development, public education on this massive and historic project, economic development, and initiatives to enhance the quality of life for residents.

In addition, Dr. Saviak has taught strategic planning at statewide conferences of local officials. He has also taught over 1,500 local officials in the Northeast Florida region from cities, counties, special districts, school districts, and constitutional offices how to do goal setting and strategic planning from 2007 through the present. Many of these officials then successfully managed or participated in goal setting and strategic planning for their local governments and entities. Dr. Levey also regularly teaches local officials on planning and other key subjects in public policy and management.

Deliverables would include:

- ✓ **Review of research** – Review and analyze background research on the city and city government to aid in workshop success – review longitudinal demographic and economic data such as U.S. Census and UF BEBR reports as well as city policies, programs, and services, prior goal setting and/or strategic plans, the most recent annual budget and ACFR, the CIP, the Comprehensive Plan, the Annual Citizen Survey, any program evaluations, and all current long-range department plans. Review recent media and social media reports of high-profile city government issues. Review recent city commission agendas and video of PCCC meetings (Dr. Levey and Dr. Saviak).
- ✓ **Conduct a strategic planning orientation in advance of the interviews and workshop.**
- ✓ **In person or electronic interviews with the City Council (5), City Manager, Assistant City Manager, Chief of Staff, and Department Directors (15-20)** to aid in agenda design and workshop success by discussing mission, vision, values, goals, and objectives in terms of services/policies/programs, capital projects, and institutional

capacity from both policymakers and administrators and gain a better understanding of identifying, designing, implementing, and evaluating how these might be best achieved if selected by the policymakers (Dr. Saviak and Dr. Levey).

- ✓ **Administration and analysis of an electronic survey to the City Council, City Manager, Assistant City Manager, Chief of Staff, and Department Directors, and employees** on the topics of SWOT analysis, mission, vision, values, goals, and objectives. This provides policymakers, senior staff, and employees with an opportunity to communicate the city's priorities and needs via an electronic survey. The process and workshop benefit from the analysis of this data. Whitson Digital Strategies (<https://whitsondigital.com>) will oversee the administration of the electronic survey working closely with city government. With assistance from the city government, the consulting team will be responsible for the crafting of the content of the survey instrument, administration, and analysis and reporting of the survey data.
- ✓ **Aid in formulation of the workshop agenda**, with advanced publication, in concert with the City Manager and Assistant City Manager (Dr. Saviak and Dr. Levey).
- ✓ **One-day facilitation services for the goal setting workshop on (date)** (Dr. Levey and Dr. Saviak).
- ✓ **Draft Strategic Plan** (within 45-60 days upon completion of the workshop). The strategic plan would include the synthesis of the research, all objectives, and summary implementation plans for objectives over the next two, three, and five years (Dr. Levey and Dr. Saviak). Depending on the specific objective, staff may produce more detailed implementation plans.
- ✓ **Continued advice and assistance during plan implementation.**

Suggested Schedule

Given the timeline leading up to the workshop, adherence to a specific schedule would result in the best outcomes:

- ✓ Review of city and city government research – Dr. Levey and Dr. Saviak – February 2024
- ✓ Individual interviews with elected officials and senior staff - Dr. Levey and Dr. Saviak – March 2024
- ✓ Electronic survey of policymakers, administrative leadership, and employees – Whitson Digital Strategies – April 2024
- ✓ Discussion of research and development and publication of the workshop agenda – Dr. Levey and Dr. Saviak with the City Manager and Assistant City Manager – April 2024
- ✓ Strategic Planning Workshop – Dr. Levey and Dr. Saviak facilitating – May 2024
- ✓ Draft Strategic Plan – Dr. Levey and Dr. Saviak – June 2024
- ✓ Final Strategic Plan – Dr. Levey and Dr. Saviak – June/early July 2024

Resources Required

The consulting cost for Dr. Saviak and Dr. Levey to facilitate the design of this process and plan and aid during its successful implementation and evaluation would be \$30,000. The City of Palm Coast is responsible for organizing the strategic planning workshop, supplying needed research, and actual implementation and resourcing of the plan. Dr. Saviak and Dr. Levey have enabled other organizations to experience significant success through this process and regularly teach this subject to executives and professionals