

**Agenda Item:** 4.a

**Meeting Date:** February 6, 2024

## **MEMORANDUM**

**To:** City Commission

**Date:** 2024-01-23

**From:** Nicole Delfino

**Subject:** Strategic Planning Project Update & Background

**Presenter(s):** Nicole Delfino, Strategy & Sustainability Manager; Angela Crist, USF Florida Institute of Government

**Recommend:** Phase I Project: Review Data Collection & Information

**Epic Goal(s):**

1. Create a vibrant, cultural experience that touches the lives of our community and visitors.
2. Create a visual sense of place throughout Dunedin.
3. Promote Dunedin as The Premier Coastal Community, protecting and improving our natural resources for the enjoyment of all.
4. Be the statewide model for environmental sustainability stewardship.
5. Enhance community relationship strategies that strengthen inclusiveness, respect, transparency and collaborative engagement.
6. Be a premier employer by fostering a diverse, highly engaged workforce through employee recruitment and attraction, workforce retention, employee development and inclusion initiatives.

**Boards & Committees:** N / A

**Budget Impact:** \$64,512.50 - Included as approved BPI in FY23-24

**Past Action:** Strategic Plan Project BPI request in FY23-24  
RFP Award for Strategic Plan Consulting Services on 7-25-2023

**Next Action:** Phase II - Strategic Planning Project

**Attachments:**

[A. Strategic Planning Project Phase I Presentation.pdf](#), [B. Strategic Planning Project Timeline.pdf](#), [C. Nov 1 2023 Community Forum I\\_Real Time Record.pdf](#), [D. Nov 13 2023 Employee Focus Group\\_Real Time Record.pdf](#), [E. January 16 2024 Community Forum II Real Time Record.pdf](#),

**Background:**

The City of Dunedin, Florida issued an RFP in April 2023 seeking proposals from Strategic Planning consultants/agencies with experience in municipal government strategic planning to work with city staff to develop a city-wide plan including developing a mission, visions, values, goals, objectives, and outcomes along with clearly defined performance measures.

The scope of the work required that the selected consultant review the City's existing documentation including, but not limited to: 2022 Citizen Survey, FY 22-23 Budget Book, FY 22-23 Business Plan, Epic Goals, 2019 Employee Engagement Survey, other Master Plans, the Comprehensive Plan, and the City's Committee and Board Annual Reports, and other feedback or documents critical to the success of providing a cohesive city-wide Strategic Plan.

The RFP outlined the following project priorities:

- a. Identify and/or develop the organization's mission, vision, and values.
- b. Identify key organizational priorities and strategies for the City over the next three-five years.
- c. This strategic plan should inform and align the City's annual budget with priorities and goals as identified by the strategic planning process, including the capital improvement plan.
- d. The strategic plan should incorporate the City's 6 Epic Goals into the plan.

In section 5, the RFP also outlined the following Deliverables:

- 5.1 Aid the City in establishing a city-wide mission, vision, and values statement(s).
- 5.2 Aid the City in identifying its image, and what sets it apart from other coastal communities.
- 5.3 Identify key priorities for the City that will bring stability to the organization for the next five years, guiding City resources (money, people, and time) to achieve specific goals and inform budget priorities annually.
- 5.4 Development of SMART goals with sample measurements to achieve plan measurement and success.
- 5.5 On-site meetings, workshops, listening sessions, and/or public engagement as required with community, staff, leadership, and City Commission for plan development and presentation.
- 5.6 Deliver a draft version and final strategic plan report via Word and PDF for reproduction and communication purposes. Report should enable flexibility in updating sections year over year as plan is accomplished/achieved. Formatting should be reproducible for the City's use and ability to use as a communication tool.
- 5.7 Attend and present to City Commission for Strategic Plan development and final product delivery.

Proposals were due on May 23, 2023. Five proposals were received and reviewed. A selection committee consisting of Nicole Delfino, Assistant to the City Manager; Sue Burness, Director of Communications; and Sue Bartlett, Director of Public Works; and Kelli Hammer Levy, Director of Pinellas County Public Works and guest evaluator reviewed the submitted proposals. The Committee met on June 6, 2023 to review all 5 proposals and shortlisted three firms: Berry and Dunn, Raftelis, and FIOG @ USF. Additional requests for information were provided to the three finalist firms with a request to present at a final review meeting held on June 20, 2023. The finalist firms each presented their proposals for project implementation and responded to questions from the Committee. The Committee reviewed and ranked the three firms, with a unanimous decision to select FIOG @ USF as the consultant selected for this project.

FIOG's proposal included working with the Collaborative Labs at St. Petersburg College to utilize the meeting technology to engage participants and for visual representation. Following execution of the agreement, FIOG/SPC anticipates project kick off in August with a project duration of approximately one year.

In August 2023, FIOG/SPC began review of existing documents (environmental scan) on the project, including collection and review of data. This step included reviewing the City's EPIC Goals, all master plans, comprehensive plan, business & CIP plan, budget, survey data, and committee annual reports. The initial kick off meeting was held with Department Head staff on September 12, 2023. In the interim period between the project start and ahead of the first community focus group session, FIOG held one-on-one interviews with approximately 20 key stakeholders throughout the City. These stakeholders included elected officials, key business leaders in the community, and active residents.

Communications outreach began immediately as a critical component of the Strategic Planning process. This outreach included development of a public facing project page, hosted on the City's website and easily found under the "City Project" tab. The Strategic Planning page serves as a public information page on the project, including purpose of project, project cost, timeline, and hosts all documents related to the project. This page link and project information has been shared on social media, in the newsletter, spotlighted in blog posts, included in the Strategic planning kick off video to the public and staff, as well as communicated in outgoing emails to City boards and committee and other email communication.

With a communication plan formulated, the first Community Forum was set for November 1, 2023 at City Hall. The workshop started at 5:30 pm and concluded at 8:30 pm. Approximately 35 residents participated in providing information and interacting and working within groups to begin defining community priorities, the vision, and mission of the City. This work identified and prioritized those things that residents most valued and treasured in the community, those things they would not change in the future, and issues that

are impacting the City. The Vision and Mission workshop section included identifying those things that are celebrated and shared in Dunedin and highlighting key words to provide a framework to the Mission. This event was widely communicated and the public invited through all communication channels (social media, website, newsletter), via board and committees and direct emails.

The second interactive meeting was an Employee Focus Group, held on November 13 from 1:00 pm to 4:00 pm with approximately 30 employees from all across the organization. The collaborative event focused on the employee group working in teams to identify organizational strengths, liabilities, opportunities and challenges. Groups then worked on key phrases and ideas to define "core values" within the organization. All City employees were also engaged through a brief feedback questionnaire, communicated through emails and staff in late November through mid-December.

The last community meeting for Phase I of the Strategic Planning project occurred on January 16, 2024 at City Hall. The event was similarly structured as the first Community Forum and was attended by approximately 50 residents, held from 5:30 pm - 8:30 pm. This second meeting provided a recap, prioritized Vision and Mission concepts, and delved into key emergency areas by defining community priorities. The emerging vision themes were identified as: safe and secure, inclusive and welcoming, safeguards history and heritage, multi-generational and transitional community, and environmentally conscious. The emerging mission themes were identified as: quality of life, connection between residents and the city, fiscally sound and responsible, and services and infrastructure. Breakout teams each identified key priorities for each of the emerging themes for the vision and mission and developed and prioritized outcomes for the focus areas. This event was widely communicated and the public invited through all communication channels (social media, website, newsletter), via board and committees and direct emails.

The background and environmental scan, stakeholder interviews, employee focus group & employee questionnaire, and community focus group one and two conclude Phase I of the Strategic Planning project. The presentation to Commission on Phase I is to provide feedback on the project to date, the activities concluded, and the emerging themes. Phase II will begin with the first Leadership Forum to be held on Tuesday, February 13.