

Agenda Item: 2.c

Meeting Date: September 1, 2026

MEMORANDUM

To: City Commission

Through: Jennifer K. Bramley, City Manager

From: Nicole Delfino

Date: 2026-09-01

Subject: Strategic Plan: Dashboard Review

Presenter(s): Nicole Delfino, Strategy & Sustainability Manager

Staff Recommendation: Review Strategic Plan Dashboard

Strategic Themes: Good Governance

Boards & Committees: N/A

Budget Impact: \$25,000 per year, included with Strategic Planning & CIP/BPI Tracking Software

Past Action: Strategic Planning Development took place between 2023 and 2024. Presentation of the final plan occurred in September 2024. Strategic Planning software review and implementation took place in the spring of 2025, with the Strategic Plan fully implemented in the software in the fall of 2025. Capital Improvement Plans (CIP) and Business Plan Initiatives (BPI) were added into the Strategic Planning software in late 2025, with the first reporting cycle of CIP/BPI taking place in Quarter 1 of FY 2026-2027. Measurements were added to Strategic Planning Software at the start of 2026, with the first reporting cycle of Measures taking place in Quarter 2 of FY 2026-2027.

Next Action: Quarterly Updates, Reporting, and Strategic Plan Review in 2027

Attachments: [A. 2026 Strategic Plan Dashboard Update 9.1.26.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, 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 includes working with the Collaborative Labs at St. Petersburg College to utilize meeting technology to engage participants and for visual representation. FIOG/SPC and City Staff kicked off the Strategic Planning project in August 2023.

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 concluded Phase I of the Strategic Planning project. The presentation to Commission on February 6, 2024 provided feedback on the project to date, the activities concluded, and the emerging themes.

Phase II of the Strategic Planning project began with the first Leadership Forum I held on Tuesday, February 13, 2024. Leadership Forum I focused on reviewing key themes and words identified in the mission, vision, values and strategic themes. Commissioners worked to refine and confirm strategic focus areas, themes, and prioritizing key issues. Leadership Forum II, held on March 25, 2024, was a continuation of work held in Forum I for the Commission to further identify, review and provide guidance on the mission, vision, values, themes and to review and prioritize the objectives and goals of the Strategic Plan. FIOG

and project City Staff (Nicole Delfino) worked diligently across many working sessions with departments to utilize the feedback from the leadership, community and employee forums to refine the strategic plan's goals and objectives.

An interim project plan was presented to Commission at a workshop meeting held on July 9, 2024 in order to provide the opportunity for City leadership to review the work done towards refining the goals and objectives within each Strategic Theme. The Strategic Themes are: City Services, Environmental Resiliency & Sustainability, Communications and Technology, Community Amenities, Multi -Modal Transit, Good Governance, and Infrastructure, Planning and Growth. Under each Strategic Theme are a number of goals, objectives and action identified and assigned to a department lead. This detailed action plan is the result of all of the project work to date and are reflective of the outcomes of the various forums. In addition to the goals and objectives, a draft mission, vision, and values statement were reviewed in the July 9, 2024 session. The language of those statements were based on the culmination of the data and feedback from the forums and are reflective of the information distilled through the participatory method of this project.

Additional work with project leadership and department staff continued in July to fully develop the action plans under each objective. The action plans are those items that provide a self-explanatory guide as to how the objective will be implemented.

The final draft report was presented to Commission on September 3, 2024, including a fully developed Strategic plan organized by theme, then goal, objective and action items. The plan included the adopted City vision, mission, and core values statements.

Following the approval of the plan, staff begin working across the organization on implementation of the plan and development of a software for tracking and public facing dashboard. ClearPoint Strategy was selected as the Strategic Planning software hosting company, where the Strategic Plan, including Themes, Goals, Objectives, and Action items were tracked and reported. The first reporting cycle for Strategic Plan Action items took place in April 2025 for the Quarter 2 updates for FY 2025-2026.

Phase II of the software development included implementing the City's Capital Improvement Plans (CIP) and Business Plan Initiatives (BPI) into the system. This implementation allowed for CIP and BPI to be linked to Strategic Plan Objectives and Goals and to summarize and run reports based on theme, department. The CIP and BPI items were added into the Strategic Planning software in late 2025, with the first reporting cycle of CIP/BPI taking place in Quarter 1 of FY 2026-2027.

The final phase of the Strategic Planning software project was implementation of Measurements in order to create a public facing dashboard. This development took place over the course of the start of 2026, which included software development, weekly project meetings, and collaboration with Department Directors and Division Managers. The first reporting cycle of Measures took place in Quarter 2 of FY 2026-2027.

The successful tracking of measures allows for useful information to be shared to the public facing Dashboard. The Dashboard is accessible via the City's website or directly by accessing <https://dunedin.clearpointstrategy.com/>. The dashboard measures can be modified over time to display those items most important to the community. The dashboard measures are updated quarterly.

Project Key Dates:

Project Kick Off (September 12, 2023), Community Focus Group Forum I (November 1, 2023), Employee Focus Group Forum (November 13, 2023), Community Focus Group Forum II (January 16, 2024), Strategic Plan Project Update Commission Presentation (February 6, 2025), Leadership Forum I (February 13, 2024), Leadership Forum II (March 25, 2024), Strategic Planning Project Review - Vision, Mission, Values, Goals & Objectives (July 9, 2024), Strategic Planning Project - Final Report (September 2024), Strategic Planning Staff Kick-Off Retreat (January 15, 2025), Commission Retreat (February 14, 2025), Strategic Planning Workshop (Commission Meeting in February 2026), Dashboard Presentation (September 1, 2026).