

STRATEGIC PLANNING  
SESSION REPORT

**DUNEDIN**  
Home of Honeymoon Island

March 2, 2023

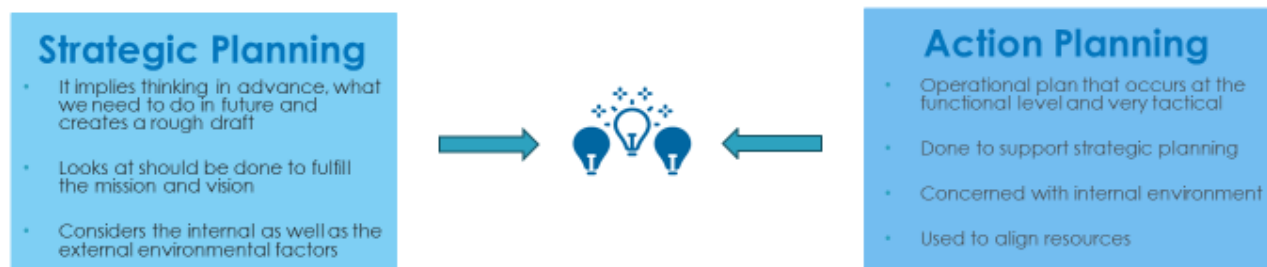
This report was made to deliver an overview of the Strategic Planning Session by summarizing valuable information needed to assist with future long term planning for the City of Dunedin.

The Strategic Planning Workshop was held on March 2, 2023 at the Dunedin Public Library with the following elected officials and city leaders present:

Mayor Julie Ward Bujalski  
Vice Mayor John Tornga  
Commissioner Mo Freaney  
Commissioner Jeff Gow  
Commissioner Rob Walker  
Jennifer Bramley, City Manager  
Jorge Quintas, Deputy City Manager

Angela Crist, Director, USF Florida Institute of Government served as the facilitator for the Workshop.

The agenda consisted of a full day of activities starting with a special welcome from the Mayor, celebrating the past year accomplishments and discussing the potential path forward. Director Crist had participants conduct an activity to determine the True North. This activity led to a discussion on each person thinks differently and from a different perspective. This exercise was intended to lay the foundation for a better understanding of the comparable between strategic and operational planning.



## Top 5 things to remember...

1. Their purposes are distinct
2. They plan for different amounts of time
3. Their goals have different scopes
4. They have different methods for reporting progress
5. They need to be revised at different rates

In an effort to help the elected officials and city leadership understand the City's current financial position and trends within the current economy, David Jang with Deep Blue Investment Advisors presented the 2023 Financial Outlook. Mr. Jang also led a discussion how the current financial position and economic trends would affect the decisions the elected officials make in their future planning.

The morning concluded with a brief discussion on the FY 2023 - FY 2028 Municipal Plan, FY 2023 - 2028 Capital Improvements Plan (CIP) and the EPIC Goals. The Business Plan consists of 58 Business Plan Initiatives (19 new and 39 existing), while the CIP has 106 Capital Improvement Projects (24 new and 82 existing). The Commissioners had an opportunity to bring forward any "Hot Topics" that were not covered in the previous discussion. The intent of this discussion was to continue the workshop focus on meaningful conversations for long-term planning.

Following lunch, Director Crist introduced the five components of a situational assessment and the critical success factors needed to evaluate those things the City is doing well, where are the gaps and future desires. The remainder of the day was spent on group activities assess the following categories:



Leadership, Decision-making and Structure, People, Work Processes and System, and Culture and Climate. The day was concluded with a brief wrap-up and next steps discussion on importance of a strategic road map which keeps the momentum going.

The remaining pages of this report reflect the discussions held, information obtained and recommendations for next steps.

9:00 am - 9:15 am	<p>Welcome and Introductions</p> <p>By Mayor Julie Bujalski and Jennifer Bramley, City Manager</p> <ul style="list-style-type: none"> <li>Accomplishments and Successes!</li> <li>Where do we go from here?</li> </ul>
9:15 am - 9:30 am	<p>Strategic vs Operational—What’s the Difference? (Group Discussion)</p> <p>Where do we want to be long-term?</p> <ul style="list-style-type: none"> <li>What are the daily milestones/actions that need to be reached?</li> <li>How do we think differently?</li> </ul>
9:30 am - 10:45 am	<p>Financial Outlook</p> <p>By Financial Advisor: David Jang, Deep Blue Investment Advisors</p> <ul style="list-style-type: none"> <li>What is the current financial position of the City?</li> <li>What are trends happening within the economy?</li> <li>How will the current financial position and trends affect the decisions you make as elected officials?</li> </ul>
10:45 am - 11:00 am	BREAK
11:00 am - 11:45 pm	<p>Operational Planning: EPIC GOALS!</p> <ul style="list-style-type: none"> <li>Brief Overview of FY 2023 Municipal Business Plan</li> <li>58 Business Plan Initiatives (19 new and 39 existing)</li> <li>106 Capital Improvement Projects (24 new and 82 existing)</li> <li>Q &amp; A for the EPIC Goals</li> </ul>
11:45 pm - 12:30 pm	<p>City Commission “Hot Topics”</p> <ul style="list-style-type: none"> <li>What are those pressing issues not covered in the EPIC Goals?</li> <li>Are these topics driving us to think long-term?</li> </ul>
12:30 pm – 1:00 pm	LUNCH
1:00 pm - 2:45 pm	<p>Strategic Planning: Situational Assessment (Group Activity)</p> <ul style="list-style-type: none"> <li>Why is this important?</li> <li>What factors/drivers do we need to consider?</li> <li>How do we make our goals, values, and vision distinct?</li> </ul> <p>What are those critical success factors needed for a long-term vision?</p> <ul style="list-style-type: none"> <li>Leadership</li> <li>Decision-Making and Structure</li> <li>People</li> <li>Work Processes and Systems</li> <li>Culture/Climate</li> </ul>
2:45 pm - 3:00 pm	BREAK
3:00 pm - 4:00 pm	<p>Strategic Planning: Situational Assessment (Group Activity)</p> <ul style="list-style-type: none"> <li>Why is this important?</li> <li>What factors/drivers do we need to consider?</li> <li>How do we make our goals, values, and vision distinct?</li> </ul> <p>What are those critical success factors need for a long-term vision?</p> <ul style="list-style-type: none"> <li>Leadership</li> <li>Decision-Making and Structure</li> <li>People</li> <li>Work Processes and Systems</li> <li>Culture/Climate</li> </ul>
4:00 pm - 4:30 pm	<p>Next Steps and Wrap Up</p> <ul style="list-style-type: none"> <li>How do we keep this momentum going?</li> <li>How do we develop a strategic road map towards the “NORTH”?</li> </ul>

# SITUATIONAL ASSESSMENT



- LEADERSHIP**
- DECISION-MAKING AND STRUCTURE**
- PEOPLE**
- WORK PROCESSES AND SYSTEMS**
- CULTURE AND CLIMATE**

The above aforementioned areas were discussed with the participants looking at each area using the PESTLE model. This model focuses on the Political climate, Economic state, Social changes, Technical innovations, Legal/Legislative regulations, and Environmental (climate/culture) values.

A sample of the worksheet is provided below.

**SITUATIONAL ASSESSMENT**

### Leadership

FOR EACH OF THE CATEGORIES BELOW, WRITE DOWN THINGS THE CITY IS DOING WELL AND WHAT NEEDS TO BE DONE TO MOVE THE CITY FORWARD. TAKE THE TIME TO REFLECT ON ACCOMPLISHMENTS, GAPS AND FUTURE DESIRES.

SIX DRIVERS	WHAT ARE WE DOING WELL NOW?	ARE THERE GAPS? IF SO, WHAT ARE THEY? ARE POSSIBLE THEIR POTENTIAL SOLUTIONS?	WHAT IS VALUE AND COMMUNITY IMPACT?	WHAT ADDITIONAL RESOURCES OR CAPACITY IS NEEDED?
POLITICAL				
ECONOMIC				
SOCIOLOGICAL				
LEGAL & LEGISLATIVE				
ENVIRONEMNTAL (CLIMATE/ CULTURAL)				

*Sample Worksheet*

CITY OF DUNEDIN      ✦      WORKSHEET

# ENVIRONMENTAL (CLIMATE AND CULTURE)

## What we do Well!

- Strong City Leadership with Commissioners and City Manager
- Community recognizes the value of the City leadership
- Autonomy of decision-making within the city
- City Manager solicits staff input for ideas and suggestions
- Cohesive and dedicated leadership team
- Wellness plans and programs for employees
- Desirable place to work
- Decisions around public art
- Gladys Douglas Preserve

## What are the Gaps?

- City tends to be reactive vs proactive
- Challenges exist with the time needed to create the vision and long term plan while still leading the City
- Lack of **Professional Development** Opportunities
- **Employee Climate Survey**
- Program for employee feedback and recognition
- Mechanism needed to share resources, collect data and report successes
- Loss of institutional knowledge from employees leaving for private sector
- Develop strategy for attracting and retaining talent
- Improve air quality
- More access to the water (i.e. marina)



# ECONOMIC

07

## What we do Well!

- Community is very active and engaged with decisions made by the City
- Engaged Finance Board
- Millage Rate is stable
- Professional budgeting, forecasting and transparency
- Use Boards and Committees to advise City on certain issues
- Salary compensation study
- Vibrant CRA and Downtown

## What are the Gaps?

- Need **additional resources** to meet community needs amongst continued inflation
- **Capacity, resources and money** to develop and implement strategic
- Is there a plan to increase the millage rate for increased services
- BRC
- Operational burdens tied to the budget
- Affordability of Programs
- Competitive salaries and recruitment for existing employees and new hires
- Look at other areas for growth
- Provide good conditions for businesses

# POLITICAL

## What we do Well!

- Non partisan and collegial with colleagues at the local, state and federal level
- Value the process for developing a strategic plan
- Unified culture among Commission of civility and respect
- Provide opportunities for citizens to give public comment
- Strong relationships with community partners

## What are the Gaps?

- Need a Better **Communication Strategy**
- Time and capacity to plan accordingly
- Formalized core values and guiding principles
- Lack of knowledge of government
- Need to figure out how to reach people where they are



## LEGAL AND LEGISLATIVE

### What we do Well!

- Established relationships with legislative delegation (i.e. Blue Jays)
- Community participation in local legislative action groups (i.e. Forward Pinellas)
- Serve a model for CRA requirements
- City Liaison Appointments
- Enforce Code Compliance
- Effective implementation of Public Records and Sunshine

### What are the Gaps?

- Work to change legislation that is affecting the city and its residents such as unfunded mandates
- Utilize Lobbying Tools to assist the City's legislative position on specific issues
- Need to prioritize the city's legislative needs
- Increased advocacy communication efforts on pending legislation and the impacts on the community
- Concerned about potential loss of leadership due to new financial disclosure legislation
- Better turn around time from legal counsel
- More proactive code enforcement



## SOCIAL

### What we do Well!

- Progressive and bold in community offerings, events, and activities (i.e. PRIDE Parade)
- Offer many opportunities for Diversity Equity and Inclusion populations
- Leadership is committed to inclusiveness
- Strong citizen involvement

### What are the Gaps?

- Consider providing housing that is inclusive for ALL community members
- Opportunity to build a better relationship with Pinellas County through social activities
- Consider restructuring **boards and committees**
- Is there a community group we are missing? (i.e. senior population)
- Consider trying to not meet the needs of ALL
- create additional opportunities for employees to engage



## TECHNOLOGY

### What we do Well!

- Leadership team was resilient during recent cyber threat
- Utilize social media, web based forms and other technologies
- User-friendly website that engages community members
- Ability to "Tell the Story" of the City
- Assess current systems and lessons learned
- Use technology for the City RFP processes
- NEOGOV

### What are the Gaps?

- ERP is taking longer than anticipated
- A more streamlined process aggregating community feedback--formal and informal ideas
- No existing **Digital Dashboard** for internal and external reporting
- Need to collect, review and analyze **data and business analytics**
- Need Technology Master Plan -- **Prioritization of Projects**
- Employees unsure of technology and its uses (i.e. many projects are not cloud based)
- More cyber training
- Extended Fiber/Broadband for all community members
- SMART City
- Develop a **comprehensive communication strategy**
- Use online access to streamline some city services



# EMERGING THEMES

11



**Communication**



**Data**



**Education  
and Training**



**Engagement**



**Resources**



**Shared Vision**

# NEXT STEPS

12



## **Determine process for developing a strategic plan**

As the City moves into the next phase of developing a strategic plan, it is recommended the City consider working with a third party to provide subject matter expertise, specializing in local government strategic planning. By doing so, the process remains inclusive and subjective.



## **Use participatory strategic planning process to engage all members of the community**

The USF Florida Institute of Government is also recommending using a participatory methodology which includes gathering data and information, plan design and implementation. During the data and information gathering phase all relevant studies within the last five years should be reviewed such as the Business Plan, CIP Plan and last updated Comprehensive Plan. This is also the phase where resident and employee feedback is obtained. Throughout the plan design phase consideration should be given to creation of core values, guiding principles and a glossary of terms. During the final phase of implementation, a dashboard or tool should be developed with a quarterly reporting mechanism to the Commission and community.





## ***Dwight D. Eisenhower***

*“Plans are useless,  
but planning is everything,”*



the John Scott Dailey

FLORIDA  
INSTITUTE OF  
GOVERNMENT

at the University of South Florida



4202 E Fowler Avenue | Tampa | FL | 33620



813.974.2346



<https://www.usf.edu/arts-sciences/institutes/fiog/>