



Strategic Planning Session

Thursday, January 28, 2016



S.R. 40 Gateways
West Ocala Redevelopment Area



SR-40 GATEWAYS
WEST OCALA COMMUNITY REDEVELOPMENT AREA

Downtown Mixed Use Development Project - 2017



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This document is a comprehensive guide detailing the overall strategy of the City of Ocala, how it was derived and the next steps in ensuring successful implementation.

“Strategy without tactics is the slowest route to victory.
Tactics without strategy is the noise before defeat.”

-Sun Tzu

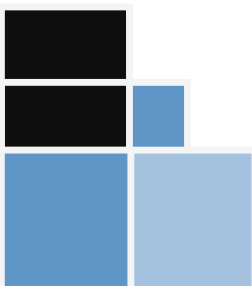
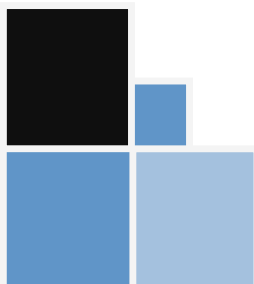


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Executive Summary

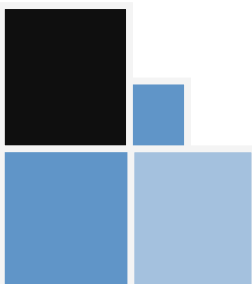
In February of 2016, the Ocala City Council conducted their annual strategic planning session with the purpose of aligning the vision of all Councilmembers, providing clear direction to City staff, and continuing on the great successes of 2015. Participants included all five City Councilmembers, the Mayor, the Chief of Police, the City Manager, and various members of the executive staff.

Velocity Advisory Group was engaged to facilitate the session for a second consecutive year. Velocity conducted one-on-one interviews with all members of Council and the City Manager to align the agenda and activities with the overarching goals of the session. These interviews revealed great alignment among Councilmembers as to the priorities for this session and the coming year.

*“Planning is bringing the future
into the present, so you can do
something now.”*

Previously, the goal of the strategic planning session was to re-evaluate the city’s four existing strategic priorities and align them with the desires and direction of the Council. However, Council felt that the City has such great momentum coming into the year that it was more important to focus on continuing the successes and executing on already determined initiatives.

Although consensus around the direction was already established, it’s very important to maintain steady progress by always looking for areas of improvement. The session included numerous informational presentations from City staff, however the emphasis was placed on providing City Council with a forum to determine the collective direction of the City’s strategy.



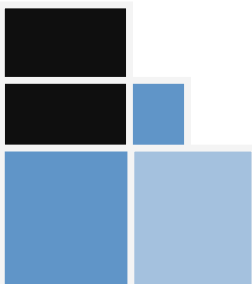
In order to fully explore new and existing opportunities, participants worked through various exercises during the session together. The exercises built upon one another and followed through the first three phases of strategic planning: Analyze and Assess, Set Priorities, and Establish Gameplan.

Council and the Mayor then reviewed all the content from the day's discussions to "vote" on the potential initiatives that they perceived as most valuable. This process proved the entire day's discussion aligned with the four strategic priorities, while providing additional "milestones" for consideration in the next fiscal year.



New "milestones" or initiatives selected by Council were grouped into these four strategic priorities. The city's staff has shown a great ability to execute their strategy at a high level and provide clear performance indicators to measure progress.

The following report details a review of the methodology used in the strategic planning process, a summary of the exercises and their outcomes, as well as considerations from Velocity Advisory Group.



Methodology

Based on extensive experience, facilitators, Dave Fechtman and Ben Bowman, employed their unique four-stage strategic planning process to guide participants throughout the day. All four phases of the process rely on the fundamentals of interactive participation, which produce the highest levels of engagement, teamwork and comprehension. The four phases consist of the following:

1. Analyze and Assess

Determine the current state of your organization both internally and externally.

2. Set Priorities (a.k.a. major goals or initiatives or projects)

Select the top initiatives for your organization based on the analysis work and alignment to purpose.

3. Establish Gameplan (a.k.a roadmap or blueprint or action plan)

Create measurable action steps to support and achieve your priorities.

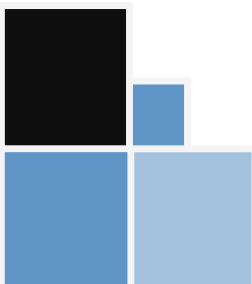
4. Implement Gameplan

Work through your gameplan as a team.

The facilitators' approach was to review both past successes and challenges and the potential objectives the City was/is responsible for achieving, as well as to assess the current environment in which the organization is operating.

Participants completed phases one, two and part of phase three in the initial sessions. Priorities should generally be broad and reach across any delineated workgroups allowing all team members to contribute to achieving the common goals.

The latter part of phase three and all of phase four are to be completed by City staff under the leadership of the Senior Leadership Team.



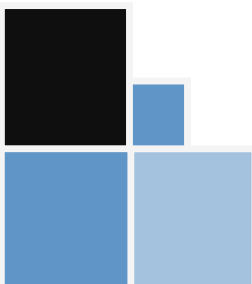
Review

Planning Session Expectations:

All participants were asked to identify what they wanted to achieve during the session and any expectations they had of the session. This list is used to engage the participants from the start and provide a measurement throughout the session to be certain that expectations are being met.

The responses appear below:

- Focus on midtown area
- Seamless transitions from area-to-area within the City
- “Catch up” on current initiatives
- Continuous improvement of blighted areas
- Social services issues
- Review & alignment with Ocala Vision 2035
- Celebrate successes (CRA on West side, etc.)
- Businesses in West Ocala
- Medical facility in West Ocala
- Prioritization of resources identified
- Reduce strategic risks



Review

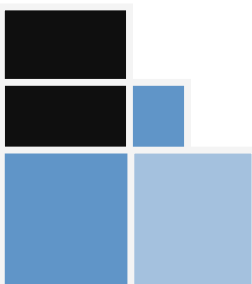
Original Priorities:

The City of Ocala entered the session with four existing strategic goals (priorities) as the most important focal points for the city.

- 1. Economic Hub*
- 2. Fiscally Sustainable*
- 3. Operational Excellence*
- 4. Quality of Place*

A primary objective of this planning session was to analyze and validate these four strategic priorities if they are indeed the four pillars of the city government.

Velocity Advisory Group led the participants through a series of exercises intended to unearth any missing components of the strategic priorities and substantiate their importance in the City of Ocala's Strategic Plan.



Review

Review of the 2015 Strategic Planning Session:

To help participants enter the proper mindset and perspective for the session, Velocity gave a brief review of the strategic planning process and 2015 session.

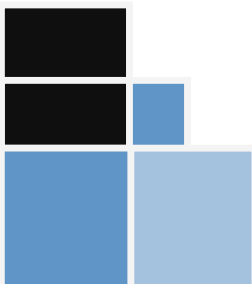
The 2015 strategic planning session included much of the same process, however it also featured multiple other exercises to accommodate the broader scope of the session.

Other exercises included:

- *A stakeholder analysis*
- *A review of the Mission, Vision, and Values of the City*
- *A communication plan (internal and external) for the dissemination of the Strategic Plan*

“Stripped to its essence, the culture of an organization is the sum of its shared values, beliefs, and norms of behavior.”

-Larry Bossidy



Review

Review of the Downtown Master Plan & Ocala Vision 2035:

Before successfully creating strategy, an organization must clearly identify their target, or north star, for which they are aligning their actions. The Downtown Master Plan was developed in 2004 and the Ocala 2035 Vision was completed by the community and adopted by the City of Ocala City Council on October 19, 2010 as a visioning process for the community to define the city's desired future. John Zabler, the City Manager, presented the two plans to the participants as reminders to be considered when developing strategic direction.

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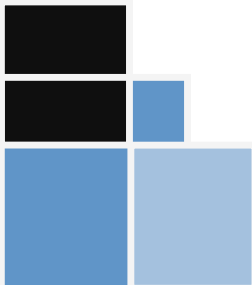
▶ Establishing Downtown Ocala as a vibrant hub of residential, retail, office, governmental, cultural and entertainment activity:

▶ Catalytic Opportunities:

- ▶ Chamber site - being developed as mixed use/hotel/residential project
- ▶ Library site - repurposed as IHMC, not as a mixed use development; not consistent with the Master Plan
- ▶ Marion Theatre - rehabilitated, no restaurant included, as recommended by the Master Plan
- ▶ Bank of America site - has not been redeveloped as a mixed use site
- ▶ Sprint site - being redeveloped with 18 townhomes, no professional office units; partially consistent with the Master Plan
- ▶ Concord Square parking lot

▶ Develop a Cultural Arts Program:

- ▶ Hire a full-time cultural arts manager
- ▶ Art in City Spaces Program
- ▶ Ocala Outdoor Sculpture Competition
- ▶ Tusawilla Art park
- ▶ MAX



Review

Celebrating Successes from 2015 Strategic Plan:


This phase of the strategic planning process is about obtaining well-rounded information. A key component is identifying the “Points of Pride” and “Areas of Improvement” from the previous strategic plan. City Manager John Zobler gave a thorough presentation on the progress and results of the city’s execution towards its existing strategy and four strategic priorities.

Priority 2 - Fiscally Sustainable

- ▶ Successes
 - ▶ Pension reform
 - ▶ New grant dollars - \$16M
 - ▶ New revenues -
 - ▶ Soft landing from Taylor SWAPS liability
 - ▶ Resolution of CR III settlement
 - ▶ Property values are up 7% over prior year
 - ▶ City employee retention - 66% in FY15, 83% YTD FY16


Priority 1 - Economic Hub

- ▶ Successes
 - ▶ Parking Garage
 - ▶ FedEx
 - ▶ Hotel/Mixed Use Development
 - ▶ Sheltair
 - ▶ Telecom - improving service delivery
 - ▶ OEU - lowest rates, high reliability
 - ▶ Water Resources - leading the way on nutrient reduction





Priority 4 - Quality of Place

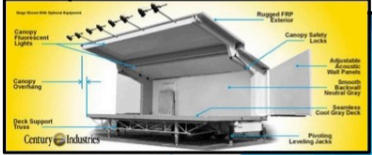
- ▶ Forecast
 - ▶ East Ocala CRA
 - ▶ Lillian Bryant Splash Park
 - ▶ Art Park
 - ▶ Mobile event venue
 - ▶ Reilly Arts Center outdoor event



Priority 3 - Operational Excellence

- ▶ Forecast
 - ▶ Potential sales tax dollars to pay for public safety and roads needs
 - ▶ Continued evolution of Reilly Arts Center and Tuscawilla park
 - ▶ Completion of improvements at Discovery Center
 - ▶ Implementation of self-service payment kiosks



Analyze and Assess

Key Topics: Presentation & Discussion:

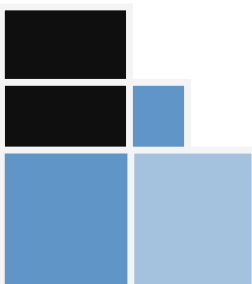
To further discover and discuss the current environment, various city staff members provided succinct, yet informative presentations on four topics requested by City Council:

- Budget Overview & Pension
- Economic Development
- Telecommunications
- Capital Improvement Projects

Throughout this exercise and various other activities, an ongoing list of “discussion items” was captured for later discussion in more detail. This list also added to the content for development of the plan.

Items included on this list were:

- Future annexations
- Council input on design of signage and wayfinding
- MRMC 3rd Avenue expansion
- Sovereign Building redevelopment
- “Unplanned events” budget and procedure
- Midtown (Tuscawilla, Wyomina, etc.) (Social services)
- Economic incentives
- Consideration for sale of entire Airport Business Park



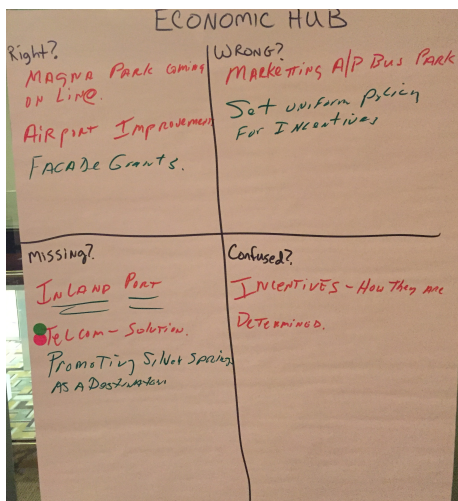
Analyze and Assess

Four What's Exercise:

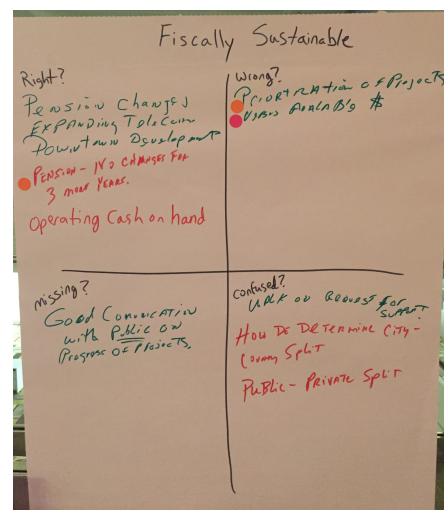
In order to fully evaluate the current four priorities, Velocity led the group through an exercise called, "The Four What's", where they were asked to fully evaluate and answer the following four questions about each of the four existing priorities. This information was later used to develop milestones.

- What's Right?
- What's Wrong?
- What's Missing?
- What's Confused?

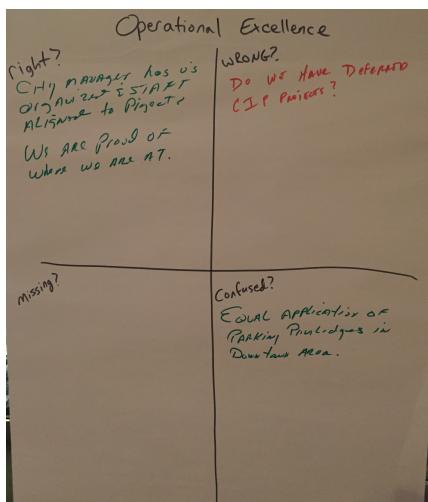
1) Economic Hub



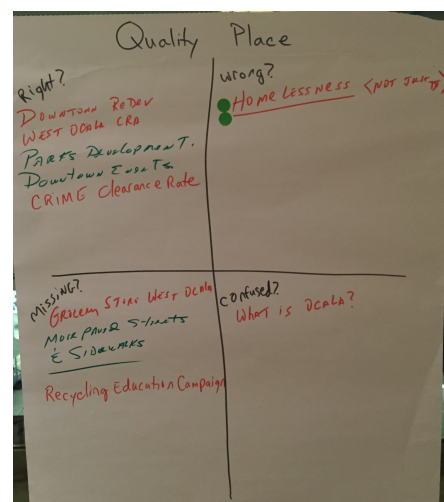
2) Fiscally Sustainable



3) Operational Excellence



4) Quality of Place



Establish Gameplan

Since Council confirmed the four strategic priorities, the rest of the dialogue and artifacts from the session will be delivered to the senior leadership team as potential milestones for implementation. These milestones should be properly vetted and integrated into the existing operations for full strategic execution.

PRIORITY #1: *Economic Hub*

Milestones:

- Telecommunications – missing solutions (x2)
- Focus on Midtown area (x2)

PRIORITY #2: *Fiscally Sustainable*

Milestones:

- Prioritization of projects vs. available funds (x2)
- Unplanned events – budget and procedures (x1)
- Pension – maintain current plan w/o changes for 3 years (x1)

PRIORITY #3: *Operational Excellence*

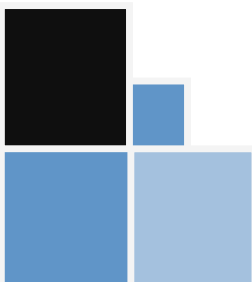
Milestones:

- Catch up on current initiatives (x1)

PRIORITY #4: *Quality of Place*

Milestones:

- Social services issues (x2)
- Medical facility in West Ocala (x1)



Considerations

While facilitating a strategic planning session, Velocity Advisory Group is afforded a unique perspective of discovery, analysis, and opportunity for the City. After careful consideration, we are able to provide unbiased, independent recommendations for consideration by City Council, the City Manager, and the Assistant City Managers to help accomplish the strategic priorities and ensure overall success.

- “Social Services Summit” – including all stakeholder groups (non-profits, business owners, citizens, etc.) to brainstorm and strategize on innovative ways to address the issue of social services and drug-related crime
 - Centralized location with synergies of service organizations
 - Council recommends Velocity Advisory Group to facilitate community engagement program
 - Point-person from City staff to identify case studies/plans from other cities’ success stories: St. Petersburg, Del Ray Beach, Orlando, Tampa
 - Business planning (Cindy Kelley to lead)
- Workshop for telecommunications based on results of the RFP
- Consider full-time recycling coordinator/recycling education campaign
- Unplanned events workshop (standard forms and economic impact vs. advertising purpose)
- Continue to support poverty, unemployment, and substance abuse programming/clinics in West Ocala to combat the drug-test failure statistics
- Organizational succession planning for diversity development, DROP knowledge transfer, and leadership development through a formalized talent readiness program
- Laminate strategic priorities scorecard to help with retention and communication (per request by Council)

