



Strategic Planning Session

Fiscal Year 2018

Wednesday, March 8, 2017

This document is a comprehensive guide to the annual strategic planning process for the City of Ocala. It outlines how it was derived and the next steps in ensuring successful implementation.



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

-Sun Tzu

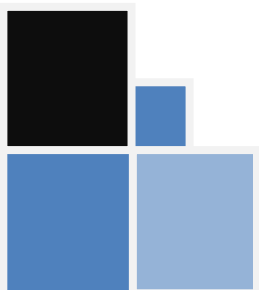
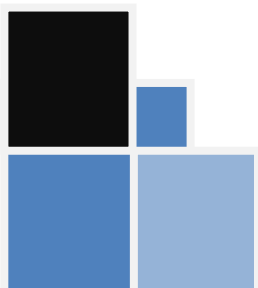


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Executive Summary

On Wednesday, March 8, 2017, Ocala's five City Councilmembers, the Mayor, Chief of Police, City Manager and several other leadership staff members gathered in the beautiful second-floor conference room of R+L Carriers to conduct their annual strategic planning session.

For the third consecutive year, Velocity Advisory Group was asked to facilitate the strategic planning process. In the months prior to the session, Ben Bowman, this year's facilitator, conducted one-on-one interviews with each member of City Council to understand the unique topics they would like to address during the planning session. In conjunction with the City Manager's office, this input was then used to craft a customized agenda that City staff would use to prepare informational presentations on each relevant topic.

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

The focus of FY2018's session was slightly different from the prior two years. The primary motivation for FY2016 was to take a step back and evaluate the strategic direction of the City to be sure it aligned with the vision of City Council—which, at that time, included multiple new Councilmembers. In FY2017, the unified goal was to focus on effective implementation and execution of the many important initiatives that were recently launched.

Heading into FY2018's planning session, Councilmembers unanimously acknowledged that City staff had successfully completed many of its objectives and allowed for new strategic opportunities in the coming fiscal year. These topics will be specifically addressed later in this report.

Since the ultimate goal of the strategic planning process is to align the needs of the City of Ocala with the operations of City staff, the strategic planning

process led the participants through a comprehensive approach to evaluate every area of City government.

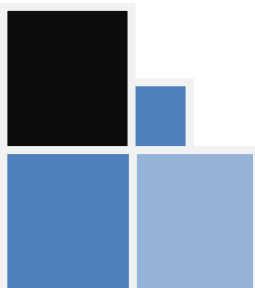
The internal operations of the City staff are based on four strategic goals:



During each annual planning session, Council is able to re-evaluate to determine if these four goals remain the most important focus areas for the City to accomplish its mission. Council confirmed that they would like to preserve the four existing strategic goals.

Each planning session also includes an overview of the prior year's accomplishments and improvement opportunities, as well as presentations from staff leaders on the various topics that Council has requested. These two important components paint a comprehensive picture of today's current environment.

Next, Council conducted a "Start / Stop / Continue" exercise for each of the four strategic goals to further evaluate the current state and help determine



the strategic direction for FY2018. Councilmembers 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 and most productive. This process revealed new "milestones" for consideration in the next fiscal year.

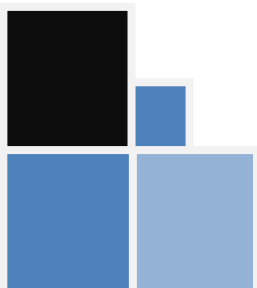
These new "milestones" or initiatives selected by Council were categorized under each of the four goals. Interestingly, a large amount fell under *Quality of Place*, which has clearly affects the success of the other three goals. These initiatives will make a strong positive impact on those who live, play, and work in Ocala.

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. Council will be given updates periodically throughout the year and strategic progress will also be delivered to the public through the City's multiple communication channels.

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.

If you are reading this report and have interest in any of the focus areas, please stay involved in the discussion.

These initiatives are designed to help you, your family, your community, and your business.



Methodology

Based on extensive experience, the facilitator employed a unique four-stage strategic planning process to guide participants throughout the day. All four phases of the process rely on high levels of interaction and participation. The four phases are outlined below:

1. Analyze and Assess

Determine the current state of the City of Ocala both internally and externally.

2. Set Priorities

Select the top initiatives for the City based on the analysis work and alignment to the mission.

3. Establish Gameplan

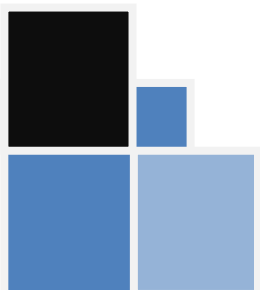
Create measurable action steps to support and achieve your priorities.

4. Implement Gameplan

Work through your gameplan as a team.

During the planning session, participants completed phases one, two and part of phase three. 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.

The Senior Leadership Team assembled the following morning for an informational “Plan Launch” to set the stage for the beginning work of Phase Four.



Analyze and Assess

Pre-Session Council Interviews:

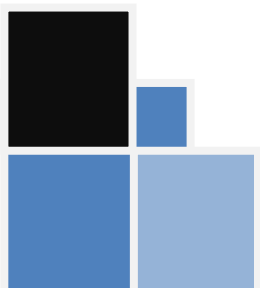
In the months leading up to the planning session, Ben Bowman spoke with each member of Council, individually and privately, as well as the Mayor and the City Manager, to discuss the primary focus areas and unique expectations of each person.

These interviews allow for:

1. The creation of a customized agenda tailored to this year's unique needs
2. Staff presentations that provide relevant information
3. Council's ability to guide the process from the very beginning.

The responses appear below:

- *The process is working—no major changes.*
- *We're ready for new challenges.*
- *Telecommunications Update*
- *Airport Terminal & Business Park*
- *Appropriation of Penny Sales Tax*
- *Corridor/CRA Update*
- *City Events – Financials & Strategy*
- *Staff Org Chart & Succession Planning*
- *City Charter Provisions & Procedures*



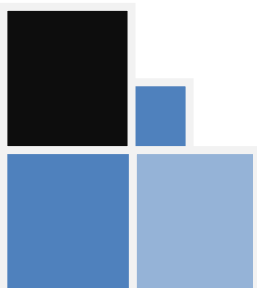
Review

Define the North Star:

All participants were asked to define what a success looks like at the end of Fiscal Year 2018. This “North Star” would act as a compass by which to align all initiatives and outcomes. This list was also 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:

- *Continue to make (all of) Ocala a destination*
 - *Cleaning up vagrancy/all-hands-on-deck*
 - *Gateway improvement*
- *Customer-centric approach*
 - *Removing “Not my job” mindset between departments*
- *Generating excitement around Ocala*
- *Addressing drug issues*
- *Continue development of our Arts community*
- *Potential convention center*
- *Community & media engagement*
 - *Proactive & preemptive*
 - *Focus groups*
- *Communication plan*



Review

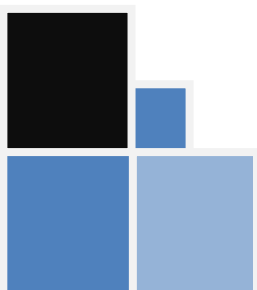
Current Strategic Goals:

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 goals if they are indeed the four pillars of the city government.

Velocity Advisory Group led the participants through a series of discussions and exercises to unearth any missing components of the strategic goals and verify their place in the City of Ocala's Strategic Plan.



Review

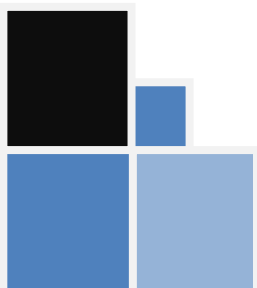
Review of the FY 2017 Strategic Planning Session:

To help participants enter the proper mindset and perspective for the session, Velocity gave a brief review of the strategic planning process and the FY 2017 session.

The FY 2017 strategic planning session included a similar process, however it featured other exercises and areas of focus to accomplish last year's unique goals.

Other exercises included:

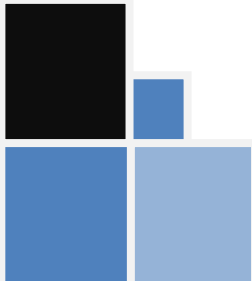
- *Review of the Downtown Master Plan*
- *Alignment with Ocala Vision 2035*
- *Discussion on:*
 - *The Budget & Pension*
 - *Economic Development*
 - *Telecommunications*
 - *Capital Improvement Projects*
- *Four What's Exercise for each strategic goal*



Review

Celebrating Successes from FY 2017 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 goals.



Analyze and Assess

Key Topics: Presentation & Discussion:

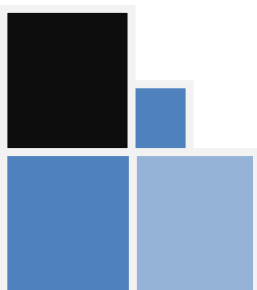
To further discover and discuss the current environment, various city staff members provided succinct, yet informative presentations on four topics requested by City Council:

- Telecommunications Update
- Airport Terminal & Business Park
- Appropriation of Penny Sales Tax
- Corridor/CRA Update
- City Events—Financials & Strategy
- Staff Org Chart & Succession Planning
- City Charter Provisions & Procedures

Throughout this exercise and various other activities, an ongoing list of ideas and discussion items were 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:

- Solutions to the drug and homelessness issues
- Enhanced customer service
- Making all of Ocala a destination
- Generating excitement around Ocala
- Cultural arts planning
- Community and media engagement



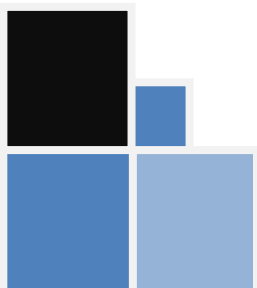
Analyze & Assess

Future Considerations: Homelessness & Drug-Related Issues:

Similarly, to the issues faced by cities across the country, Council wanted to use this planning session to generate a gameplan to address the increasing homelessness and drug-related incidences in various areas of Ocala. This topic blended with other agenda items, but throughout the day potential solutions were captured for incorporation into the strategic plan.

Potential solutions included:

- The new Ocala Fire Rescue and Ocala Police Department substation
- Relocating one social service provider to another area of the city to remove the geographical density of social services
- Addressing the effectiveness of the “Continuum of Care”
- Partnering with other community representatives who are conducting their own endeavors
- A joint workshop between the City and County
- Creation of a day shelter across from Interfaith Emergency Services as a safe alternative to users congregating on the city streets

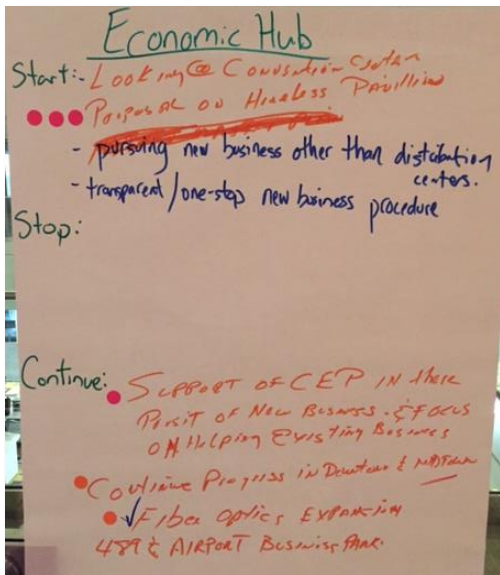


Analyze and Assess

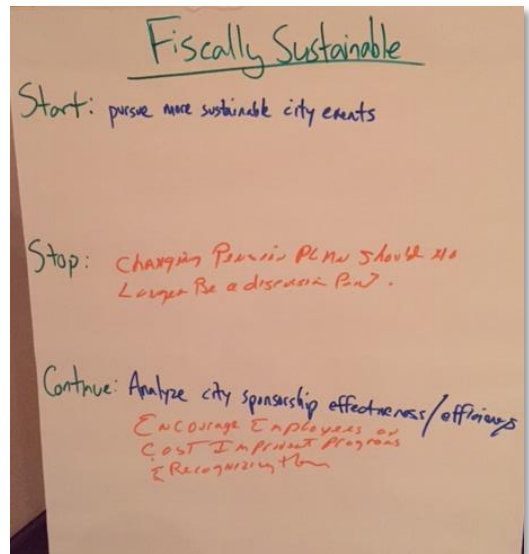
Start / Stop / Continue Exercise:

To fully evaluate the current four priorities, the group was asked what they would like to Start / Stop / Continue about each of the four existing priorities. This information was later used to develop milestones.

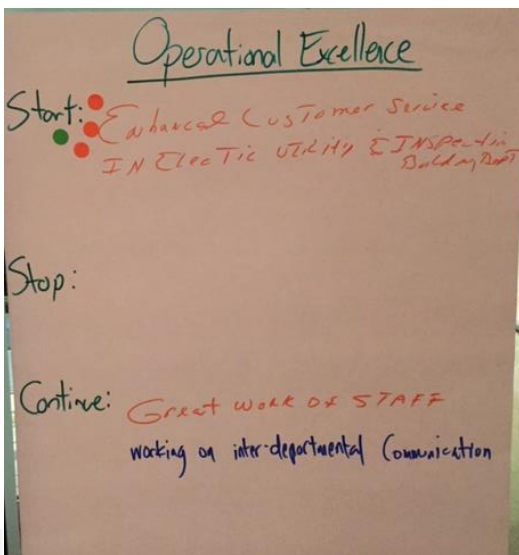
1) Economic Hub



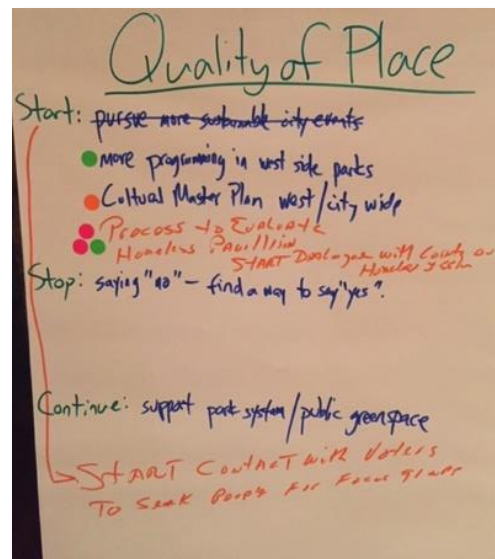
2) Fiscally Sustainable



3) Operational Excellence



4) Quality of Place



Establish Gameplan

Voting for Strategic Milestones:

After all the various topics, presentations, and discussions, Council felt comfortable that the most important initiatives had been addressed.

However...

“If everything is a priority, nothing is a priority.”

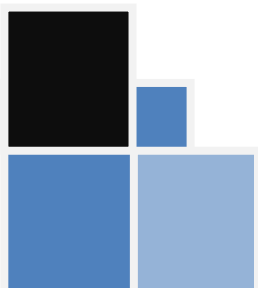
Each Council member was then given three “votes” to choose which initiative, topic, or idea was most important to them and would most move the City towards its North Star. The items receiving votes are shown below.

Since Council confirmed the four strategic goals, the other takeaways generated 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:

- Support of CEP in the pursuit of new business and focus on helping existing businesses



PRIORITY #2: *Fiscally Sustainable*

Milestones:

- Fiber optics expansion

PRIORITY #3: *Operational Excellence*

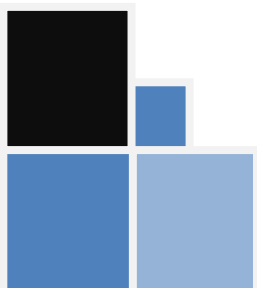
Milestones:

- Enhanced customer service in electric utility, inspection, building, etc. (x4)
- City charter revision workshop

PRIORITY #4: *Quality of Place*

Milestones:

- Proposal on the homeless pavilion (x3)
- Process to evaluate homeless pavilion (x3)
- City/county joint workshop on drug issues
- Relocation of one social service, to start
- More programming in west side parks
- Cultural arts master plan for west Ocala and citywide
- Continue to make all of Ocala a destination
- Continue progress in downtown and midtown

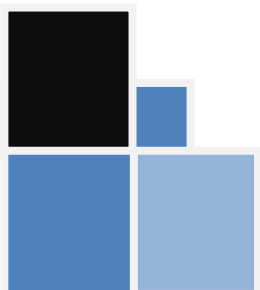


Establish Gameplan

Action Items & Initiatives:

To provide greater clarity and ensure an effective handoff to City staff for execution, a list of specific action items and Council agreements were unanimously agreed to:

- City/County joint workshop for drug/homelessness issues
- Cost estimate of day pavilion
- Initiative to improve customer service across all departments
- Workshop to discuss potential changes to the city charter
- Increased programming in West Ocala
- Cultural Master Plan
- Development of skate park
- Promotional strategy for incentives to existing businesses
- Expansion of fiber optics



Communication Plan

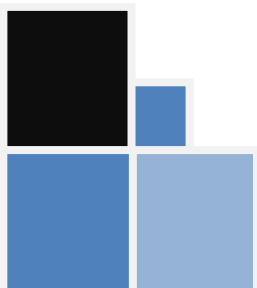
Internal and External Communication:

Upon consensus regarding the strategic direction, Council members and staff discussed the best way to effectively communicate the plan launch and ongoing progress, both internally and externally.

Council felt extremely comfortable with current internal communications, so the conversation quickly shifted to external communication with the constituency and various stakeholder groups.

The most favorable suggestions included:

- Targeted marketing for specific stakeholder groups
- Focus groups for active voters in recent local elections
- Create stakeholder focus groups to proactively build support for initiatives before launching
- Promote a bullet-pointed list of the upcoming Council agenda via social media outlets



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.

- Add telecommunication performance measures to the strategic plan dashboard of metrics
- Utilize a third-party facilitator for the city/county joint workshop to lead the dialogue from an unbiased perspective
- Consider a millennial recruitment plan to incorporate into the succession planning and talent development efforts
- Identify a corporate sponsor for the skate park development
- Build a diverse advisory council for the skate park development to build community engagement—including youth from the midtown area and those who frequent the other skate parks. Perhaps even consider including those who have been cited for skating illegally in the past.
- Include a line-item on recurring city-sponsored or city-partnered event forms that list the city's Return-on-Investment from that organization's prior event(s)
- Research the structure of other comparable city's charters in advance of the workshop
- Launch carefully chosen focus groups with well-rounded participants for upcoming City initiatives. This will allow honest feedback (and eventual savings) before a program is rolled-out to the community.

