



# 2023 STRATEGIC PLANNING

## Executive Summary



## CITY OF OCALA - STRATEGIC PLAN EXECUTIVE SUMMARY

---

### Overview

On April 11<sup>th</sup>, 2023, the Velocity Advisory Group facilitated a Strategic Planning Session for The City of Ocala's 2024 Fiscal Year. Velocity Advisory Group is a management consulting firm that specializes in helping organizations develop and implement strategic plans. We use a collaborative and comprehensive approach to strategic planning, which involves engaging stakeholders, conducting a thorough analysis of the organization's internal and external environment, and developing a customized action plan to achieve the desired outcomes. Facilitated by Dan Blake, Velocity Advisory Group helped identify strengths and weaknesses, explore opportunities, and develop a clear path forward to achieve their goals.

The City of Ocala has a mission to provide fiscally responsible services consistent with the community's current and future expectations. Its vision is to make Ocala a great place to live, play, and prosper which served as the foundational theme for the planning session. The city achieves its mission through various initiatives, such as investing in infrastructure, public safety, and staff. The city also promotes economic development by encouraging business growth and development, supporting entrepreneurship, and attracting new businesses to the area. Overall, the City of Ocala is committed to improving the well-being of its residents and creating a vibrant and prosperous community.

### Key Objectives

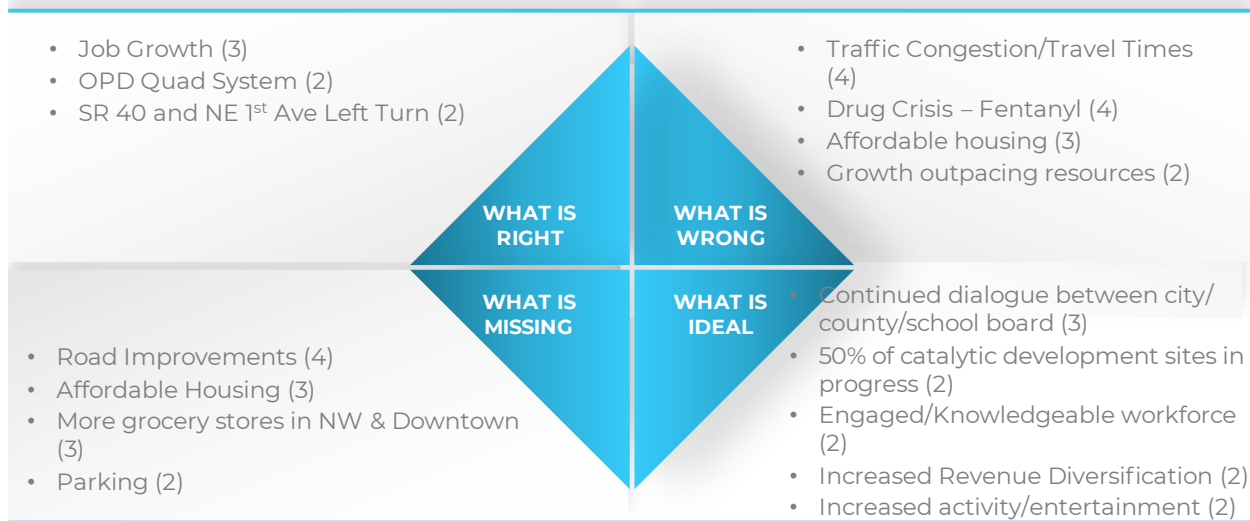
The objectives of this year's strategic planning session were to review the initiatives from the previous year, assess their progress, and identify areas for continued improvement. The session aimed to identify what is right, what is wrong, what is missing, and what the ideal situation would look like. The focus was on adopting a servant leadership approach that puts the needs of others first and prioritizing initiatives that have the most significant impact on the city's mission and goals. The session aimed to encourage collaboration and participation among the mayor, councilmembers, and senior leadership, facilitate open and honest communication, and develop a comprehensive action plan that aligns with the organization's values, vision, and newly identified objectives.

### The Four "Whats"

After completing the interactive four "Whats" exercise, votes were tallied to identify the most common themes. By using this process, key issues and challenges facing the city were identified, along with the most pressing areas for improvement. The results of the vote have been summarized in a graphic below, which provides a visual representation of the themes that emerged. These themes have been used during the initiative-setting process, ensuring that efforts are focused on addressing the most important issues and achieving the city's strategic objectives.

THE 4 “WHATs”: WHAT IS \_\_\_\_\_ MAKING OCALA A GREAT PALCE TO LIVE, PLAY, AND PROSPER

Summary of Top Votes from Council and Mayor for each flip chart



### Setting Initiatives

As the emerging themes were reviewed, it became evident that many of the smaller projects and quick wins previously identified had already been accomplished. This is a testament to the progress the team has made over the last year, and to the effectiveness of previous initiatives. By recognizing and acknowledging these accomplishments, the team can build upon its successes and focus attention on addressing the more complex and long-term challenges.

This year's initiatives represent large-scale projects that will be measured predominantly by milestones rather than 100% completion. Given their size and complexity, they will require cross-departmental collaboration and the active participation of teams working towards them. The achievement of milestones will be an important indicator of progress toward strategic objectives that can be shared with Council, and the ongoing monitoring of these milestones will ensure that teams stay on track and make any necessary adjustments along the way. These initiatives will highlight the importance of teamwork, communication, and collaboration, in working towards achieving shared goals and objectives.



### FY 2024 Priorities

- Building the 2050 Plan**
  - Downtown / West Ocala
  - CRAs and Gateways
- Affordable Housing**
  - Define / Plan / Finance / implement
- Engaged/Knowledgeable Workforce**
  - Leadership Development & Servant Leadership
  - Attract & Retain Talent
- Budget**
  - This Year and then a long -term plan
- KPI Metrics**
  - Simple views of data for presentation
- Increase & Generate Revenue**
  - Projects to Drive Growth
  - Selling Properties
- Homelessness Prevention**
  - Master Planning
- Building / Permitting / Inspection Process**
  - Flow Charts
  - Right People in the Right Seats
- Public Safety**
  - Preparing for future growth
  - Health Topics Included?

### Next Steps

The next steps following the strategic planning session include confirming the defined initiatives listed above, identifying project teams, and assigning champions to lead each initiative. These teams will be responsible for building project game plans that outline specific goals, timelines, resources, and metrics for success. They will work collaboratively with other stakeholders and City Manager, Pete Lee, to ensure that initiatives are aligned with the city's values, vision, and objectives. Regular status reports will be provided with milestones to ensure that progress is being made toward achieving the identified goals. This process will help to promote accountability, transparency, and effective communication, and ensure the city is on track to achieve its strategic objectives.