

Strategic Operating Plan FY 2007 4th Quarter Update

November 5, 2007



Strategic Operating Plan

Scheduled Presentations

- November 5, 2007 FY 2007 Summary
- February 4, 2008 1st Qtr. 2008
- May 5, 2008 2nd Qtr. 2008
- August 4, 2008 3rd Qtr. 2008
- November 3, 2008 4th Qtr. 2008



Strategic Planning Initiative

To attain the City Commission adopted Vision and Mission Statements using the City Values to align goals, outcomes, strategies, action items, annual budgets and organizational activities with employee actions



**"Lakeland - a vibrant, culturally
inclusive world-class community."**

**"A community working together to
provide an exceptional quality of life."**



Strategic Operating Plan

Vision/Mission

Values: Standards for conducting daily business

Goals: Efforts focused toward particular outcomes

Outcomes: Measurable end results expected from Goal-Setting

Strategies: Plan of action for meeting Outcomes

Actions: Specific targets representing measurable progress towards a Goal or Strategy



STRATEGIC OPERATING PLAN

Activity since August 2007:

- Completed for FY 2008:
 - Strategic Plan Document
 - Business Plan Document
 - Performance Budget Document
- Establishment of the Performance Excellence Division, reporting directly to the City Managers Office
- Continued development of the FY 2008 Actions:
 - Includes incomplete 2007 Actions (non-operational) and newly defined 2008 Actions.



STRATEGIC OPERATING PLAN

Activity since August 2007:

- Preparing for the FY 2009 Strategic Plan:
 - Stakeholder's Meetings (Internal & External)
 - Pre-Retreat Directors Meetings (January)
 - City Commission Annual Retreat (February 21st & 22nd)
 - Post-Retreat Informational Meetings (February)
 - Development of the FY 2009 Strategic Plan Document
- KSI & FBC update scheduled for the December 14th Agenda Study



Communication Goal

“Develop an informed and engaged community”

- **Outcome: Informed and Engaged Employees**
 - ✓ **Strategy:** Promote an organizational culture characterized by open communication and employee involvement
- **Outcome: Informed and Engaged Community**
 - ✓ **Strategy:** Promote effective communication inclusive of all residents and stakeholders
 - ✓ **Strategy:** Encourage a shared sense of community and responsibility through citizen education and involvement



Strategic Outcomes Summary

FY2007 4th Quarter Update

Communication (31 Actions)	Completed	Underway	Not Started	Abandoned
Short-term (year 2007)	12	8	0	2
Intermediate (years 2008 - 2010)	4	3	0	2
Long-term (years 2011+)	0	0	0	0
Total	16	11	0	4

COL Strategic Operating Plan

Communication – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Citizen Survey Feedback (OCAT)	Conduct annual evaluation of city operations by residents using qualitative and quantitative social science research techniques showcased on City and employee websites.	\$5,500	2008	Questionnaire to be finalized in mid-December. On track for mail-out of evaluations in February
Lakeland Electric Customer Workshops	Conduct residential customer and commercial educational workshops.	\$16,000	2008	A commercial customer seminar was held on September 12th, with presentation of topics such as commercial roofing coating and efficient lighting technology. Approximately 40 attendees.

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Communication – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Diversity Education Series (Lakeland Vision)	Develop active participation in Diversity Task Force to improve attitudes and respect for individuality through a series of events celebrating all cultures.		2007	Multicultural Festival ran from September 20th to 23rd, 2007 with support from the City of Lakeland, University of South Florida Lakeland, Polk Community College, Florida Southern College, Polk County Community Health & Social Services, Polk Museum of Art, and the Polk County School Board.
Values Campaign (OCAT)	Develop campaign to promote values throughout City organizations; (i.e., badges, posters, employee meetings, etc).	\$11,500	2007	Values campaign officially kicked off in April and will be completed in November 2007. Videos have been posted on InSite.

COL Strategic Operating Plan

Communication – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Customer Feedback Program (OCAT)	Provide customer survey cards at City Facilities and develop procedure to collect and respond to customer satisfaction/dissatisfaction feedback.	\$3,780	2008	Survey cards printed and delivered the 1st week of October; being distributed to City facilities with walk-in traffic. OCAT has been tasked with determining who collects surveys, compiles data, distributes information to departments and responds to customers.
Strategic Plan Employee Forums (OCAT)	Establish monthly meetings between City of Lakeland Department Heads/Directors and their respective workgroups, e.g., brown-bag lunches, to discuss how their department aligns to the City Strategic Plan (City Manager's office representative will attend one of these meetings annually).	\$4,300	2007	Monthly meetings between City Manager's office and Department Heads have been established. Department coordinate meetings within their respective workgroups.

COL Strategic Operating Plan

Communication – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Web Site Performance Measures	Promote effective communications with all residents and stakeholders of the City of Lakeland by publishing law enforcement monthly performance measures.	\$1,200	2007	Monthly performance measures will continue to be posted on the Police Department's website.
Strategic Plan Public Outreach (OCAT)	Inform the public on initiatives aimed at achieving strategic Goals using annual calendar, Lakelandgov.net and other pro-active techniques.	\$7,268	2007	The 2008 City Calendar was eliminated from the FY 2008 budget. In response, the City continues to publish updated information about completed action items on both the Intranet and the Internet.

Economic Opportunity Goal

“Create and encourage inclusive, lasting environments that grow, attract and retain a creative, talented, educated and technically qualified workforce”

- **Outcome: Enriched Organization Workforce**
 - ✓ **Strategy:** Recruit, hire and retain highly skilled employees
 - ✓ **Strategy:** Promote career development and educational opportunities
- **Outcome: Enriched Community Workforce**
 - ✓ **Strategy:** Establish area “Workforce Development Partnerships”
 - ✓ **Strategy:** Encourage the development of high-skilled labor sectors
 - ✓ **Strategy:** Promote diverse cultural opportunities
- **Outcome: Sustainable Business Environment**
 - ✓ **Strategy:** Promote international relationships
 - ✓ **Strategy:** Support area economic development initiatives
 - ✓ **Strategy:** Promote high skilled-high wage employment opportunities
 - ✓ **Strategy:** Promote the establishment and sustainability of small businesses



Strategic Outcomes Summary

FY2007 4th Quarter Update

Economic Opportunity <i>(28 Actions)</i>	Completed	Underway	Not Started	Abandoned
Short-term <i>(year 2007)</i>	10	8	0	0
Intermediate <i>(years 2008 - 2010)</i>	3	6	0	1
Long-term <i>(years 2011+)</i>	0	0	0	0
Total	13	14	0	1

COL Strategic Operating Plan

Economic Opportunity – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Advanced Life Support (ALS) Service	Provide Advanced Life Support (ALS) level service from all fire stations requiring paramedic training and certification status and necessary equipment.	\$100,000	2010	New paramedics have completed Polk County Emergency Medical Service orientation and are in the process of completing mandated ambulance ride time. State of Florida Advanced Life Support permits have been applied for Lakeland Fire Department Engine 41 and Rescue 42. Emergency medical dispatch (medical triage system) continues to evolve and is scheduled for implementation in 2008.
Lakeland Electric Power Academy	Develop power academy with area schools to attain a skilled workforce.	\$5,000	2008	Position of Trainer/School-to-Work Approved; currently evaluating candidates. Curriculum design and certification requirements are being established and documented. Design of Energy Lab and classroom are complete. Marketing campaign started. Students currently providing feedback on options for logo/branding. Brochures for Parent/Teacher Association presentations under development. DVDs and website are also being developed. Academy Summit planned and scheduled for November 2, 2007.

COL Strategic Operating Plan

Economic Opportunity – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Small Aircraft Transportation System (SATS)	Establish the small aircraft transportation program with a goal of achieving an active and expanding role in this new aviation transportation system.	\$7,500	2007	DayJet has established small aircraft transportation and begun trial operations with on-demand charter service from the Lakeland Linder Regional Airport.
College Partnerships	Work closely with area schools and colleges to develop special class offerings for City of Lakeland Employees.	\$500	2007	The City will continue to cultivate partnerships with area schools in order to develop mutually beneficial programs. The initial program that inspired this action item never came to fruition. Area college representatives attended the Vendor/College Fair and relationships continue to be developed with COL employee needs in mind.

COL Strategic Operating Plan

Economic Opportunity – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Leadership Training (OCAT)	Establish a requirement that Department Head incumbents complete at least 15 hours of Leadership/Management Education per year.	\$2,200	2007	Leadership and Supervisory training requirements have been added to all supervisor and management job descriptions City-wide. Additionally, the requirement for Department Heads to complete at least 15 hours of leadership/management training/education per year and/or completion of the Certified Public Manager program (funds permitting) was also established. This requirement will be communicated to Department Heads along with information regarding their current training record and future CityU and Certified Public Manager training opportunities.
Time Management Curriculum (OCAT)	Add mandatory Time Management Class into City University curriculum for Levels I, II, and III.	\$10,350	2007	Class is now offered on a regular basis as part of CityU courses.

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Economic Opportunity – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Recruitment/ Hiring Process Review (OCAT)	Conduct process analysis and development project in an effort to improve the recruitment and hiring process as well as a checklist/process to coordinate system information when employees are hired or change positions, departments, divisions, etc.	\$50,000	2007	The final elements of this project have been completed. The improved process will be implemented and worked through process improvement cycles using data collected during and at the completion of recruitment and hiring efforts.
Workforce Diversity Campaign	Launch a comprehensive multi-faceted approach to sensitizing and educating workforce on diversity issues with cultural diversity class becoming mandatory for all employees by FY08.	\$1,000	2009	The first article was published in the September issue of Access. Additional articles will be published in the electronic version of Access during FY 2008.

COL Strategic Operating Plan

Economic Opportunity – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Work Education and Internship Partnerships	Conduct activities with educational and business partners to target increased participation from employees in educational and internship opportunities to increase the number of technical and highly-skilled individuals available in the workforce.	\$10,000	2007	While the intent of this goal will be on-going, a number of targeted activities have been completed. All Internship money has been used to fund the intern positions with continued funding of the program again in FY 2008. To improve clarity, the internship process will be mapped out and program feedback will be reviewed to determine future improvements to the program. The Vendor/College Fair was held in August providing an opportunity to update the local representatives on programs and City-needs as well as plan for future career development events and activities.
Employee Wellness Clinic	First year's implementation cost to provide an on-site alternative for City employees to handle minor emergencies and injuries, as well as preventive health maintenance.	\$459,128	2010	The City's Wellness Clinic's grand opening was held on Friday, August 3, 2007; and clinic was open for utilization on Monday, August 6, 2007.

Fiscal Management Goal

“Develop and effectively manage financial resources”

- **Outcome: Optimal Management of Existing Financial Resources**
 - ✓ **Strategy:** Enhance strategic and budgetary planning with performance measurement systems
 - ✓ **Strategy:** Operate physical assets according to “Best Practices”
 - ✓ **Strategy:** Optimize fiscal capacity of existing financial resources
 - ✓ **Strategy:** Leverage underutilized assets
- **Outcome: Develop New Financial Resources**
 - ✓ **Strategy:** Establish public/private partnerships
 - ✓ **Strategy:** Establish perpetual care funds (or endowments) for public and private contributions



Strategic Outcomes Summary

FY2007 4th Quarter Update

Fiscal Management (24 Actions)	Completed	Underway	Not Started	Abandoned
Short-term (years 2007 - 2008)	3	4	0	1
Intermediate (years 2009 - 2012)	3	11	0	1
Long-term (years 2013+)	0	1	0	0
Total	6	16	0	2

COL Strategic Operating Plan

Fiscal Management – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Impact Fee Study	Complete and implement the results of new Impact Fee Study to be undertaken by a consultant to evaluate fire protection, law enforcement and parks.	\$100,000	2007	The impact fee studies for Parks, Fire and Police were updated by Tindale-Oliver, with recommended fees contained in each study. The City Commission adopted 100% of the recommended new Fire and Law Enforcement fees, and 85% of the recommended Parks fee on October 1, 2007. Collection of the new fees will commence in January, 2008 per adopted ordinances 4910, 4911 and 4912. The consultant has been retained under a new contract to update ordinance provisions for the City's Transportation impact fee ordinance, however that does not involve a change to the actual impact fee.

COL Strategic Operating Plan

Fiscal Management – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Strategic Planning Execution	Develop key success indicators (KSI's) aligned to key intended outcomes (KIO's) of City's Vision and Strategic Goals and execution through a system and structure to integrate budgetary planning with performance Management.	\$3,000	2008	Produced FY2008 Strategic Plan Document. Met with departments responsible for Key Success Indicators – reviewed, revised, and agreed on formula, calculation and tracking expectations. FY2008 Key Success Indicators attached to Outcomes and placed in Strategic Plan Document & Business Plan Document.
Citizen Action Center	Provide a website for citizens to provide feedback to City officials.	\$3,950	2007	Core application has been completed and is ready for 'soft' rollout. Continuing to make minor enhancements as needed prior to large-scale announcement of websites availability.
Lakeland Center Renovation	Improve the aesthetic appearance and readiness of the Lakeland Center.	\$500,000	2009	Locker room and backstage areas of the Jenkins Arena have been completed. New directional signage has been installed.
Distribution Reliability Improvement	Install additional distribution line switches to improve power restoration flexibility.	\$55,000	2008	Completed installation of ten switches in association with distribution circuit upgrades.

Growth Management Goal

“Ensure planning and infrastructure results in quality developments and safe, attractive neighborhoods”

- **Outcome: Quality Developments**

- ✓ **Strategy:** Promote a comprehensive, integrated approach to all land use decisions
- ✓ **Strategy:** Develop reliable and efficient infrastructure systems that support desired urban development
- ✓ **Strategy:** Establish incentives to encourage high quality developments

- **Outcome: Safe, Attractive Neighborhoods**

- ✓ **Strategy:** Promote public safety initiatives and projects that enhance property values
- ✓ **Strategy:** Counteract the physical and economic decline of neighborhoods
- ✓ **Strategy:** Empower residents to address neighborhood concerns



Strategic Outcomes Summary

FY2007 4th Quarter Update

Growth Management (41 Actions)	Completed	Underway	Not Started	Abandoned
Short-term (years 2007)	3	13	2	1
Intermediate (years 2008 - 2010)	0	15	0	1
Long-term (years 2011+)	0	6	0	0
Total	3	34	2	2

COL Strategic Operating Plan

Growth Management – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Planning, Development and Design Standards	Review planning, development and design standards to ensure non-traditional housing development can be pursued to accommodate international, transnational and creative class residential interests.	\$50,000	2008	A consultant contract was authorized to identify and map various “design districts” throughout the City. This is the first phase of an effort to create a more design-based zoning code. This will address both commercial and residential development and preempts the initial effort of the 3rd quarter that focused on commercial development only.
Kelly Recreation Complex Expansion	Design and construct additional recreational space to accommodate programming demands.	\$875,000	2008	Schematic plans are complete; project currently in the construction document phase.
English Oaks Force Main Construction	Expansion of the Southwest Wastewater Collection and Transmission Systems in a timeframe to address anticipated growth.	\$11,000,000	2009	Design in progress for pump stations and pipelines. The Turnpike Authority has not granted optimal access to their right- of-way to minimize the need for private acquisitions. Consultant to pursue design of associated easements. The pump stations go to bid next quarter.

COL Strategic Operating Plan

Growth Management – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Northeast Wellfield Permit Process	Complete the water use permitting process to obtain additional supply which in turn will allow continual growth in the greater Lakeland area.	\$750,000	2008	The administrative hearing ended on August 21 st ; with the parties submitting their Recommended Orders in October. The Administrative Law Judge anticipates making his rulings by mid to late December 2007.
West Lakeland Wasteload Reduction Facility	Complete design, permitting, financing and construction of proposed Wastewater High Strength Pre-Treatment Plant.	\$16,133,000	2008	Purchase orders have been issued and the Contractor given the Notice to Proceed. Shop Drawing reviews are in progress. Publix has agreed to the sale of a required easement to transport effluent from their Industrial Complex to the new Pretreatment Plant in October 2007.
Regional Police Services	Develop and implement a plan for regional distribution of police services to obtain optimal efficiency of police resources, personnel, and services in transition to regional sub-stations.	\$1,500,000	2009	A meeting was held on July 23, 2007 to examine a proposed Table of Organization for the Police Department. Further analysis continues. The entire process has been impacted by the effects of the Florida Property Tax Reform initiatives and the resulting resources that will be available to support this reorganization.

COL Strategic Operating Plan

Growth Management – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Private Area Lighting	Provide electric commercial and residential customers with a means to add lighting to premises.	\$250,000	2008	147 Private Area Lights were installed the 4th quarter for a total of 715 installed in 2007.
Neighborhood Association Coalition Meetings	Empower residents to address neighborhood safety concerns through activities of the Neighborhood Association Coalition (NAC).	\$500	2007	The 4th quarter Neighborhood Association Coalition (NAC) meeting was held on September 10, 2007. The discussion continued to focus on strategic rather than tactical issues. The Hispanic Festival held on October 6th was an example of the Police Department's involvement and support of the Hispanic Outreach portion of this action item.
Brick Street Policy	Create a new City Brick Street Policy to allow property owners to petition for conversion of asphalt streets to brick streets and to share the cost for the upgrade.	\$5,000	2007	A City Brick Street Policy has been completed by the Public Works Engineering Division. The recommended policy is currently being finalized by the City Manager's office for implementation.

Quality of Life Goal

“Provide quality public spaces; deliver superior municipal services, and support arts, education, recreation and wellness”

- **Outcome: Quality Public Spaces**
 - ✓ **Strategy:** Promote public/private partnerships to develop public spaces
 - ✓ **Strategy:** Implement Parks & Trails Master Plan priorities
 - ✓ **Strategy:** Preserve and enhance unique natural and historic resources
- **Outcome: Superior Municipal Services**
 - ✓ **Strategy:** Establish “Best Practices” benchmarks
- **Outcome: Support Community Arts, Wellness & Recreation**
 - ✓ **Strategy:** Establish public/private partnerships and promote community events and culturally diverse programs
- **Outcome: Support Education**
 - ✓ **Strategy:** Engage in partnerships with area education institutions



Strategic Outcomes Summary

FY2007 4th Quarter Update

Quality of Life (19 Actions)	Completed	Underway	Not Started	Abandoned
Short-term (years 2007)	6	4	0	0
Intermediate (2008 - 2010 years)	1	7	0	0
Long-term (years 2011+)	0	1	0	0
Total	7	12	0	0

COL Strategic Operating Plan

Quality of Life – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Art in Public Places	Encourage continued placement of public art as recommended by the Public Art Committee.	\$25,000	2008	Private funding for the 2008 Lemon Street Sculpture Show is in the process of being secured.
Lake Hollingsworth Westside Treatment Strands Project	Complete construction of stormwater treatment retention strands between the path and the lake on the western side of Lake Hollingsworth.	\$900,000	2008	An assessment review of the Alternatives Analysis Study originally developed by CH2MHill was completed by Moduss Engineering. A review meeting was held with Public Works staff to discuss the findings and determine the next phase of the project. A conceptual plan representing the recommended alternative is being prepared from which an engineering design and permitting services proposal will be developed. Staff time was spent accumulating data and information to be evaluated by the Consultant.

COL Strategic Operating Plan

Quality of Life – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Fire Services Benchmarks	Establish best practices benchmarks and report activity using those measures by participating in the Florida Benchmarking Consortium.	\$3,000	2007	Fire Department personnel attended workshops conducted by the Florida Benchmark Consortium and continue to collect data for established benchmarks. The Fire Department will remain a member of the Consortium and compile data internally in the Strategic Plan.
Customer Satisfaction Surveys	Conduct residential customer satisfaction surveys maintaining a rating of 85% or above and conduct commercial customer satisfaction surveys semi-annually maintaining a rating of 80% or above.	\$14,000	2007	Conducted a Residential Customer Satisfaction Survey during the month of July with a return-result of 82%. Next survey is scheduled for the month of October. A Commercial Customer Satisfaction Survey is also scheduled for month of October.

COL Strategic Operating Plan

Quality of Life – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Library Facilities Expansion	Expand and improve Library facilities and services in response to community partnerships and identified needs.	\$400,000	2007	Grand opening of the E-library South Lakeland was July 16, 2007. One capital item, an outdoor book drop, is on order after approval received from landlord for placement. Collection purchase continues from City allocation. Build-out costs in 4th quarter = \$40,088.00. Collection expenditures in 4th quarter = \$6,707.00.
Lakeland Electric School Programs	Visit local schools promoting utility programs, electrical safety and conservation.	\$2,000	2007	Conducted 1 High School, 1 Middle School and 8 Elementary class presentations; attended 10 community events.

COL Strategic Operating Plan

Quality of Life – 4th Quarter Action Reporting

Deliverable	Action	Estimated Cost	Projected Completion/ Fiscal Year	Status
Community Center Computer Program	Partnership with Polk County School Board to supply computer training to residents at community centers.	\$1,500	2008	On September 10th, the first of many sessions began in the computer lab. Users of the lab totaled 43. Of this number, nine (9) were adults in the Introduction to Computers class. The remaining were students in our After School Tutoring Program. In that the new school year only recently begun, participant levels are expected to rise . The advantages afforded students to help excel in class work and FCAT skills are tremendous. The bank of computers with internet access also open up avenues for increased classes in varying computer programs. The Community Development Department is making an impact by aiding the Lakeland community in becoming increasingly more technical.

Strategic Outcomes Summary

FY2007 4th Quarter Update

Overall Summary 143 Actions	Completed	Underway	Not Started	Abandoned
Short-term (77) <i>(year 2007)</i>	34	37	2	4
Intermediate (58) <i>(years 2008 - 2010)</i>	11	42	0	5
Long-term (8) <i>(years 2011+)</i>	0	8	0	0
Total	45	87	2	9

Summary

- ✓ **Establishment of Performance Excellence Division**
- ✓ **Completed 2008 Strategic Plan, Business Plan and Performance Budget documents**
- ✓ **Continued development of the 2008 Actions**
- ✓ **Preparation for the 2009 Strategic Plan**
- ✓ **KSI & FBC update scheduled**



Questions?

