Day One
April 3, 2018

FY19

City Commission Strategic Planning Workshop

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FY19

Opening Comments

Tony Delgado
City Manager

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Overview of City's Strategic Operating Process, Workshop Agenda and Outcomes

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ROAD MAP FOR DAY 1

City of Lakeland
City Commission Strategic Planning Workshop
April 3, 2018 – Day One
RP Funding Center
Lake Hollingsworth Ballroom

Agenda

10:00 am About the Day & FY19 Strategic Issues

Overview of City's current Strategic Operating Process, Workshop Agenda and Outcomes

- *Review Vision & Mission Statements and Strategic Goals*
- *Overview of Prospective Issues as seen by Departments & City Management*
- *Introduction of Facilitator*

10:15 am Office of Management & Budget Update

- *Benchmarking Study Results Update*
- *Presentation of the 2018 City of Lakeland Values Survey Results*
- *Performance Management Overview and CC Goal Valuation Results*

12:00 pm Lunch

1:00 pm Economy and Legislation

Presentation of issues related to the economy and legislation that could influence Lakeland's future direction:

- *Marsha Faux, Polk County, Property Appraiser*
- *Dave Shepp, Southern Strategy Group, Governmental Consultant*
- *Julie Townsend, Lakeland Downtown Development Authority (LDDA), Exec. Director*
- *Jason Willey, City of Lakeland, Business Development Manager*
- *Laura Rodriguez, Larry Ross & Liz Craven, Lakeland Vision*
- *Steve Scruggs, Lakeland Economic Development Council (LEDC), President*

2:45 pm Break

3:00 pm Fiscal Management Goal

Financial Overview and FY19 Prospective Issues

- *Preliminary Financial Overview*
- *FY19 General Fund Projections*

4:00 pm Governance Goal

Follow-Up on FY18 items and discussion of FY19 Prospective Issues

- *FY18 Development of our Succession Management Plan*
- *FY18 Wage Study Results and Implementation*

5:00 pm Next Steps for Strategic Issues & Prioritization Session

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ROAD MAP FOR DAY 2 A.M.

City of Lakeland
City Commission Strategic Planning Workshop
April 4, 2018 – Day Two
RP Funding Center
Lake Hollingsworth Ballroom

Agenda

8:00 am Breakfast

8:15 am About the Day & FY19 Strategic Issues
Overview of SOP Process, Agenda and Outcomes

8:30 am Quality of Life Goal
Follow-Up on FY18 items/Initiatives and discussion of FY19 Prospective Issues

- *Prior Year(s) Actionable Items/Initiatives:*
  - *Homelessness Initiative*
  - *Enhancing Public Access to the Downtown Core (Parking)*
  - *Fire Training Center Master Plan*
  - *Dog Leg Woods Park*
- *FY19 Prospective Issues:*
  - *Parks & Recreation:*
    - ✓ *Long-Term Parks Planning*
  - *Public Works:*
    - ✓ *Solid Waste & Recycling Rates*
    - ✓ *South Wabash Update*
  - *Water Utilities:*
    - ✓ *PRWC (alternative water)*
    - ✓ *Expansion, Development & Incentives*
  - *Community Development:*
    - ✓ *Strategic FDOT Transportation Project Costs*
  - *Fire:*
    - ✓ *Inspection Rates and Station 8 Update*
  - *Police:*
    - ✓ *Crime Stats/Calls for Service, FY19 Staffing and Department Update*

9:45 am Break

10:00 am Quality of Life Goal (Cont'd)

12:00 pm Lunch

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ROAD MAP FOR DAY 2 P.M.

City of Lakeland
City Commission Strategic Planning Workshop
April 4, 2018 – Day Two
RP Funding Center
Lake Hollingsworth Ballroom

1:00 pm Growth Management Goal

Follow-Up on FY18 items and discussion of FY19 Prospective Issues

- *FY19 Prospective Issues:*
  - *Airport:*
    - ✓ *Long-Term Efforts for Commercial Service*
    - ✓ *Master Plan Process and Considerations*
  - *Community Development:*
    - ✓ *Tiny House Initiatives & Current Regulations*

1:45 pm Economic Opportunity Goal

Follow-Up on FY18 items and discussion of FY19 Prospective Issues

- *Prior Year(s) Actionable Items:*
  - *Broadband Initiative*
  - *10 Acres Infrastructure & Downtown Infrastructure*
- *FY19 Prospective Issue:*
  - *Downtown Master Planning*

2:45 pm Break

3:00 pm Strategic Issues & Prioritization Process

Facilitated exercise with the City Commission reviewing and clarifying issues to be further developed:

- *Departments Strategic Topics*
- *City Commission Strategic Topics*

5:00 pm Wrap-Up & Next Steps leading to the May 1st Business Planning Retreat

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Vision

Lakeland – a vibrant, innovative, culturally inclusive world-class community.

Mission

A community working together to achieve an exceptional quality of life.

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Strategic Goals

Quality of Life:
Provide quality public spaces; deliver superior municipal services; and support arts, education, recreation and wellness.

Fiscal Management:
Develop and effectively manage financial resources.

Communication:
Develop an informed and engaged community.

Growth Management:
Ensure planning and infrastructure results in quality development and safe, attractive neighborhoods.

Economic Opportunity:
Create and encourage inclusive, lasting environments that grow, attract and retain a creative, talented, educated and technically qualified workforce.

Governance:
Provide for responsive and responsible governmental service.

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Overview of Prospective Issues

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Facilitator – Dr. Robert E. Lee (Bob)

Dr. Robert E. Lee (Bob) is an Assistant Professor in Florida Gulf Coast University's (FGCU) Master of Public Administration program. Bob also serves as the Executive Director of the Center for Florida Local Government Excellence and previously served as a member of the graduate faculty at Florida State University (FSU). Bob developed a Graduate Certificate in Local Government Management at both FSU and FGCU as part of their Master of Public Administration programs.

Before joining academia, Bob had a rewarding 26 year career in city management serving as the chief appointed official in three different forms of government: City Manager in Naples and City Manager in Gulfport (both Council/Manager forms of government in Florida); Assistant to Mayor in Lauderhill (one of Florida's former Strong Mayor/Council forms of government); and Director of Administrative Services in Bellevue (one of Pennsylvania's Council/General Manager forms of government).

Bob served on the American Society for Public Administration (ASPA) Executive Committee on Intergovernmental Management and Relations and is a Past President of the Suncoast Chapter of ASPA and is a past recipient of **ASPA's Picot B. Floyd Award for Public Leadership.** Currently, Bob serves on the International City and County Management Association (ICMA) Advisory Board on Graduate Education and is a Past President of the Florida City and County Management Association (FCCMA) and is a recipient of the **Michael J. Roberto Award for Career Development** and recipient of three **President's Awards** for contributions to FCCMA.

Bob serves as the Webinar facilitator for FCCMA and for the Florida Association of City Clerks (FACC) and serves as an Instructor for the Florida League of Cities (FLC) "Advanced Institute for Elected Officials", the FLC "Ethics Training" program", the FACC "Professional Education Academy", and the Florida Center for Public Management's (CPM) "Certification Program for Special District Managers". Bob's Consulting firm, Local Government Advisors, Inc., (see www.localgovadvisors.com) consults with local governments on Charter Review, Strategic Planning, Board Retreats, Ethics, Sunshine Laws, Finance, Forms of Government Issues, Team Building, Employee Promotional Exams, and other local government management issues.

Bob recently authored and co-authored articles on Florida local government in the following academic journals: **State and Local Government Review**, **Journal of** Compensation and Benefit Review, and the Journal of Public Affairs **Education**, Bob has also published articles in **Public Management,** and authored five chapters on finance for a 2010 book (and the 2012, 2014, and 2016 book editions) entitled: Florida County Government Guide and was the recipient of the **National Council on Public Policy's 2017 Michael C. Robinson Prize** for a historical study (Florida Pensions) that contributed directly to the formation of public policy.

Bob has a B.A. and M.P.A. from the University of Pittsburgh and a D.P.A. from Nova Southeastern University in Ft. Lauderdale.

Robert E. Lee, DPA, ICMA-CM

Office of Management & Budget Update

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Benchmarking Study Results Update

Shawn Sherrouse, Assistant City Manager
Kindle Bowden, OMB Manager

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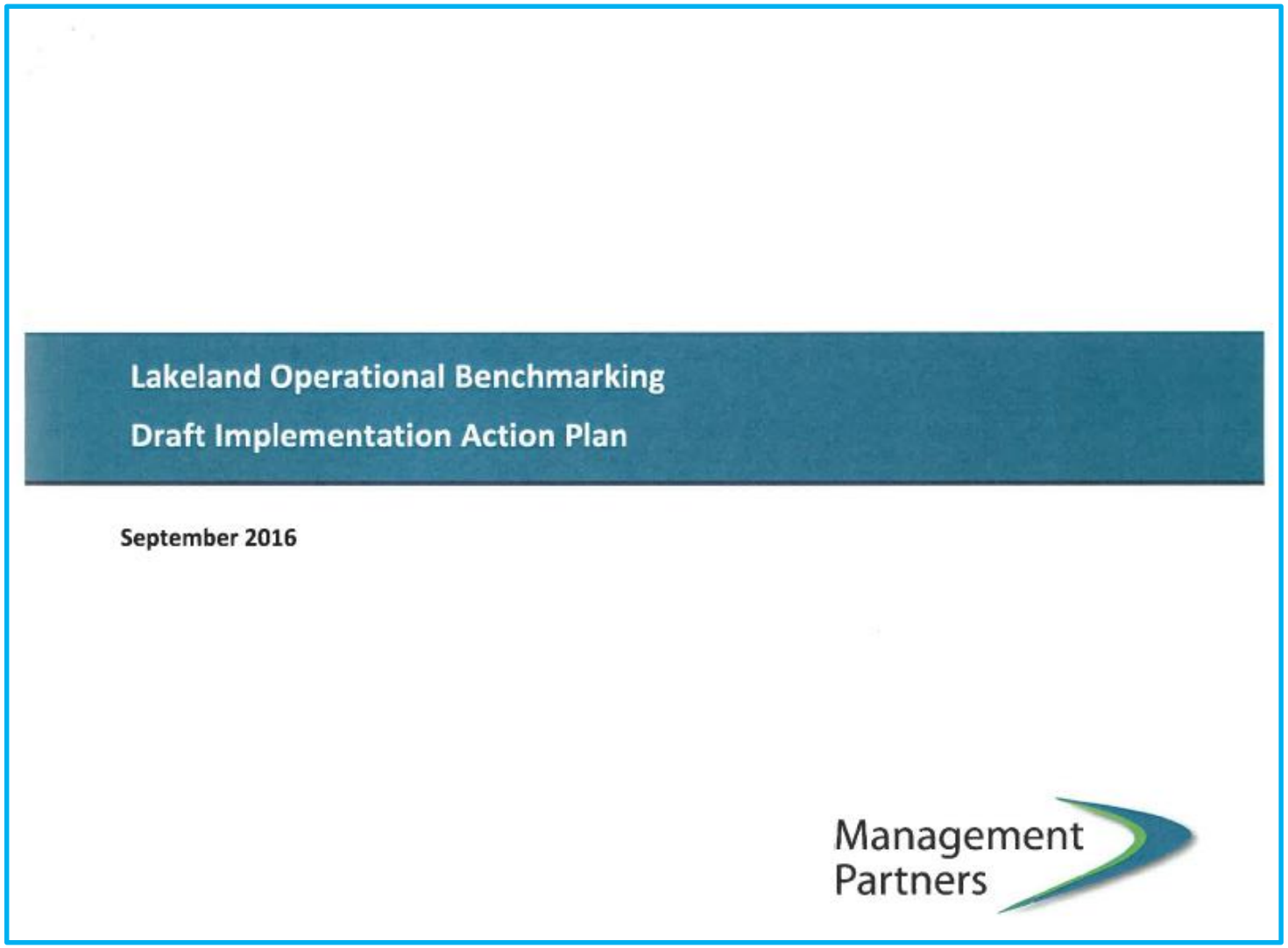
Benchmarking Study Update



PRIORITY 1

Benchmarking Study Update

	Areas for Improvement	Priority	Person Responsible
1	Prepare a ten-year financial forecast that is built on sustainable assumptions.	1	Finance Director
2	Examine the City's actual claims expenditure experience over a multi-year period to identify trends and ways to improve them.	1	Director of Risk Management
3	Examine response times, both for fire and for EMS, to assess whether the national standards are being met at least 90% of the time.	1	Fire Chief
4	Undertake detailed process analysis from the customer perspective to determine where in the development review process there are opportunities for improvement, including reducing cycle time and improving customer service and efficiency.	1	Community Development Director
5	Conduct a review of the Communications Department to determine which areas of responsibility can be handled with the department's current staffing and which should be handled differently.	1	Deputy City Manager
6	Move freedom of information act requests to the City Clerk's Office from the Communications Department.	1	City Manager
7	Evaluate the organizational arrangement and role definition between Finance and OMB to clarify areas of responsibility.	1	City Manager
8	Simplify the classification system.	1	Human Resources Director
9	Complete a process improvement project of the hiring process to reduce the time it takes from the time a prospective vacancy is identified until the time a replacement person reports. Each step (including actions required of a department and of the central HR unit) should be examined.	1	Human Resources Director
10	The private sector has capacity to provide some services currently provided by city employees. In some cases, private sector costs are sufficiently below (>15%) city costs to warrant changing the method of service delivery.	1	Director of Finance
11	Identify ways to increase the clearance rate for violent crime and establish a program to do so.	1	Police Chief
12	Assess the feasibility of raising the P-card limit of $1,500 for managers that need to purchase equipment or parts requiring a fast response.	1	Finance Director
13	Reexamine the City's policy of only allowing new employees to begin work once a month.	1	Director of Human Resources
14	Assign responsibility to conduct any managed competition projects identified for analysis to an organization unit, such as the Finance Department, rather than the department responsible for operating the service.	1	City Manager

Completed
In-Progress

PRIORITY 1

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2018

Completed
In-Progress

PRIORITY 2

Benchmarking Study Update

	Areas for Improvement	Priority	Person Responsible
15	Analyze the use of fire overtime to determine whether there is an optimal balance of full-time permanent positions, especially with regard to training personnel.	2	Fire Chief
16	Perform a thorough financial evaluation of Lakeland's golf course, including alternative service delivery approaches.	2	Finance Director
17	Document a long-range financial plan for the future of cemeteries so the amount in perpetual care funding that will ultimately be required can be factored into a sustainable cemetery financial plan.	2	Finance Director
18	While the basics of department operations seem excellent, witness the department's recent accreditation, it is also true that any organization as large and complex as the Lakeland Public Works Department would benefit from a management review to create an agenda of opportunities for improvement.	2	Public Works Director
19	With the assistance of the process improvement team, identify where paper-based processes are still in use and implement a technology solution to improve efficiency.	2	Information Technology Director
20	Analyze the use of police overtime to determine whether there is an optimal balance of full-time permanent positions.	2	Police Chief
21	Analyze the deployment of field sworn and non-sworn personnel to maximize the commitment to neighborhood community- based policing.	2	Police Chief
22	For each significant contract for service, adopt a management/quality of service plan to establish the basis for ensuring proper results.	2	Finance Director
23	Examine the costs and benefits of outsourcing all tree maintenance work and mowing, including cemeteries. These are two functions for which there is significant private sector capability.	2	Finance Director
24	Centralize the management responsibility for conducting customer surveys of internal and external services in the City Manager's Office.	2	City Manager
25	Analyze ways to eliminate the city central stores operation using arrangements with private sector suppliers to save costs and improve efficiency.	2	Deputy City Manager

Completed
In-Progress

PRIORITY 2

Benchmarking Study Update

2018

	Completed
	In-Progress

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PRIORITY 3

Benchmarking Study Update

	Completed
	In-Progress

	Areas for Improvement	Priority	Person Responsible
26	Conduct a thorough review of the provision of emergency medical services, including dispatch, pre-arrival medical instructions, and coordination of medical control provided by the city, the county, and local hospitals.	3	Fire Chief
27	Undertake a detailed analysis of the types and locations of structure fires as well as the age of structures impacted by fire working with other departments involved in building safety.	3	Fire Chief
28	Evaluate the costs and benefits of implementing a customer-relationship management (CRM) system, using the latest technology to allow customers to interact with the City.	3	City Manager

PRIORITY 3

Benchmarking Study Update

2018

Completed
In-Progress

	Areas for Improvement	Priority	Person Responsible
26	Conduct a thorough review of the provision of emergency medical services, including dispatch, pre-arrival medical instructions, and coordination of medical control provided by the city, the county, and local hospitals.	3	Fire Chief
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Benchmarking Study Update

Projects Identified as In-Process (12):

- OMB Followed Up with Departments
- OMB Available to Assist as Needed

Projects Identified as Not Started (13):

- OMB Contacted Each Department Assigned to Projects
- Determined Type of Project Needed:
  - ✓ Department working on project and only needed follow-up for reporting.
  - ✓ Developed Team and established process improvement project
  - ✓ Completed mapping to assist in data-gathering and analysis

Benchmarking Study Update

Projects Identified as In-Process (12)

Status	Priority 1	Priority 2	Priority 3
Completed	3	3	N/A
In-Process	6		N/A

Projects Identified as Not Started (13)

Status	Priority 1	Priority 2	Priority 3
Completed	1	2	1
In-Process	1	6	2

OMB

PRIORITY 1

Benchmarking Study Update

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2018

Completed
In-Progress

OMB
PRIORITY 2

Benchmarking Study Update

2018

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Completed
In-Progress

Benchmarking Study Update

2018

Completed
In-Progress

	Areas for Improvement	Priority	Person Responsible
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Benchmarking Study Results Update – LPD

Benchmarking Study

Study Recommendation: Analyze the use of police overtime to determine whether there is an optimal balance of full-time permanent positions:

LPD analyzed the use of police overtime to determine if there is an optimal balance of full-time permanent positions and concluded this does not play a factor in our deployment strategies and business model.

The majority of LPD's overtime is paid regardless of the number of full-time positions. Typical fixed overtime includes: holidays, built-in, standby, over shift, callout and court-time.

First year cost for a Police Officer $130K. This represents 9.4% of LPD's total FY17 overtime.

It is not practical for LPD to reduce overtime by $130K by hiring one (1) Police Officer.

Benchmarking Study

Study Recommendation: Analyze the deployment of field sworn and non-sworn personnel to maximize the commitment to neighborhood community-based policing

LPD deploys its community policing efforts in a two-prong approach.

We deliver services and build partnerships through dedicated units. Our manpower allocation allows a portion of time for patrol officers and specialized unit officers to engage the public in problem solving efforts. Below is the department deployment model.

Neighborhood Liaison	11 Officers	100%	11
School Resource	10 Officers	100%	10
Selective Enforcement	6 Officers	75%	4.5
Special Investigations	21 Detectives	50%	10.5
Uniformed Patrol	90 Officers	50%	45
Community Services	5 Civilian Positions	100%	5
Total Combined Effort (43% of total line officers)			81 Officers & 5 Civilians

QUESTIONS

Benchmarking Study Results Update – Public Works

	Areas for Improvement	Priority	Person Responsible
18	While the basics of department operations seem excellent, witness the department's recent accreditation, it is also true that any organization as large and complex as the Lakeland Public Works Department would benefit from a management review to create an agenda of opportunities for improvement.	2	Public Works Director

Public Works – Efficiencies

Street Sweeping

Current Program

- Six Sweepers Operate In Zones Throughout the City
  - ✓ Improves aesthetics of City
  - ✓ Prevents trash and nutrients from entering system
  - ✓ Annual average of 21,947 miles of roads swept
  - ✓ An average of 3,500 tons of debris swept from City streets

Street Sweeping Study

- Optimize Program Efficiencies
  - ✓ Sweep in the right place at the right time
- Develop City specific nutrient removal rates for increased regulatory compliance
  - ✓ NPDES Stormwater discharge permit and TMDL lake restoration requirements

Recommendations to Improve Efficiencies

- Redefine Street Sweeping Routes and Frequencies
  - ✓ Cluster zones with higher frequencies
- The City of Lakeland was the first (and only) municipality that FDEP has approved the use of the City specific nutrient removal rates for street sweeping debris

Public Works – Efficiencies

Solid Waste – Efficient Routes

- Re-route all Automated Garbage/Recycling
  - ✓ Understand program norms
  - ✓ Establish available capacity for growth management and employee work load equity
- Changed Method Bulk Collection is Performed
  - ✓ Increase program efficiency with area routing
  - ✓ Reduce customer wait times for large and bulk item collection
- Re-route all Commercial Front Loader Dumpster Services
  - ✓ Better understanding of program norms
  - ✓ Establish the available capacity for growth management
  - ✓ Employee work load equity

QUESTIONS

Benchmarking Study Results Update – P&R

	Areas for Improvement	Priority	Person Responsible
23	Examine the costs and benefits of outsourcing all tree maintenance work and mowing, including cemeteries. These are two functions for which there is significant private sector capability.	2	Finance Director

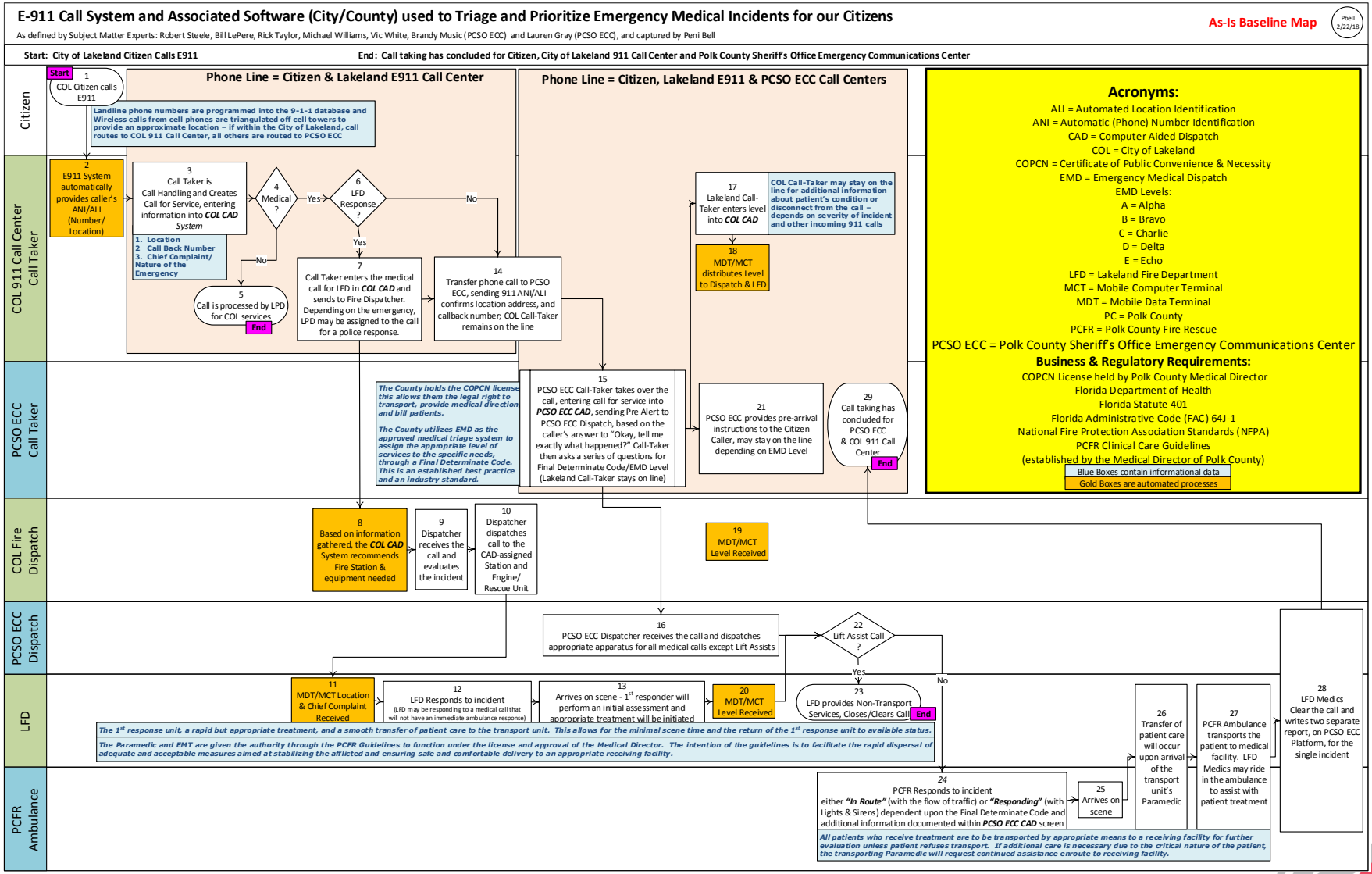
Benchmarking Study Results Update – Fire

	Areas for Improvement	Priority	Person Responsible
26	Conduct a thorough review of the provision of emergency medical services, including dispatch, pre-arrival medical instructions, and coordination of medical control provided by the city, the county, and local hospitals.	3	Fire Chief
27	Undertake a detailed analysis of the types and locations of structure fires as well as the age of structures impacted by fire working with other departments involved in building safety.	3	Fire Chief

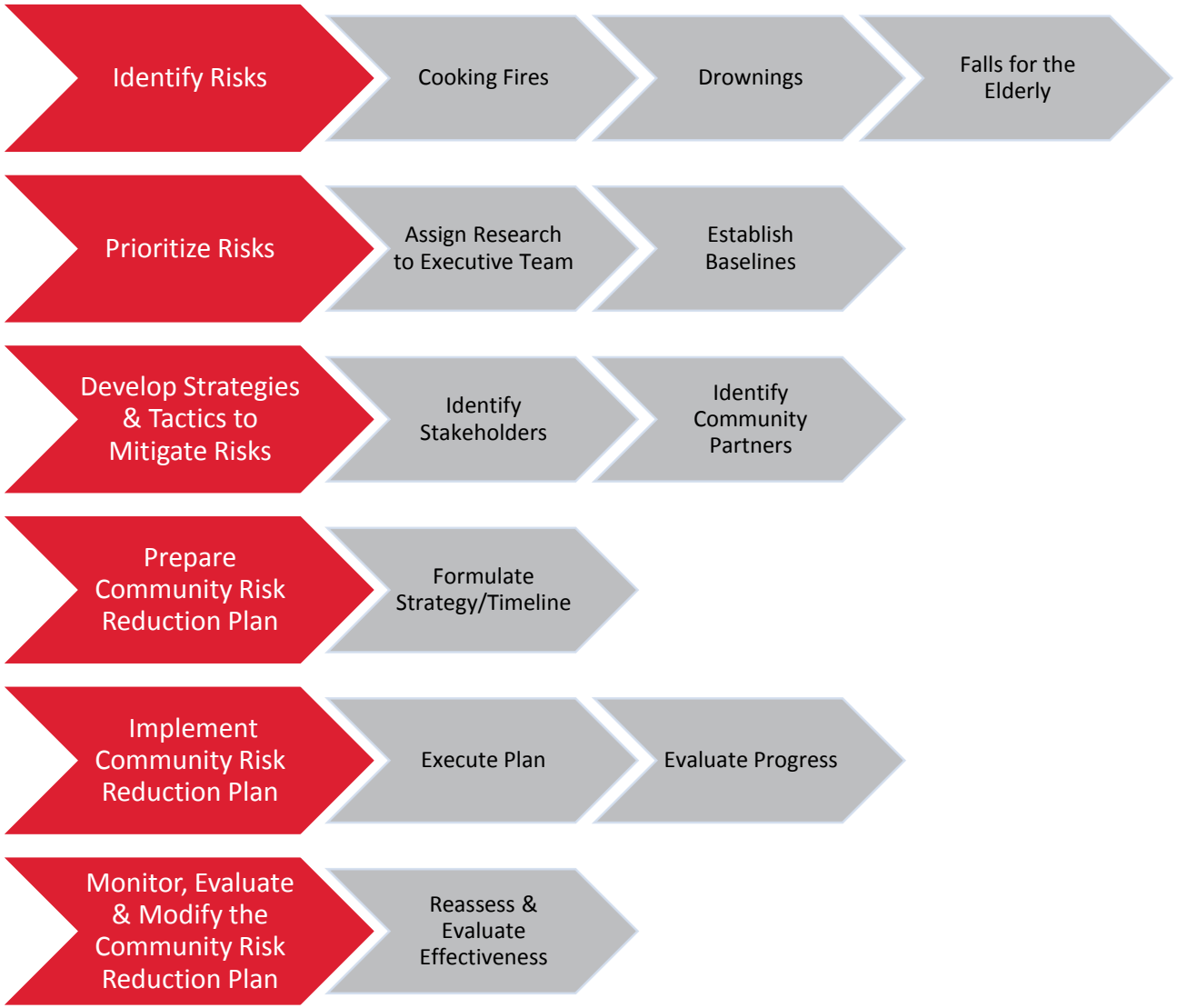
Revised Definition of Area of Improvement

	Areas for Improvement	Priority	Person Responsible
26	~~Conduct a thorough review of the provision of emergency medical services, including dispatch, pre-arrival medical instructions, and coordination of medical control provided by the city, the county, and local hospitals.~~ **Define redundancies in the E-911 System and Associated Software Applications (City/County) used to Triage and Prioritize Emergency Medical Incidents for our Citizens.**	3	Fire Chief
27	~~Undertake a detailed analysis of the types and locations of structure fires as well as the age of structures impacted by fire working with other departments involved in building safety.~~ **Conduct an All Hazards Community Risk Assessment that will serve to assist in the mitigation, preparation and deployment of appropriate emergency resources.**	3	Fire Chief

E-911


E-911 Call System and Associated Software (City/County) used to Triage and Prioritize Emergency Medical Incidents for our Citizens
As defined by Subject Matter Experts: Robert Steele, Bill LePere, Rick Taylor, Michael Williams, Vic White, Brandy Music (PCSO ECC) and Lauren Gray (PCSO ECC), and captured by Peni Bell
As-Is Baseline Map
Pbell 2/22/18
Start: City of Lakeland Citizen Calls E911
End: Call taking has concluded for Citizen, City of Lakeland 911 Call Center and Polk County Sheriff's Office Emergency Communications Center
Citizen
COL 911 Call Center Call Taker
PCSO ECC Call Taker
COL Fire Dispatch
PCSO ECC Dispatch
LFD
PCFR Ambulance
Phone Line = Citizen & Lakeland E911 Call Center
Phone Line = Citizen, Lakeland E911 & PCSO ECC Call Centers
Start
1 COL Citizen calls E911
Landline phone numbers are programmed into the 9-1-1 database and Wireless calls from cell phones are triangulated off cell towers to provide an approximate location – if within the City of Lakeland, call routes to COL 911 Call Center, all others are routed to PCSO ECC
2 E911 System automatically provides caller's ANI/ALI (Number/ Location)
3 Call Taker is Call Handling and Creates Call for Service, entering information into COL CAD System
1. Location
2 Call Back Number
3. Chief Complaint/ Nature of the Emergency
4 Medical ?
Yes
No
5 Call is processed by LPD for COL services
End
6 LFD Response ?
Yes
No
7 Call Taker enters the medical call for LFD in COL CAD and sends to Fire Dispatcher. Depending on the emergency, LPD may be assigned to the call for a police response.
14 Transfer phone call to PCSO ECC, sending 911 ANI/ALI confirms location address, and callback number; COL Call-Taker remains on the line
17 Lakeland Call-Taker enters level into COL CAD
COL Call-Taker may stay on the line for additional information about patient's condition or disconnect from the call – depends on severity of incident and other incoming 911 calls
18 MDT/MCT distributes Level to Dispatch & LFD
The County holds the COPCN license this allows them the legal right to transport, provide medical direction, and bill patients.
The County utilizes EMD as the approved medical triage system to assign the appropriate level of services to the specific needs, through a Final Determinate Code. This is an established best practice and an industry standard.
15 PCSO ECC Call-Taker takes over the call, entering call for service into PCSO ECC CAD, sending Pre Alert to PCSO ECC Dispatch, based on the caller's answer to "Okay, tell me exactly what happened?" Call-Taker then asks a series of questions for Final Determinate Code/EMD Level (Lakeland Call-Taker stays on line)
21 PCSO ECC provides pre-arrival instructions to the Citizen Caller, may stay on the line depending on EMD Level
29 Call taking has concluded for PCSO ECC & COL 911 Call Center
End
8 Based on information gathered, the COL CAD System recommends Fire Station & equipment needed
9 Dispatcher receives the call and evaluates the incident
10 Dispatcher dispatches call to the CAD-assigned Station and Engine/ Rescue Unit
19 MDT/MCT Level Received
16 PCSO ECC Dispatcher receives the call and dispatches appropriate apparatus for all medical calls except Lift Assists
22 Lift Assist Call ?
Yes
No
11 MDT/MCT Location & Chief Complaint Received
12 LFD Responds to incident
(LFD may be responding to a medical call that will not have an immediate ambulance response)
13 Arrives on scene - 1st responder will perform an initial assessment and appropriate treatment will be initiated
20 MDT/MCT Level Received
23 LFD provides Non-Transport Services, Closes/Clears Call
End
The 1st response unit, a rapid but appropriate treatment, and a smooth transfer of patient care to the transport unit. This allows for the minimal scene time and the return of the 1st response unit to available status.
The Paramedic and EMT are given the authority through the PCFR Guidelines to function under the license and approval of the Medical Director. The intention of the guidelines is to facilitate the rapid dispersal of adequate and acceptable measures aimed at stabilizing the afflicted and ensuring safe and comfortable delivery to an appropriate receiving facility.
24 PCFR Responds to incident either "In Route" (with the flow of traffic) or "Responding" (with Lights & Sirens) dependent upon the Final Determinate Code and additional information documented within PCSO ECC CAD screen
25 Arrives on scene
26 Transfer of patient care will occur upon arrival of the transport unit's Paramedic
27 PCFR Ambulance transports the patient to medical facility. LFD Medics may ride in the ambulance to assist with patient treatment
28 LFD Medics Clear the call and writes two separate report, on PCSO ECC Platform, for the single incident
All patients who receive treatment are to be transported by appropriate means to a receiving facility for further evaluation unless patient refuses transport. If additional care is necessary due to the critical nature of the patient, the transporting Paramedic will request continued assistance enroute to receiving facility.
Acronyms:
ALI = Automated Location Identification
ANI = Automatic (Phone) Number Identification
CAD = Computer Aided Dispatch
COL = City of Lakeland
COPCN = Certificate of Public Convenience & Necessity
EMD = Emergency Medical Dispatch
EMD Levels:
A = Alpha
B = Bravo
C = Charlie
D = Delta
E = Echo
LFD = Lakeland Fire Department
MCT = Mobile Computer Terminal
MDT = Mobile Data Terminal
PC = Polk County
PCFR = Polk County Fire Rescue
PCSO ECC = Polk County Sheriff's Office Emergency Communications Center
Business & Regulatory Requirements:
COPCN License held by Polk County Medical Director
Florida Department of Health
Florida Statute 401
Florida Administrative Code (FAC) 64J-1
National Fire Protection Association Standards (NFPA)
PCFR Clinical Care Guidelines
(established by the Medical Director of Polk County)
Blue Boxes contain informational data
Gold Boxes are automated processes

Community Risk Assessment



QUESTIONS

Community Values Survey

CITY OF Lakeland
www.lakelandgov.net

Dr. Larry Ross

- Emeritus Professor of Business in the Barney Barnett School of Business & Free Enterprise at Florida Southern College.
- Bachelor's degree from Florida State University, MBA and PhD in marketing from Georgia State University's J. Mack Robinson College of Business.
- Teaching interests are in the areas of marketing and strategic planning.
- Consultant and Facilitator in the areas of marketing and strategic planning.
- Author and lecturer on survey based research and strategic planning.
- Prior board service for the McKeel schools, the United Way of Central Florida and Past President of Leadership Lakeland Alumni Association.

FLORIDA SOUTHERN COLLEGE

Larry Ross, Ph.D.,
City of Lakeland Citizens Values Research Partner

Community Values Survey 2018

Survey Summary

- January 23 – February 28, 2018
  - ✓ 5,558 valid responses
- <u>Survey Limitations</u>:
  - ✓ Respondents do not represent a probability sample; may not be representative of population
  - ✓ Hispanic & African American populations are slightly under-represented
- <u>Survey Strengths</u>:
  - ✓ High level of precision due to large number of responses
  - ✓ Five years of valid longitudinal data

History of the Survey

2013

OMB Develops Survey for City of Lakeland

CITY of LARGO

Communications

Florida Southern

2014

Written Report

2015

Added Specialized Reports by Request

2016 & 2017

Enhanced Reporting

2018

Developed Dashboard Reporting

Community Values Survey 2018

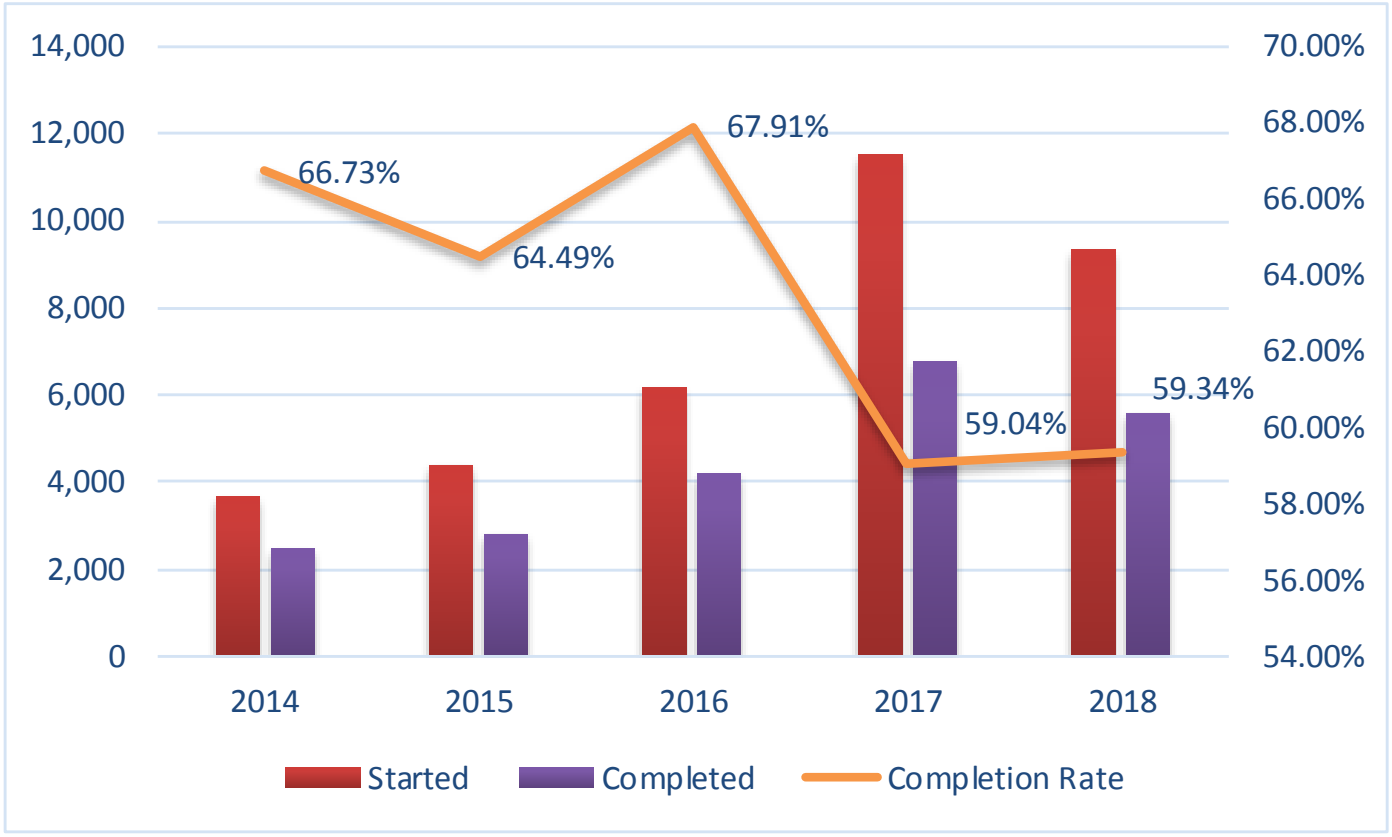
Getting the Word Out

- Email Blasts
- Social Media
- www.Lakelandgov.net
- Utility Bill Insert
- Community Outreach
- Coffee Sleeves
-

Posters & Cards
- Napkins at Local Restaurants

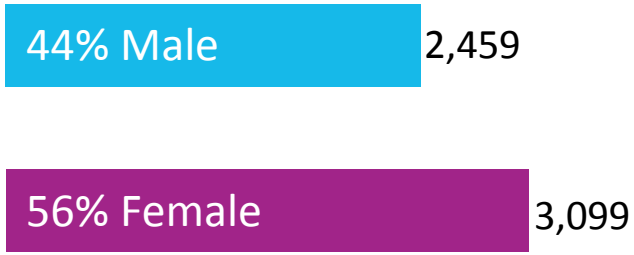
Community Values Survey 2018

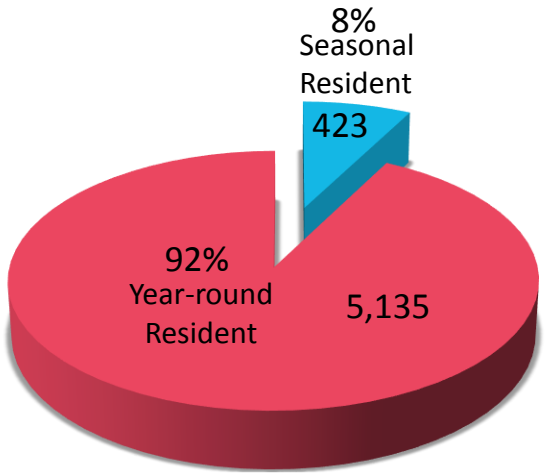
Citizen Engagement

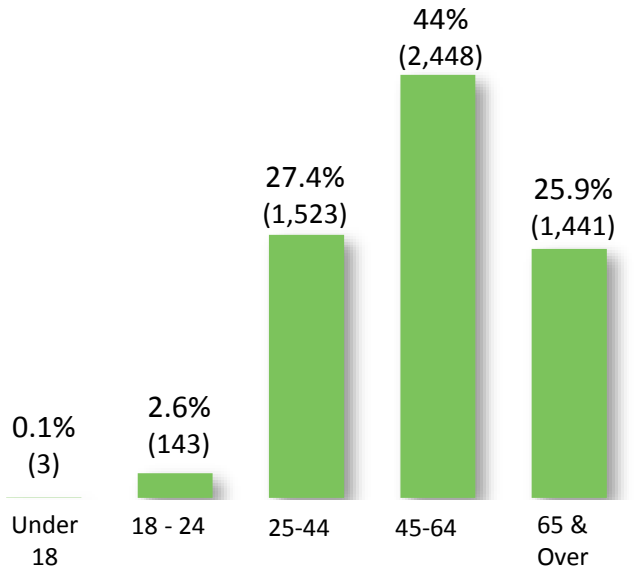


Community Values Survey 2018

Respondent Demographics





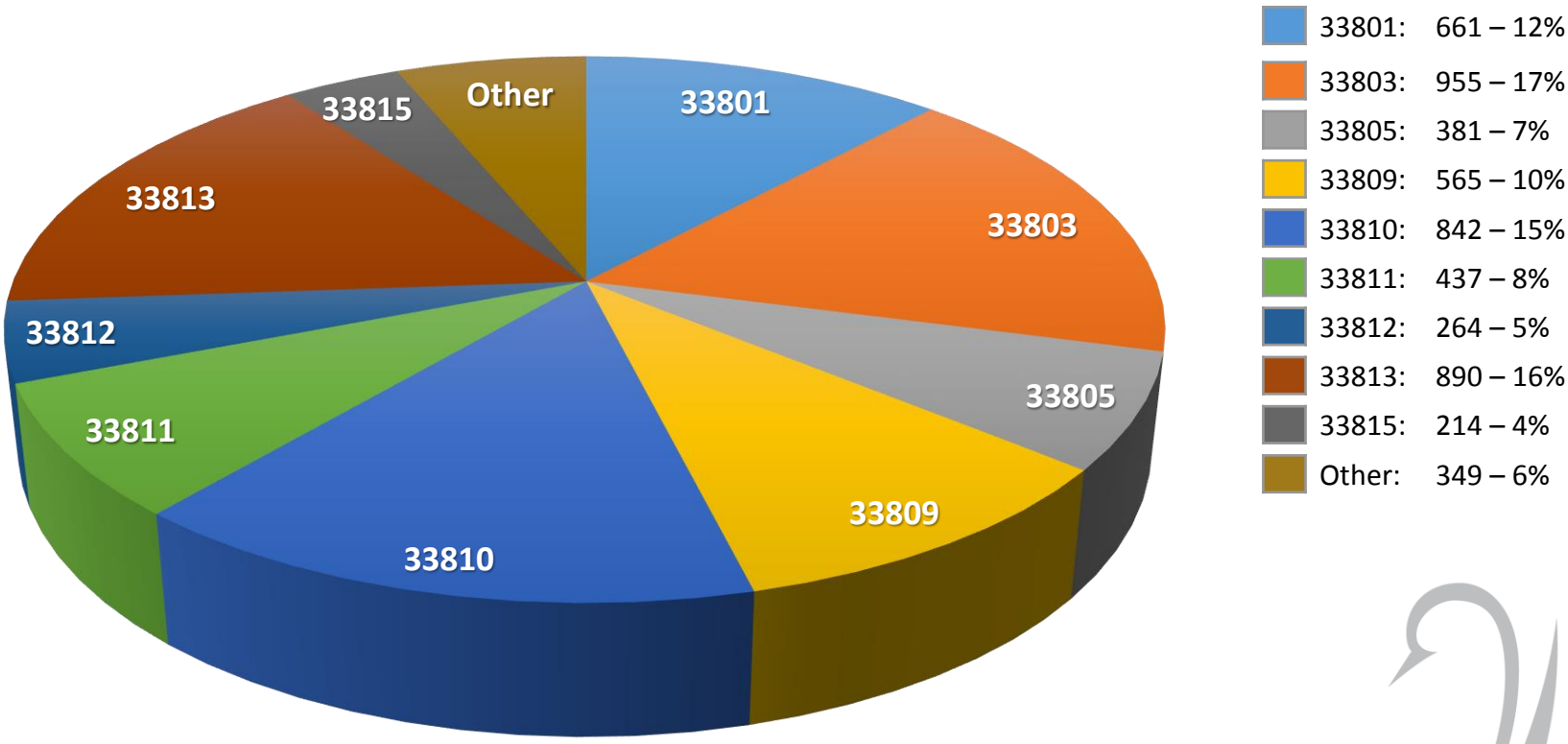


Responses can be calculated by:

- Age
- Ethnicity
- Gender
- Zip Code
- Valued Services

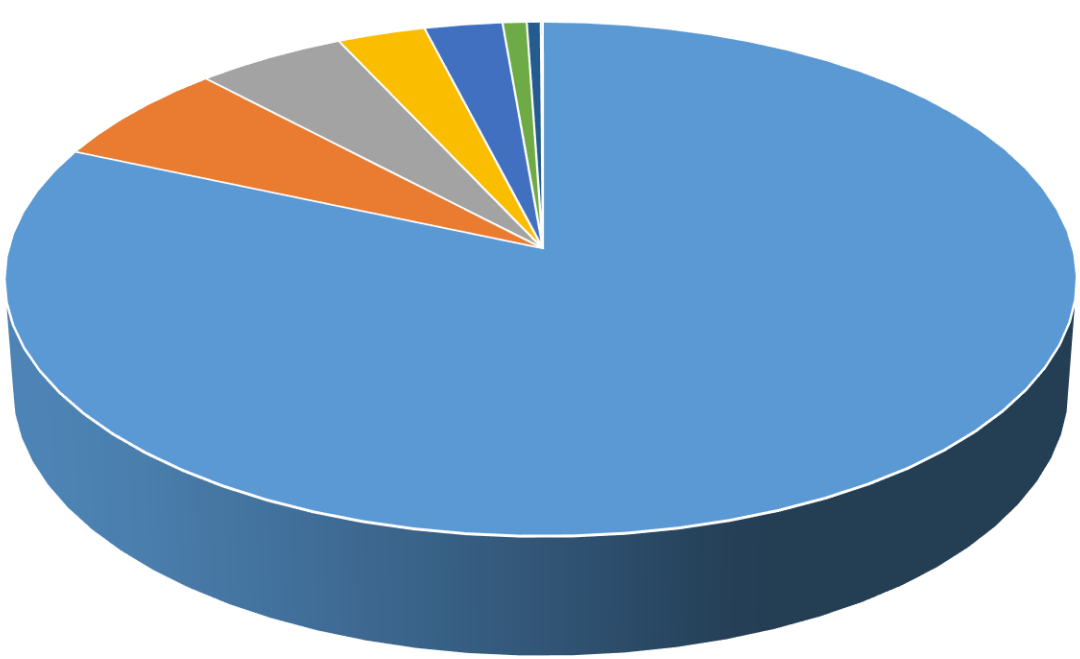
Community Values Survey 2018

Where the Respondents Live



Community Values Survey 2018

Respondent Ethnicity



- Caucasian: 4,532 – 81.54
- Hispanic: 358 – 6.45%
- African American: 282 – 5.07%
- Two or More Races: 165 – 2.96%
- Other: 146 – 2.63%
- Asian: 45 – 0.81%
- American Indian/Alaska Native: 26 – 0.47%
- Native Hawaiian/Pacific Island: 4 – 0.07%

Community Values Survey 2018

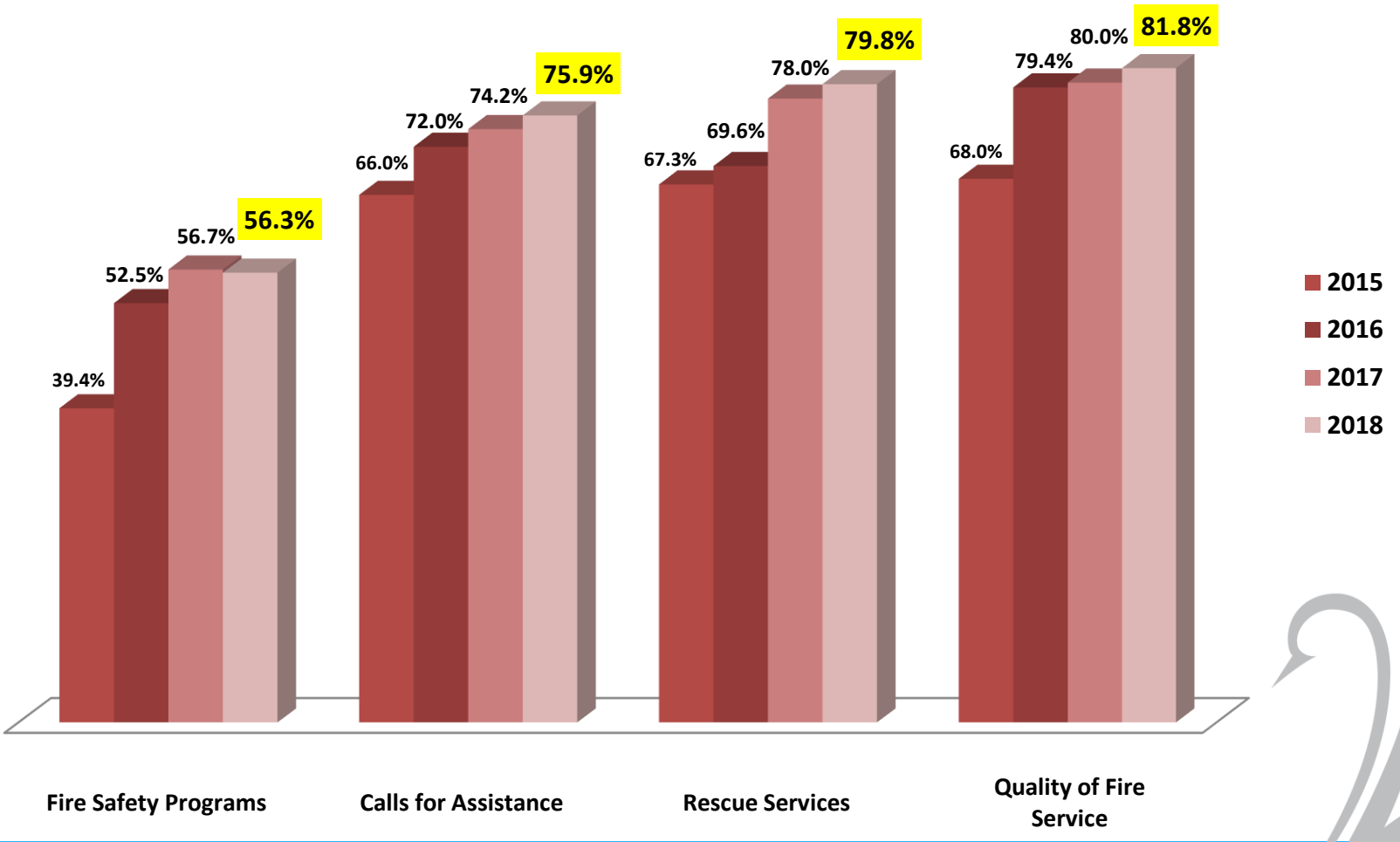
Weighted Value of City Goals

Value/ Priority	City Goal	2018 Mean Score*	2017 Mean Score*	2016 Mean Score*	2015 Mean Score*
#1	Quality of Life	3.947	3.883	3.809	3.685
2	Economic Opportunity	2.978	3.069	3.022	3.104
3	Fiscal Management	2.861	2.879	3.031	3.130
4	Growth Management	2.646	2.610	2.592	2.552
5	Communication	2.569	2.559	2.549	2.529

* 5 = Highest Value; 1=Lowest Value

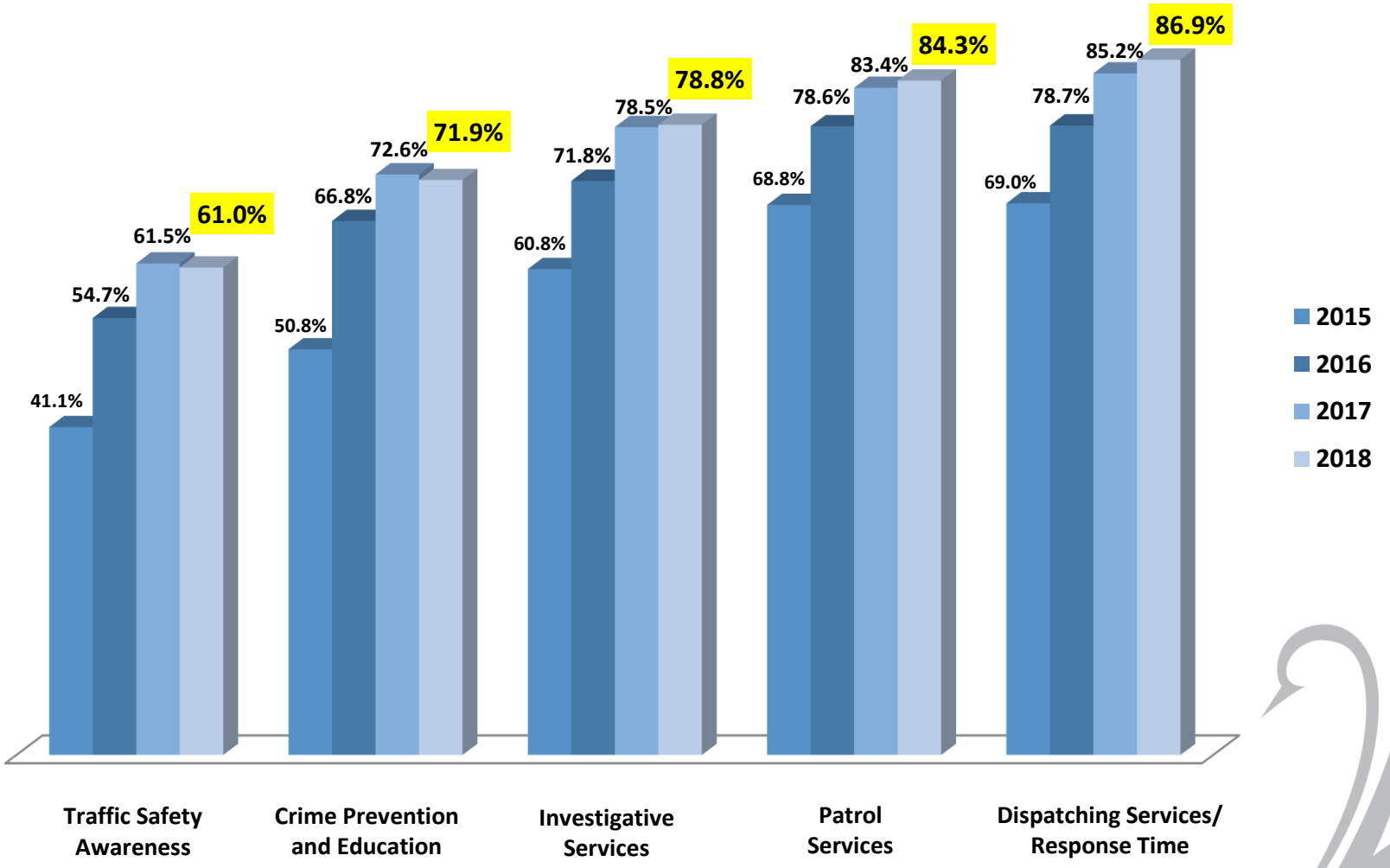
Community Values Survey 2018

Community Safety – Fire Services



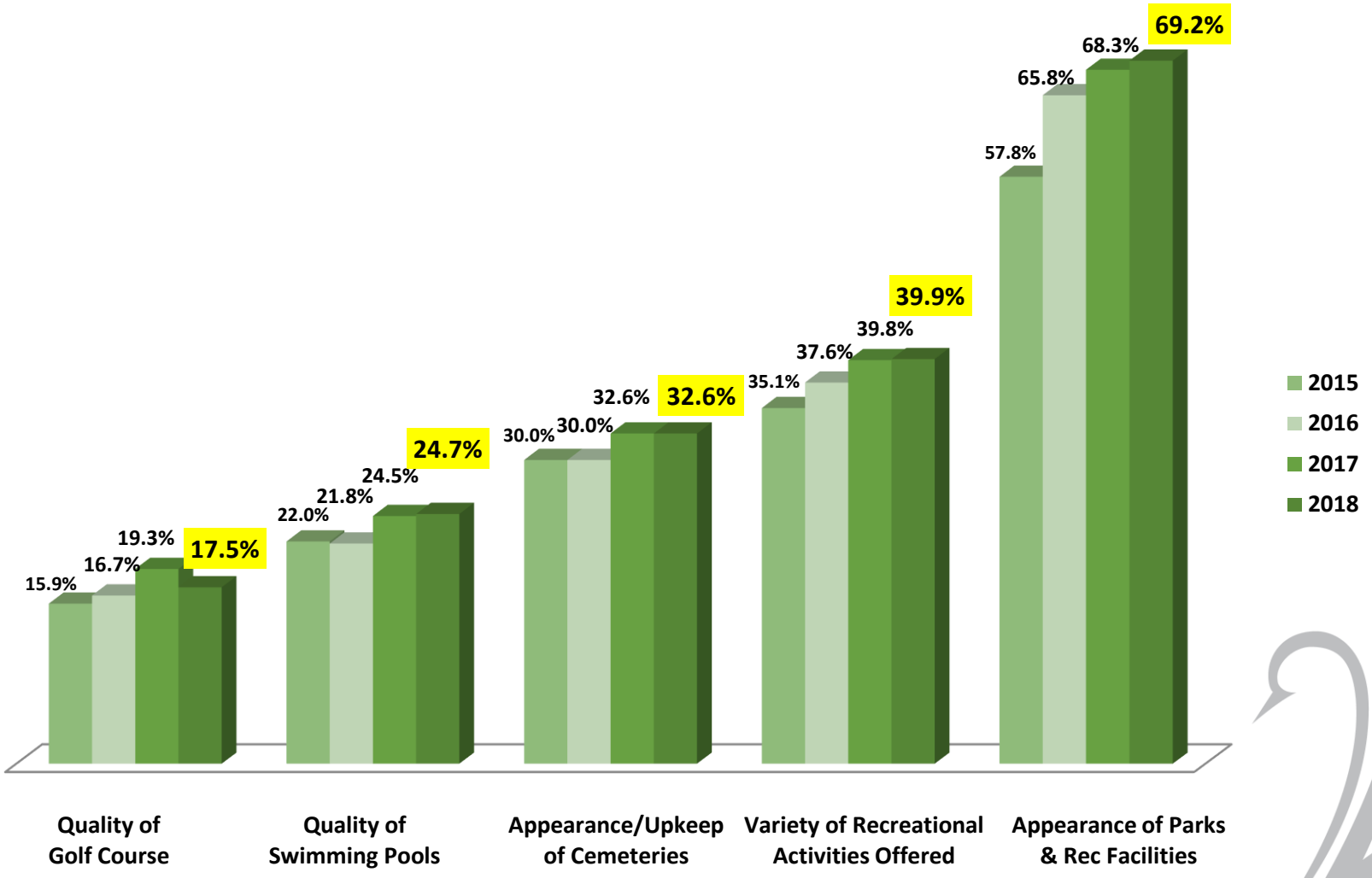
Community Values Survey 2018

Community Safety – Police Services



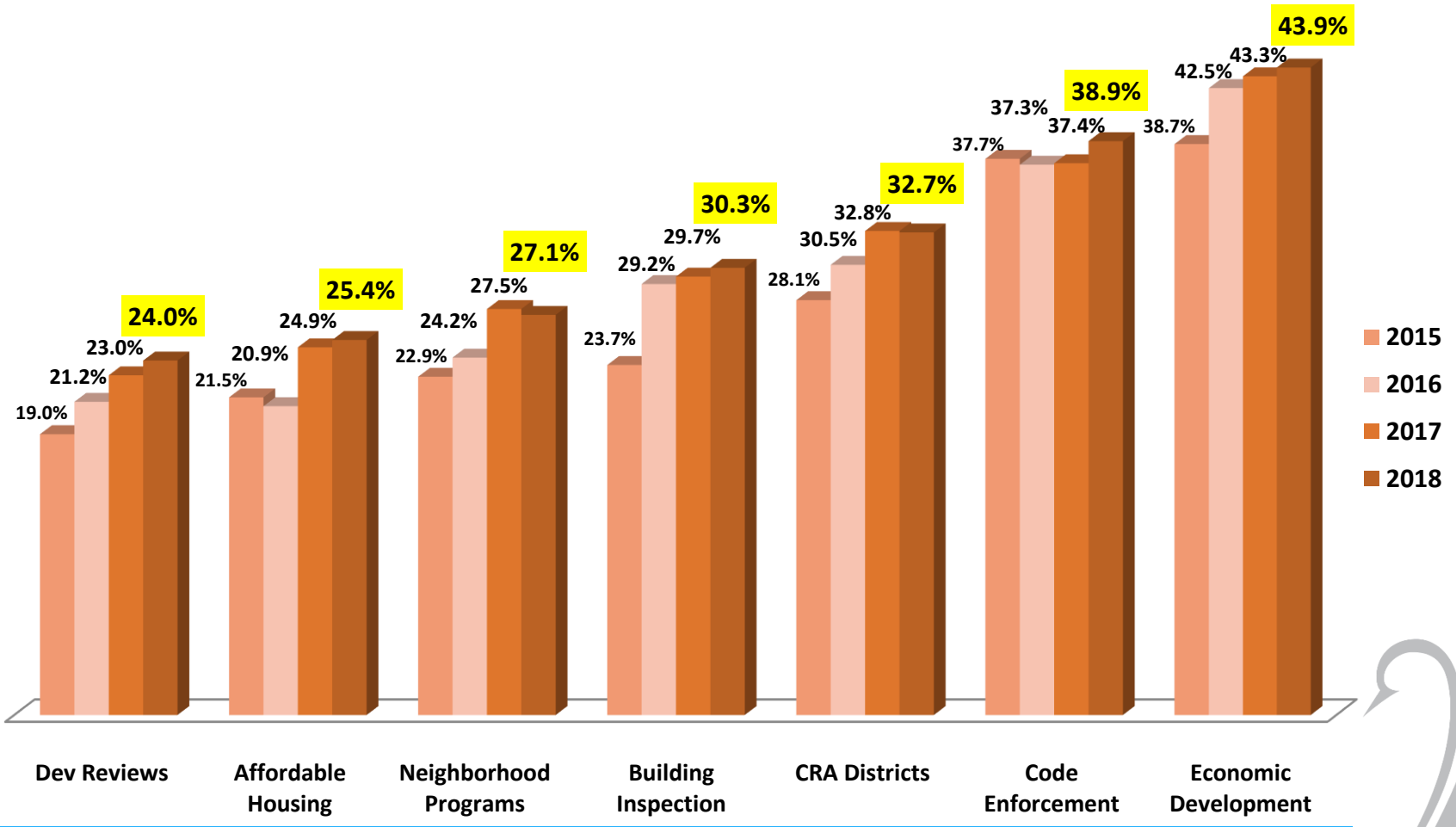
Community Values Survey 2018

Parks & Recreation Services



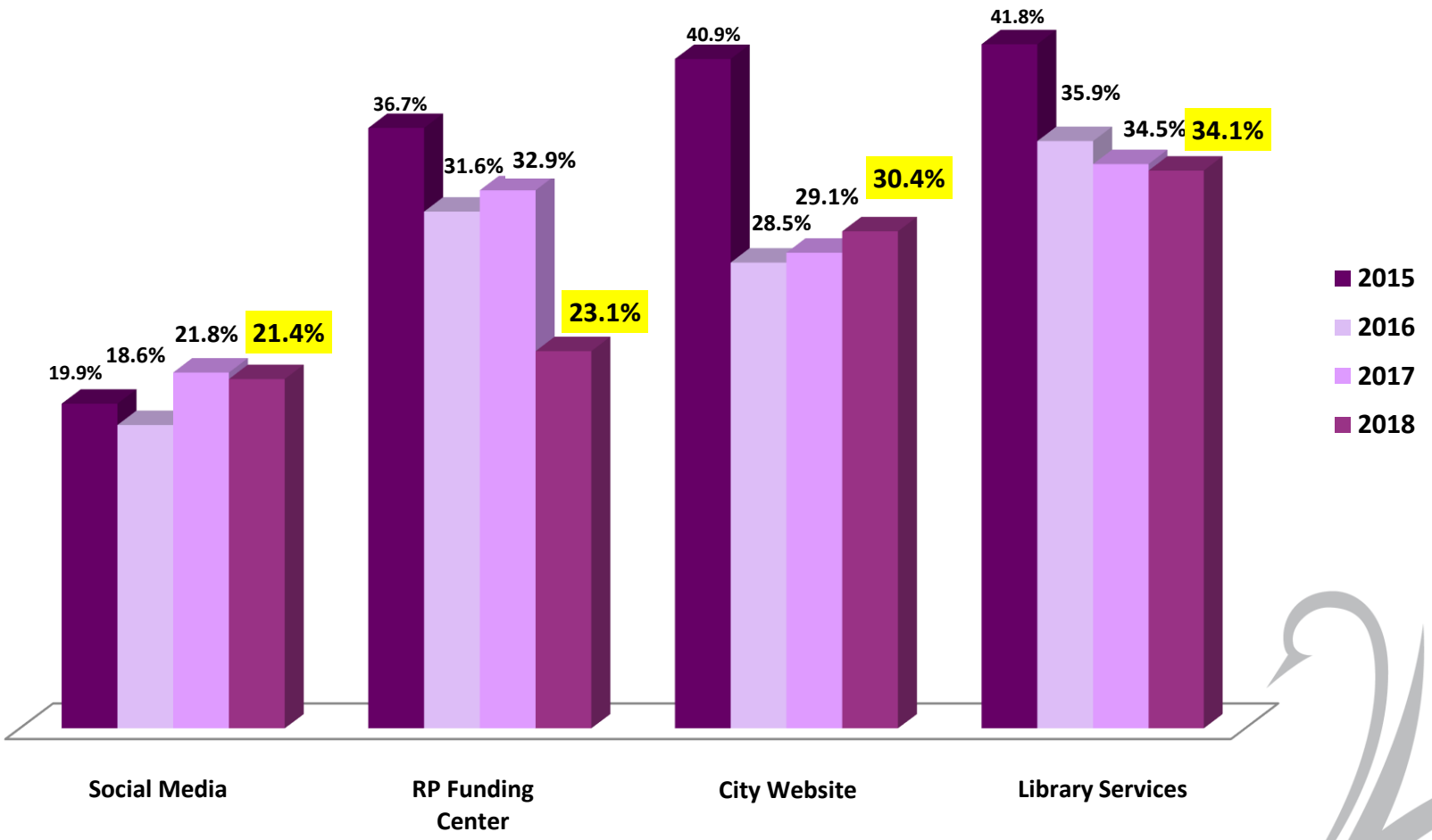
Community Values Survey 2018

Economic & Community Development



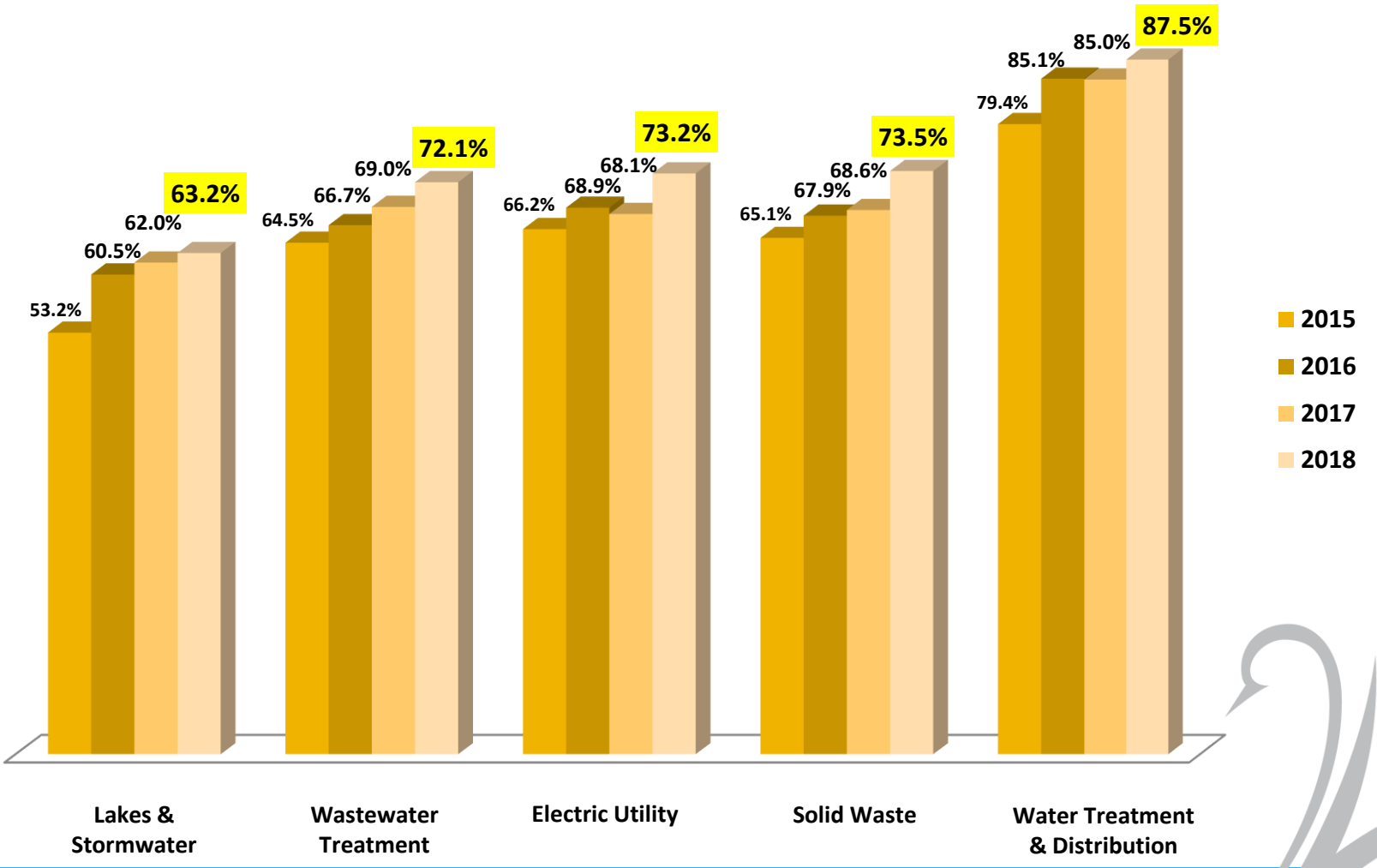
Community Values Survey 2018

Cultural & Community Services



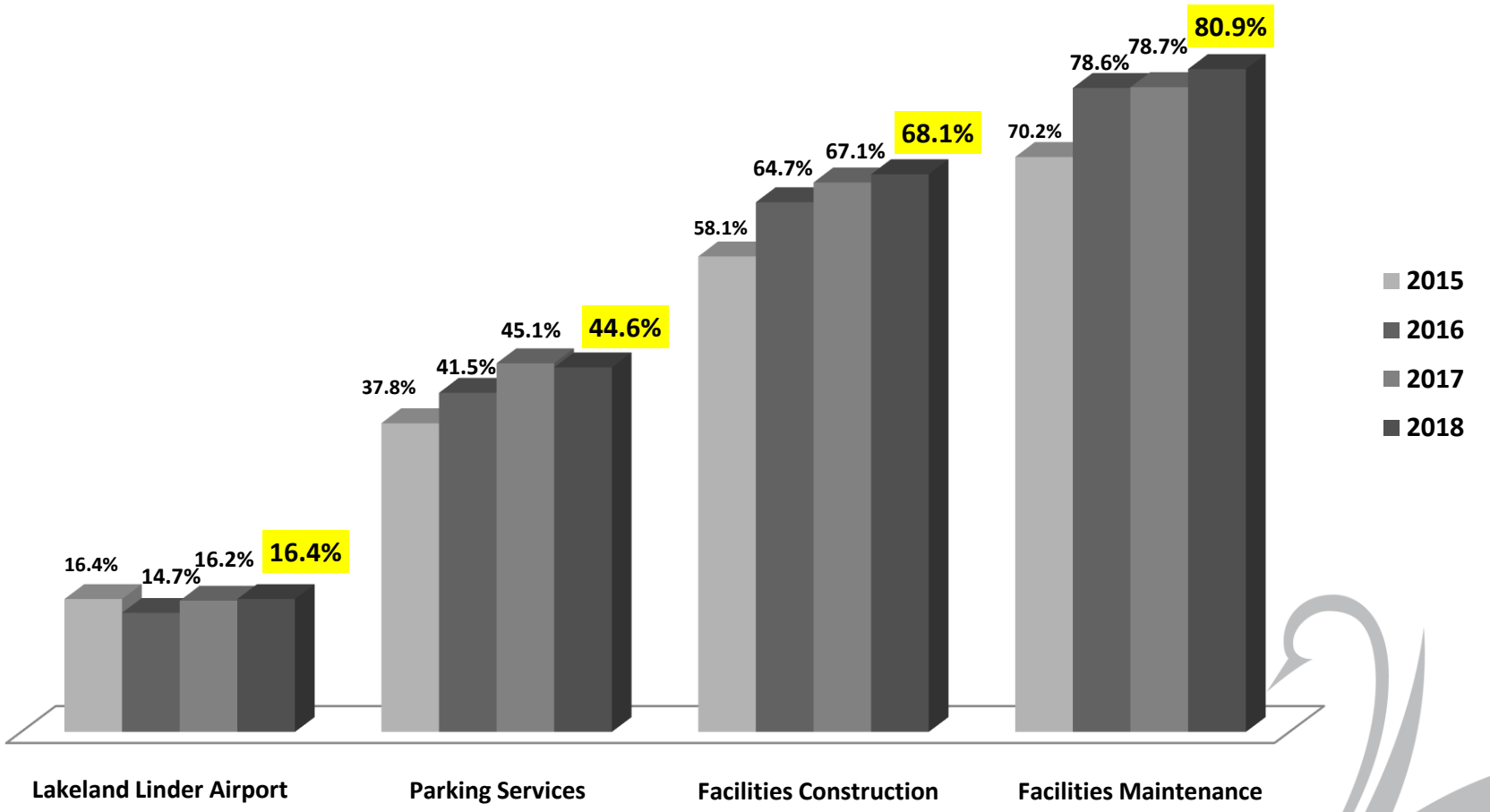
Community Values Survey 2018

Environmental & Utility Services



Community Values Survey 2018

Transportation Utility Services



Community Values Survey 2018

Alternatives for Maintaining City Services**

- Increasing User Fees again identified as the most favorable alternative.*
- Decreasing Service Levels remains least favorable. (Slight increase from 2017)

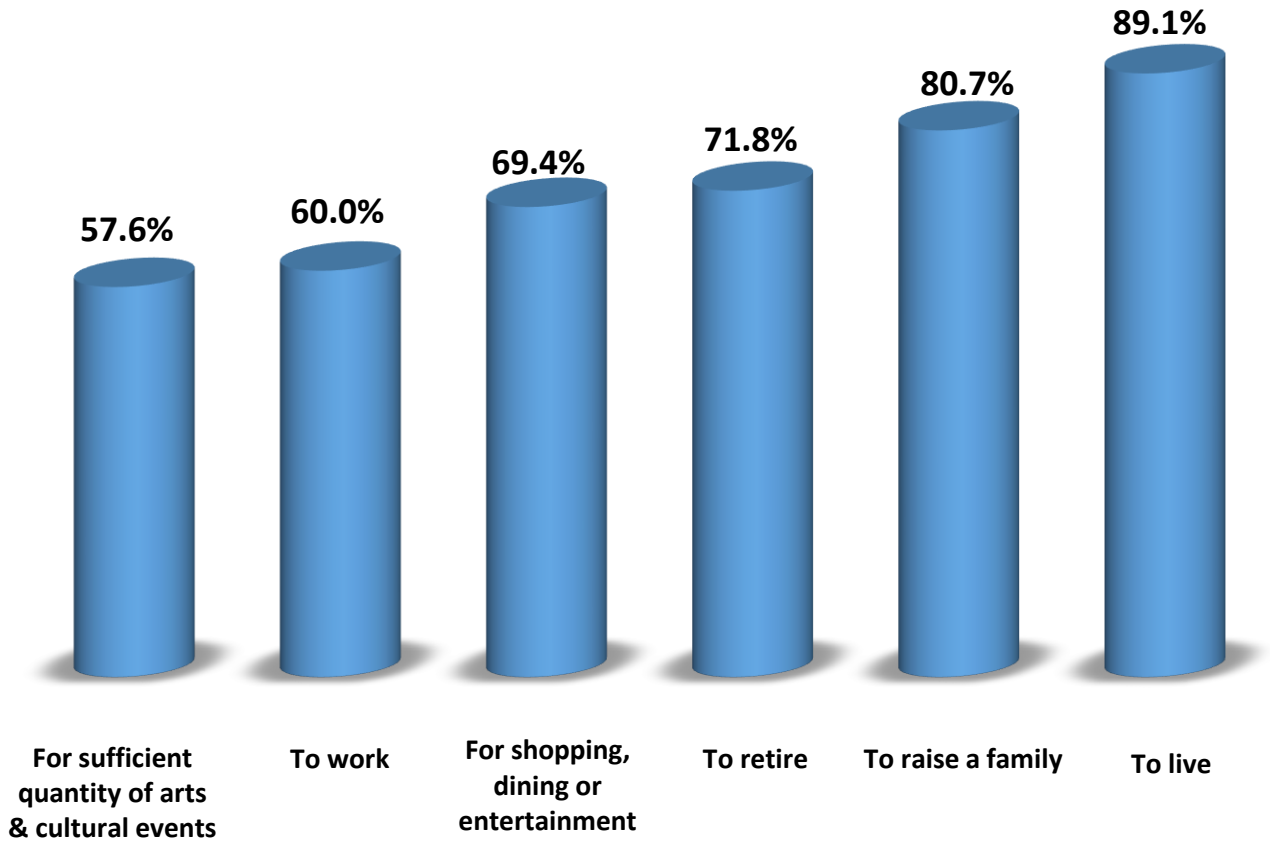
Priority	Alternatives for Maintaining City Services	2018 Mean Score*	2017 Mean Score*	2016 Mean Score	2015 Mean Score
1	Increase User Fees	2.469	2.422	2.441	2.422
2	Increase General Taxes	1.913	1.965	1.937	1.813
3	Decrease Service Levels	1.618	1.613	1.622	1.765

*Mean Score; 3 = Most Favorable; 1 = Least Favorable

This question is asked based on a scenario where all cuts and efficiencies have previously been completed and an alternative remains necessary.

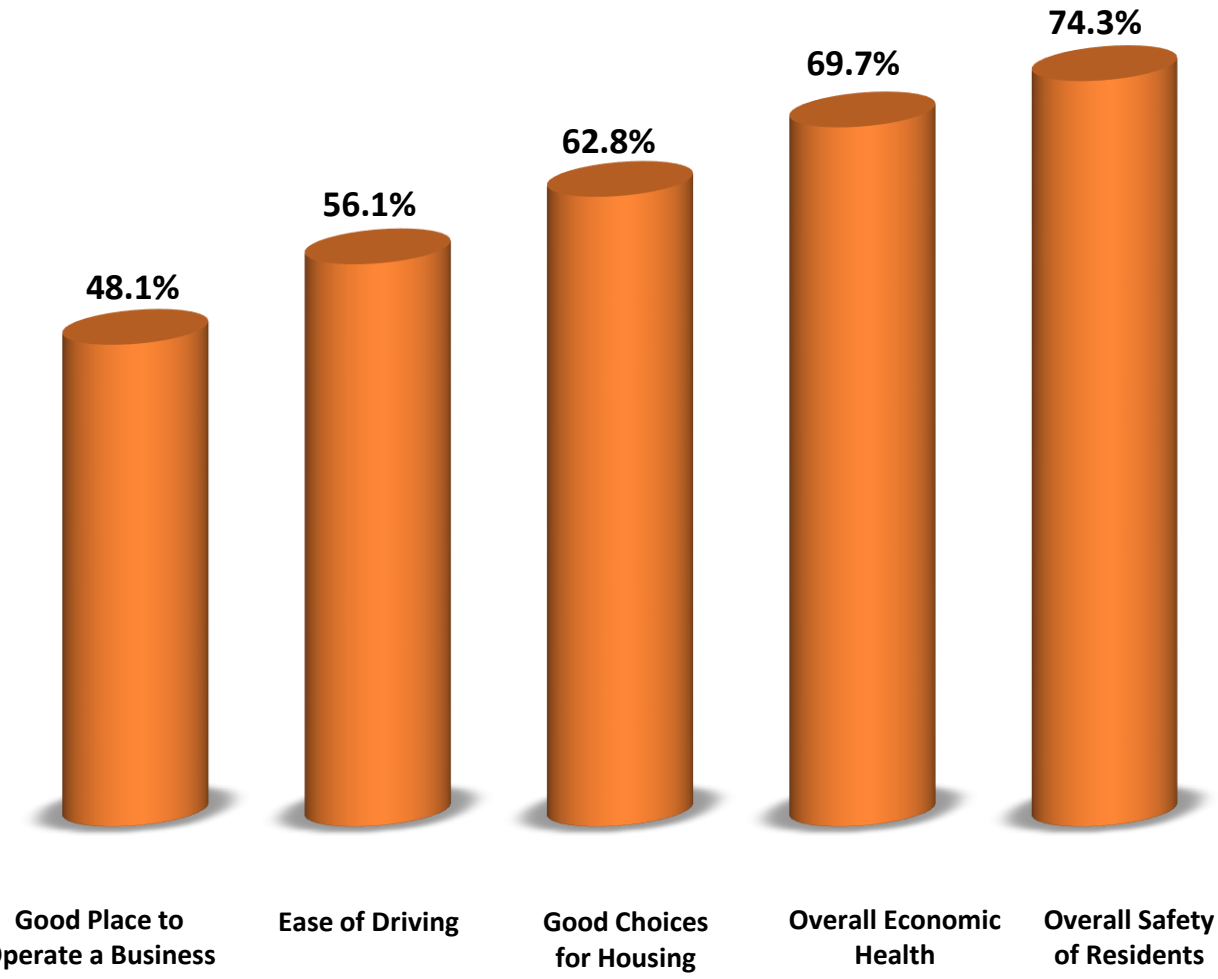
Community Values Survey 2018

Lakeland: A Good Place…



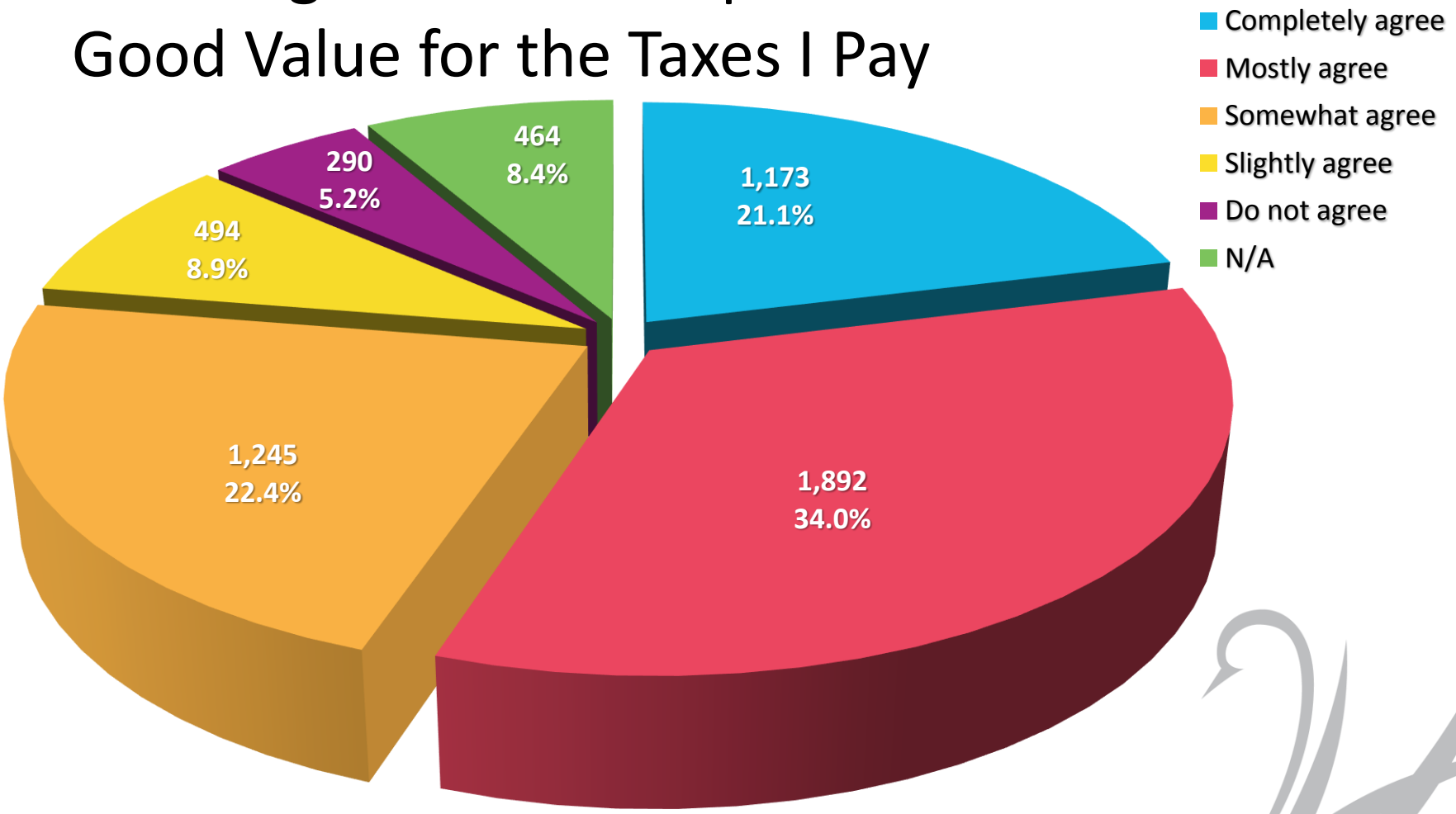
Community Values Survey 2018

Assessing Lakeland's Features



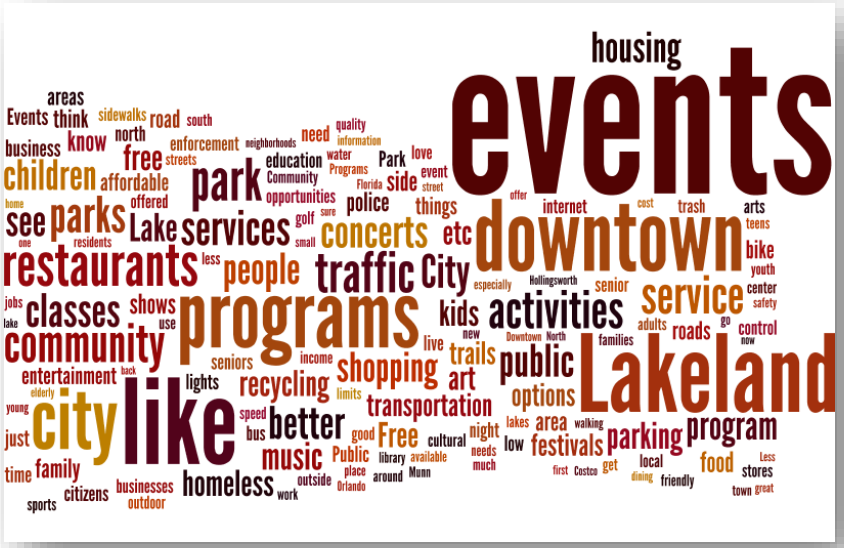
Community Values Survey 2018

Assessing the Value Proposition
Good Value for the Taxes I Pay



Community Values Survey 2018

Services



General Comments

Community Values Survey 2018

Summary & Discussion

Key Findings	Supporting Data
Citizens want to share, they are "engaged."	9,235 Started, 5,585 Completed; Down from 2017 but more than double 2015.
Quality of Life #1 priority by wide margin.	**3.95/5.0 – 32% higher than #2 (Econ. Opp.). #1 Most Valued for 5 years and trending higher.**
Community Safety (Fire & Police) are most valued city services.	Fire (56.3 – 81.8% Significant Personal Value) Police (61.0 – 86.9%). ALL trending higher.
Golf Course, Airport & Info available on Social Media are least valued.	**17.5% Sig. Personal Value for Golf Course, 16.4% for Airport, and 21.4% for Social Media. Lowest value and trending down.**
Value of Cultural & Community Services "Mixed" - trending down or flat.	Library four-year downward trend. RP Funding Center rated much lower than 2017. Website up 1.3% from 2017.
Prefer increasing User Fees.	**Increased slightly to 2.469. Stable, but trending up.**
Consistently assessed "Good Place to Live."	Four-year upward trend. Five features declined from 2017.
Uncertain for "Good value for Taxes Paid."	**First year reversal of upward trend (55.1% versus 58.9 - 2017; 57.3% - 2016; 52.3% - 2015).**

QUESTIONS

Performance Management Overview and CC Goal Valuation Results

CITY OF Lakeland
www.lakelandgov.net

Performance Measurements

- The City has had defined Key Success Indicators (KSI's) for almost a decade.
- KSI's did not evolve as the City was growing and changing in their Strategic Planning Process.
- Resulted in a lot of great measurements that really weren't able to provide KSI data that could drive the organization.
- OMB met with every department/division and using a methodology developed by Mark Friedman called "***Results Based Accountability***", together we revised the City of Lakeland KSI's.

Performance Measurements

Results-Based Accountability (RBA) is a disciplined way of thinking and taking action to improve performance.

Trying Hard is Not Good Enough, by Mark Friedman

Performance Measurements

- Why Should we use it?
  - ✓Moves from talk to action quickly
  - ✓Simple, common sense that's easily understood
  - ✓Helps groups to challenge assumptions that can be barriers to innovation
  - ✓Uses data and transparency to ensure accountability for communities and the performance of services

Performance Measurements

- Development Process – Departments were:
  - ✓Briefed on the RBA Methodology
  - ✓Asked to review the Services their respective Departments/Divisions were responsible for
  - ✓Locate measurements that told the story of how they were achieving that Service in the best interest of their Customer (both internal & external)
  - ✓Identify what City Strategy and ultimately City Goal that Service then connected to
- That's when we hit the first wall….

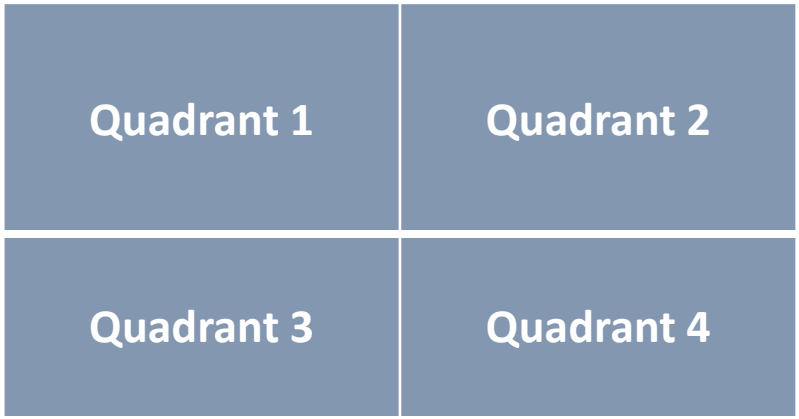
Performance Measurements

- The First Wall:
  - ✓Strategies – they were a decade old too

- What to do:
  - ✓ OMB began to review and along with assistance from the CMO, we revised the Strategies to better align with our current Goals.

Performance Measurements

- Next Steps:
  - ✓ Taking the Revised Strategies, Departments continued their Measurements Development
  - ✓ Following the RBA Methodology, we asked Departments to only consider measurements falling into Quadrants 3 & 4 in their KSI Development:



Performance Measurements

Quadrants?

Performance Measurements

Results:

- Departments did a FABULOUS JOB!
- 100's of Measurements meeting the specific criteria laid out using RBA.
- NEXT ROADBLOCK….
  - ✓ that's a lot of measurements, good measurements!
  - ✓ KSI's are supposed to be high-level and just a few to tell our story but we had a lot of really great measures

Performance Measurements

Results:

- Some KSI's are the combination of several weighted measurements.

Goal	# of KSI's	# of Measurements
Quality of Life	13	38
Communication	7	13
Economic Opportunity	8	13
Fiscal Management	10	15
Growth Management	15	25
Governance	15	29

Performance Measurements

So How Will We Use This Information:

1. Projects and Positions (items) under consideration for budgeted funds will be required to have an identifiable connection to a specific KSI measurement(s), Strategy and Goal.
   - Items will have a direct connection to specific Goal(s)
   - Measureable tracking of specifics that are advancing the City's Goals
2. All of this information will be contained in our new Dashboard and available at your fingertips.

Performance Measurements

Next Steps:

- Roll Out the Dashboard with the Values Survey Data Loaded.
- Sr. Leadership Workshop, Departments will review the compiled measurements and determine if representative of the outcomes expected, to achieve the City Goals.
- Once complete, the Dashboard will then be loaded with all of the above information and released for your use after the Business Planning Workshop.
- Continue working on the other levels of information in the Dashboard.

SWAN STATS

Your City of Lakeland Dashboard

THANK YOU!!!

Stephanie Passey, OMB **Lienys Tellez, IT**

Eric Vaughn, IT **Armando Quintana, IT**

All Departments

City Commission Goal Valuation

- March 2, 2018 – Agenda Study
  - ✓ Used the Analytical Hierarchy Process (AHP)
    - ❖ Different prioritization than prior years results.

FY19

Rank	Goal	Weights
1	Fiscal Management	32.71%
2	Economic Opportunity	23.47%
3	Quality of Life	17.10%
4	Growth Management	11.13%
5	Governance	9.73%
6	Communication	5.86%

QUESTIONS

Lunch

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Economy and Legislation

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Marsha Faux

- Marsha is a native of Polk County. She has lived on the same property her entire life.
- Publix Super Markets, Inc. 20 yrs. 1972-1992
- Property Appraiser's Office 26 yrs. 1992 to present
  Elected Property Appraiser in 2000, serving in her 5th term

Appraisal Designations:

- CFA, Certified Florida Appraiser
- ASA, American Society of Appraisers
  Accredited Senior Appraiser
  Real Property/Ad Valorem
- USPAP Uniform Standards of Professional Appraisal Practice

Civic Involvement:

- Polk Vision Executive Committee, President-Elect 2011/2012
- Involved in Polk Vision since inception in 2004
- Polk Leadership Class One 2007/2008
- United Way & other various Civic Clubs

Professional Organizations:

- Property Appraisers Association of Florida (PAAF), 2013 to present
- Florida Association of Property Appraisers (FAPA), Past President 2010/2011
- Florida Association of Property Appraisers Legislative Award 2010
- International Association of Assessing Officer 1985 to present
- Florida Tangible Personal Property Industry/Government Task Force
  1993 – 1997 appointed by Governor Bob Martinez
- Florida Chapter of IAAO 1995 to present / Secretary 1996
- American Society of Appraisers 1999 to present

Marsha M. Faux,
Polk County Property Appraiser

Dave Shepp

- Joined Southern Strategy Group in February 2015, after leading Florida Strategic Group, a full-service government affairs consulting firm, for 14 years.
- Provides services to local governments, businesses, educational institutions, economic development entities, national companies, and statewide trade associations. Throughout his years lobbying, David has secured tens of millions of dollars for clients in the Florida budget.
- With a Bachelor of Arts degree in Political Science from Florida State University, David started in Florida politics in 1996, working with the Fowler White Law Firm. Later that year, David moved to Polk County and served as a Legislative Assistant for Rep. Adam Putnam from 1996-2000 before opening Florida Strategic Group.
- David lives in Lakeland with his wife, Shannon, and son, William.
- David has had the pleasure of representing his hometown of Lakeland since 2001.

Dave Shepp, Lobbyist
Southern Strategy Group

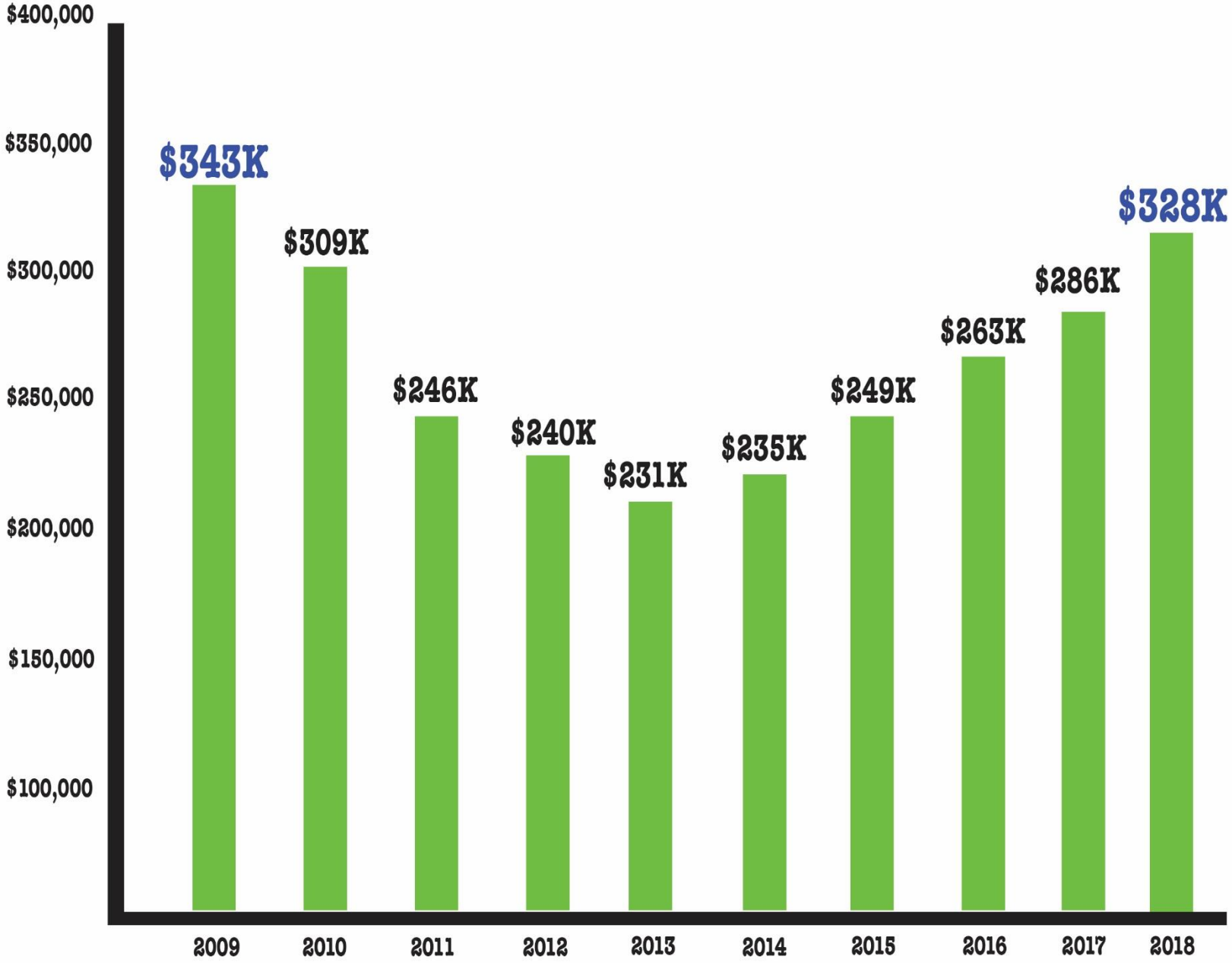
Julie Townsend

DOWNTOWN LAKELAND
LAKELAND DOWNTOWN DEVELOPMENT AUTHORITY

Julie Townsend is the Executive Director of the Lakeland Downtown Development Authority. Julie has been involved in advocating for and promoting Downtown for more than 15 years first serving as a board member and then Executive Director of the Downtown Lakeland Partnership and CRA Advisory Board Member/LDDA Board of Director.

Julie Townsend, Executive Director
Lakeland Downtown Development Authority
(LDDA)

LDDA TAX REVENUES • 10 YEAR PERSPECTIVE



DOWNTOWN LAKELAND™

6 FUNCTIONS OF THE BOARD AS DEFINED IN THE SPECIAL ACT

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

The board shall not provide city governmental services, but shall **act as a catalyst** *to see that such services are properly planned for within the downtown area and are provided in a proper and full manner within that area.*

BIG BELLIES

ALLEY COMPACTORS

ROW USE PERMIT CHANGES

PARKING CHANGES

SPECIAL EVENT PERMITTING CHANGES

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

Assist *the city in preparing and maintaining on a current basis an* **analysis of the economic conditions and changes** *occurring in the downtown area, including the effect thereon of such factors as metropolitan growth,* **traffic congestion, parking** *and other access facilities, and structural obsolescence and deterioration.*

DOWNTOWN DATABASE

TRACKING OF RETAIL/RESTAURANT/BARS, etc.

PARKING GARAGE ANALYSIS

VACANT BUILDINGS ANALYSIS/IMPLIED PARKING IMPACTS

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

Assist *the city in formulating and maintaining on a current basis both* **short - range and long - range plans for improving the attractiveness and accessibility** *to the public of downtown facilities, promoting efficient use thereof, remedying the deterioration of downtown property values, and developing the downtown area in general.*

C-6 DESIGN GUIDELINES

GRANT PROGRAMS

SIDEWALK CAFE PERMITS

SIDEWALK SIGNS

CONTAINER GARDENS

BANNERS

VALET

SHUTTLE

BIG BELLIES

COMPACTORS

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

Recommend *to the city, for its consideration and approval, the* **actions deemed most suitable for implementing any downtown development plans**, *including removal, razing, repair, renovation, reconstruction, remodeling and improvement of existing structures, addition of new structures and facilities, relocation of those existing, and changes in facilities for getting thereto and therefrom.*

REDEVELOPMENT PLAN
STRATEGIC FRAMEWORK

LANDUSE/PHYSICAL VISION
MARKETING/RECRUITMENT
GOVERNANCE
INFRASTRUCTURE

GAP ANALYSIS

PARKING STUDY

AGENCY COORDINATION

ALLEY DRAINAGE ISSUES

BUSINESS RECRUITMENT

MINIMUM MAINTENANCE STANDARDS

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

Participate actively *in the* **implementation and execution of downtown development plans**, *including establishment, acquisition, construction, ownership, financing, leasing, licensing, operation, and management of publicly owned or leased facilities deemed feasible and beneficial in effecting implementation for public purposes; however, this subsection shall not give the board any power or control over any city property unless and until assigned to it by the city commission under the provision of subsection (6).*

PARKING ANALYSIS

MARKETING AND EVENTS

BUSINESS RECRUITMENT

VALET

GOVERNANCE AND INFRASTRUCTURE

REDEVELOPMENT PLAN
STRATEGIC FRAMEWORK

LANDUSE/PHYSICAL VISION
MARKETING/RECRUITMENT
GOVERNANCE
INFRASTRUCTURE

DOWNTOWN LAKELAND™

LDDA FUNCTIONS

Carry on such additional lawful projects and undertakings related to the downtown area as the city commission may assign to the board with its consent.

LIAISON BETWEEN CITY AND BUSINESSES

COMMUNICATIONS

ADVOCATE

ASSESS CONDITIONS/MAKE RECOMMENDATIONS

VISITOR's GUIDE

SOCIAL MEDIA

FARMERS CURB MARKET

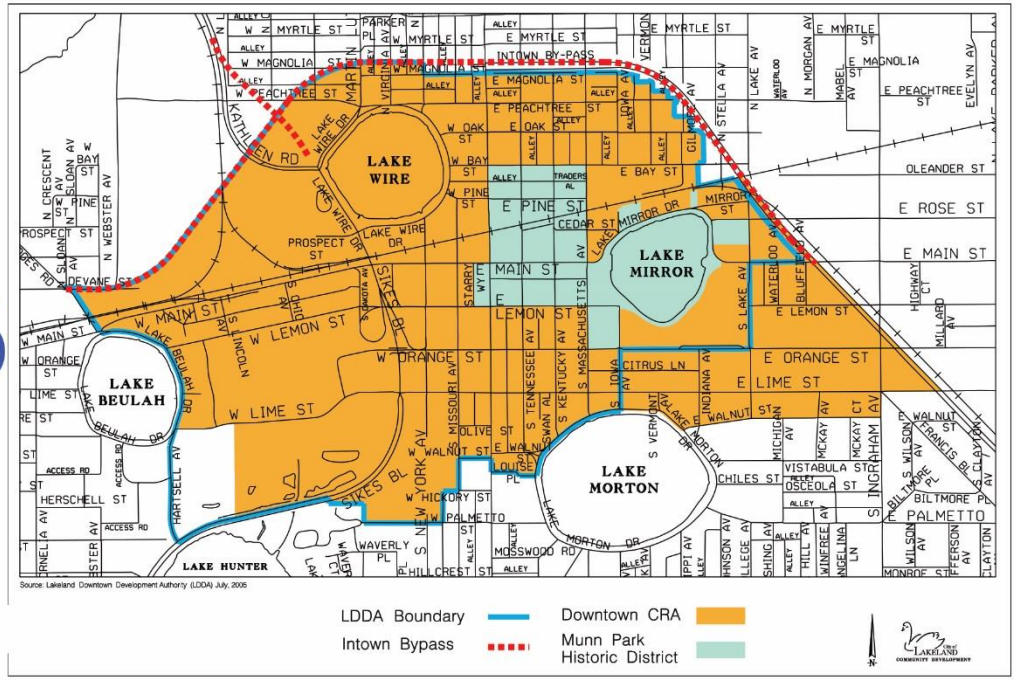
DLP EVENTS : FIRST FRIDAY, GIRLS NIGHT OUT, HOLIDAY WALKABOUT, etc.

DOWNTOWN LAKELAND™

TOTAL CURRENT TAXABLE VALUE : $240M

PARCELS : 498

- Taxable : 328
- Tax Exempt : 166
- Vacant : 275



DOWNTOWN LAKELAND™

QUICK BY THE NUMBERS

Residents : 700 - *apartments, condos, retirement*
Jobs : 7,000 - *relatively flat for a decade*
Restaurants : 26 - *2 still to come, one recently closed*
Retail : 25 - *2 still to come; net gain of 8 since 2014*
Bars : 4 - *1 still to come; net 0 since 2014*

DOWNTOWN LAKELAND™

GRANTS & INCENTIVES

TOTAL GRANTS : $152,381.16
SUPPORTED REDEVELOPMENT COSTS : $3.8M

Also support redevelopment with LDDA TIF

DOWNTOWN LAKELAND™

ECONOMIC CONDITIONS

CUSTOMER PARKING CONSTRAINTS

Increase in retail & restaurants creates greater need for daytime customer parking

SOLUTIONS IMPLEMENTED & SUGGESTIONS

Free after 3pm in Cedar St. Public Parking Zone 2725

PROPOSAL TO COME: Daytime Valet & Daytime Shuttle

DOWNTOWN LAKELAND™

THE ASK

SUPPORT CRA SECOND FLOOR REDEVELOPMENT EFFORTS

3 FUNDING SOURCES : CRA, LDDA, COL

SUPPORT CODE ENFORCEMENT ACTIVITIES

DOWNTOWN MINIMUM MAINTENANCE STANDARDS
MORE AGGRESSIVE PENALTIES FOR HISTORIC STRUCTURES

SUPPORT CONSISTENT LPD COVERAGE

DAY AND NIGHT

RANK CITY-OWNED PROPERTIES FOR REDEVELOPMENT

IDENTIFY SPECIFIC PARCELS AND PROJECTS; MARKET TO DEVELOPERS WITH INCENTIVES

DOWNTOWN LAKELAND™

QUESTIONS?

Jason Willey

- Jason Willey, Business Development Manager for the City of Lakeland and has worked for the City since 2000.
- Responsible for all of the City's internal economic and business development activities. Working closely with developers, engineers, architects and realtors, much of Jason's time is spent navigating processes, solving problems and facilitating growth.
- Has a Bachelor of Science in Public Administration from Florida State University and a Master's Degree in Business Administration from Webster University.
- Graduate of Leadership Lakeland Class XXX and Leadership Polk Class IX.
- On the Board of Directors for St. Paul Lutheran School, and Lakeland Vision and serves several other advisory boards and committees.
- Married to Devy for 16 years and is the proud father to two children, Spencer 13 and Charlotte 7.
- Enjoys spending time with family, running, soccer and traveling.

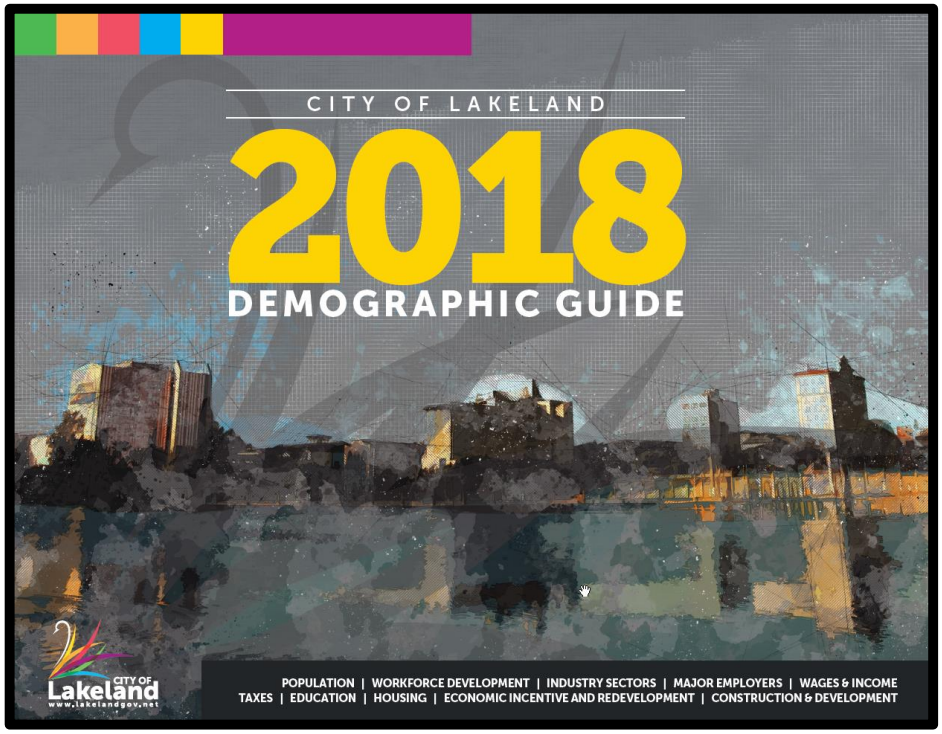
Jason Willey, City of Lakeland Business Development Manager

City of Lakeland Economic Development Update

Jason Willey

City of Lakeland

Business Development Manager



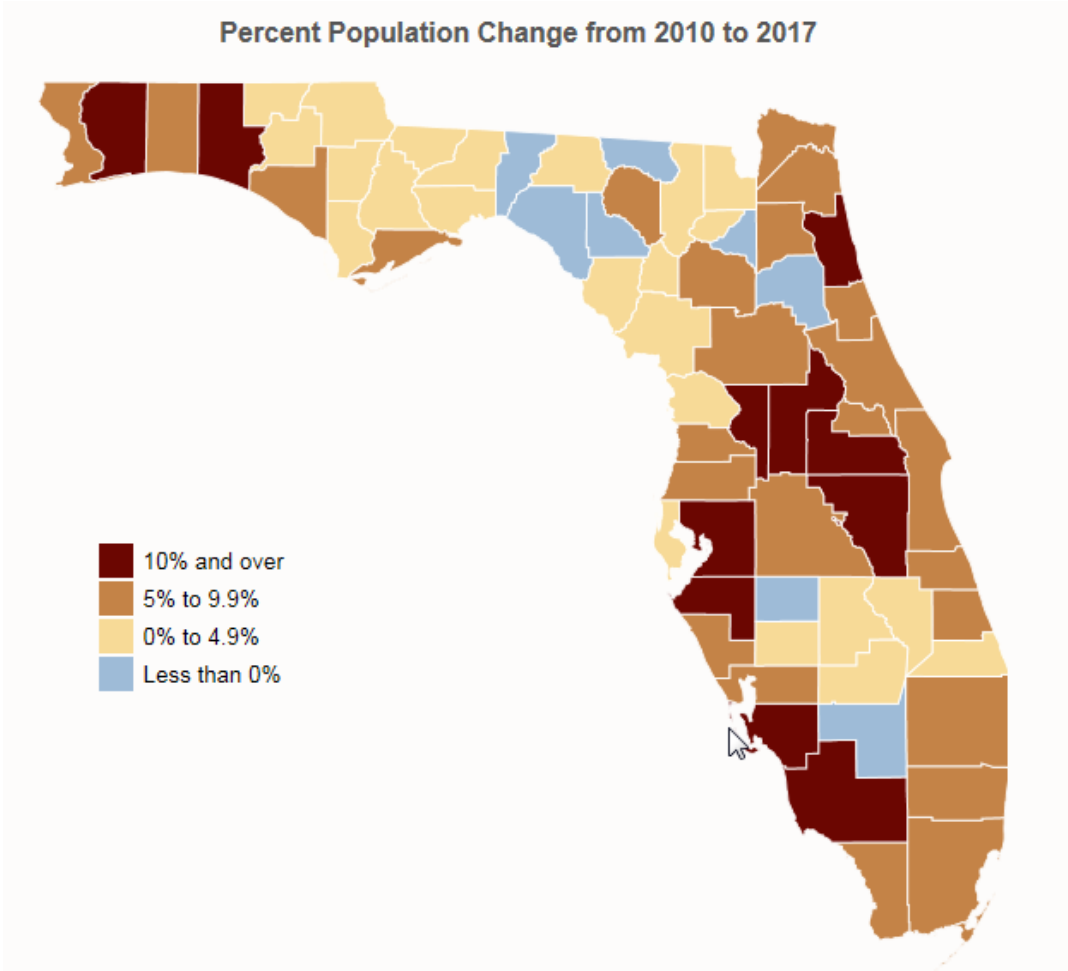
Year	Population	Sq. Miles
1960	41,350	16.78
1970	42,803	17.17
1980	47,406	20.59
1990	70,576	44.23
1995	74,626	50.55
2000	78,452	51.91
2005	90,851	71.38
2010	97,422	74.48
2011	97,690	74.62
2012	98,200	74.75
2013	98,773	74.83
2014	100,728	74.84
2015	101,517	74.84
2016	102,507	74.84
2017	**104,185**	**75.02**

2017 Population Estimates

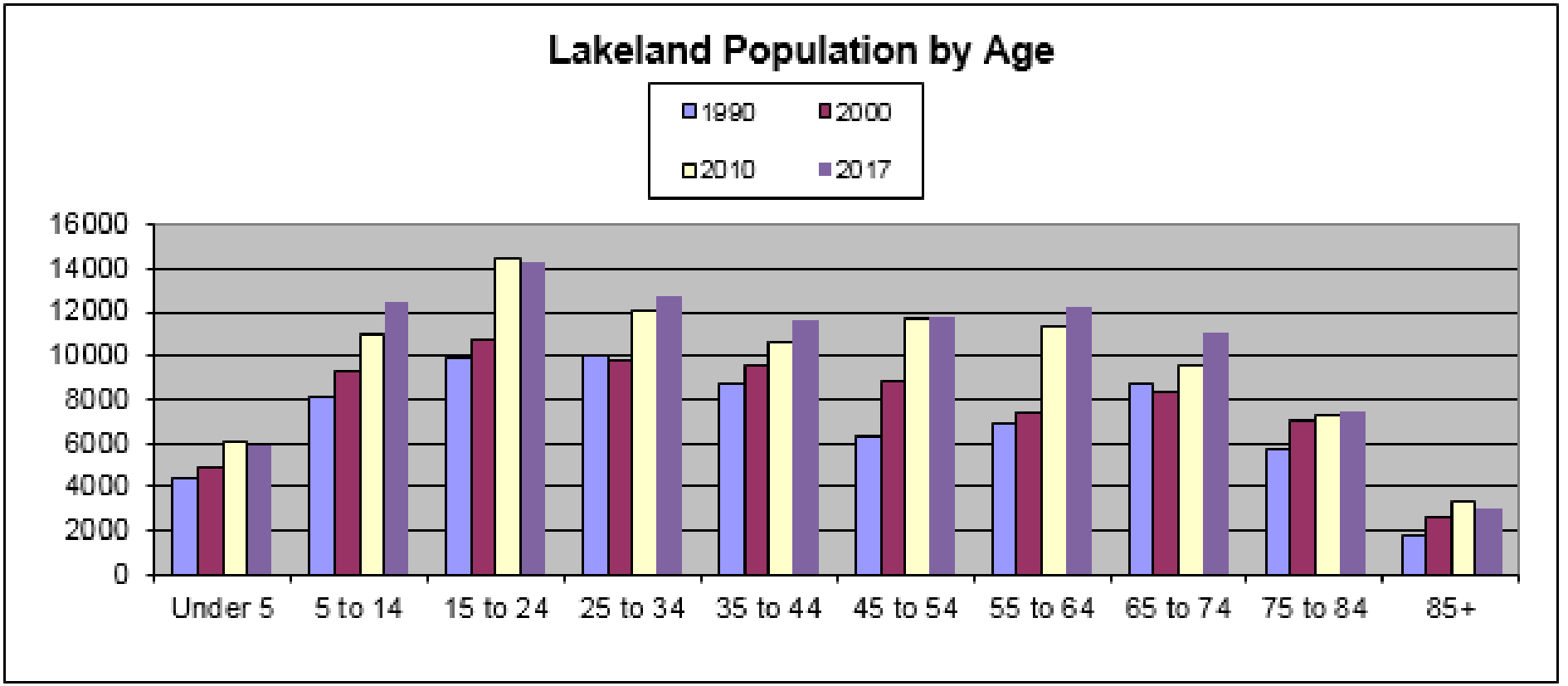
Lakeland	104,185
Polk County	658,517
Florida	20,363,867

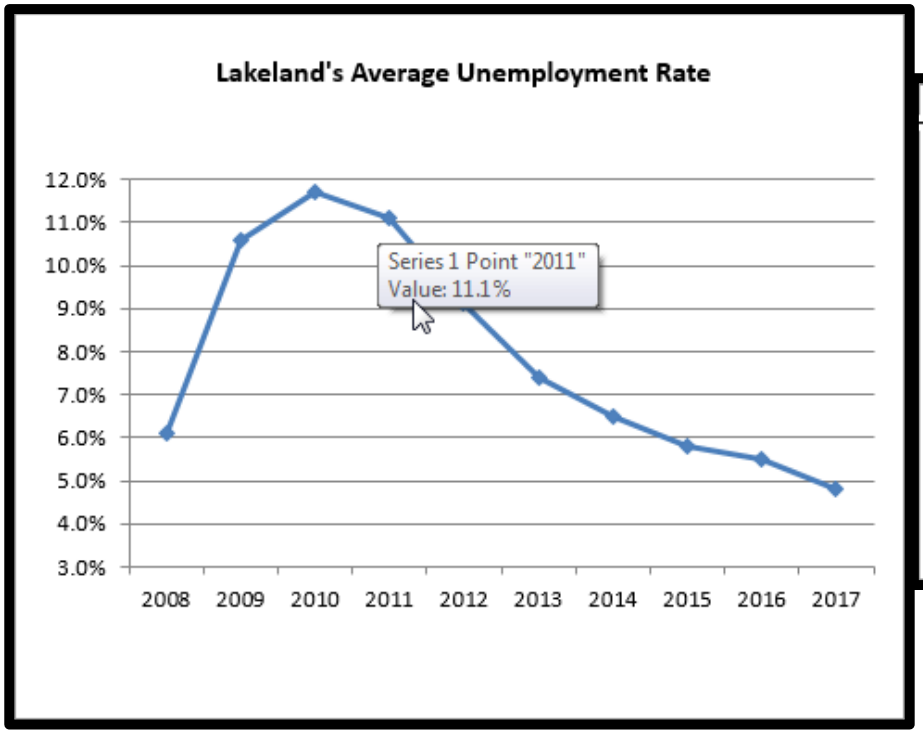
Population and Growth

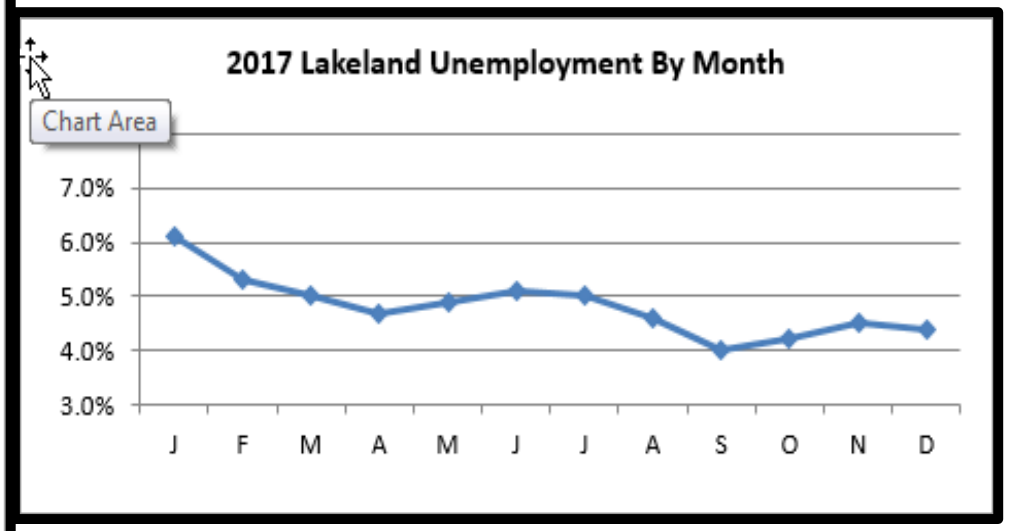
Population and Growth



Population and Growth

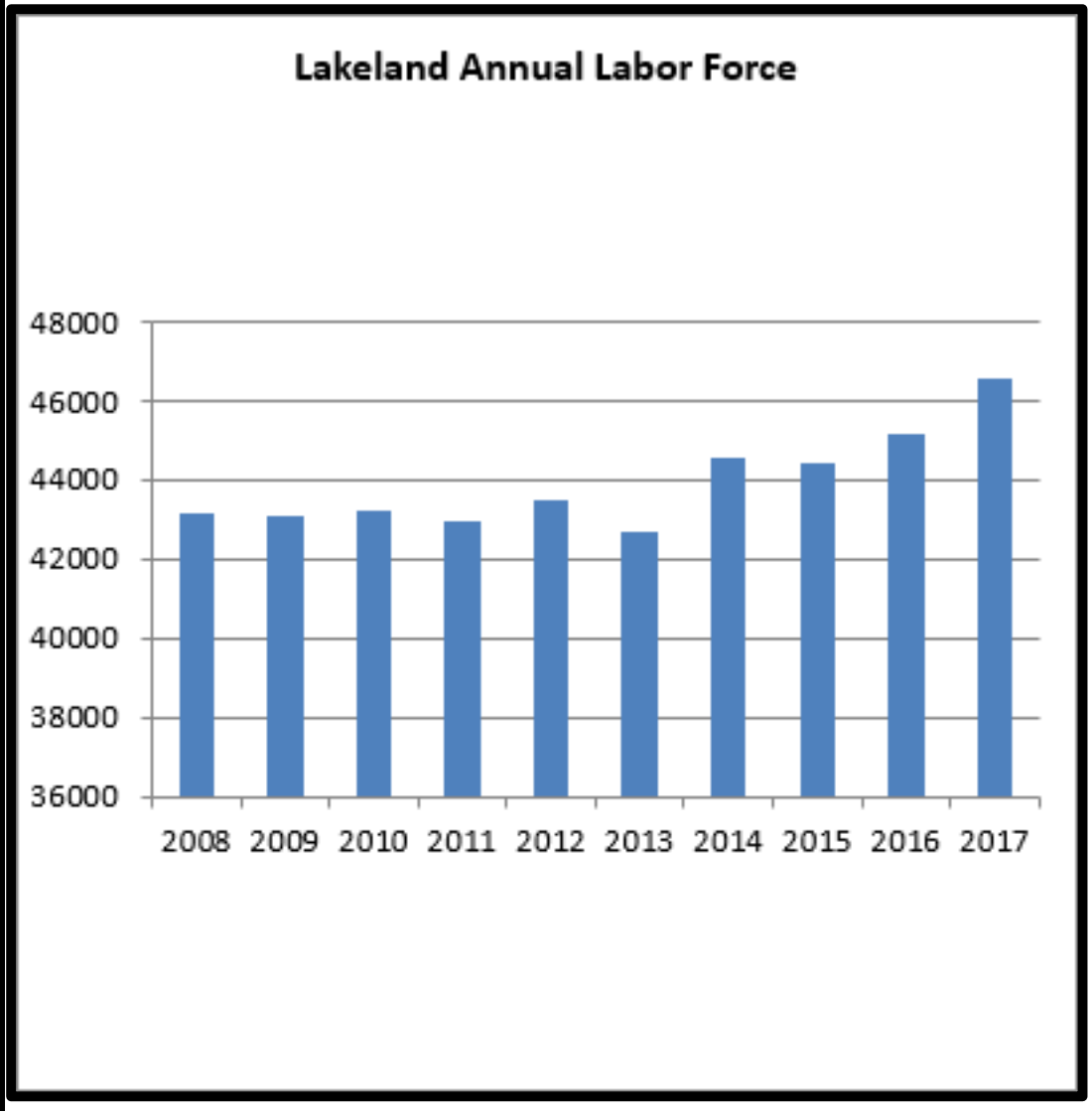


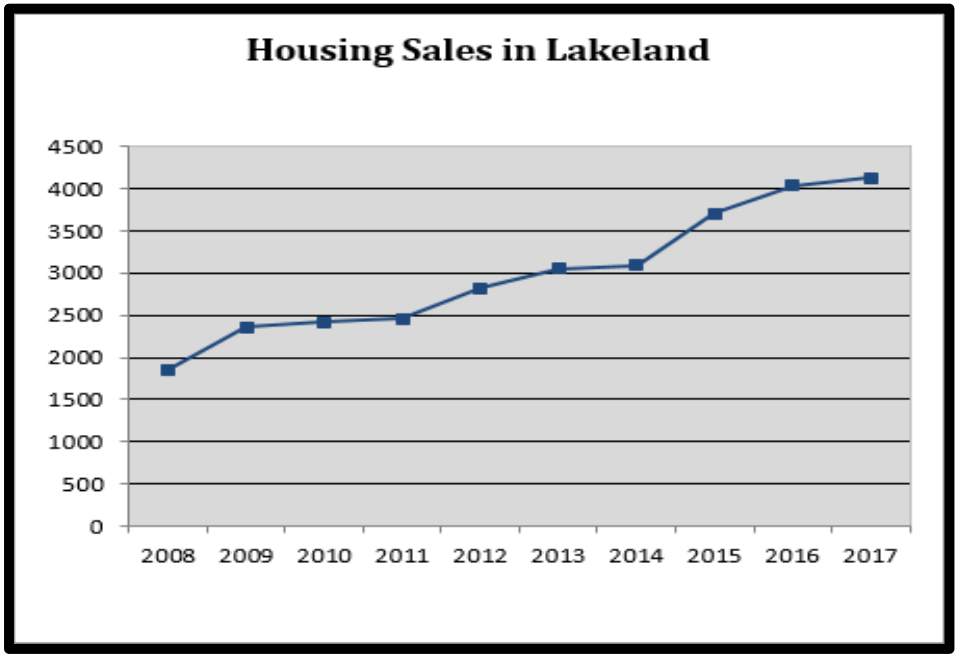


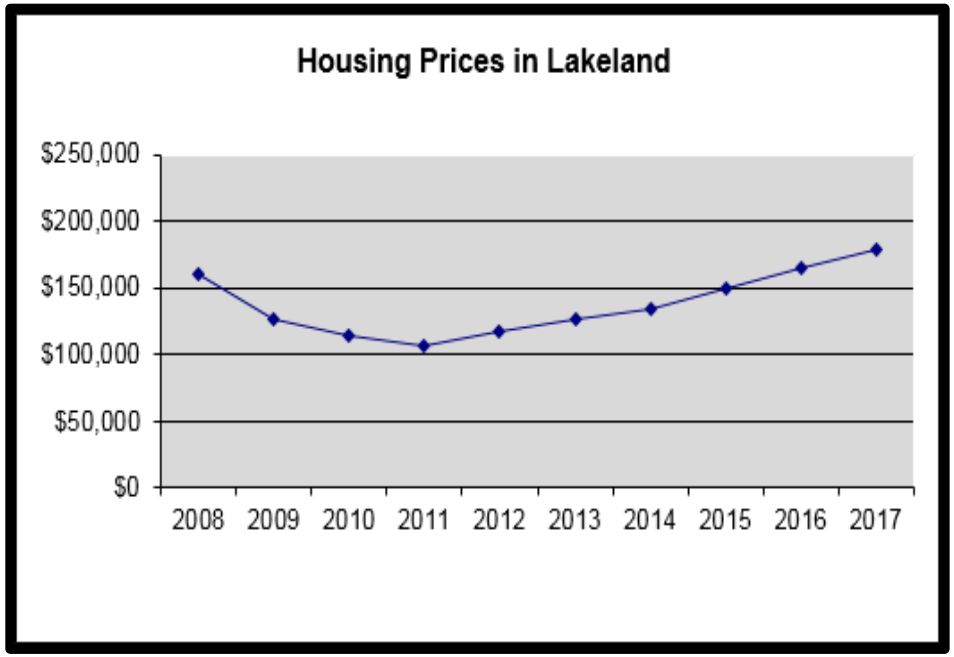


Workforce Development

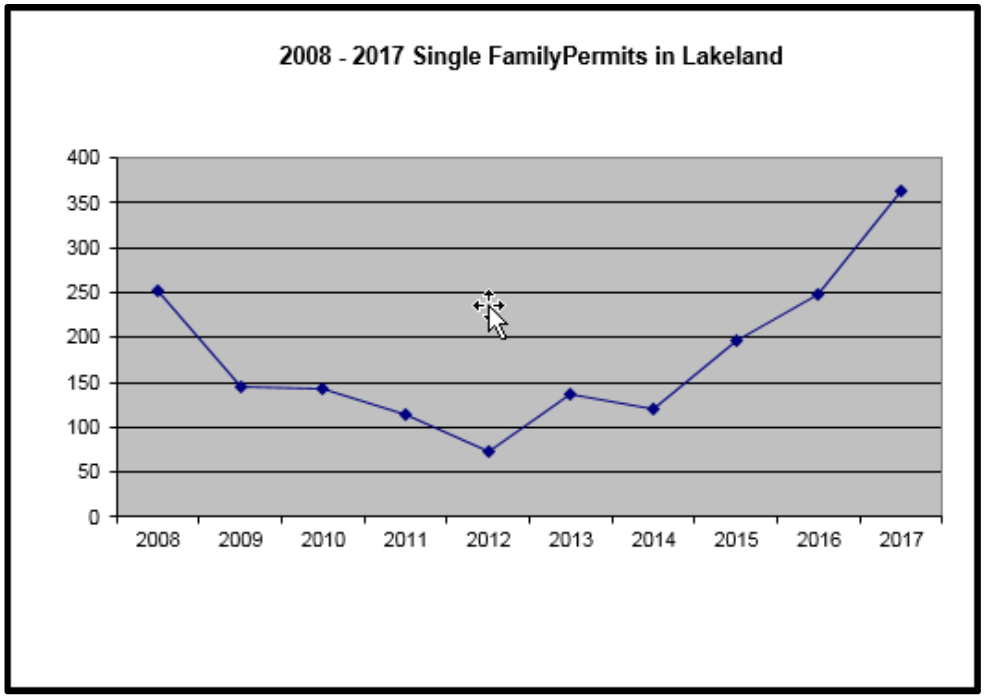
Workforce Development




Housing Sales in Lakeland
4500
4000
3500
3000
2500
2000
1500
1000
500
0
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017


Housing Prices in Lakeland
$250,000
$200,000
$150,000
$100,000
$50,000
$0
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017

Housing

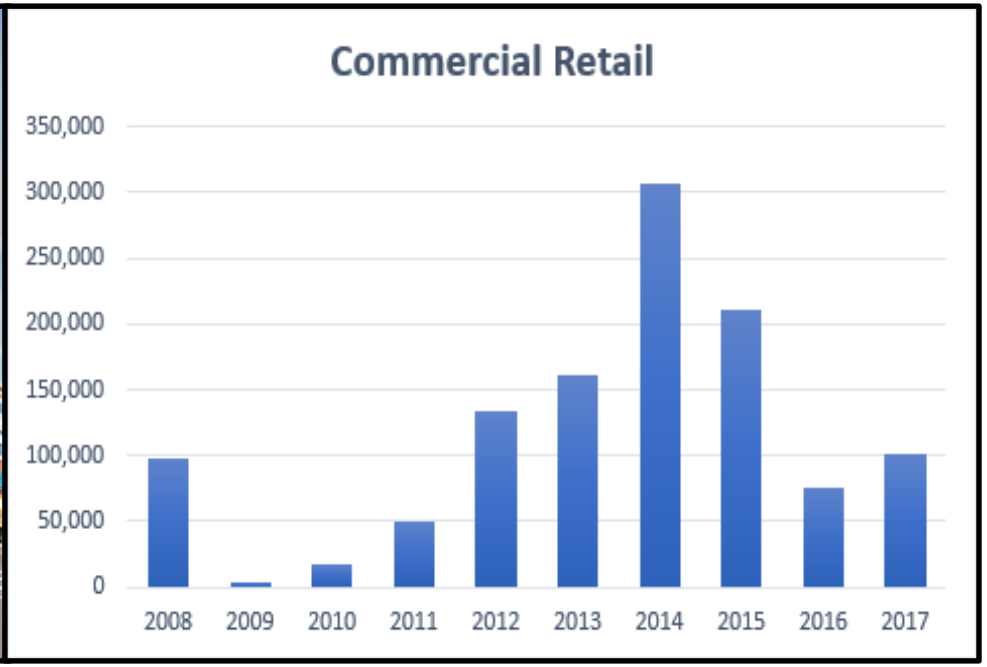


Residential Construction

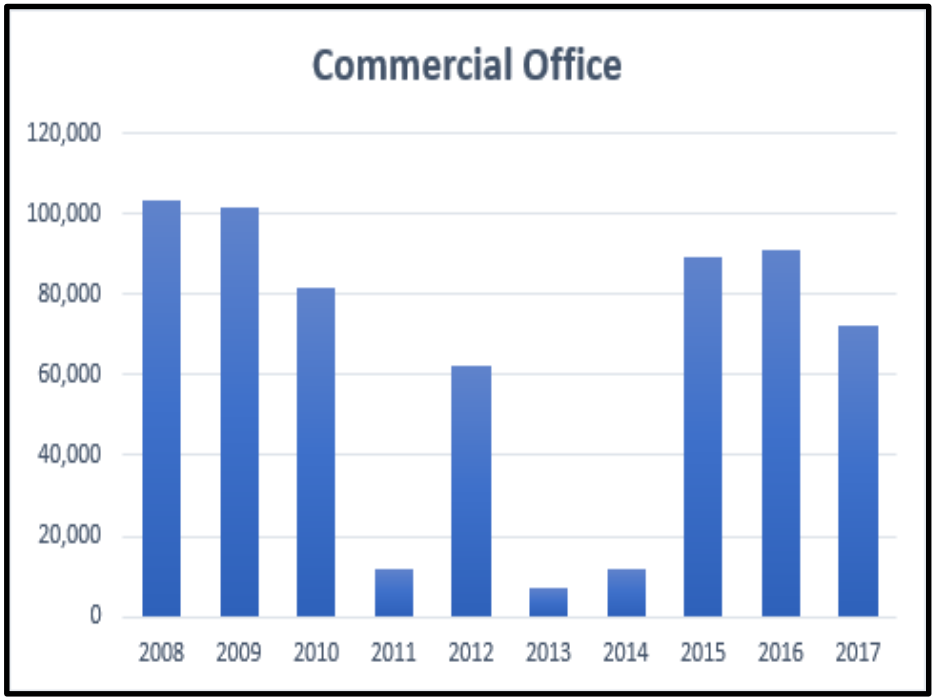
Multi-Family Construction

- 50 M/F Permits in 2017
- 33 M/F Permits in 2016

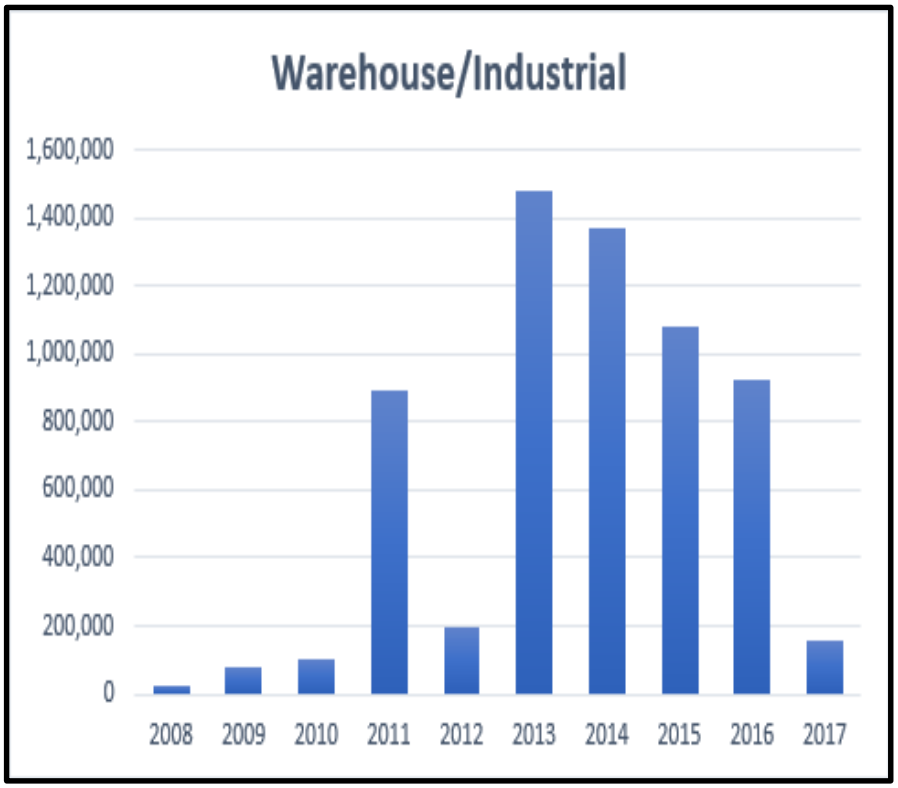
- 600 Units completed in LE Service Area in 2015-2017



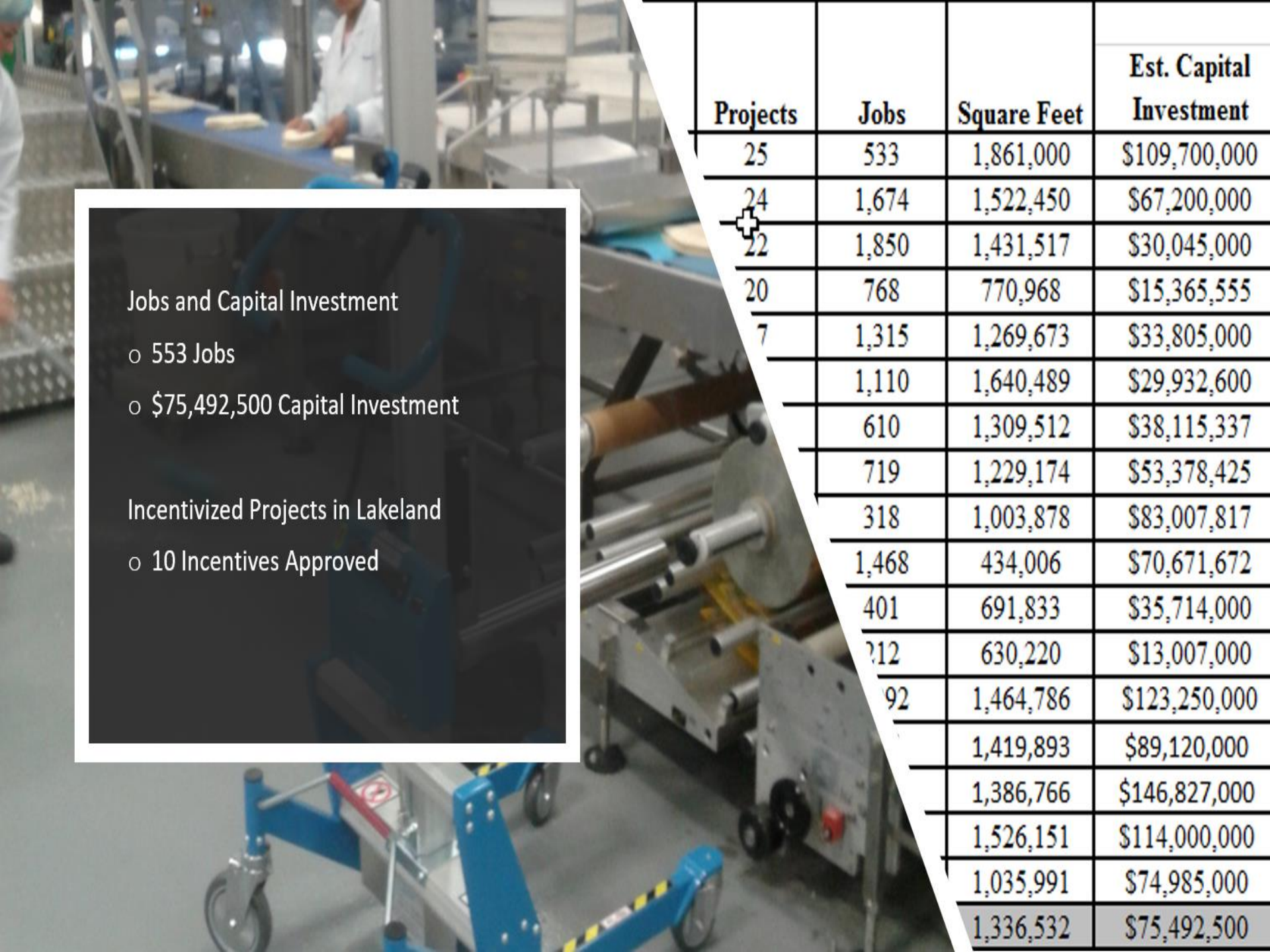
Retail Construction Activity



Office Construction Activity



Industrial Construction Activity



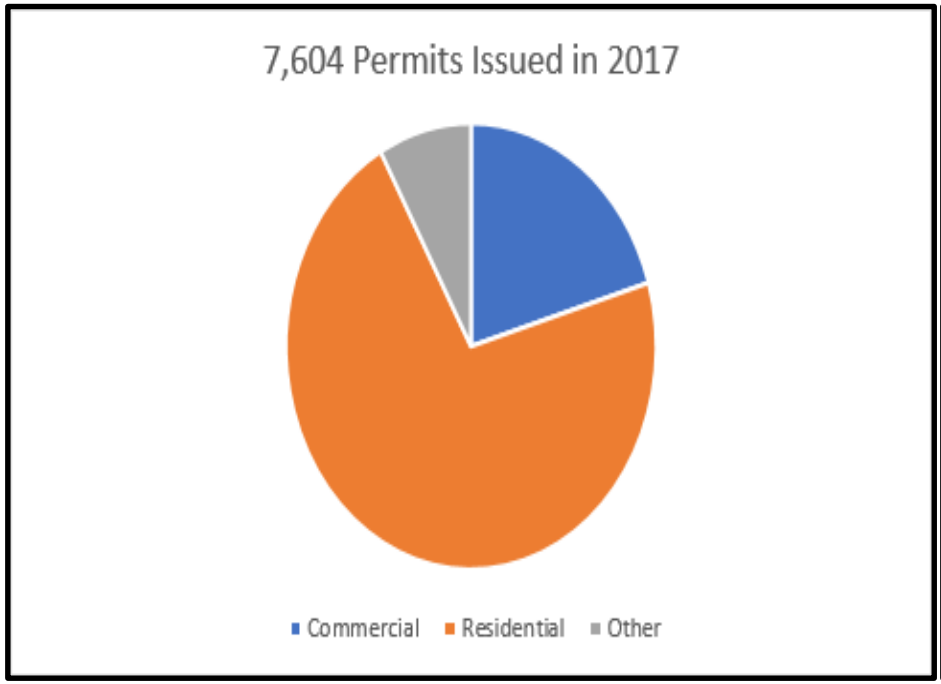
Jobs and Capital Investment

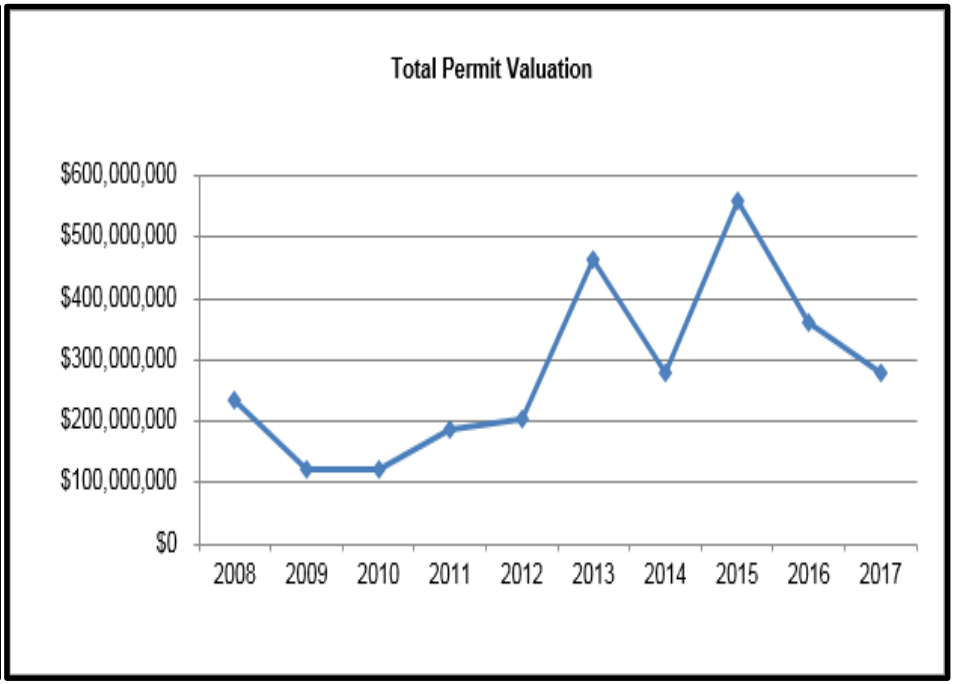
- 553 Jobs
- $75,492,500 Capital Investment

Incentivized Projects in Lakeland

- 10 Incentives Approved

Projects	Jobs	Square Feet	Est. Capital Investment
25	533	1,861,000	$109,700,000
24	1,674	1,522,450	$67,200,000
22	1,850	1,431,517	$30,045,000
20	768	770,968	$15,365,555
7	1,315	1,269,673	$33,805,000
	1,110	1,640,489	$29,932,600
	610	1,309,512	$38,115,337
	719	1,229,174	$53,378,425
	318	1,003,878	$83,007,817
	1,468	434,006	$70,671,672
	401	691,833	$35,714,000
	212	630,220	$13,007,000
	92	1,464,786	$123,250,000
		1,419,893	$89,120,000
		1,386,766	$146,827,000
		1,526,151	$114,000,000
		1,035,991	$74,985,000
		1,336,532	$75,492,500





Permitted Projects in Lakeland

- Population and Growth
- Communicate
- Be Competitive/Incentive
- Telling our Story

Lakeland Moving Forward

Laura Rodriguez

Laura Rodriguez is the Executive Director of Lakeland Vision and is proud to be a native of Lakeland. She graduated from the University of South Florida and spent over ten years in the public sector serving as a conduit between people and their government. In both the Florida Senate and the United States House of Representatives, Laura's roles ranged from Legislative Aide, Chief-of-Staff (FL Senate) and Outreach Coordinator (U.S. House of Representatives). Public Service has always been a focus and remains so at Lakeland Vision by providing a platform for citizens who would like to affect change on the long-range planning of Lakeland.

Personally, Laura has always had a passion for community service and currently serves on the Presbyterian Homes and Housing Foundation, The Lakeland Chamber of Commerce's Advocacy Committee, is an ordained elder at First Presbyterian Church of Lakeland and is a member of Leadership Lakeland Class XXXII. Laura is also a member of Pi Sigma Alpha (National Political Science Honor Society). She is married to Danny Rodriguez and together they have a four year old daughter, Madelyn, and a five month old daughter, Penelope. In her spare time, Laura enjoys gardening, reading, travel and spending time with her family.

Laura L. Rodriguez, Executive Director of Lakeland Vision

Dr. Larry Ross

- Emeritus Professor of Business in the Barney Barnett School of Business & Free Enterprise at Florida Southern College.
- Bachelor's degree from Florida State University, MBA and PhD in marketing from Georgia State University's J. Mack Robinson College of Business.
- Teaching interests are in the areas of marketing and strategic planning.
- Consultant and Facilitator in the areas of marketing and strategic planning.
- Author and lecturer on survey based research and strategic planning.
- Prior board service for the McKeel schools, the United Way of Central Florida, and Past President of Leadership Lakeland Alumni Association.

Larry Ross, Ph.D., City of Lakeland
Citizens Values Research Partner

Liz Craven

Liz Craven, along with her husband Wes, own Pro-Ad Media, a Polk County based media company serving the local community for over 23 years. Pro-Ad Media is the home of the Polk Elder Care Guide, Foodie Magazine and Polk Home and Garden Magazine. Wes and Liz also own and operate BigHarryDeals.com. Liz lives in Lakeland and is very active in the local community. Liz serves on a number of local boards including the Lakeland Area Chamber of Commerce, Lakeland Vision, First United Methodist Church Board of Trustees, Better Living for Seniors Coalition and CATT_Rath Senior ConeXtions.

Liz is a proud mother of two grown daughters and is a die-hard Seminole fan! She enjoys spending time with family, reading and being outside in this great city.

Liz Craven
Pro-Ad Media

Our Community. Our Future.

About Lakeland Vision

MISSION STATEMENT: Lakeland Vision collaborates with a broad range of community stakeholders to implement a comprehensive action plan shaped by the community's own vision of its future.

Lakeland Vision, Inc. identifies community strengths and weaknesses in order to create and implement a comprehensive, action-oriented plan for the future of the metro Lakeland area. The plan was developed with diverse and broad-based community input and continues to address the following Strategic Elements from the Make your Mark visioning program:

- Arts, Activities & Entertainment
- Diversity & Community
- Downtown & Neighborhoods
- Economy
- Education
- Environment
- Governance
- Growth & Infrastructure
- Parks & Recreation
- Social Initiatives
- Transportation

In the years following the Make Your Mark visioning process, Lakeland Vision's Board of Directors, Vision Partners and Community Collaborators have been working together to ensure that Lakeland's citizen driven vision for the future is carried to fruition.

Lakeland Vision Community Re-Refresh

2018 - 2019

Age - Friendly Lakeland

A Community for a Lifetime

Lakeland Vision's Goal:

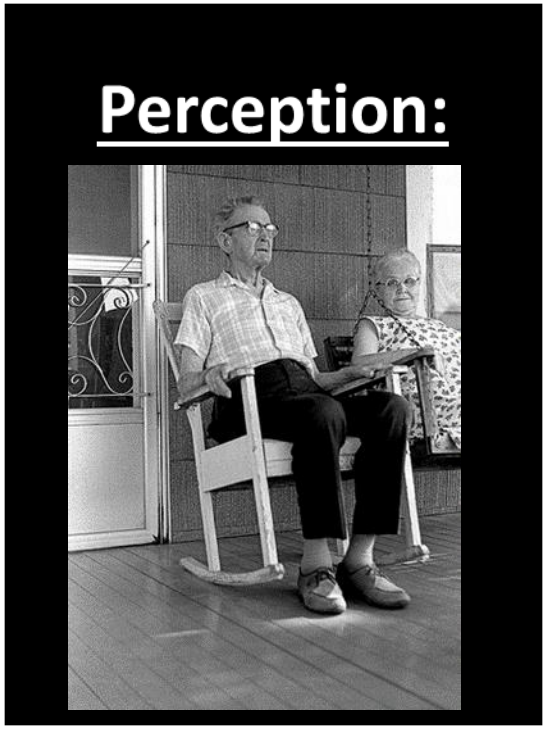
To ensure Lakeland Seniors experience a high quality of life in a variety of living situations, are involved in the community and have good access to services including senior centers, health care, continuing education and public transportation.

When Does a Person Become a SENIOR CITIZEN?

- **AARP defines "Senior Citizen" as anyone age 50 and older.**
- **U.S. Government - you are a "Senior Citizen" when eligible for Social Security and Medicare benefits – around age 65**

Other ideas: When You …

- **Can't live independently**
- **Can't drive a car**
- **Retire**
- **Turn 75**
- **Turn 85**
- **Have grandchildren**
- **Have gray hair**



Senior Demographics in Lakeland

- At inception of Lakeland Leadership Council on Seniors, **HALF** of Lakeland's adult population was aged 50 or older *(2010 Census)*.
- *Approaching double the # of residents aged 18 or younger.*
- Lakeland's total population at the time of the 2010 Census was **97,422 . . . 25,961** were seniors over the age of 60.

REALITY

A Brief History

- ✓ 2010 – City Commission approved Focus Groups
- ✓ 2011 – COL partnered with **Lakeland Vision** to form **Lakeland Leadership Council on Seniors**
- ✓ 2012 – Strategic Plan drafted and approved
- ✓ 2014 – Achieved **Communities for a Lifetime** designation from Florida Department of Elder Affairs
- ✓ 2017 – **AARP** Florida presents City with "Age-Friendly Community" Designation. Lakeland Leadership Council on Seniors Becomes Age-Friendly Lakeland - begins public outreach to survey residents ages 45 and older.

Department of ELDER AFFAIRS STATE OF FLORIDA

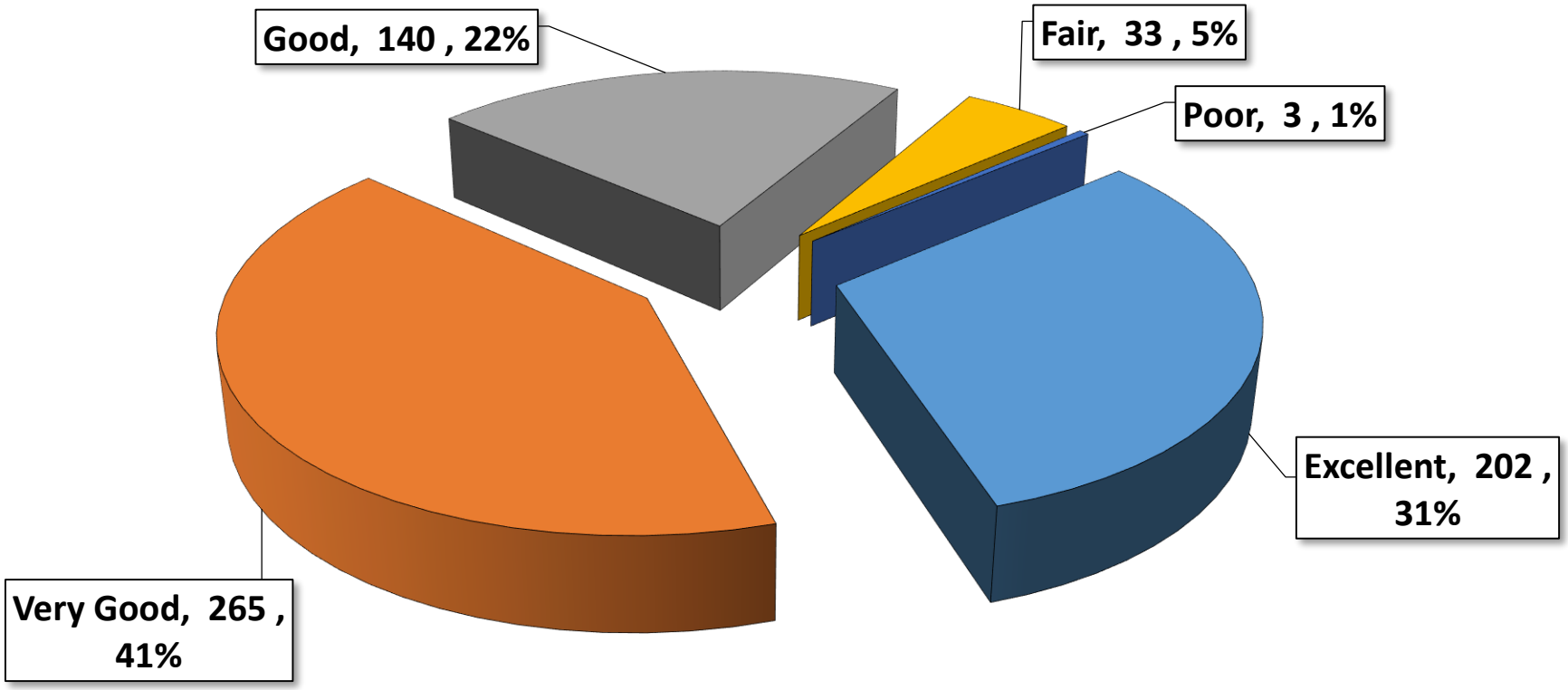
2018 Stakeholder Survey

Perceptions and Baselines

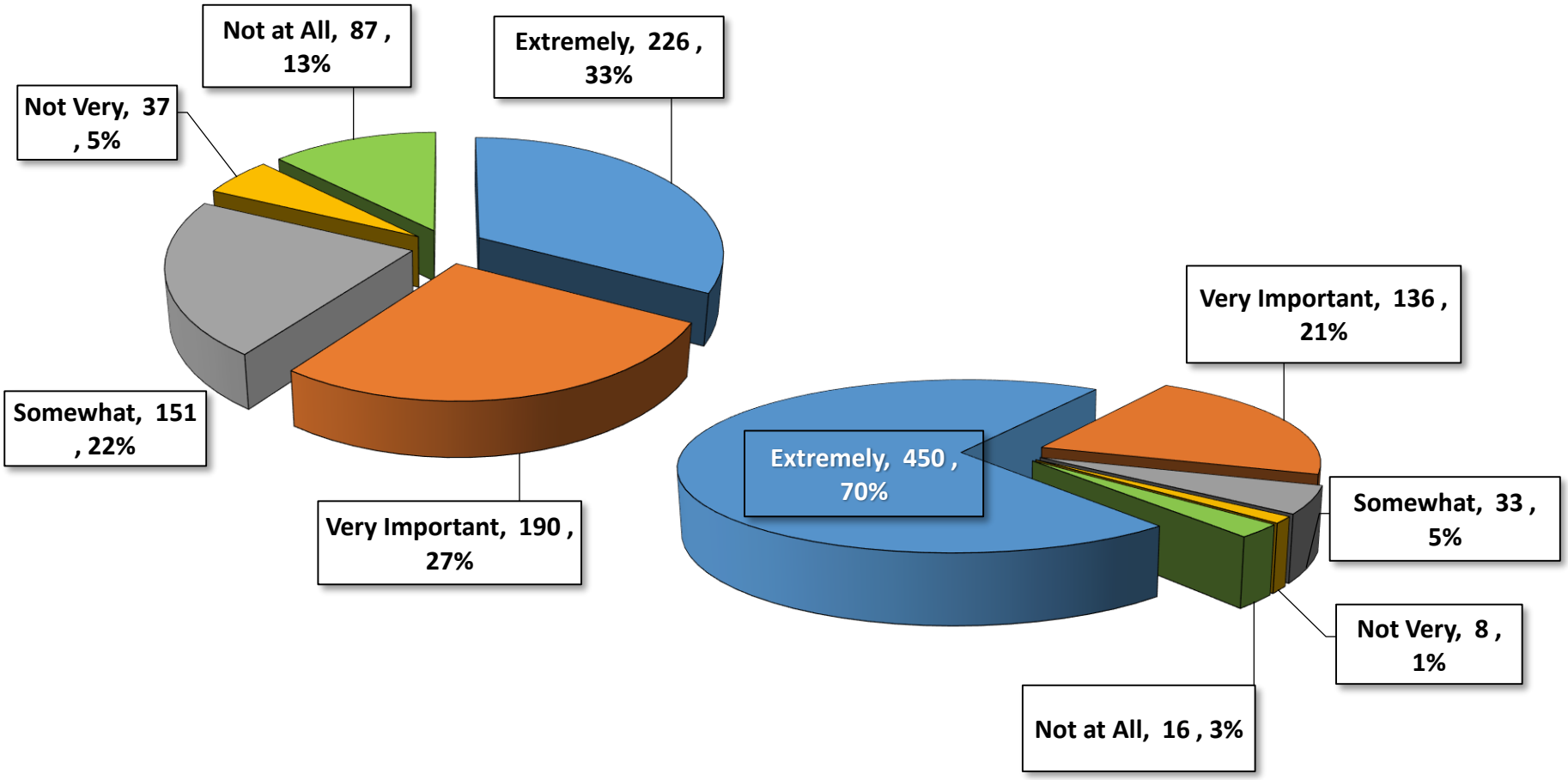
Who responded?

- **Representative cross section by zip code**
- **Representative of tenure/time in City**
- **White/Caucasian (88%)**
- **Female (75%)**
- **Educated; 4 year degree/Grad degree (54%)**
- **Drivers Self/Others drive (74.8%)**
- **Affluent; HH Income > $30k (68%)**
- **Married (58%)**
- **Connected; Online daily (67%)**
- **Voters (72%)**

Rate Lakeland As A Place to Live As you Age



How Important to Remain in Lakeland as you age



Housing Related Topics

How important to have the following:

DO WE HAVE IT?

	Extremely Important	Very Important	YES	NO	NOT SURE
Home Repair Contractors - trustworthy, do quality work & affordable	82.4%	12.0%	47.3%	12.3%	38.1%
Home Repair Service for low-income older adults that helps with repairs	64.5%	23.7%	18.4%	22.0%	57.3%
Affordable Housing Options for adults (assisted living, active adult, shared facilities)	63.8%	22.5%	40.7%	16.9%	40.1%
Homes Equipped with no-step entry, wider doorways, grab bars in bathroom	57.4%	25.7%	37.8%	11.7%	48.2%
Seasonal Services for low-income adults (lawn work, etc.)	58.7%	25.8%	29.9%	18.8%	48.9%
Well-maintained homes & properties	72.6%	22.6%	70.1%	10.8%	16.9%

Parks & Public Service Topics

How important to have the following:

DO WE HAVE IT?

	Extremely Important	Very Important	YES	NO	NOT SURE
Well-maintained/Safe Parks within walking distance of your home	48.0%	27.7%	42.6%	42.9%	12.3%
Public Parks with enough benches	50.3%	29.3%	41.5%	29.6%	26.6%
Sidewalks in good condition, pedestrian safe and accessible for assistive mobility devices	68.7%	22.0%	42.6%	30.2%	24.9%
Well-maintained public buildings	68.8%	23.3%	52.4%	11.1%	34.2%
Neighborhood Watch Programs	54.6%	27.4%	42.7%	13.8%	41.2%

Transportation & Parking Topics

How important to have the following:

DO WE HAVE IT?

	Extremely Important	Very Important	YES	NO	NOT SURE
Accessible Convenient Public Transportation	58.4%	25.8%	34.2%	30.1%	33.4%
Affordable Public Transportation	60.5%	25.1%	41.2%	11.2%	45.3%
Reliable Public Transportation	63.5%	26.0%	28.9%	14.7%	55.3%
Easy to read traffic signs	73.6%	20.1%	73.7%	15.0%	9.0%
Public parking/areas to park	65.2%	26.3%	55.8%	23.3%	18.7%
Affordable public parking	65.0%	26.1%	49.8%	18.1%	29.8%
Well-lit safe streets/intersections	75.4%	19.3%	49.5%	25.5%	22.6%

Healthcare & Wellness Topics

How important to have the following:

DO WE HAVE IT?

	Extremely Important	Very Important	YES	NO	NOT SURE
Well-maintained hospitals/health care facility	81.2%	14.3%	78.9%	5.3%	13.5%
Variety of health care professionals/specialists	78.9%	16.6%	75.2%	6.1%	16.4%
Conveniently located emergency care centers	67.5%	24.2%	67.5%	9.0%	21.3%
Affordable home health care providers	70.7%	20.2%	20.7%	15.2%	61.9%
Well-trained certified home health care	68.1%	21.3%	33.4%	6.8%	57.4%
Service helping seniors find/access health svcs	63.4%	25.4%	26.1%	10.3%	61.2%

Community Information Topics

How important to have the following:

DO WE HAVE IT?

	Extremely Important	Very Important	YES	NO	NOT SURE
Access to community info in one location	55.6%	27.5%	9.4%	31.3%	57.0%
Clearly displayed community info/large lettering	48.6%	32.4%	7.6%	28.7%	61.4%
Automated community info/easy to understand	48.0%	28.6%	8.2%	25.7%	63.8%
Free access to computers/internet - public place	54.7%	26.6%	55.6%	6.2%	35.9%
Community info delivered in person to home	47.9%	26.0%	7.0%	18.4%	72.3%

Rath ConNEXTions Center

Provides seniors 50+ with education, resources, services, advocacy and leadership, enabling them to age with independence and dignity.

One Man's Vision – Alfred Rath

- Funding From:
- University of South Florida
- West Central Fla Area Agency on Aging
- Polk County Eldery Services
- Bartown Community Healthcare Foundation
- Retirement Research Foundation of Chicago

Focus on Families

Referral Hub
SHINE (Info on Medicare & other insurance options)
Memory Screening
Caregivers Support
Parkinson's Support
Education Round Table

Strategic Vision for Age-Friendly Lakeland at the Rath Center

ADMINISTRATION	PROGRAMS	COMMUNITY OUTREACH	SENIOR BRAIN TRUST
• Admin & Ops • Facilities Mgt. • Funding • Advocacy • Government Relations	• Rath Center Activities • Senior Center (Catholic Charities Partnership)	• Neighborhood Assoc. Coordination • Neighborhood Programs • Outreach Activities	• Volunteer Central • SCORE Partnership • Senior Brain Trust

Looking to the Future

Questions & Discussion?

Steve Scruggs

Lakeland Economic Development Council

- Serving in his 30th year with the Lakeland Economic Development Council (LEDC).
- Received his B.S. Degree from Troy State University in Troy, Alabama and his Masters Degree in Economic Development at the University of Southern Mississippi in Hattiesburg, Mississippi.
- Steve is a member of Trinity Presbyterian Church and is married to Tammy and they have three children.

Steve Scruggs, President
Lakeland Economic
Development Council
(LEDC)

Development Sites

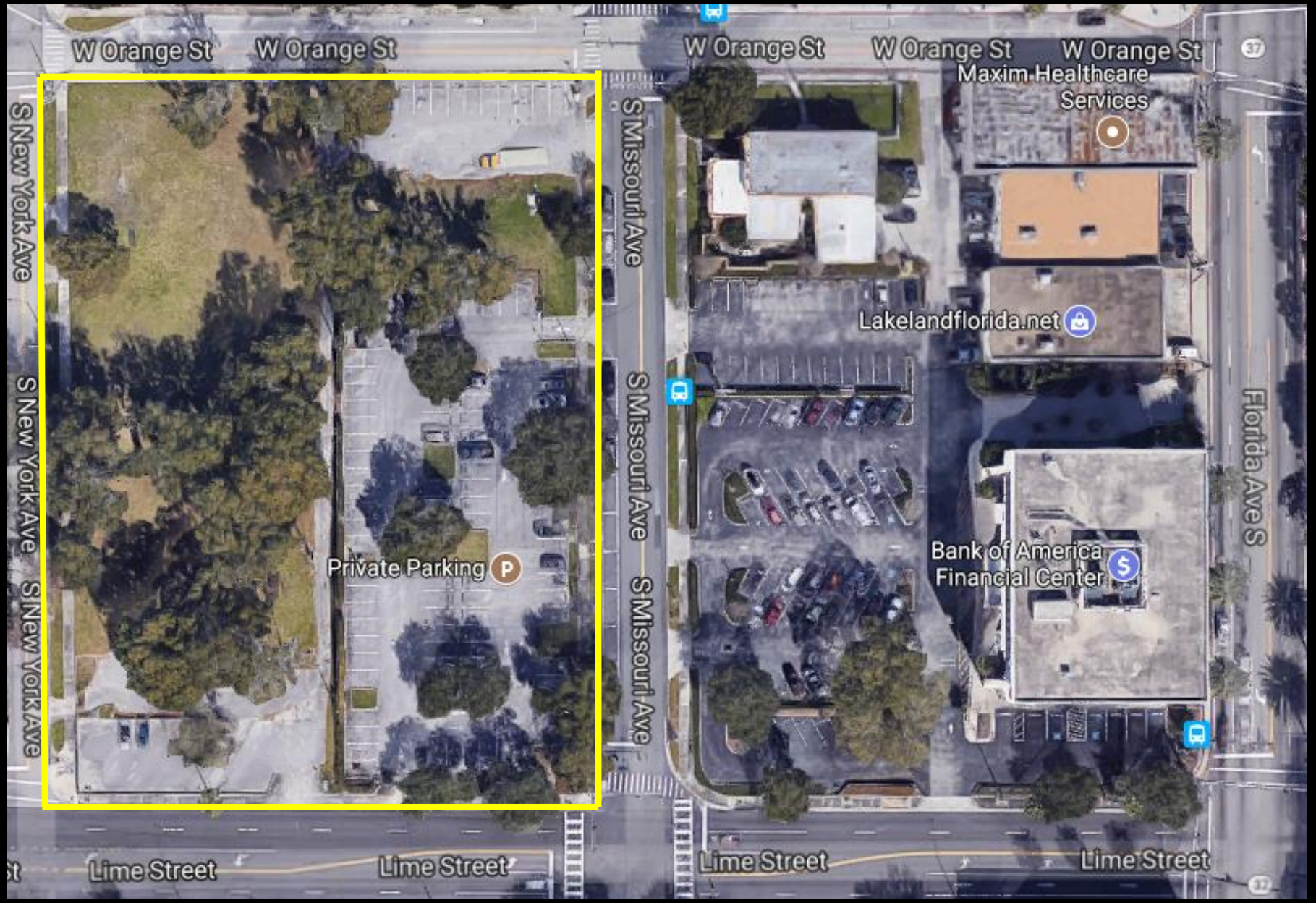
- Identify Sites
- Identify Incentives to go with sites
- Identify Users

Potential Development Sites

- City & CPS Parking Lot
- Aspyre/Publix Parking Lot
- Aspyre Heritage Plaza Parking Lot
- Catapult Parking Lot
- Fire Station Parking Lot
- Terrace Hotel Parking Lot
- Publix/Citrus Mutual Parking Lot
- Lemon Street Parking Garage Lot
- Frontier Parking Lot
- Wells Fargo Parking Lot

City & CPS Parking Lots

Aspyre's Publix Lots



Aspyre's Heritage Plaza

Aspyre's Heritage Plaza Lot

FINFROCK
FINFROCK DESIGN, INC.

Lake Mirror - Corporate Sites

- Catapult Parking Lot
- Former Fire Station Parking Lot

Catapult & Fire Station Parking Lots

Terrace Hotel Lot

Terrace Hotel Lot

Publix/Citrus Mutual/City Lots

Lemon Street Parking Garage Lot

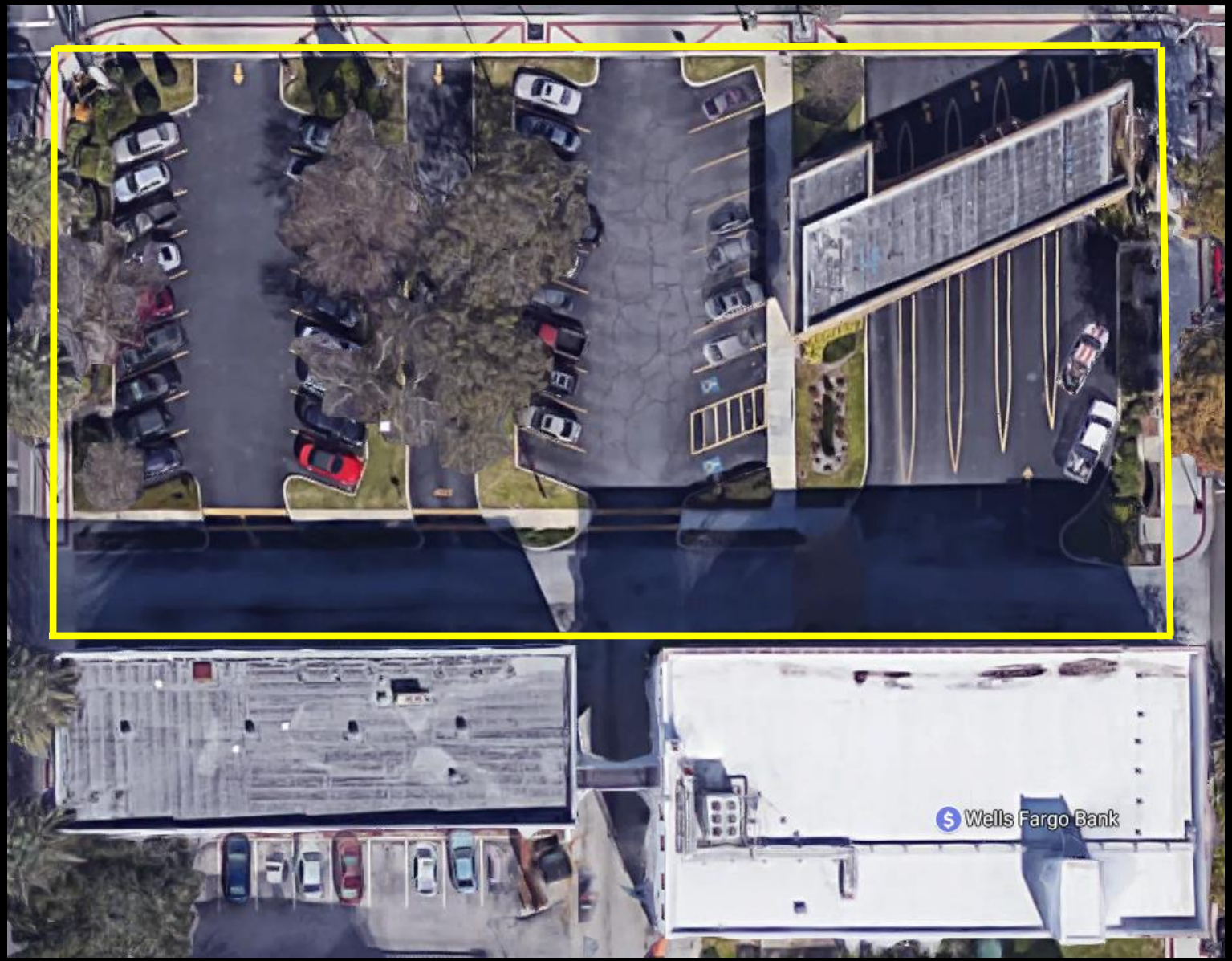
Lemon Street Parking Garage Lot

Publix/Citrus Mutual Lot

Frontier Lot

Frontier Lot

Wells Fargo Lot



Wells Fargo Lot

Wells Fargo Lot

Local Talent

- Local Developers
- Local Architects
- Identify 5-6 Potential Development Sites

Break
(15 minutes)

CITY OF Lakeland
www.lakelandgov.net

Fiscal Management Goal

CITY OF Lakeland
www.lakelandgov.net

Preliminary Financial Overview and General Fund Projections

CITY OF Lakeland
www.lakelandgov.net

Finance

Mike Brossart, Finance Director

Preliminary FY19 Budget Assumptions

- 6.0987% Property value growth in FY19
- 1.25% Operating expense growth - Continued efforts to reduce operating expenses throughout the City
- 1.50% ATB's & 2.50% Merit - for eligible employees
- 6.00% maximum increase in Health Insurance

Preliminary FY19 Budgets

- Airport
- Lakeland Electric
- Parking
- RP Funding Center
- Solid Waste
- Stormwater
- Water / Wastewater

Preliminary General Fund Projections

	FY'18	FY'19	FY'20	FY'21
FY Starting Surplus	21,501,254	17,410,327	17,006,228	16,240,758
Budgeted revenues	116,502,077	119,935,845	123,298,761	126,420,109
Budgeted expenses	121,615,731	124,927,944	128,791,231	132,280,494
Budgeted Surplus Generated / (Used)	(5,113,654)	(4,992,099)	(5,492,470)	(5,860,386)
Budgeted Ending Surplus	16,387,600	12,418,228	11,513,758	10,380,372
Revenue variance (Est vs budget)	(96,088)	840,000	863,000	885,000
Expense variance (Est vs budget)	1,118,815	3,748,000	3,864,000	3,968,000
Estimated FY Ending *Actual* Surplus	17,410,327	17,006,228	16,240,758	15,233,372
PIF Minimum Surplus	2,500,000	2,500,000	2,500,000	2,500,000
Total GF & PIF Surplus	19,910,327	19,506,228	18,740,758	17,733,372
Days Cash	**60**	**58**	**54**	**50**

QUESTIONS

Governance Goal

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Development of our Succession Management Plan

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Human Resources

Mark Farrington, Human Resources Director

America's Workforce Challenge

A Challenge…for all employers, all industries, all market segments

On Jan. 1 as the year 2011 began, the oldest members of the Baby Boom generation celebrated their 65th birthday.
…In fact, on that day, today, and for every day for the next 19 years, 10,000 baby boomers will turn 65

Pew Research Group

Lakeland's Workforce Challenge

Eligible to Retire

	Within 1 Year	Within 2 Years	Within 3 Years	Within 4 Years	Within 5 Years
Fire	14	18	21	22	25
Police	36	46	56	62	74
General Employee	384	425	466	521	569
Total	434	489	543	605	668

Lakeland's Workforce Challenge

DROP Employees Scheduled to Leave the Workforce

	In 2018	In 2019	In 2020	In 2021	In 2022	In 2023
Employees	31	38	62	40	53	7

231 Total employees currently in DROP with 6,311 years of service

Lakeland's Workforce Challenge

Eligible to Retire

	Within 1 Year	Within 2 Years	Within 3 Years	Within 4 Years	Within 5 Years
Fire	14	18	21	22	25
Police	36	46	56	62	74
General Employee	384	425	466	521	569
Total	434	489	543	605	668

DROP Employees Scheduled to Exit:

	In 2018	In 2019	In 2020	In 2021	In 2022	In 2023
Employees	31	38	62	40	53	7

"Within the next Five (5) years, 44% of our workforce will be eligible to retire or will exit DROP"

Build

To Align a Talent Management Strategy with the Business Strategy, Vision and Mission

- A Leadership Model for the Future was developed – with active City Manager's Office commitment and engagement
  - ✓ Goal is to develop a diverse pipeline of highly qualified future leaders
  - ✓ Eight Leadership Attributes were behaviorally defined
  - ✓ Job Family Groupings Completed – by Department Heads

Leadership Model of the Future

- Customer Centric
- Workforce Sustainability and Accountability
- Strategic Focus
- Professional Resiliency
- Results-Oriented Leadership
- Champions Change
- Strategic Communicator
- Servant Leadership

SME workshops completed at three levels across department targeting:

- Senior Leadership
- Mid-Level Management
- Front Line Supervision

Key Verbiage Includes:

- “Talent Pools”
- “Exemplary Performance”
- “Accelerated Development”
- “Experiential Opportunities”
- “High Potentials”

CMO/DH Approvals to Launch the Talent Review Process

What is a Talent Review Session?

- A strategic business decision-making process for proactively and candidly discussion, planning and acting on talent needs to align future leadership with business success.
  - ✓Pilot Departments
  - ✓Individualized Assignment Development Plans Created

Next Steps

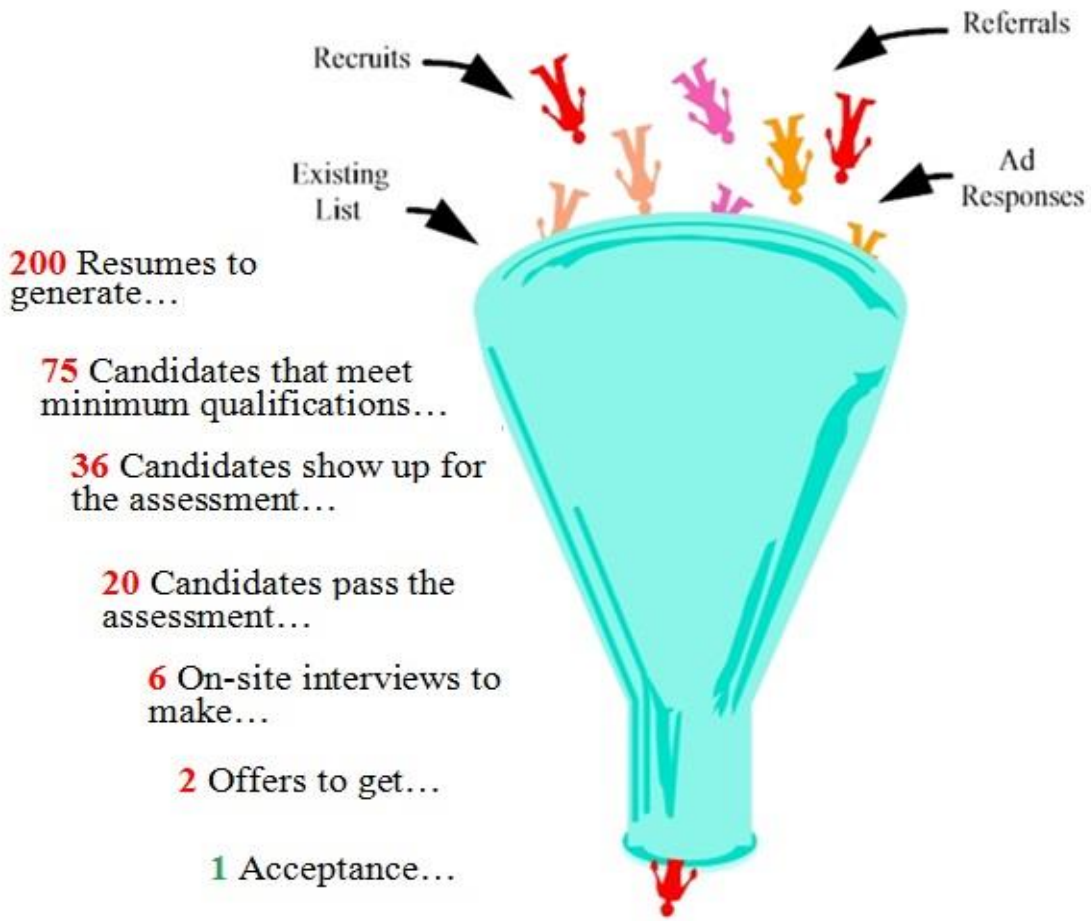
- Follow ups with CMO Talent Review Panel on Assignment Development Plan Progress
- Finalize communications and FAQs for Managers and employees
- Expand roll-out in Departments

Succession Management (Build or Buy)

Buy

- High Volume Staffing Operation
  - ✓323 Hires/Rehires in FY17
  - ✓321 Hires/Rehires in FY16
- High Volume Applicant Flow
  - ✓6,321 Applicants in FY17
  - ✓7,722 Applicants in FY16
- Items impacting Staffing
  - ✓The absence of aligned behaviors required for success in Lakeland to compared candidates against is problematic
  - ✓Interviewer Training has not been a priority

Recruitment



Recruitment Efforts

- Partnership with Polk County School Board
  - ✓Lake Gibson Middle School Pre Power Academy
  - ✓Tenoroc Power Academy
  - ✓Travis Technical School Power Academy
- Social Media
- Community Involvement
- In House Executive Searches
  - ✓Director of Public Works
  - ✓Assistant City Manager
  - ✓Director of Community and Economic Development
    - *Estimated Cost Savings of $63,950*

Recruitment Challenges

- Available Candidates that Meet Requirements
  - ✓78.92% High School Graduation Rate
  - ✓36.9% Associate's Degree or higher
  - ✓27.7% Bachelor's Degree or higher
- Extensive Background and Screening for Public Safety
- Veteran's Preference
  - ✓Must physically review every application submitted
  - ✓Must make good faith effort to obtain DD-214
- Union Bargaining Agreements
- Education and Training of Hiring Managers

Time to Fill

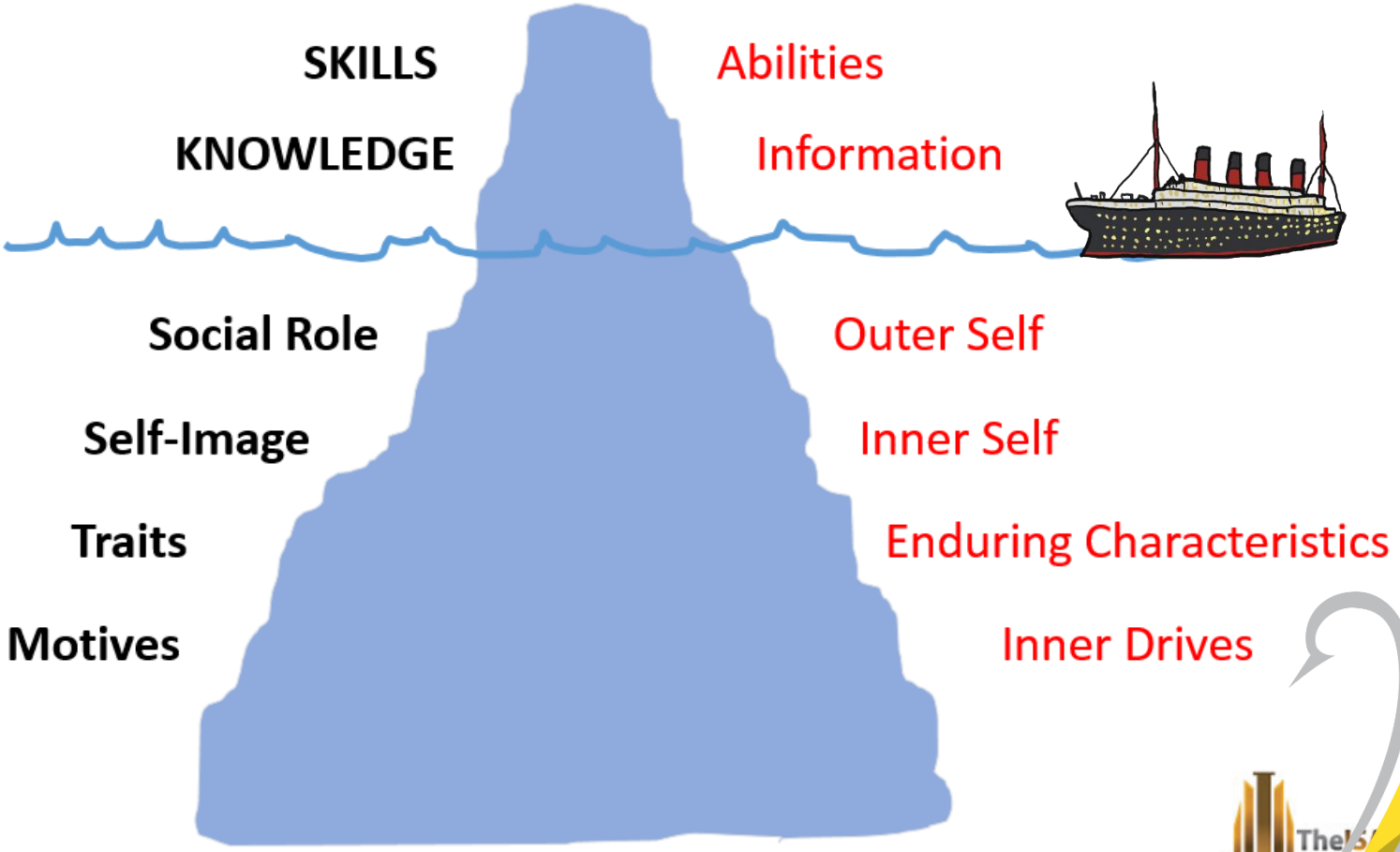
Creation to Offer		
Time Period	**Days**	**# of Requisitions**
Fiscal Year 2015	80	343
Fiscal Year 2016	78	314
Fiscal Year 2017	82	344
Current Fiscal Year	70	190

Recruitment and Selection

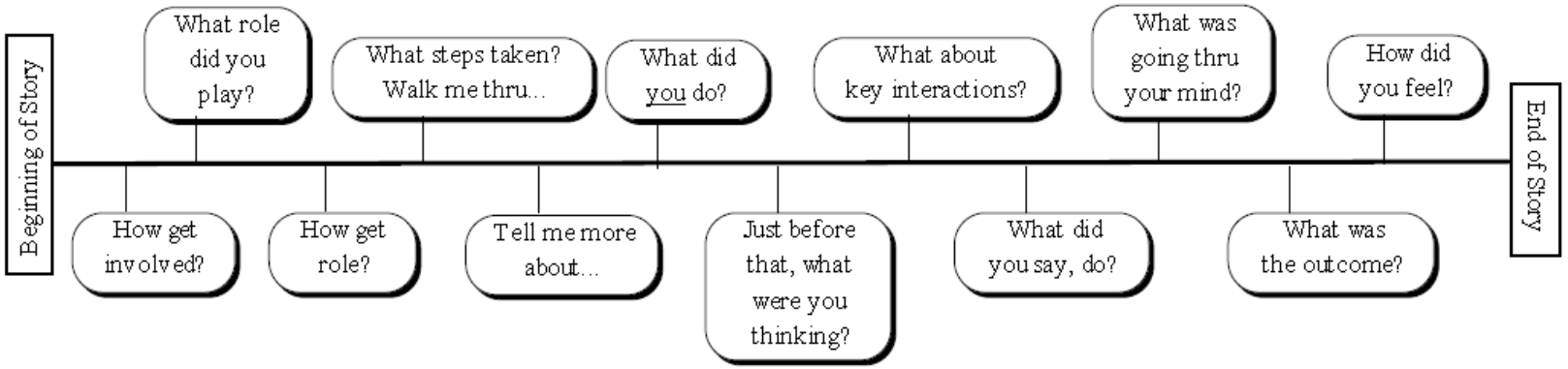
- Behavioral Interview Guides
  - ✓ Evaluation Based on Leadership Model and Competencies
  - ✓ Past Experience Based Questions
  - ✓ No Hypothetical Questions
  - ✓ Lots of Follow Up Questions

The primary difference between organizations is the quality of people they hire and retain

Leadership Models/Competencies



Deep Dive


Beginning of Story
What role did you play?
What steps taken? Walk me thru...
What did you do?
What about key interactions?
What was going thru your mind?
How did you feel?
End of Story
How get involved?
How get role?
Tell me more about...
Just before that, what were you thinking?
What did you say, do?
What was the outcome?

Next Steps…

- Behavioral Interview Training
  - ✓ Hiring Managers will complete Selecting Excellence training
  - ✓ Mock Interviews:
    - Department Hiring Managers
    - City Employees
  - ✓ Development of interview guides
- Method will Be Utilized at All Levels

QUESTIONS

Wage Study Results and Implementation

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Human Resources

General Employee Wage Study

- Management Advisory Group International, Inc. (MAG) was tasked with:
  - ✓Conducting market based review and analysis of the current classification structure with public employers to assess competitiveness
  - ✓Providing recommendations on structure (min – mid – max)
  - ✓Assessing and consolidating General Population roles to eliminate duplication and address job worth inequities

General Employee Wage Study

- MAG's Data Collected indicates:
  - ✓56% of the COL General Employee Classifications are either equal to or exceed marketplace midpoints for comparable positions.
  - ✓44% of COL General Employee Classifications are below marketplace midpoints.
- MAG's Draft Conclusions and Recommendations
  - ✓The City of Lakeland for the most part offers very competitive wages in addition to great non-cash compensation
  - ✓Address the classifications/individuals where the entry level rates are below the market rates
  - ✓Aggressive Consolidation of most job classifications with lines of progression

General Employee Wage Study

Planned Approach : Acknowledge who we are…

Phase I (Following Receipt of Final MAG Report)

- Communicate, Communicate, Communicate.
- Include an Executive Overview with the Published Study Results.
- Address those classifications and staff (the 44%) whose classifications fall below market rates and where applicable address those staff who fall below minimum market rates in the new pay grade.
- Partner with Operational Leaders to articulate and plan next steps related to classification consolidation.

Phase II (10/1/18 through 9/30/19 Anticipated)

- Eliminate steps in ranges and move to an open range structure provided it is practical and justifiable.
- Introduce updated practices related to Pay on Hire, Promotion, Demotion in support new structure with proper alignment.
- Initiate a process to consolidate classifications where practical and where no discernable differences exist.

QUESTIONS

Review/Next Steps for Strategic Issues & Prioritization Session

Tony Delgado
City Manager

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