

City of Lake City

Strategic Planning Document - FY2008

STRATEGIC PLANNING SESSION

The City Council in and for the citizens of the City of Lake City, Florida, met for a Strategic Planning Session, on March 16, 2007, beginning at 9:00 A.M., at 4375 Seminole, Starke, Florida 32091.

PRESENT

Mayor, Vice Mayor, City Council, City Manager, General Manager, City Clerk, Deputy City Clerk, City Finance Director, Lake City Reporter and Dr. Jerry Osteryoung.

Members identified Strengths, Weaknesses, Opportunities, Threats:

1. STRENGTHS

- Growth potential
- Utility operations
- Progressive Council
- Accessibility of Council
- Services outside
- New leadership
- Community ready to change
- Land and airport
- Sound financial
- Location
- Budget preplanning
- Great reputation
- Utility growth potential
- Desirable community
- Staff
- Control growth
- Community events

Members were asked to rank the top four strengths as to the most critical/level of importance.

1. Sound financial with budget preplanning
2. Staff
3. Progressive Council with community ready to change
4. Growth potential and location

2. WEAKNESS

- Change is tough for staff
- Loosing staff (retirement)
- Small size
- Communication
- Bloated budget
- Budget comes up (no priorities)
- Codes and ordinances need updated
- Aging infrastructure (items)
- Morale
- Teamwork
- Customer Service with feedback (reward employees for above benchmark to improve teamwork)
- Annexation action plan
- Finding qualified people - labor force

Members concur most of the weaknesses are employee or financial issues and can be easily corrected. Dr. Osteryoung stressed to the members there is no such thing as too much communication and suggested conducting customer, citizen and employee feedback surveys. Dr. Osteryoung stated you should inspect what you expect.

Teamwork and Morale (Behavior)

Perform team building and management training. Hold executive leadership meetings. This will correct untrained management.

3. THREATS

- Governmental agency
- Legislature
- Washington (tax base, reduction in Federal funding)
- Revenue sharing
- Inflation (concrete, asphalt, steel, copper, etc.)
- Growth
- Business as usual attitude
- Wastewater/environmental
- Unfunded mandates
- Less technical workforce
- Losing population

Most of the threats identified are governmental opportunities. Dr. Osteryoung suggested calculating revenue per employee and stated the amount should be approximately 125,000 to 175,000 each.

4. OPPORTUNITIES

- Regional Utility
- Downtown area
- Employees
- Communications
- Economic Development
- Airport (Economic Development Plan)
- Annexation
- Codes & Ordinances
- Grants
- Beautiful place
- Re-organization of staff
- Pro-active

Dr. Osteryoung stated employee suggestion boxes work but the City must thank the employee(s) for input and celebrate if the suggestion works. Dr. Osteryoung reminded members, employees need to feel appreciated and stated if you do not have a goal you cannot get there.

5. SUMMARIZATION

- Lot of opportunity
- Great strengths
- Weaknesses are fixable
- Threats are real

6. GOALS - QUANTITATIVE (FIVE YEARS)

At this time Dr. Osteryoung broke the participants into two person groups and asked them to set three quantitative and three qualitative goals for five years down the road. Three of the goals should have numbers and three goals should be without numbers.

- Pay as you go program for 5% repairs (5% of hard assets-no bond issues)
- Reduce size of staff by 20%
- Annexation - one per year (involuntary)
- Cut budget by 15% (operating expenses not personnel)
- Take advantage of two external grant funding opportunities each year
- Review and revise at least 10% of the City Codes with staff preparing the draft for review by City Attorney

Dr. Osteryoung stated when a person is hired look for three things: motivation, people skills, and character. Dr. Osteryoung expressed the importance of preparing a five-year budget.

7. GOALS - QUALITATIVE (FIVE YEARS)

- Improve communications (electronically)
- Customer Service by 25% (must develop specificity)
- Complete water/wastewater projects
- Annual strategic retreats
- Develop short and long range plans
- Attract new business and residential for downtown (Economic Development Agreement)
- Clean-up City
- Public/private partnerships
- Comprehensive training plan
- Document management system/plan (manage paper & electronic)
- Updated employee pay grade/classification plan, administrative policies and procedures, manual

Dr. Osteryoung suggested having a Director of Communications. Dr. Osteryoung stated this is a worthwhile expense. He also suggested holding a citywide meeting with employees. The Director of Communications position could be responsible for following up with every customer/call within twenty-four hours. Dr. Osteryoung stated the strategic plan should be reviewed once a month.

8. PRIORITIES FOR THE CITY IN THE NEXT FIVE YEARS

- Improve customer service by 50%
- Improve communications and cross training
- 5% Repairs pay as you go (hard assets)
- Address water and wastewater needs
- Clean up city and 10% codes review/revision
- Reduce staff by 20% and cut operating budget by 15% (attrition by retirement)
- Annexation
- Acquire at least two new external funding sources annually
- Manage paper and electronic system plan
- Update employee pay and classification, administrative policies/procedures, employee manual
- Downtown - public and private partnerships

IMPLEMENTATION PLAN

Priority 1 - Improve customer service, training, and communications, by 50% (City wide)

Person (s) in charge: City Manager/General Manager

Customer Service – Action Steps

1. Baseline for customer service survey(s) – General Manager
2. Identify criteria for operational procedure(s) for handling and following up with customers – City Manager
3. Evaluate customer service every year – City Council
4. Utilize secret shopper to measure effectiveness
5. Accept ownership of the problem
6. Achieve 10% improvement every year

Training – Action Steps

1. Appoint Training Director - Develop a plan
2. Remember "use the right words" and promote we care.
3. Task executive leadership team to select training

Communications – Action Steps

1. Appoint person in charge(newsletter citizens/employees)
2. Develop a plan (internal) hold persons accountable
3. Develop a plan (external)
4. Measure the plans success

Priority 2 - 5% Repairs pay as you go (hard assets) and Water/Wastewater needs

Person (s) in charge: City Manager/General Manager

Asset Replacement – Action Steps

1. Prioritize needs
2. Present recommendation to City Council through staff

Water/Wastewater Needs – Action Steps

1. Water and Wastewater Action Plan

Priority 3 - Clean up City and review/revision of 10% City Code

Person (s) in charge: City Manager/General Manager

Priority 4 - Reduce staff 20% and cut operating budget 15%

Person (s) in charge: City Manager/General Manager

Reduction - Action Steps

1. Utilize attrition as much as possible
2. Cut/reduce staff by 4% per year

Priority 5 - Annexation (one voluntary per year)

Person in charge: City Manager

1. Annexation Action Plan

Service area for utilities

Person in charge: General Manager

Priority 6 - Acquire at least two new external funding sources annually

Person(s) in charge: City Manager/General Manager

Apply for four to six funding sources a year

Priority 7 - Manage paper and electronic records system, update employee manual, administrative policies and procedures, update employee pay and classification

1. Manage paper and electronic records system – City Clerk
2. Update employee manual, administrative policies/procedures – City Manager/General Manager
3. Update employee pay and classification – City Manager/General Manager

Priority 8 - Downtown - Public and Private Partnerships

Person in charge: City Manager

1. Consider creating a committee of citizens to assist

9. REVIEW

1. S.W.O.T. (Identified)
2. Weaknesses addressed
3. Many opportunities
4. Threats are minimal

- Have next retreat in January 2008
- Have person(s) in charge report monthly on progress of goals
- Offer incentives for achieving the goals.