



the John Scott Dailey

FLORIDA  
INSTITUTE OF  
GOVERNMENT

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the public sector.**

**Proposal for City of Clearwater:  
Strategic Planning Process**

**January 19, 2021**

**Prepared for:**

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# ANTICIPATED STRATEGIC PLANNING PROCESS

## PHASE ONE:

### 1.1 Kick Off and Work Plan Refinement

The USF team will meet with City senior staff to formally initiate the process, review and refine the work plan and scope, identify key stakeholders for initial interviews, and identify key background information for the team to review. Aspects of the work plan that may be refined include the sequence of the activities described below, the relative emphasis on meetings/group discussions and communication mechanisms for input, and the overall timeline of the project.

### 1.2 Individual/Group Stakeholder Interviews

The USF team will meet with approximately 18-20 key individual, business and organization stakeholders identified by City staff as having particular insight into issues facing the City or into the views and opinions of segments of the City community. Staff and elected officials will be asked to identify an initial set of interviewees, and others may be suggested by those interviewed or residents. Insights and information gained in these interviews will be used, without attribution (anonymously), to help develop starting points for discussions at the Community Forum and for potential social media outreach.

### 1.3 Communications Outreach

The USF team will work with City staff throughout the process to develop or prepare strategic planning process content for use within the City's current social-media and/or web presence.

### 1.4 Resident Feedback Survey

If desired by the City, the USF team will work with staff to develop a city-wide, web-based citizen survey. Initial questions for the survey will be developed in collaboration with staff. Additional questions may be identified by participants in the stakeholder interviews. This survey would be a mechanism for additional public input, rather than a statistically representative sampling of resident opinion. The USF team will analyze, group and summarize the feedback survey into a report which will be presented to Clearwater's leadership team. A version of the survey results will also be posted to the City's website.

### 1.5 City Council: Kick-Off, Setting Expectations and Teambuilding

The USF team will facilitate a one-day workshop with City leadership to share the action steps for the strategic planning process, discuss Council member expectations and participation as well as review the relevant requirements of the Sunshine Law. The specific agenda will be determined in consultation with the City Manager and City leadership.

### 1.6 Community Focus Group Forum I (3 hours) *\*\*Community Forum II—optional\*\**

This Community Forum will invite stakeholders including residents, businesses, and other groups affiliated with the Clearwater community. The USF team will invite elected officials, but request elected officials to listen and observe, but not participate. This Forum will:

- ask participants to identify characteristics of Clearwater that they value most and do not want to change, and issues affecting Clearwater that the city will need to address
- begin to discuss participants' desires for the future of the City and City government, including a potential vision statement, and possible goals, objectives or recommendations related to the vision and issues

- Discuss priorities

The USF team will develop workshop materials for the Forum. The USF team will also prepare a Forum Summary outlining activities and conclusions at the Forum, as well as suggestions for City communication.

### **1.7 Employee Survey**

If desired by the City and to foster employee engagement, and assess employee readiness for change, the USF team will work with staff to develop a city-wide, web-based employee survey. Employee feedback would be anonymous, with a goal of 100% employee participation/input. Survey questions would focus on:

- identifying internal and external strengths, weaknesses, opportunities and threats (SWOT) that are influencing Clearwater
- how the city's current plans, policies and processes will shape future outcomes
- suggestions for improving organizational effectiveness
- overall employee engagement and readiness for change
- employee desires for the future of Clearwater government as an organization and as a workplace

Initial questions for the survey will be developed in collaboration with staff. This survey would include a mechanism for full employee participation, rather than a statistically representative sampling of employee opinion. The USF team will analyze, group and summarize the employee survey into two reports: one detailed report for leadership, and one abbreviated report which will be shared with all employees to foster engagement and buy-in.

### **1.8 Employee Focus Group Forum (3 hours)**

This Employee Forum will invite a representative sampling of employees across all departments, and all levels, of the organization.

- debrief the employee survey results
- prioritize the SWOT analysis results from the employee survey

The USF team will develop workshop materials for the Employee Forum. The USF team will prepare an Employee Forum Summary outlining activities and conclusions at the Forum.

### **1.9 Report to Council**

The USF team will prepare a presentation and report of the Stakeholder Interviews, Community Forum, as well as the Employee Survey and Forum. This presentation will outline activities and conclusions, solicit comment on the overarching vision and goals resulting from the Community Forum, and solicit Council approval to proceed to Phase Two of the Strategic Planning Process.

## **PHASE TWO:**

### **2.1 Leadership Forum I (4 hours)**

Leadership Forum I will include Leadership across each department and City Council.

- debrief the citizen forum/survey results
- debrief the employee forum results
- debrief initial citizen and employee desires for the future of the City, including potential goals, objectives and recommendations related to the vision

- develop mission, vision, values, and strategic SMART+C goals for the City government as an organization

The USF team will develop workshop materials for Leadership Forum I. The team will prepare a Forum Summary Report outlining activities and conclusions at the Forum.

## **2.2 Leadership Forum II (3 hours)**

Leadership Forum II will include Leadership across each department and City Council.

- Review/finalize mission, vision, values, and strategic SMART+C goals
- Develop champions, objectives, implementation plans and timelines for each goal
- Determine a schedule for monitoring (accountability checkpoints) for each goal

The team will develop workshop materials for Leadership Forum II. The team will prepare a Leadership Forum II Summary Report outlining activities and conclusions at the Forum, as well as recommendations for long-term success of the strategic plan.

## **2.3 DRAFT Final Report: Planning Retreat with City Manager and Departments Heads**

The USF team will prepare a Draft Strategic Plan which will include:

- An organizational overview
- A definition and purpose of the Strategic Plan
- A written summary of the process used in the completion and assembly of the plan
- An establishment of the City's mission, vision and values statements
- A list of stakeholder priorities for City goals and objectives, including those of elected officials, employees, residents, businesses, and of any other significant groups
- A description of SMART+C goals and objectives for the City
- Recommendations for the long-term success of the strategic plan
- Raw data obtained from the assembly of the plan
- Other information as deemed necessary by the USF team

Following the planning retreat with the City Manager and Department Heads, a final draft report will be created and circulated to senior staff for review and comment.

## **2.4 Presentation of Final Report to Council**

The USF team will collaborate with Clearwater staff to present the report to the Council. The USF team will answer questions and/or clarify the report and implementation strategies.

## EXPECTED TIMELINE

The timeline may be adjusted at the discretion of Clearwater staff. The total project duration would be approximately ten to twelve months to complete the scope of services from execution of a signed contract.

**Note:** This outline is tentative and will be refined based on initial consultation with the City Manager, Council and staff. It is intended to serve as a starting point for discussions to develop a final design.

### **Phase One:**

1.1	Kick Off and Work Plan Refinement	March 2021
1.2	Communications Outreach	March 2021 – On-going
1.3	Individual/Group Stakeholder Interviews	April 2021
1.4	Resident Feedback Survey	May 2021
1.5	City Council: Kick-Off, Setting Expectations, Teambuilding	March 2021
1.6	Community Focus Group Forum I (3 hours)	June 2021
1.7	Employee Survey	June 2021
1.8	Employee Focus Group Forum (3 hours)	July 2021
1.9	Report to Council	August 2021

### **Phase Two:**

2.1	Leadership Forum I (4 hours) off-site	September 2021
2.2	Leadership Forum II (3 hours) off-site	October 2021
2.3	DRAFT Final Report	November 2021
2.4	Final Presentation of Report to Council meeting	December 2021

## ESTIMATED INVESTMENT

Based on the scope and expected deliverables, the estimated cost to cover the FIOG's costs to complete the proposed Strategic Planning Process is anywhere from \$39,600.00 - \$55,900.00 dependent upon certain variations of the scope of work. The final cost will be inclusive of travel, printing, publishing and ADA document remediation.

## ADDITIONAL INFORMATION

### THE USF PROJECT TEAM – PERSONNEL

***Our team includes experts in Statistics and Data Analysis, Survey Development, Human Resource and Project Management for local government.***

**John L. Daly, PhD**, is Associate Professor of Public Administration and past Founding Director of the School of Public Affairs at the University of South Florida. His research interests include human resource management and public policy issues facing local government. He also is a specialist of governance and public policy challenges facing southern African nations. John has received two Fulbright Scholar grants to the Kingdom of Swaziland. He first served as a consultant to the Kingdom of Swaziland's government (1998-99). His second Fulbright grant allowed him to join the University of Swaziland faculty (2005-06). Most recently, John was selected as the 2014 recipient of the International City/County Management Association's Academic Award in Memory of Stephen B. Sweeney. This honor was presented to him at the 100<sup>th</sup> ICMA Conference in Charlotte, NC, in September 2014. John is the author of two books, *Training in Developing Nations* (2005, M.E. Sharpe/Routledge) and *Human Resource Management in the Public Sector: Policies and Practices*, (2012, M. E. Sharpe/Routledge). Dr. Daly has extensive experience providing consulting services to Florida municipal governments, primarily in the areas of human resource management and organizational development.

**Stephen Neely, PhD**, is an assistant professor in Public Administration at the University of South Florida's School of Public Affairs. He has an earned PhD in Public Administration from North Carolina State University, as well as two Master degrees in Social and Public Policy Analysis as well as Business Administration. His specialties include research methods, survey administration, and data analysis, and he has previously conducted survey research in partnership with agencies/organizations such as the Florida City/County Management Association, the Florida Center for Cybersecurity, and the City of Zephyrhills, Florida.

**Angela Crist, MPA**, serves as the Director of the USF FIOG. Ms. Crist has a proven track record as a high energy, results driven leader recognized for innovative strategies and tactics. Her excellent problem solving and customer-oriented focus have created value and managed client expectations to obtain mutual benefit. With over 15 years of experience, Angela has built and led new department or groups with related staff training and mentoring to attain long-term business goals. She has consistently achieved positive results by motivating and leading organizations to identify, develop and capitalize on business opportunities by forging alliance across organizational boundaries. Her professional affiliations include Florida City and County Management Association, Florida League of Cities, Florida Association of Counties, USF Alumni Association, USF Area Community Civic Association, and Leadership Tampa Bay Alumni Association.

**Robyn Odegard, MA**, serves as the Learning and Development Facilitator with the Florida Institute of Government at USF. In this role, she serves as project manager, program manager, and research administrator. Robyn holds certifications as a Certified Associate in Project Management (CAPM) from the Project Management Institute and CRA USF-ADVANCED certification from USF Research and Innovation. She received her MA in Political Science from the University of South Florida.

### BRIEF DESCRIPTION OF ORGANIZATION

**The John Scott Dailey Florida Institute of Government (FIOG)** was created by the Florida Legislature in 1980 and subsequently designated as a Type I Institute by the Florida Board of Regents. The institute fulfills its statewide mission through a consortium of six (6) affiliate program offices located at the Florida State University, the University of Florida, the **University of South Florida**, the University of Central Florida, Florida Atlantic University, and Florida Gulf Coast University.

The FIOG at USF works directly with all USF faculty, staff and practitioner's university-wide to bring their expertise to our clients. All of our USF faculty, staff and practitioners are highly qualified and provide top notch services in a variety of critical areas including developing and implementing training and research programs, services, and grant and contract administration activities involving federal, state, and local governments, non-profit organizations, and the private sector.

In January 2013, the School of Public Affairs (SPA) at the University of South Florida (USF) was created to merge the graduate programs in Urban and Regional Planning and Public Administration, as well as **the John Scott Dailey Florida Institute of Government**. The faculty consists of interdisciplinary group of scholars and former practitioners who share a common commitment to student learning, top-notch scholarship and applied community engagement.

The School's John Scott Dailey Florida Institute of Government (FIOG) provides training and technical assistance to local and state government officials, volunteers and the general public on a wide range of topics, such as team building, strategic planning, goal setting and effective communication. The FIOG partners University professionals from a variety of disciplines with organizational leaders charged with solving specific local issues to identify, evaluate and implement effective solutions. For the purposes of this project.

## OUR SERVICE CAPABILITIES

**The John Scott Dailey Florida Institute of Government (FIOG at USF)** works directly with all USF faculty, staff and practitioner's university-wide to bring their expertise to our clients. As part of a regional structure for enhanced relationships, the FIOG serves government and non-profit entities within a 9-county region including Hardee, Hernando, Highlands, Hillsborough, Manatee, Pasco, Pinellas, Polk and Sarasota.

With over 25 years of experience in the local community, the Florida Institute of Government at the University of South Florida has a vast history of helping government and non-profit entities through visioning and strategic planning processes, offering and coordinating trainings, technical assistance, and applied research projects for the local community. Since 1995, the institute has conducted approximately 24,793 workshops and conferences statewide in Florida—an average of 2,749 per year. Also, during this same time, approximately 580,685 participants, the large majority of whom represent officials and employees from local government in Florida, have attended programs resulting in over 2.6 million professional contact hours. The institute has also conducted an estimated 1,190 technical assistance and applied research projects, an average of 119 annually.