

PROPOSAL

LEADERSHIP AND STRATEGIC PLANNING

Mayor and City Commission

City of Fort Pierce

October 2014

Program Outcomes

➤ **VISION, GOALS, PLAN (5 YEAR), and, MISSION FOR THE CITY OF FORT PIERCE**

- Vision 2030: A Vision Statement with defined, value-based principles that describe the preferred future in 15 years for the City of Fort Pierce
- Goals for 2020: Four to six Goals with measurable objectives which become major focus areas for the City of Fort Pierce
- Plan 2015 – 2020: A Plan to realize the Vision, to enhance the Mission and to achieve the Goals with an analysis of major challenges and opportunities and specific actions
- Mission: A Mission Statement that defines what should be the primary purposes of the City of Fort Pierce with operating guidelines and service priorities

➤ **STRATEGIC DISCUSSION ON CRITICAL ISSUES**

- Critical Issues: key issues shaping the City of Fort Pierce future
- Strategy: desired outcomes, potential partners, activities, timeframe

➤ **ACTION AGENDA FOR 2015**

- Policy Agenda for 2015: A Top “10” list of Top and High Priority policy related actions for the Mayor and City Commission to address during the next year
- Management Agenda for 2015: A Top “10” List of Top and High Priority management or administrative actions for the next year
- Major Projects for 2015: A list of key projects to be completed or requiring significant work for the next year
- Action Outlines 2015: For prioritized actions including activities/milestones, timeframe, responsible party/team
- Guidelines for Budget and Capital Projects: direction, priorities

➤ **MAKING THE STRATEGIC PLANNING PROCESS WORK FOR THE CITY OF FORT PIERCE**

Institutionalizing the process in the governance process and the organization

- Progress Matrix or Status Reports
- Marketing the Plan to the Community
- Incorporation into Policy Reports, Budget Plan Development, Program Development, Project Planning

Program Outline

ACTIVITY 1: Strategic Planning Activity Outline for the City of Fort Pierce

The consultant will consult with the City Manager to finalize purposes, work products, activities, and time frames.

ACTIVITY 2: Mayor, City Commission and City Manager Background Interviews

The consultant will interview the Mayor, each member of the City Commission, the City Manager, City Attorney and others. The purposes of each interview are to:

- Gain background on the City of Fort Pierce and the community
- Discuss their vision for the future, mission of City of Fort Pierce, goals for 2020
- Identify and discuss issues today and opportunities on the horizon
- Focus on key topics for the Workshop

During the interview, the questions are likely to explore the following information:

1. During the past year, what are the major successes for the City of Fort Pierce?
2. What did not get accomplished this past year or is in progress and needs to continue for the next year?
3. As you talk with residents, what are their messages to you about issues today and their desires for the future?
4. What are Fort Pierce's primary strengths, weaknesses, opportunities and threats?
5. As you look to the future, what are the major challenges facing the City of Fort Pierce?
6. Success for the City of Fort Pierce in 2030 means . . . ?
7. What do you believe are the most important 5-year goals for the City of Fort Pierce?
8. During the next year, what are the specific, major issues that you feel need to be addressed by the City of Fort Pierce?
9. What suggestions do you have for increasing the effectiveness of the Mayor and City Commission?
10. What other topics do you feel need to be addressed during the workshop?

Additional questions are likely to be added to this list based upon further discussion.

ACTIVITY 3: Interview Analysis and Preparation of Leader's Guide 2015 – A Working Document for Managers

The consultant will analyze the interview data and prepare a summary of:

- Vision 2030 Rough Outline Draft: Statement with defined principles
- Working Draft Goals for 2020 with Objectives
- Potential Targets for Action 2015
- Mission Rough Outline Draft: Purpose of City Government with defined principles and core services

These drafts will be placed in a Leader's Guide – A Working Document for Managers that will be used and modified during the Strategic Planning process.

ACTIVITY 4: Strategic Planning Session 1 for Managers Team

A one-day Leadership and Strategic Planning Workshop will be held. The purpose of this session is to:

- Provide background on Strategic Planning
- Review accomplishments from the past year
- Focus on Vision, Mission and direction for the City of Fort Pierce
- Identify topics for Mayor and City Commission Workshop

The specific agenda will be developed and submitted to the City Manager. The Workshop should be flexible, adjusting to your needs, and should be fun in order to maximize the learning experience.

ACTIVITY 5: Preparation of Leaders' Guide 2015 for Mayor and City Commission

The Consultant will analyze the interview data and prepare a summary of:

- Vision 2030 Rough Draft: Statement with defined principles
- Mission Rough Draft: Purpose of City Government with defined principles
- Working Draft Goals for 2020 with Objectives
- Potential Targets for Action 2015

These drafts will be placed in a Leader's Guide – A Working Document that will be used and modified during the Mayor and City Commission Workshop.

ACTIVITY 6: Leadership and Strategic Planning Workshop I for Mayor and City Commission

A 1½ – 2 days Leadership and Strategic Planning Workshop will be conducted for the Mayor and City Commission. The specific agenda will be developed based upon the interviews. A typical outline for a Leadership and Strategic Planning Workshop follows:

1. Keys to City Success: Effective Leadership and Teamwork
2. Realities for 2015: for Cities, for the City of Fort Pierce
3. Strategic Planning Model the for City of Fort Pierce
4. Performance Report 2014
5. City of Fort Pierce's Vision 2030
6. City of Fort Pierce: Mission and Core Services
7. Goals for 2020
8. Plan 2015 – 2020: Initial Draft

ACTIVITY 7: Strategic Planning Workshop II for Managers Team

A one-day Strategic Planning Workshop is suggested for the Managers. This workshop will focus on:

- Vision 2030: Review, Reality Test
- Goals 2020: Review, Reality Test
- FOR EACH GOAL
 - Outcome-based Objectives: Review
 - Value to Residents: Review
 - Challenges and Opportunities with Short Term Priority
 - Actions 2015 with Initial Priority
- City of Fort Pierce's Mission and Service's: Review
- Action Outlines 2015: Development (with Key Issues, Activities/Milestones, Time Frame, Responsible Party)

ACTIVITY 8: Citizen Summit (Optional)

In many cities, the Mayor and City Commission desire to have public input prior to finalizing the strategic plan. The problem has been that at City Hall meetings or neighborhood meetings the discussion is dominated by the negativist and/or the attendance is small. In working with various cities, we have refined an effective process for citizen input – called “Citizen Summit”.

A “Citizen Summit” is scheduled to provide meaningful citizen input for the Strategic Planning Process. It is usually held in the evening from 6:00 – 9:00 p.m. The Mayor and City Commission members invite 7 – 10 individuals to attend. I encourage the inclusion of high school students. A written invitation is prepared by City Staff and sent to each individual with a RSVP requested. I also encourage each Commission member to call the individuals that they invite. The City Manager's office compiles a list of participants, finalizes arrangements and location.

This meeting process is designed to allow public input by written comments, small focus group discussion or large focus group discussion. The topics focus on: Reasons for Living in City of Fort Pierce, Actions to Enhance their Quality of Life, Major Issues for the Next Year; Opportunities for the Community, and Messages to the Mayor and City Commission. The outcomes from this meeting are specific information from Citizen Input and dialog between the Mayor and City Commission with the Community.

ACTIVITY 9: Leadership and Strategic Planning Workshop II for the Mayor and City Commission

Leadership and Strategic Planning Workshop II (2 – 4 hours) will be held for the Mayor and City Commission. The purposes of this Workshop are:

- Plan 2015 – 2020: Refinement and Finalization
- Action Agenda 2015: Policy Agenda 2015 - Top Priority, High Priority; Management Agenda 2015 – Top Priority, High Priority
- Action Outlines on Key Issues: 2015
- Actions to Make the Strategic Planning Process Work for Fort Pierce

ACTIVITY 10: Final Reports for the Mayor, City Commission and City Manager

As a follow-up to the workshop, the following reports will be prepared for the Mayor, City Commission and City Manager:

- Strategic Plan 2015 – 2020 - 2030
- Executive Summary 2015 – 2020 – 2030 (small booklet)
- Action Agenda 2015 with Monthly Calendar
- Leader's Guide 2015: Final Report
- Plan in Brief 2015 (1 page/2-sided, laminated)
- Performance Report 2014

These reports become working documents for the next year.

STRATEGIC FRAMEWORK

VISION 2030
*“Desired Destination for the
City of Fort Pierce”*

PLAN 2020
“Map to the City of Fort Pierce’s Destination”

EXECUTION
“Route for Next Year”

MISSION
“Responsibilities of the City of Fort Pierce”

BELIEFS
“How the City of Fort Pierce Should Operate”

STRATEGIC FRAMEWORK BASIC ELEMENTS

VISION

**“What We Want to Become –
Our Preferred Future as Defined in Value-Based Principles.”**

PLAN

**“Our Road Map for 5 Years – How to Realize Our Vision with
Achievable Goals Defined Through: Objectives, Meaning to
Our Residents, Challenges and Opportunities, Actions 2015,
Major Projects 2015 and Actions on the Horizon.”**

EXECUTION

**“Actions to Implement the Plan – A Work Program for Next Year
with a “To Do” List for Mayor, City Commission and Management –
To be Completed with Accountability for the Results.”**

MISSION

**“Purposes of City Government – Determined in Service Businesses
Defined in: Operating Elements, Business Successes, Challenges and
Opportunities and Service Improvements 2015.”**

BELIEFS

**“Our Core Beliefs Which are the Foundation for Our City
Government – Creating a Corporate Culture of Action and
Accountability, the Primary Value, As Defined in Performance
Standards to Guide Behaviors and Actions.”**

HOW WE CONDUCT OUR BUSINESS

Consultant Resume and Qualifications

Lyle J. Sumek, President
Lyle Sumek Associates, Inc.
9 Flagship Court
Palm Coast, Florida 32137-3373
(386) 246-6250

Academic

A.B. in Public Administration, San Diego State College, 1967
M.S. in Public Administration, San Diego State College, 1968
Ph.D. in Public Administration, University of Southern California, 1977

Local Government

Management Intern, City of San Diego, 1965
Management Assistant, City of San Diego, 1965 – 1968
(Fire Department, Public Works Department, City Manager's Office)

University Teaching

Instructor, University of Southern California, 1970 – 1972
Assistant Professor, Northern Illinois University, 1972 – 1973
Associate Professor and Assistant Dean (Boulder Campus),
University of Colorado, 1973 – 1979

Consulting Services

President, Sumek Associates, Inc. (a Colorado Corporation), 1979 – 1991
President, Lyle Sumek Associates, Inc. (a Florida Corporation), 1991 – Present

Publications

Numerous Publications on Leadership, Strategic Planning, Team Building and
Aligning the Corporate Culture – High Performance Organization Accountable
for the Results

References

City of Boca Raton, Florida

Leif Ahnell City Manager
201 W Palmetto Park Road, Ste 320
Boca Raton, FL 33432
(561) 393-7898

City of Dubuque, Iowa

Michael C. VanMilligen, City Manager
50 W 13th Street
Dubuque, IA 52001
(563) 690-6036

City of Gilroy, California

Tom Haglund, City Administrator
7351 Rosanna Street
Gilroy, California 95020
(408) 846-0202

City of Bettendorf, Iowa

Decker Ploehn, City Administrator
100 Ribaut Road
Beaufort, SC 29902
(843) 255-2184

City of Fort Lauderdale, FL

Lee Feldman, City Manager
100 N Andrews Avenue
Ft. Lauderdale, FL 33301
(954) 828-5959

Town of Hilton Head Island, South Carolina

Steve Riley, Town Administrator
1 Town Center Court
Hilton Head Island, SC 29926-1872
(843) 341-4701

City of Clive, Iowa

Dennis Henderson, City Manager
1900 NW 114th Street
Clive, IA 50325
(515) 223-6220

City of Kissimmee, Florida

Mike Steigerwald, City Manager
101 N Church Street, 5th Flr
Kissimmee, FL 34741-5054
(407) 518-2305

City of Round Rock, Texas

Steve Norwood, City Manager
221 E Main Street
Round Rock, Texas 78664
(512) 2183234

City of Moline, Illinois

Lew Steinbrecher, City Manager
1630 8th Avenue
Moline, IL 61235
(309) 524-2004

City of Sugar Land, Texas

Allen Bogard, City Manager
2700 City Center Blvd North
Sugar Land, TX 77479
(281) 275-2713

City of Virginia Beach, Virginia

James K. Spore, City Manager
2401 Courthouse Drive
Building 1, Room 234
Virginia Beach, VA 23456-9001
(757) 427-4242

More references are available upon request.

Fee Estimate

Leadership and Strategic Planning

City of Fort Pierce

October 2014

ESTIMATED BILLING TIME:

Number of days scheduled is flexible and is based on the needs of the City.

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|--------------------|---|
| ACTIVITY 1 | Strategic Planning Outline for the City of Fort Pierce |
| ACTIVITY 2 | Mayor and City Commission, City Manager, Background Interviews
(1 hour per person, in person or by phone, billed at actual time) |
| ACTIVITY 3 | Interview Analysis and Preparation of Leader's Guide 2015 – A Working Document for Managers |
| ACTIVITY 4 | Strategic Planning Session I for the Management Team |
| ACTIVITY 5 | Interview Analysis and Preparation of Leader's Guide 2015 – A Working Document |
| ACTIVITY 6 | Strategic Planning Session I for Mayor and City Commission |
| ACTIVITY 7 | Strategic Planning Workshop II for Managers |
| ACTIVITY 8 | Citizen Summit (Optional) |
| ACTIVITY 9 | Leadership and Strategic Planning Workshop II for Mayor and City Commission |
| ACTIVITY 10 | Final Reports |

Total Estimated Time _____ 8-12 Days

* *Cancellation/unavailability of individuals may result in additional charges*

CONSULTATION FEES:

Individual consultation _____ \$ 225.00 per hour
 _____ \$1,800.00 per day on-site
 (8 hours)

The typical cost is \$14,000 - \$22,000 to completion + expenses + products.

EXPENSES: _____ Additional Costs

Including, but not limited to:

- *Airline Tickets*
- *Travel/Auto Expenses*
- *Telephone/Fax Usage Fee (billed at \$12.00/hr.)*
- *Assessment Instruments*
- *Accommodations and Meals*
- *Typing, Duplication, Binding, Shipping*
- *Products:*
 - *Strategic Plan (coil bound)*
 - *Executive Summary (booklet)*
 - *Action Agenda 2015*
 - *Leader's Guide Summary Report*
 - *Plan in Brief*