



City of Belle Isle Strategic Plan 2019-2020

BOARD AUTHORIZATION

(Authorization designates board member's approval of the strategic direction and action plans described in this strategic plan document.)

Mayor, Nicholas Fouraker	Signature: _____	Date: _____
District 1, Ed Gold Jr.	Signature: _____	Date: _____
District 2, Anthony Carugno	Signature: _____	Date: _____
District 3, Karl Shuck	Signature: _____	Date: _____
District 4, Mike Sims	Signature: _____	Date: _____
District 5, Harvey Readey	Signature: _____	Date: _____
District 6, Jim Partin	Signature: _____	Date: _____
District 7, Sue Nielsen	Signature: _____	Date: _____

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PURPOSE OF TEAM BUILDING AND STRATEGIC PLANNING

Strategic Planning and Team Building are key components of any successful organization, but even more so when it comes to meeting the diverse needs of a growing city and governing efficiently and effectively. The City of Belle, in its effort to provide quality services in the manner our citizens expect and deserve, completed a two day workshop to work on a long-term Strategic Plan for our community and to work on our team skills to maximize our ability to meet our citizens Goals and needs.

Team Building

The purpose of the Team Building Workshop was to provide an opportunity for elected officials and staff to build mutual understandings and respectful working relationships.

Florida has a strong Sunshine Law to ensure that government business is conducted in a transparent manner. Public notices were published of the workshop, but no members of the public attended. While the law ensures that democratic interests are protected, it makes it difficult for elected officials to simply get together informally and talk to one another about non-business-related items. These social interactions are essential to developing more congenial relationships which can improve teamwork.

The Team Building Workshop provided that opportunity for the Commission to focus on understanding each other better so they can work together more effectively. The Goals of the Teamwork sessions were to

- Reach Agreement on the common purposes of the Commission
- Enhance working relationship
- Create more effective processes for reaching consensus as a Team
- Understand each other's interests and styles

Unfortunately, not all members were present; but the five elected officials who were committed to the process and present for the full two days have developed skills which can help them to work better together for the good of the community, even when they disagree.

Team Building Process

During the workshop, the group completed a Personality Styles Inventory to better understand how we all have a preferred way of dealing with problems/issues. The ways we solve problems, prioritize information, make decisions, and even structure our time are individual and unique to each of us. Through various exercises the group learned to understand, adapt and communicate better to ensure that our preferred styles or individual differences do not hinder the governing process. The group made a commitment to continue to work diligently on their listening and communication skills as well as working to understand other team members better.

Focusing on working together as a team helps ensure that City's Goals are achieved. Elected Officials working well together as a team can more easily reach consensus on the ideal direction for the City enhancing realization of the City's Vision.

Strategic Planning

Strategic Planning is “a process of defining the values, purpose, Vision, Mission, Goals and Objectives of an organization. Through the planning process, the organization identifies the outcomes it wants to achieve through its programs and the specific means by which it intends to achieve these outcomes.” Strategic Planning:

- Improves the confidence of our citizens in the capability of government.
- Provides the organization with clear direction based on consensus.
- Improve effectiveness and efficiency of City operations by clarifying expected results.
- Prioritizes and focuses the Organization’s Resources on the desired outcomes.
- Ensures Accountability and Responsiveness to our Citizens with regular feedback.

In summary, Strategic Planning in Local Government gives City staff the guidance and clear direction needed to ensure that they are meeting the Goals set by the elected officials to meet the needs of the community.

The Strategic Planning Process

The majority (5 of 8 members) of the City of Belle Isle Commissioners and City staff worked together diligently for two days, August 16 & 17, 2019, in a public workshop to create the City’s first Strategic Plan to ensure the City has a road map for maintaining and/or achieving the community’s Vision of our City. The workshop was facilitated by a professional consultant to ensure a representative, fair and effective Strategic Plan that reflects the majority intent.

The Strategic Planning process included a four-hour team building session to maximize the effectiveness and efficiency of the Commission and staff team as they work together to meet the City’s Mission and Goals.

During the workshop, the Commission conducted an extensive environmental scan and discussed those strategic issues that could hinder the organizations ability to be successful as well as those issues that might help the City reach its Vision. Critical Issues examination focused on the following internal and external factors.

Critical Issues	
Internal Factors	External Factors
• Organizational Culture	• Society/Culture
• Structure	• Socio-demographics
• Daily Practices	• Competition
• Cost Efficiency	• Economic Factors
• Innovation & New Services	• Political Factors
• Technology	• Legal Factors
• Policies	• Government/Regulations
• Financial Stability & Assets	• Local Market Trends

The following issues were identified as critical issues that should be addressed to ensure the City may successfully reach its Vision.

1. Team Work on the Commission and Efficiently run Business Meetings.
2. Jurisdictional issues with other government agencies.
3. Long-term Financial viability and ability of current millage rate to continue to meet the needs of the community in terms of resources needed to meet growth and/or expansion.
4. Communication with the public to ensure timely, transparent, and accurate dissemination of information.
5. Remaining current with technology and software to maximize efficient delivery of services.
6. Outdated and inadequate facilities including septic tanks, sidewalks and lighting, parks, city buildings.

Both the team building and critical issue examination were a critical part of the Strategic Planning process to ensure that all those individuals who were present and involved could work together effectively as we reviewed the City's Mission and Vision Statements, determined what values were important to the community and finally developed Goals to provide direction for implementing the Mission and Vision.

The following summarizes each component of the Strategic Planning process for the City of Belle Isle and the proposed final Strategic Plan which shall be voted on and adopted at a public business meeting.



VISION STATEMENT

The Commission examined the organization’s current Vision Statement and felt it was lacking.

“To be Central Florida’s premiere community where residents and businesses can thrive in a healthy environment, centered on Lake Conway, with the support of a responsive city government.”

Our Vision reflects what we believe is, can and should be the “ideal state” for the City of Belle, Florida.

A SAFE, SERENE FLORIDA COMMUNITY
WHERE FAMILIES DESIRE TO RESIDE, RAISE A FAMILY,
ENJOY OUR NATURAL SURROUNDINGS, EXCELLENT SCHOOLS
AND QUIET WAY OF LIFE.

MISSION STATEMENT

An organization’s Mission Statement defines the organization’s purpose and the reason why it exists. The ‘Mission’ is the overall purpose of the **entire** organization and its component parts, i.e. the Commission, Departments and Staff and even Committees.

The Commission examined Belle Isle’s current Mission Statement: “Belle Isle’s City Commission strives to preserve the community’s quality of life and identity, and to provide needed services to Belle Isle residents through careful and meaningful growth and sound fiscal control.”

The Commission determined that the current Mission Statement did not adequately convey the purpose and direction of the organization as a whole. The Commission proposed the following Mission Statement to reflect more accurately what the Commission working together with staff does and must do to attain our City’s Vision:

THE CITY OF BELLE ISLE CONTINUOUSLY PRESERVES OUR NATURAL RESOURCES AND
ENHANCES OUR QUALITY OF LIFE THROUGH INTELLIGENT, INCLUSIVE LEADERSHIP AND
OUTSTANDING MUNICIPAL SERVICES

VALUES

Value Statements clarify what your organization stands for, believes in and the behaviors you expect to see as a result. The Commission has identified twelve key values to drive the execution and implementation of our decisions, programs and services.

VALUES

ACCOUNTABLE	ETHICAL	EXCELLENCE
INCLUSIVE	LEADERSHIP	OPEN AND TRANSPARENT
QUALITY	RESPONSIVE TO PUBLIC	SELFLESS
SOLVENT	STEWARDSHIP	TRUSTWORTHY

GOALS

The Mission Statement is broader compared to Goals. Goals and the resultant Objectives and strategies are the specific descriptions of how to achieve the Mission through ‘small wins.’ Goals should address those critical issues and/or problems the City has identified during the Strategic Planning process, which may hinder the City’s ability to achieve its overall Mission and reach its Vision. Goals are short term and while they may not change annually, they should be reviewed annually. It is not unusual for a Goal statement to change from a change word such as “Improve or Reduce” to a continuity word such as “Maintain” once a Goal is reached, but the Commission would like to maintain that goal and the supporting objectives.

During the Strategic Planning process, the Commission identified the following as key Goals for the City to focus on over the next few years. Initially, there were six Goals which were consolidated to differentiate between statements which were Goals and those which were Objectives/Strategies which implement the overall Goal. Goals that were actually Objectives/Strategies became a part of the broader Goal.

1. TO IMPROVE COMMUNICATION AND RELATIONSHIPS WITH ALL STAKEHOLDERS, INTERNALLY AND EXTERNALLY.
2. TO MAINTAIN AND ENHANCE CITY INFRASTRUCTURE (INCLUDING FACILITIES, UTILITIES, ROADS, SIDEWALKS, AND PARKS)
3. TO MAXIMIZE ALL OF THE CITY’S RESOURCES TO ACCOMPLISH THE MISSION, VISION AND GOALS EFFICIENTLY AND EFFECTIVELY.
4. TO MANAGE GROWTH.

OBJECTIVES AND STRATEGIES

GOAL I:

To Improve Communication and Relationships with All Stakeholders, Internally and Externally.

Objective 1:

Improve Community Public Relations and Outreach Efforts to Enhance Transparency, Educate/Inform, and Encourage Feedback and Support.

ACTION STEPS/STRATEGIES:

1. Enhance social media with informational videos.
2. Hire/Contract Public Relations expert to respond in a timely manner to misinformation; and generate regular positive media updates about the City.
3. Address strategic timing of information releases.
4. Expand and maximize all modes of information, including agenda clarification, pamphlets, websites.

Objective 2:

Enhance Commission and Organizational Teamwork.

ACTION STEPS/STRATEGIES:

1. Conduct more efficient business meetings by adding pre-meeting workshops.
2. Schedule informal, social, non-business meetings for Commissioners to build understanding, create trust, enhance relationships and maximize honest and open communication.
3. Schedule informal social events to include Commissioners and staff to build a stronger team.

Objective 3:

Build Positive Relationships with Governmental Entities/Organizations to Partner Successfully on Initiatives.

ACTION STEPS/STRATEGIES:

1. Schedule public community meetings between elected/senior staff of select entities to increase understanding of roles and relationships. Entities should include: Charter School Board, County Commissioner, Other Municipalities in the County, etc.
2. Schedule regular informal meetings with counterparts for teambuilding purposes.
3. Pursue formal Memorandum of Understanding (MOU) between City of Belle Isle and other entities.

OBJECTIVES AND STRATEGIES (continued)

GOAL II:

To Maintain and Enhance City Infrastructure (Including Facilities, Utilities, Roads, Sidewalks, and Parks)

Objective 1:

Prepare Feasibility Plans to Explore Requirements, Costs and Resources to Address Long-Term Viability of City Facilities and Ensure They Are Adequate to Meet Future Needs Including Long-Term Maintenance Issues as Well as Expansion of City Boundaries.

ACTION STEPS/STRATEGIES:
1. Assess Electric Utilities, Above or Below Ground.
2. Assess Parks and Recreational Facilities.
3. Assess Septic Tanks Versus Sewer System.
4. Assess Sidewalks and Light Safe Pedestrian Trail.
5. Assess Traffic Calming.

OBJECTIVES AND STRATEGIES (continued)

GOAL III:

To Maximize All of the City's Resources to Accomplish the Mission, Vision and Goals Efficiently and Effectively.

Objective 1:

Develop A City Organizational Staffing and Succession Plan to Ensure Continuity of Government.

ACTION STEPS/STRATEGIES:
1. Cross Train personnel.
2. Develop Standard Operational Procedures for all Departments.
3. Develop a 'proposed current' and projected staffing level plan to meet the proposed Goals and provide city services.

OBJECTIVE 2:

DEVELOP A LONG-TERM FINANCIAL PLAN TO ENSURE FINANCIAL STABILITY.

ACTION STEPS/STRATEGIES:
1. Build Additional Revenue Resources including:
a. Alternative sources, such as grants, partnerships, shared resources etc.
b. Additional Municipal Revenue Sources, such as fire fees, road tax, communication tax and franchise fee
2. Develop an investment strategy which maximizes the return on revenues and is consistent with all applicable laws.
3. Develop a 10-year Capital Plan coupled with the investment strategy to adequately fund projected infrastructure needs.
4. Based on Mission and Goals and expressed needs of the citizens, determine the long-term viability of the current millage rate.

OBJECTIVES AND STRATEGIES (continued)

GOAL IV:

To Manage Growth.

Objective 1:

DEVELOP A LONG-TERM PLAN FOR EXPANDING THE CITY'S BOUNDARY.

ACTION STEPS/STRATEGIES:
1. Develop annexation plan for contiguous areas
2. Investigate Joint Planning Agreement with Orange County
3. Secure County approval for JPA or Annexation Plan
4. Develop a projected staffing level plan to meet the expansion of City boundary and provide continued excellent city services.

ACTION PLAN

It is the City Manager's responsibility to work with Departments and Staff to prepare a viable Action Plan to implement the Commission's Mission, Vision and more specifically the Annually Adopted Goals.

The City Manager should work with staff to formulate an Action Plan based on the budget and provide regular reports throughout the year to the Commission and the community. It makes the Vision concrete. The Action Plan shows how you will implement strategies to attain your Objectives, ensures that staff understand their responsibilities, and can form the basis for objective staff evaluations

The Action Plan (Basic Template provided) should include:

1. Action steps (what will be done) for each objective within a Goal.
2. People responsible (by whom).
3. Date completed (by when).
4. Resources required (costs).
5. Collaborators (who should know).

Each Objective is outlined on a separate form; therefore, Goals with more than one objective will have multiple Action Plan Forms

Action Plans should be detailed enough to convey the actual actions which need to occur to achieve the objective and provide staff with the necessary direction. Timelines should be realistic and based on available resources. Dollars, equipment and people needed should be spelled out in detail to ensure the Commission is fully apprised of the resources required to fulfill the objective and to provide the background needed to build a supportive budget.

City of Belle Isle Strategic Plan

GOAL: To Improve Communication and Relationships with All Stakeholders, Internally and Externally.

Objective: Improve Public Relations Outreach Effort with the Community to enhance transparency undertaking and awareness and encourage feedback and gain support.

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA				
Equipment:	IT systems, Video , Internet (Social Media), Print				
Staffing:	CM, City Clerk, Social Media Specialist or Consultant				
Other:	Consultant (Marketing Firms or contracted person)			\$35,000/Annual	\$35,000/Annual

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Enhance social media with informational videos and posts.	City Clerk/Consultant	FY2020	Positive Citizen Comments
2. Hire/Contract Public Relations expert to respond in a timely manner to misinformation; and generate regular positive media updates about the City.	CM/City Clerk	FY2021	Positive Citizen Comments
3. Address strategic timing of /strategically information releases.	City Clerk	On-going	Positive Citizen Comments
4. Expand and maximize all modes of information, including agenda clarification, pamphlets, websites.	City Clerk/Consultant/PAB	On-going	Positive Citizen Comments
5. State of the City Address	Mayor/CM	Per Charter	Positive Citizen Comments
6. Use of Citizen Advisory Boards & Committees	Elected Officials	When created	Board members “defend” City

City of Belle Isle Strategic Plan

GOAL: To Improve Communication and Relationships with All Stakeholders, Internally and Externally.

Objective: Enhance Commission and Organizational Teamwork

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA	NA			
Equipment:	NA	NA			
Staffing:	CM, Elected Officials	NA			
Other:	Facilitator	NA	On-going/Annual	\$12,000/Annual	

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Conduct more efficient business meetings by adding pre-meeting workshops	Elected Officials/per Charter	2/2020	Better discussions on topics. Meeting time reduced. Limited Discussion at Regular Meeting
2. Schedule informal/social/non-business meetings for Commissioners to build understanding, create trust, enhance relationships and maximize honest and open communication.	Elected Officials	As called	No "fear" of sunshine laws. No "fear" of "being seen". Enjoy socializing.
3. Schedule informal/social events to include Commissioners and staff to build a stronger team.	Elected Officials/City Staff	As called	See above
4. Annual Goal Setting Workshop	Elected Officials/City Staff	Annually in 2 nd budget quarter	Next FY Budget aligns with discussed and approved goals

City of Belle Isle Strategic Plan

GOAL: To Improve Communication and Relationships with All Stakeholders, Internally and Externally

Objective: Build Positive Relationships with other governmental entities/organizations to partner successfully on initiatives

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA				
Equipment:	NA				
Staffing:	Elected Officials and Staff		On-going		
Other:					

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Schedule public community meetings between elected/senior staff of select entities to increase understanding of roles and relationships. Entities should include: Charter School Board, County Commissioner, Other Municipalities in the County, etc.	City Clerk/CM	On-going	Agreements for shared services. Project collaboration
2. Schedule regular informal meetings with counterparts for teambuilding purposes.	Elected Officials/Staff	On-going	Timely information affecting City
3. Pursue formal Memorandum of Understanding (MOU) between City of Belle Isle and other entities.	CM/Elected Officials	As needed	Project resource sharing. Approved MOUs
4. Participation on local Board and Committees (i.e., ANAC, MetroPlan, Tri-County, FLC)	CM/Elected Officials	As vacancies develop	Information sharing, Shared funding, Agency cooperation at State/County level.

City of Belle Isle Strategic Plan

GOAL: To Maintain and Enhance City Infrastructure Facilities, Utilities, Capital / Outlay)

Objective: Prepare feasibility plans to explore requirements, costs and resources to address long-term viability of City facilities and ensure they are adequate to meet future needs including long-term maintenance issues as well as expansion of City boundaries.

Resource Type	Description	Quantity		Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	City Hall, Police Station, City Infrastructure			See below	TBD	
Equipment:						
Staffing:	City Staff and Consultants					
Other:	Duke, OUC, FDOT, County (OC), FDEP, SJRWMD					

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Assess	Complete	Outcome (How is Measured?)
1. Assess Electric Utilities, above or below ground	CM, CE, Duke, OC	10/20	12/40	Less "routine" and storm outages.
2. Assess Parks and Recreational Facilities	CM, CE, PW	12/22	12/25	Park usage increases
3. Assess Municipal Buildings	CM, PD, PW, CE	10/20	10/22	Adequate space for meetings and operations
4. Assess Septic tanks versus Sewer System	CM, OUC, OC, FDEP, SJRWMD	12/21	12/40	More houses off septic. Water Quality
5. Assess Sidewalks and light safe pedestrian trail.	CM, FDOT, OC, BIPD,	12/21	12/25	Less Vehicle/Ped conflicts, more ped travel
6. Assess Traffic calming	CM, FDOT, OC, BIPD	12/21	12/30	slow traffic, less backups
7. Assess Stormwater System	CM, CE, PW, OC	12/20	12/30	Reduce Flooding, MS4,

City of Belle Isle Strategic Plan

GOAL: To Maximize All of The City’s Resources to accomplish the Mission, Vision and Goals Efficiently and Effectively.

Objective: Develop a City Organizational staffing and succession plan to ensure continuity of government.

Resources Required (Should Address Multi-Year and Annual)

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA				
Equipment:					
Staffing:	Elected Officials, City Staff				
Other:	Advisory Committees				

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Cross Train personnel	CM, Dept. Heads	12/25	Customer Survey
2. Develop standard operational procedures for all departments.	CM, Dept. Heads	12/25	Desk Top SOPs
3. Develop a ‘proposed current’ and projected staffing level plan to meet the proposed Goals and provide city services.	CM, Finance Director, Chief of Police, PW Supervisor, City Clerk	9/21	Productivity

City of Belle Isle Strategic Plan

GOAL: To Maximize All of The City’s Resources to Ensure the Mission, Vision and Goals Are Accomplished Efficiently and Effectively.

Objective: Develop a long-term financial plan to ensure financial stability.

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA				
Equipment:	NA				
Staffing:	CM, Finance Director (FD)				
Other:	Budget Committee (BC), Financial Advisor (FA)				

Detailed Action Plan: (May include Multi-Year or just first Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Build Additional Revenue Resources including: <ul style="list-style-type: none"> a. Alternative sources, such as grants, partnerships, shared resources etc. b. Additional Municipal Revenue Sources, such as fire fees, road tax, street light fees, and franchise fee, etc. 	CM, FD, BC	On-going annually for budget development (3 rd Qtr. of preceding budget year)	Improved financial condition
2. Develop an investment strategy which maximizes the return on revenues and is consistent with all applicable laws.	FA, FD, CM	10/21 (Review every 3 years)	Improved financial condition
3. Develop a 10-year Capital Plan coupled with the investment strategy to adequately fund projected infrastructure needs.	CM, FD, BC	10/20	Available funds for CIP w/o borrowing
4. Based on Mission and Goals and expressed needs of the citizens, determine the long-term viability of the current millage rate	FD, FA, CM, BC	4/20 then on-going annually	Improved financial condition

City of Belle Isle Strategic Plan

Goal: To Manage Growth

Objective: Develop a long-range plan for expanding the City's boundaries

Resource Type	Description	Quantity	Time Frame (# Budget Years)	Annual Cost	Total Cost
Facilities:	NA				
Equipment:	NA				
Staffing:	CM, City Planner (CP), Staff, CE, Elected Officials (EO)				
Other:	Finance Director (FD) Police Chief (PC)				

Detailed Action Plan: (May Include Multi-Year or Just First Budget Year)

Action Items (How?)	Owner (Who?) What Department?	Due Date (When?)	Outcome (How is Measured?)
1. Develop annexation plan for contiguous areas	CM, CP, FD, PC	6/20	Process for annexation
2. Investigate Joint Planning Agreement with Orange County	CM, CP	3/20	Coordination with OC for easier process
3. County approval for JPA or Annexation Plan	EO	6/20	OC buy-in for support
4. Develop a projected staffing level plan to meet the expansion of City boundary and provide continued excellent city services.	CM, Finance Director, Chief of Police, PW Supervisor, City Clerk	9/20	Productivity

APPENDIX

Appendix A: Belle Isle Strategic Planning Pre-Workshop Questionnaire

Appendix B: Professional Consultant Contract

Appendix A: Belle Isle Strategic Planning Pre-Workshop Questionnaire

Name:	
Role in the organization	# of years with the City:

Greetings:

I look forward to meeting each of you and working with you at the Belle Isle Strategic Planning workshop, August 16 & 17, 2019. I have attached a brief resume to this document, as an introduction.

In order to maximize the results, we may obtain from the workshop, I am requesting that you do a little prep work as outlined below and return the completed items to me **no later than AUGUST 9, 2019.**

Simply send this completed form as an attachment to me at aelwingo@gmail.com.

If you need any clarification, you may also contact me at the same email address with your questions.

Personality Style Inventory (for Team Building Purposes)

The primary purpose of this assessment is to gauge who you are as an individual. We will use the results from this assessment to generate discussion about the differences between individuals and how understanding differences will help us work better together for our community.

Go to the below website and take a short personality, personal style inventory and enter your results in the space below. Do not share with others participating in the workshop. Please enter your result in the below space and return with the whole document when completed. <https://www.strategicaction.com.au/keirse-temperament-sorter-questionnaire>.

Enter Kiersey Results Here: _____

Team Assessment (Attached)

The primary purpose of this assessment is to provide you with a sense of your team's (Commission/commission) unique strengths and areas for improvement. The scale looks at five primary components of a team that contribute to success or failure to accomplish its Mission. These include TRUST, CONFLICT, COMMITMENT, ACCOUNTABILITY, RESULTS.

Please assign a rating(number 1,2,3,4,5) to each statement. It is essential to the accurate scoring of this instrument that you enter a number. Use the entire scale (1-5) to represent your most accurate response.

Please evaluate the statements honestly and be as objective as possible. Be thoughtful about your responses, but do not agonize over each response. Your initial "gut feel" is usually best.

Note: This instrument is copyrighted and was developed by: PATRICK LENCIONI, AUTHOR OF SILOS, POLITICS, AND TURF WARS

Strategic Planning Questionnaire (Attached)

The following questionnaire, is based on the primary components of the Strategic Planning process and is intended to generate ideas from you, as an individual member of the organization, prior to the workshop group process. There is no right or wrong answer, there are simply differing points of view. Strategic Planning is a consensus building process which culminates, ideally, with outcomes which reflect the community as a whole. The questionnaire will also provide this consultant with a base upon which to help you build your Strategic Plan during the group process.

Thank you for your time and commitment to this process for making your community a better place to live.

Appendix A: Belle Isle Strategic Planning Pre-Workshop Questionnaire

Team Assessment

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Enter a number from 1 to 5 that reflects your judgement in the cell next to the question

1 = Never 2= Rarely 3= Sometimes 4= Usually 5= Always

Team members admit their mistakes.	
Team members are passionate and unguarded in their discussion of issues.	
Team members are quick to point out the contributions and achievements of others.	
Team meetings are interesting and compelling (not boring).	
During team meetings, the most important—and difficult—issues are discussed.	
Team members acknowledge their weaknesses to one another.	
Team members voice their opinions even at the risk of causing disagreement.	
Team members point out one another's unproductive behaviors.	
The team has a reputation for high performance.	
Team members ask for help without hesitation.	
Team members leave meetings confident that everyone is committed to the decisions that were agreed upon.	
During discussions, team members challenge one another about how they arrived at their conclusions and opinions.	
Team members ask one another for input regarding their areas of responsibility.	
When the team fails to achieve collective Goals, each member takes personal responsibility to improve the team's performance.	
Team members willingly make sacrifices in their areas for the good of the team.	
Team members are quick to confront peers about problems in their respective areas of responsibility.	
Team members acknowledge and tap into one another's skills and expertise.	
Team members solicit one another's opinions during meetings.	
Team members end discussions with clear and specific resolutions and calls to action.	
Team members question one another about their current approaches and methods.	
The team ensures that poor performers feel pressure and the expectation to improve.	
Team members willingly apologize to one another.	
Team members communicate unpopular opinions to the group.	
The team is clear about its direction and priorities.	
Team members are slow to seek credit for their own contributions.	
All members of the team are held to the same high standards.	
When conflict occurs, the team confronts and deals with the issue before moving to another subject.	
The team is aligned around common Objectives.	
The team consistently achieves its Objectives.	
The team is decisive, even when perfect information is not available.	
Team members value collective success more than individual achievement.	
Team members are unguarded and genuine with one another.	
Team members can comfortably discuss their personal lives with one another.	
The team sticks to decisions.	
Team members consistently follow through on promises and commitments.	
Team members offer unprovoked, constructive feedback to one another.	
Team members place little importance on titles and status. (A high score on this statement indicates that titles and status are NOT important to team members).	
Team members support group decisions even if they initially disagreed.	

Appendix A: Belle Isle Strategic Planning Pre-Workshop Questionnaire

Strategic Planning Questionnaire

Mission Statement:

"Belle Isle's City Commission strives to preserve the community's quality of life and identity, and to provide needed services to Belle Isle residents through careful and meaningful growth and sound fiscal control."

Answer these Questions about your Mission Statement.

Does it clearly state what business you are in?

Does it answer the questions: "who we are, what do we do, for whom or to whom) we do it, and why it is important?"

Is the ultimate rationale for existence clear?

Is the Mission broad enough to accommodate current times?

Can the Mission survive changes in administration?

Is it easily understandable to anyone who reads it?

Can we justify the dollars we spend on executing the Mission?

Vision

To be Central Florida's premiere community where residents and businesses can thrive in a healthy environment, centered on Lake Conway, with the support of a responsive city government.

Answer these Questions about your Vision Statement.

Does the Vision statement provide a clear picture of the organization's future?

Is the Vision statement challenging and inspiring?

Is the Vision statement believable?

Will achieving the Vision positively contribute to our overall Mission?

Strengths, Weaknesses, Opportunities and Threats (SWOT)

A SWOT analysis is a quick way to examine the City organization and the environment in which it exists and address issues that may impact the success of the Mission, Vision and ultimately the Goals you set.

What do you think are the Outside Opportunities or threats?

What do you think are the City's Internal Strengths and weaknesses?

Values

Your values clarify what your organization stands for, believes in and the behaviors you expect to see as a result. It should be based on what the citizens in your community value and want to see in their government. What are the guiding principles that are core to how we operate in this organization?

What do you believe are or should be the City's core values?

Appendix A: Belle Isle Strategic Planning Pre-Workshop Questionnaire

Other:

What topics or matters do you hope we can address at the planning session? Or, what would you like **the City** to focus on **over the next year, over the next five years?**

In your opinion, what are the most important services that the City currently provides to its citizens? In your opinion, are there any services that the City does not currently provide to its citizens that it should consider offering or focusing on?

What additional thoughts or information do you have that you think may be important to the success of the City's Strategic Planning process and accomplishing its proposed Goals?

Save questionnaire (with your name) send as attachment to: aelwingo@gmail.com no later than August 9, 2019. Print a copy and bring to the Strategic Planning Workshop. I look forward to working with you.

**OEL WINGO MANAGEMENT CONSULTING SERVICES
MANAGEMENT CONSULTING AGREEMENT**

This Management Consulting Agreement ("Agreement") is by and between Oel Wingo Management Consulting Services ("OWMCS") and the City of Belle Isle ("the City") effective immediately upon approval.

Now Therefore in consideration of the mutual covenants set forth herein and intending to be legally bound, the parties hereto agree as follows:

CONTRACT

The CITY hereby contracts with OWMCS, as an independent contractor, not an employee of the City.

CONSULTANT RESPONSIBILITIES

OWMCS agrees to perform ORGANIZATIONAL STRATEGIC PLANNING PROFESSIONAL SERVICES in accordance with the terms and conditions set forth in this agreement.

The consultant agrees to provide the following services

- Assessment of the Organizational Culture
- Organizational Strategic Plan development
- Organizational Strategic Plan communication and implementation, including change management

PRODUCTS:

Assessment and Implementation of the Strategic Planning Process shall include:

- Development and Implementation of Pre-Workshop Questionnaires
- Compilation, Assessment and Analysis of Pre-Workshop Questionnaires
- Two Days of Group Facilitation to develop a City Strategic Plan including
 - Assessment of Cities strengths, weaknesses, opportunities and threats;
 - Review of the City's Mission, Vision and Core Values statements;
 - Identify and develop specific short term and long term goals and priorities
- Final Report Development
- Public Presentation of Final Report to elected officials for final adoption

The parties agree that the time commitment for these consulting services shall not exceed the above prescribed services and duties. All hours or additional duties performed beyond the aforementioned shall be compensated at the hourly rate of One Hundred Twenty Five dollars (\$125.00).

CITY RESPONSIBILITIES

- Ensure the completion and submission of the questionnaires as provided by the Consultant within the time frame requested;
- Provide a meeting place and traditional “round table” format for workshop participants;
- Provide all workshop materials and/or technology assistance i.e. post it easel pads, power point presentations, etc.;
- Provide lunch and snack breaks to participants.

TERMINATION

Either party may terminate this agreement early by giving 30 days’ notice to the other PARTY in writing, by certified mail or personal delivery.

COMPENSATION

Consultant Fees

1. The consultant shall be paid a maximum of **\$4,000** for work performed in accordance with this agreement within thirty days of completion of the group facilitation workshops.
2. All hours in excess of the services herein agreed to shall be reimbursed at **\$125 per hour and shall be paid upon receipt of invoice.**

Travel Reimbursement

1. The City agrees to reimburse the consultant for all travel related expenses directly associated with services provided pursuant to this Agreement.
2. The consultant shall submit an invoice documenting all travel related expenses associated with the work performed pursuant to this Agreement.
 - a. Mileage shall be reimbursed at the current IRS standard mileage rate.
 - b. Receipts for meals and hotel expenses shall accompany invoice.

INDEPENDENT CONTRACTOR

Both the company and the consultant agree that the consultant will act as an independent contractor in the performance of its duties under this contract. Accordingly, the consultant shall be responsible for payment of all taxes including Federal, State and local taxes arising out of the consultant’s activities in accordance with the contract, including by way of illustration but not limitation, Federal and state income tax social security tax, unemployment insurance taxes and any other taxes or business license fees as required.

INDEMNIFICATION

1. The City agrees to indemnify, defend and hold OWMCS harmless from all claims that may arise out of OWMCS's contract with the City, provided OWMCS is acting within the scope, terms and conditions of the Agreement, regardless of whether any such claim is made during the term of the Agreement. However, the foregoing obligation for the City to indemnify OWMCS or any other provision of this Agreement notwithstanding, the City's contractual obligation to indemnify OWMCS is limited to an amount not to exceed \$200,000.00 per person and \$300,000.00 per occurrence, or such other amount as may be provided for in Chapter 768, Florida Statutes, relating to the limited waiver of sovereign immunity, as same may be amended from time to time.
2. Nothing herein is intended to constitute a waiver by the City or OWMCS of any of the statutory limitations on damages recoverable against the City, or to benefit any third party, on the basis of a claim being asserted against OWMCS. It is the purpose of this provision to ensure OWMCS that Oel Wingo shall not be personally liable for any claims arising out of her official duties and actions pursuant to this agreement.
3. Neither the City nor its insurance carriers shall be liable to any person for any act, or omission of OWMCS committed in bad faith or with malicious purpose or in any manner exhibiting wanton and willful disregard for human rights, safety or property.

NOTICE

Any notice required or permitted to be given under this Agreement shall be sufficient if hand delivered, sent by certified mail or by email with receipt confirmation to the following:

Oel Wingo Management Consulting Services	City of Belle Isle
Oel Wingo, CEO	Bob Francis, City Manager
7998 W. Hwy 318	1600 Nela Avenue
Reddick, FL 32686	Belle Isle, FL 32809
oelwingo@gmail.com	bfrancis@belleislefl.gov

MODIFICATION OR WAIVER:

No modification or waiver of this Agreement shall be valid or binding upon either party unless reduced to writing and signed by both parties.

INTERPRETATION AND CONSTRUCTION:

This Agreement shall be construed under the laws of the State of Florida. If any provision of this Agreement is determined by a court or appropriate tribunal to be contrary to the provisions of any statute or law or to be unenforceable for any reason, then to the extent necessary to render the remainder of this Agreement enforceable, such provision may be modified or severed by such court or tribunal so as to, as nearly as possible, carry out the intention of the parties and the remainder of this Agreement shall remain fully valid and enforceable.

IN WITNESS WHEREOF, the parties hereto have hereunto set their hands this 12TH day of OCTOBER, 2018

Oel Wingo Management Consulting Services

City of Belle Isles, Florida

By: Oel Wingo

By: [Signature]

Oel Wingo, Ph.D., CEO

Bob Francis, City Manager