



UNIVERSITY OF
CENTRAL FLORIDA

Florida Institute of Government

College of Community Innovation and Education

Strategic Planning Proposal – Belle Isle



July 5, 2021

Prepared for:
City of Belle Isle
Mr. Bob Francis, City Manager
1600 Nela Ave
Belle Isle, FL 32809

Prepared By:
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the John Scott Dailey
**FLORIDA
 INSTITUTE OF
 GOVERNMENT**
 at the University of Central Florida



UCF
 UNIVERSITY OF
 CENTRAL FLORIDA

July 5, 2021

City of Belle Isle
 Mr. Bob Francis, City Manager
 1600 Nela Ave
 Belle Isle, FL 32809

Dear Bob,

Thank you for considering the UCF Florida Institute of Government for the City's strategic planning needs. As discussed, a well-designed strategic planning process can add value in many ways, including:

- Create agreement on core values and priorities
- Align the Council and senior management
- Improve engagement, accountability and readiness for change
- Provide management with a strategic agenda to move the organization forward
- Communicate clear direction throughout all levels of the organization and the community
- Address key service gaps
- Provide a road map for the future

What we propose is a best-practice approach, which gives your residents, businesses, and employees a voice in this important process. It allows the Council to hear these stakeholders and make informed decisions about the future of Belle Isle. We customize everything we do. We can add or remove services to fit your goals and budget.

Enclosed please find:

- | | |
|--|-------|
| A. Florida Institute of Government at UCF Service Capabilities | pg. 3 |
| B. Proposed Strategic Planning Scope of Work | pg. 5 |
| C. Proposed Fees and Timelines | pg. 8 |
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We look forward to working with you and the Belle Isle Council members, staff, residents, and other stakeholders.

Sincerely,

Mari Rains, MSM
 Director & Consultant, UCF FIOG



ABOUT THE UCF IOG

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 four (4) affiliate program offices located at the Florida State University, the **University of Central Florida**, the University of South Florida, and Florida Atlantic University.

The Institute's original mission is in place today: to increase the effectiveness and quality of government in Florida through applied research, training, technical assistance programs and public service. A parallel goal was to provide high quality services to local governments at a reasonable cost, not always easy given budget constraints and fluctuations in the state's economy.



We partner practitioners and University professionals from a variety of disciplines, with elected officials and organizational leaders, to identify, evaluate, and implement effective solutions for a wide range of services.

Local government agencies are not required to go out for bid when utilizing the Florida Institute of Government at UCF.

OUR SERVICE CAPABILITIES

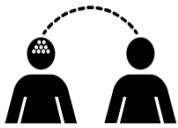
The **John Scott Dailey Florida Institute of Government at the University of Central Florida (FIOG at UCF)** works directly with faculty, staff and external practitioners to bring their expertise to our clients. The FIOG at UCF primarily serves government and non-profit entities within a 13-county region including Alachua, Brevard, Citrus, Flagler, Lake, Levy, Marion, Orange, Osceola, Putnam, Seminole, Sumter, and Volusia counties. The FIOG at UCF is often invited to consult with other FIOG clients and projects across the state.

The Florida Institute of Government at the University of Central Florida has a vast history of helping government and non-profit entities through:

- Facilitating visioning and strategic planning processes
- Facilitating community engagement forums
- Facilitating leadership and team building retreats
- Designing and facilitating leadership development and employee training programs
- Providing association management services
- Developing and coordinating certification programs
- Coordinating conferences (one-day to one-week programming)
- Consulting/technical assistance for diverse government projects including:
 - Charter review
 - Citizen satisfaction surveys
 - Records management assessment
 - Organizational development consulting
 - Human resource consulting
 - Tree surveys
 - Consensus building



5 REASONS TO HIRE THE UCF INSTITUTE OF GOVERNMENT



Seasoned consultants with an unmatched understanding of the unique needs, challenges and services of government agencies, but whom also stay current with business trends.



The FIOG is **not a profit-center**, so we offer low rates for government and non-profit agencies.



Agencies **do not have to go out for bid** when hiring the FIOG at UCF, which allows faster project commencement.



Affiliation with the **second largest university in the U.S.**, with access to expert faculty and practitioners.



30+ years of high-impact service to government agencies and non-profit agencies across Florida.

PROJECT BACKGROUND & APPROACH:

Belle Isle requested the UCF IOG provide a proposal to facilitate the city's Strategic Planning process. This facilitated process will:

- Assist the Belle Isle Council in better understanding the various stakeholders and opinions in their community
- Develop a clear understanding of the shared Vision and Priorities for the City of Belle Isle
- Data collected will assist the City with informed resource allocation and development of a strategic plan
- Collaborating with UCF provides the City an unbiased approach from an outside organization
- Foster engagement and buy-in by the Council, community, and staff

Project Overview and Approach

- Phased approach
- Highly participatory and inclusive
- Opportunity for the community to provide input
- Integrates community visioning and organizational strategic planning
- Uses the results of the visioning effort as the framework for planning
- Adaptive to the needs of the Council and community
- Transparent and responsive to City stakeholders

**PROJECT
MANAGEMENT
APPROACH**

PROPOSED SCOPE OF WORK:

The services described below would be provided through the Florida Institute of Government at UCF. **This scope is a recommended best practice for an organization to engage citizens, businesses, elected officials, and staff.**

PHASE ONE

Background Research

The consultant will review previous plans, capital projects, long-range visioning and comprehensive plans, budgets, and/or other relevant documents provided by the City Manager. The consultant will also conduct a tour of the City, either guided or self-guided. This research phase will serve as a foundation to better understand the history and unique needs of Belle Isle.

Key Stakeholder Interviews

The consultant will conduct individual Zoom interviews with each member of Council (7) and the City Manager to clarify process steps, discuss desired outcomes, and identify issues to be addressed.

Communication Plan

The consultant will support staff in developing a clear communication plan to maximize citizen engagement and participation into the process, as well as to foster transparency.



Community Visioning Forums

The consultant will conduct one four-hour community visioning forum with residents, businesses, and other stakeholders, which will:

- ask participants to identify characteristics of the City that they value most about their community and do not want to change
- identify strengths, weaknesses, opportunities and threats the City faces
- identify participants' desires for the future of the City (components of the vision)
- identify community consensus on issues the City may address in the strategic planning process



After Community Visioning – The consultant will prepare a summary of the Community Visioning Session(s) for further consideration and discussion by the council.

PHASE TWO

Council Workshop

The consultant will facilitate a six-hour workshop with the City Council which will include:

- Sharing of best practices for Council Effectiveness and success
- Review data from the Community Visioning Forum
- Current trends and conditions impacting Belle Isle
- SWOT analysis
- Development, or refinement, of a vision statement, set of organizational values, and mission statement
- Establishment of goals and priorities for staff



After Council Workshop – The consultant will prepare a summary report of the Council Workshop. It will include the SWOT analysis, Vision, Values, Mission, Goals, and Priorities agreed upon by the Council. This report will be utilized in the Senior Staff Operational Workshop.

Senior Staff Operational Workshop

The consultant will facilitate a six-hour workshop with select senior leadership to begin to operationalize the Council's goals and priority objectives. The consultant will assist the staff to:

- Review the vision, values, mission, and strategic goals from the council
- Create goal statements for each of the agreed upon goals
- Develop specific objectives, implementation plans and tentative timelines for each priority objective
- Identify champions for ownership and accountability of each priority

After Senior Staff Operational Workshop – The consultant will prepare a final Strategic Plan which will include:

- A summary of the process used in the completion and assembly of the plan
- The City’s vision, values, and mission statements
- A description of agreed upon goals and objectives for the City, as well as champions and timelines for implementation
- Other information as deemed necessary by the consultant



Presentation of Final Strategic Plan Report to Council

The consultant will collaborate with City staff to co-present the report, and Strategic Plan, to the Council. The consultant may answer questions and/or clarify the report and process.

PROJECT FEES:

The fee for the project as described is \$14,500 (all-inclusive). It includes one consultant/facilitator for each facilitated workshop/meeting. If attendance is larger than 50 attendees for the Community Visioning Forum, a second UCF IOG consultant will assist with facilitating the meeting. The quoted fees include:

- all consultations with staff (phone, Zoom, in-person and email)
- consultant research and preparation to become highly familiar with Belle Isle
- expert meeting facilitation and sharing best practices
- noted deliverables
- meeting materials & supplies
- post-meeting reports and final strategic plan report
- consultant travel expenses

OTHER OPTIONS:

The Florida Institute of Government at UCF customizes everything we do. Upon your request, we can add or remove services to the scope of work and generate a revised proposal to fit your goals and budget.

Additional Services:

The UCF IOG also has the capability to integrate these additional services to the strategic planning process. Please call to discuss these optional services and fees:

- Resident/citizen survey
- Employee survey
- Facilitated resident/citizen educational Q&A forums with senior staff
- Organizational development, change readiness, succession planning and leadership development
- Other special requests



Contracting:

Upon the City’s decision, the IOG will draft a Letter of Agreement for both parties to sign. It must be approved and routed through UCF General Counsel’s contract database prior to client signature.



Performance Concerns:

If performance concerns arise on the part of the Client or the Consultant, either party will discuss concerns and remedies for satisfactory resolution. The Agreement may be terminated by either party with 30 days written notice.

Project Scheduling:

Project dates/times will be mutually agreed upon by the City and the consultant. The UCF IOG can begin this project as early as August 2021. Subject to Council, senior staff and consultant availability, this project could be completed quickly, within a five-month timeframe. Depending on the winter holiday schedule, the project should be completed no later than January 2022.



Invoicing:

The IOG will invoice the City of Belle Isle 50% upon contract execution and 50% upon completion. Payment may be remitted by credit card, check or ACH payment to:

University of Central Florida
Florida Institute of Government
12443 Research Pkwy, Suite 402
Orlando, FL 32826



CONSULTANT / FACILITATOR BIO: MARI RAINS

Mari Rains is the Director of the John Scott Dailey Florida Institute of Government (IOG) at the University of Central Florida (UCF), where she consults with local government agencies. In this role, she also serves as the Executive Director for two associations: Volusia League of Cities and Tri-County League of Cities (Orange/Seminole/Osceola).



Ms. Rains brings a unique hybrid of business, government and academic experience. Prior to joining the UCF IOG, Mari served as full-time Faculty member for UCF's College of Business, Management Department, for seven years. She also led UCF's Learning & Development team supporting 12,000 staff and faculty across 10 locations. She had a successful career in the private sector prior to UCF. Her corporate/private projects include: Publix, Darden Restaurants, Orlando Magic, Henkels & McCoy, The Galileo School Board of Directors, Chambers of Commerce, O'Sullivan, and others.

Ms. Rains earned a Master's Degree in Management from the University of Central Florida College of Business.

Mari's 20+ years' experience centers around helping leaders and organizations build capacity and improve performance. She is a versatile and highly-sought facilitator and consultant for diverse programs, including strategic planning, management consulting, succession planning, organizational development, leadership development, and certification/curriculum design.

Ms. Rains has consulted with diverse government agencies including:

- International City/County Mgmt. Assoc.
- Florida City & County Mgmt. Assoc.
- Florida League of Cities (FLC)
- Orange County
- Seminole County
- Volusia County
- Putnam County
- Osceola County
- Marion County
- Volusia League of Cities
- Tri-County League of Cities
- City of Ocala
- City of Newberry
- City of Orlando
- City of Daytona Beach Shores
- City of Oviedo
- Town of Belleair
- MetroPlan Orlando
- Sanford Fire Department
- Florida Redevelopment Association
- Florida Association of Code Enforcement
- Florida Association of Business Tax Officials
- Florida Association of City Clerks
- Florida Records Management Association
- Property & Evidence Association of Florida
- Florida Center for Nursing
- UCF Office of Diversity & Inclusion
- UCF Police Department
- American Association of Service Coordinators
- 3rd, 7th, 9th and 11th Judicial Circuit Courts
- Orange County Library System
- And many others!