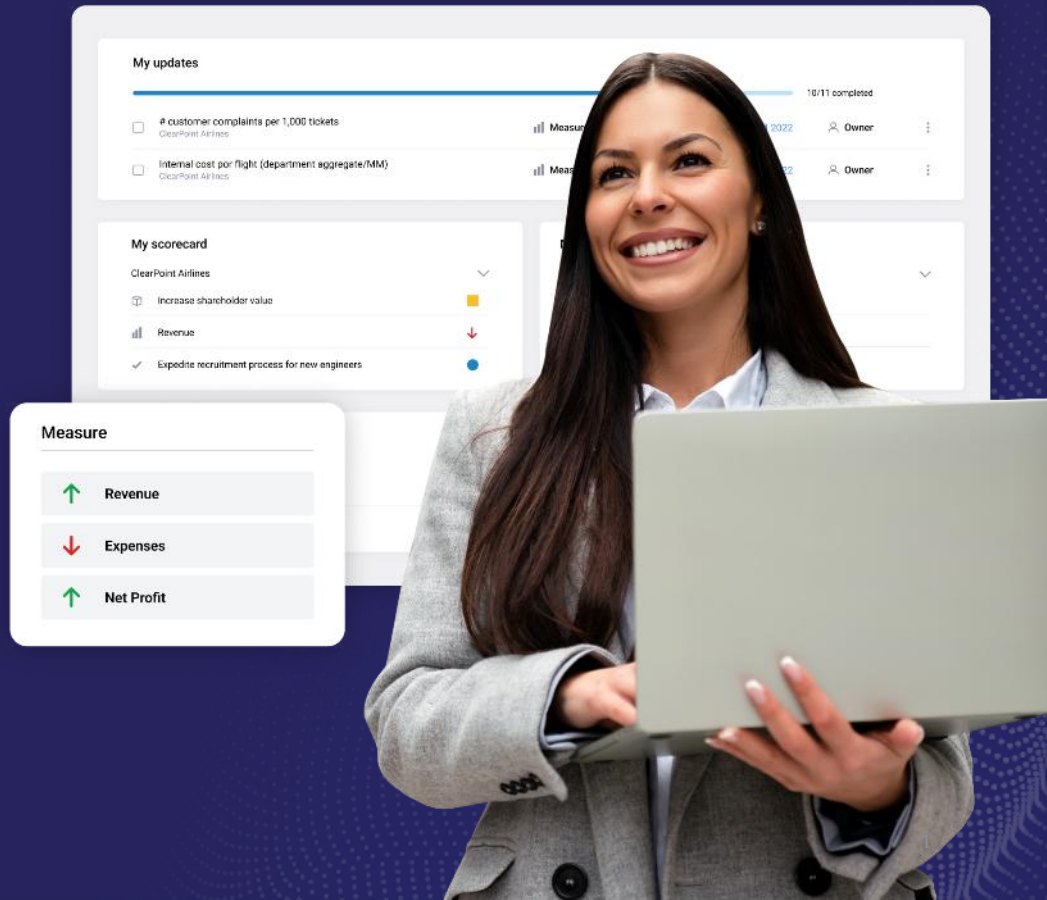




# Strategic Planning Reimagined

## A Panel Discussion

FCCMA 2025  
Orlando, FL



- Introductions
- Transforming Planning
- Managing the Plan
- Engaging Staff
- Engaging the Public

## **OUR AGENDA**



**Ted Jackson**

Managing Partner  
ClearPoint Strategy

Session Facilitator



**Nicole Delfino**

Strategy & Sustainability Manager  
Dunedin

Panelist



**Abismael Abreu**

Strategic Initiatives Administrator  
St. Cloud

Panelist



**Heaven Schott**

Senior CSM  
ClearPoint Strategy

Session Facilitator

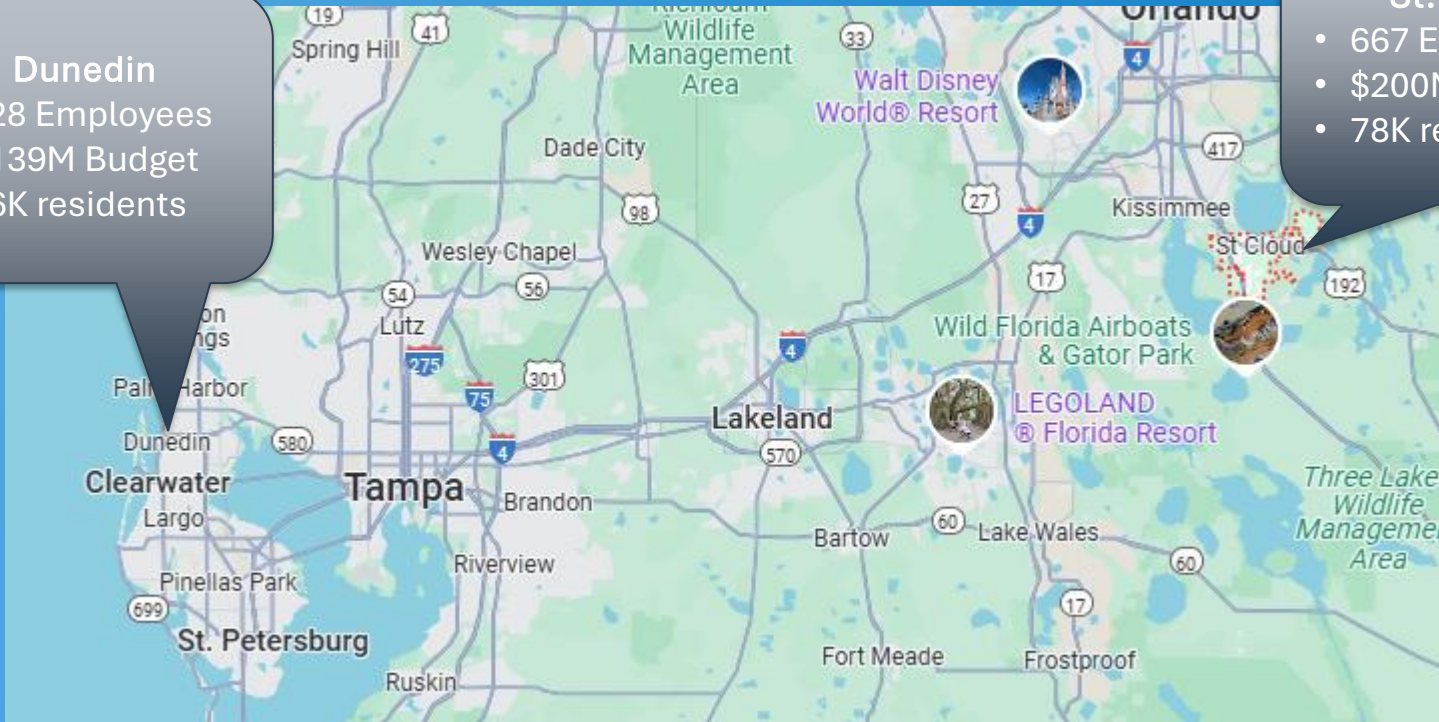


### Dunedin

- 428 Employees
- \$139M Budget
- 36K residents

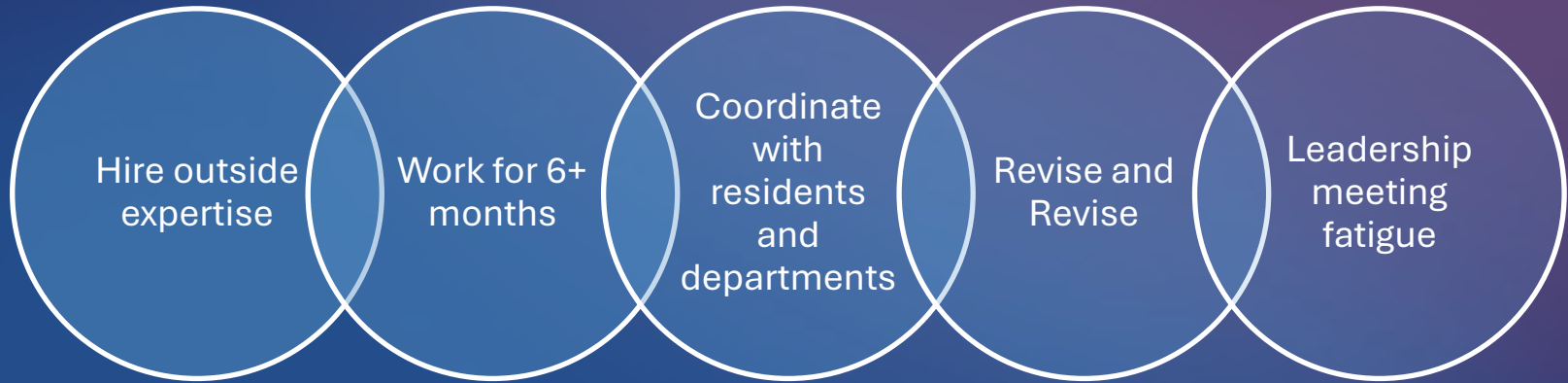
### St. Cloud

- 667 Employees
- \$200M Budget
- 78K residents



# Creating your Strategic Plan is Unpleasant

*(like pulling teeth)*



# Recap: Strategic Themes





## **Vision:**

St. Cloud is a vibrant, innovative, and unique community that embraces its history and provides an exceptional destination to live, work, and play.

## **Mission:**

We are dedicated to providing efficient quality public services, a transparent government, and a safe community.

## **Key Focus Areas & Strategic Goals:**

### **Diverse, Innovative, and Magnetic Economic Development**

- 1 Make the City a desirable business location
- 2 Increase the commercial tax base
- 3 Invest in infrastructure to recruit industries

### **Effective Community Safety**

- 1 Readiness for any emergency
- 2 State-of-the-art infrastructure and resources
- 3 Strong collaborations and partnerships with the community

### **High-Performing Government**

- 1 Focus on the continuity and sustainability of core public services
- 2 Become an employer of choice
- 3 Be on the cutting-edge of technology

### **Reliable Transportation Network**

- 1 Ease traffic congestion, reduce commute times, and improve safety
- 2 Plan, prioritize, and find innovative ways to fund transportation infrastructure
- 3 Engage and educate the community about transportation initiatives, issues, safety, and needs within the City



For More Information on the City's Strategic Plan, **Scan the QR code.**

# Managing that Strategic Plans is Complicated

*(like herding cats)*





# Engaging Staff with Strategy is Hard

*(like folding a fitted sheet)*



# Staff Engagement

## City of Dunedin Strategic Plan Implementation Staff Kick-Off Retreat

Real-Time Record

January 15, 2025



City of  
**DUNEDIN**  
Florida

# Physical Resources



## OUR VISION

To cultivate a vibrant, inclusive community that treasures its history, champions sustainability, and fosters a safe environment.

## OUR MISSION

To improve the quality of life for all by listening to the voices of our citizens and providing quality services through responsible financial stewardship.

## OUR CORE VALUES

Customer Focused

Integrity

Accountability

Stewardship

Innovation



[www.Dunedin.gov](http://www.Dunedin.gov)

**FIRST LAST, X.X (if any)**

*Staff Title and Department or Division Name*

[First.Last@dunedin.gov](mailto:First.Last@dunedin.gov)

**O** 727-xxx-xxxx | **M** 727-xxx-xxxx

**Main Address Used** | Dunedin, FL 34698

### VISION

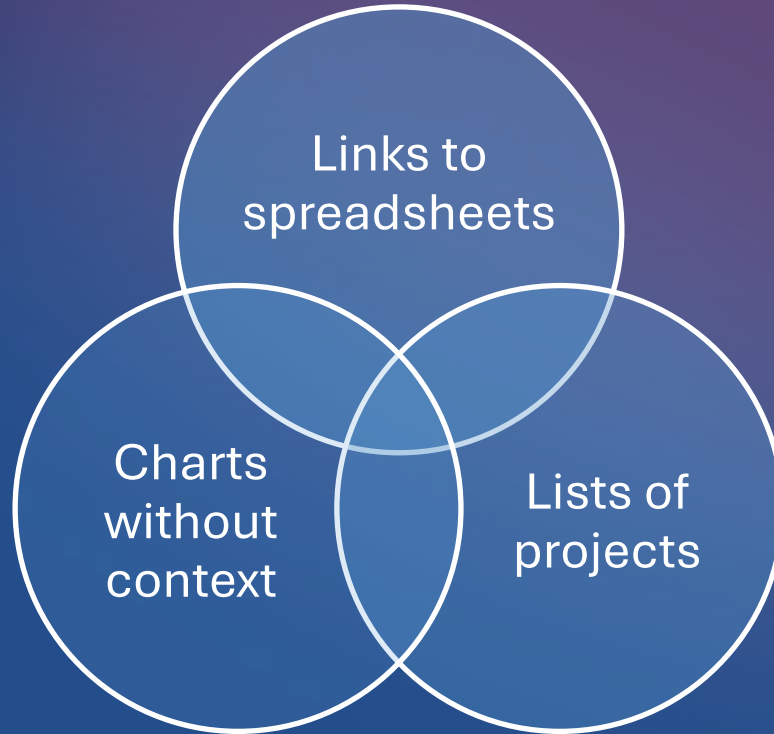
To cultivate a vibrant, inclusive community that treasures its history, champions sustainability, and fosters a safe environment.

### MISSION

To improve the quality of life for all by listening to the voices of our citizens and providing quality service through responsible financial stewardship.

# Building Trust with Residents is Tricky

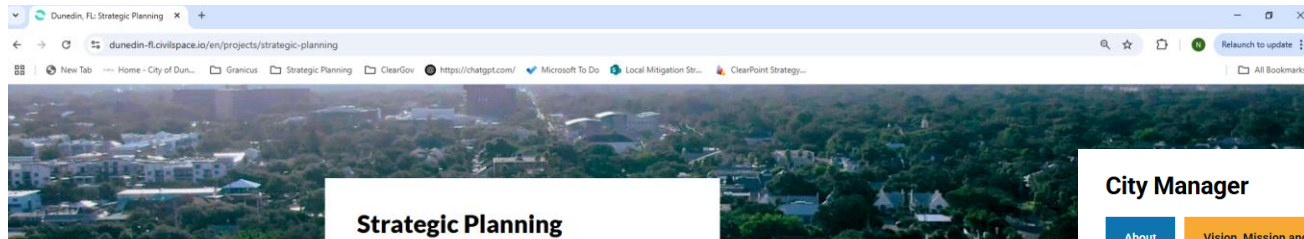
*(like teaching a goldfish to ride a bike)*



# City's Strategic Plan | City of St. Cloud, Florida - Official Website



# Public Engagement



## Strategic Planning

### STRATEGIC OPPORTUNITIES

#### Why is Strategic Planning Important?

Strategic planning plays a pivotal role in shaping the future we envision for our community. By carefully assessing our current resources, identifying potential challenges, and setting clear goals, we can effectively allocate our resources, prioritize projects, and ensure the efficient delivery of essential services. A well-crafted strategic plan not only guides our decisions today but also safeguards the interests of future generations, fostering sustainable development and enhancing the overall quality of life for everyone.

#### Goals and Objectives

- Creation of a new strategic plan
- Incorporate citizen, organization, employee, City leadership and Commission participation and feedback
- Incorporate the City's 6 Epic Goals into the plan
- Identify specific, measurable, achievable, realistic, and timely goals and actions
- Develop the organization's mission, vision, and values
- Identify key priorities and strategies for a 3-5 year range
- Inform and align the City's annual budget with goals and priorities

#### Budget

- Total Budget = \$64,512.50
- Phase 1: Data Research, Gathering & Review = \$35,000.00
- Phase 2: Strategic Plan Design & Presentation = \$29,512.50

#### Strategic Planning Process

The City of Dunedin has engaged the USP Florida Institute of Government (FIGO) and St. Petersburg College Collaborative Labs to facilitate the one-year Strategic Planning process.

#### The Community's Role

The entire community, both residents and businesses, play an important role in developing a shared vision in partnership with the City. The community's active participation and valuable

### PROJECT TIMELINE



## City Manager

### About

### Vision, Mission and Strategic Themes



### OUR VISION

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### OUR CORE VALUES

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Accountability

Stewardship

Innovation

## 7 Strategic Themes that Align with the Mission, Vision and Core Values

- City Services
- Environmental Resiliency and Sustainability
- Communications and Technology
- Community Amenities
- Multi-Modal Transit
- Good Governance
- Infrastructure Planning and Growth

## Contact Us

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# Dashboard: Q2 Update!

The screenshot displays a web browser window with the URL `app.clearpointstrategy.com/#/index?layoutId=398621&object=scorecard&periodId=329382&scorecardId=167416`. The browser's address bar shows the page title as "City of Dunedin | ClearPoint Strategy". The dashboard interface includes a left sidebar with navigation options: "Elements & Reports", "City of Dunedin", "Scorecards (1)", "Elements (139)", and "Reports (41)". The main content area features the "City of DUNEDIN Florida" logo at the top. Below the logo, there are two sections: "Vision" and "Mission". The "Vision" section states: "To improve the quality of life for all by listening to the voices of our citizens and providing quality services through responsible financial stewardship." The "Mission" section states: "To cultivate a vibrant, inclusive community that treasures its history, champions sustainability, and fosters a safe environment." At the bottom, there is a "City Theme's" section with seven categories: A. City Services, B. Communications and Technology, C. Community Amenities, D. Environmental Resilience and Sustainability, E. Good Governance, F. Infrastructure, Planning and Growth, and G. Multi-Modal Transit.

City of Dunedin | ClearPoint Strategy

app.clearpointstrategy.com/#/index?layoutId=398621&object=scorecard&periodId=329382&scorecardId=167416

City of Dunedin

Scorecards (1)

Elements (139)

Reports (41)

City of DUNEDIN Florida

**Vision**

To improve the quality of life for all by listening to the voices of our citizens and providing quality services through responsible financial stewardship.

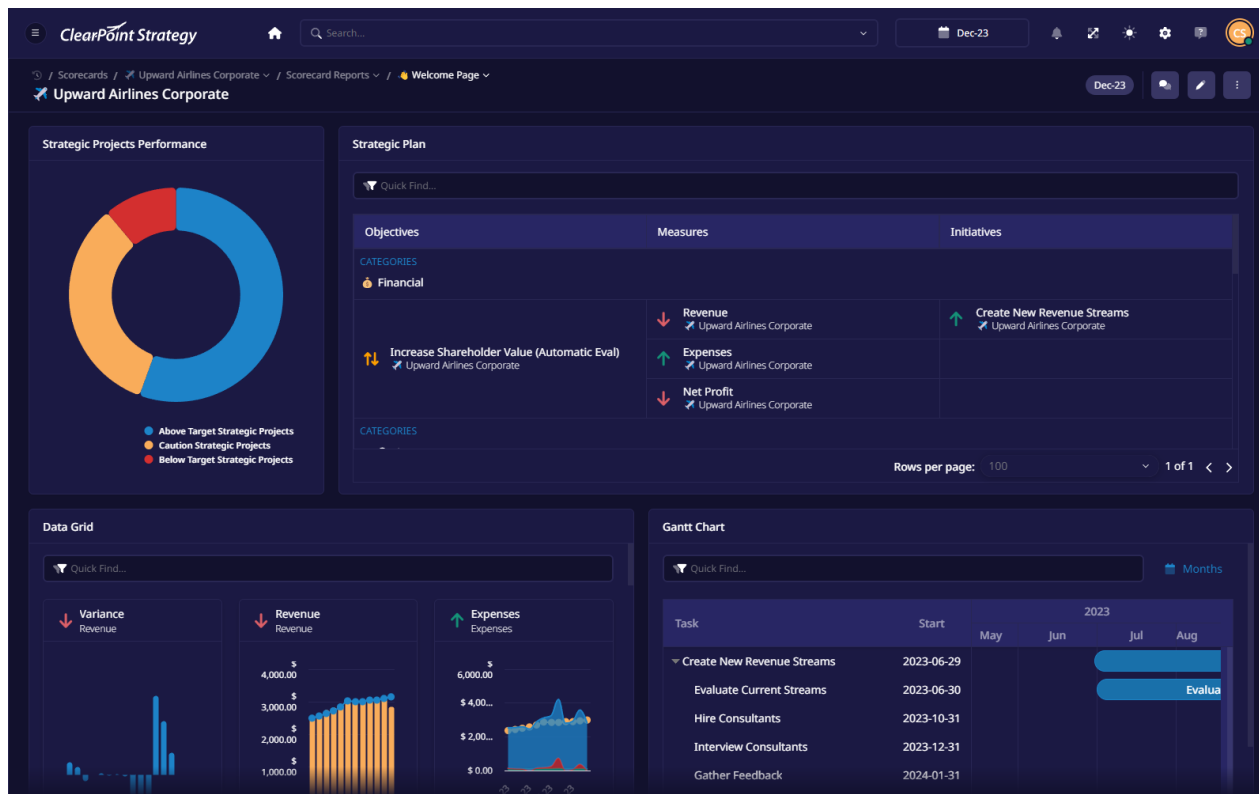
**Mission**

To cultivate a vibrant, inclusive community that treasures its history, champions sustainability, and fosters a safe environment.

**City Theme's**

A. City Services B. Communications and Technology C. Community Amenities D. Environmental Resilience and Sustainability E. Good Governance F. Infrastructure, Planning and Growth G. Multi-Modal Transit

# ClearPoint is designed to help solve these challenges



# AI Assistants to help you build your plans

AI

Thank you for confirming. Now, let's move on to identifying the high-level goals for the City of Orlando's strategic plan. What are the primary goals you would like to achieve with this plan?



Improve Mobility, Create Vibrant Public Space, Promote Inclusive Living



CS

AI

Great set of goals! Now, let's work on creating strategic objectives for each category. We'll start with the **Outcomes** category. Here are some strategic objectives aligned with your goals:



## Outcomes

- **O1: Enhance Transportation Infrastructure:** Improve the efficiency and accessibility of public transportation systems.
- **O2: Develop Sustainable Urban Spaces:** Transform underutilized areas into vibrant public spaces that encourage community engagement.
- **O3: Foster Affordable Housing Initiatives:** Increase the availability and accessibility of affordable housing options to support inclusive living.

Please review these objectives and let me know if they are appropriate.

Write a message



# Drag-and-Drop linkages for alignment

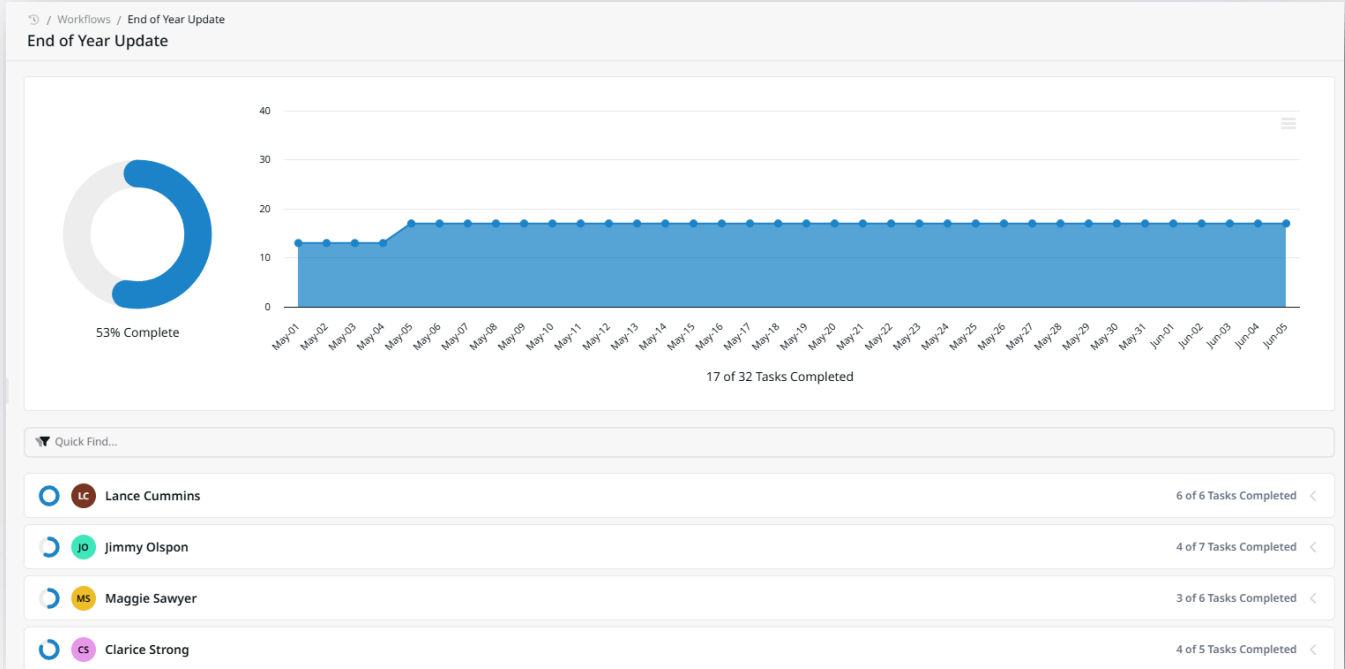
The screenshot displays a dashboard interface with a top navigation bar containing tabs: Objectives (12), Measures, Initiatives, Milestones, Action Items, and Risks. Below the navigation bar is a search bar labeled "Quick Find..." and a "Default View" dropdown.

The main content area is divided into two columns. The left column, titled "Link Elements", contains a section for "Drag elements from this column to add links for these Objectives". It includes a "Scorecard" dropdown menu showing "Metropolis City Scorecard" and a "Link Type" dropdown menu showing "Measures". Below these are several blue buttons representing different metrics: "City-wide Overhead Costs (Aggre...", "Literacy Rate", "EMS Response Time", "Benchmark: Percent of residents ...", "Airport efficiency rating", "Clearance Rate", and "Citizen Satisfaction".

The right column, titled "Measures", contains three measure cards. The top card is "Financial Health and Economic ..." with a red arrow icon and the text "Here is my analysis". The middle card is "Revenue" with a red arrow icon and a bar chart showing a steady increase over time. The bottom card is "Expenses" with a green arrow icon and a bar chart showing a steady increase over time. The bottom card is "Budget Surplus" with a blue arrow icon and a bar chart showing a steady increase over time.

Drag-and-drop linkages are shown connecting the "Financial Health and Economic ..." measure to the "Revenue" and "Expenses" measures, and the "Well-Maintained Infrastructure" measure to the "Budget Surplus" measure.

# Workflows to manage updates



# Workspaces for End Users

Workspaces / My Workspace

My Workspace

Dec-25

My Updates

4/5 Completed

End of Year Update

2025-05-02 - 2025-06-06

4/5 Completed

Start

Please make sure to check your data from the automatic data load and then add your analysis and recommendations  
For initiatives, don't forget to update % complete.

EMS Response Time

Metropolis City Scorecard

Revenue

Metropolis City Scorecard

Financial Health and Economic Vitality

Metropolis City Scorecard

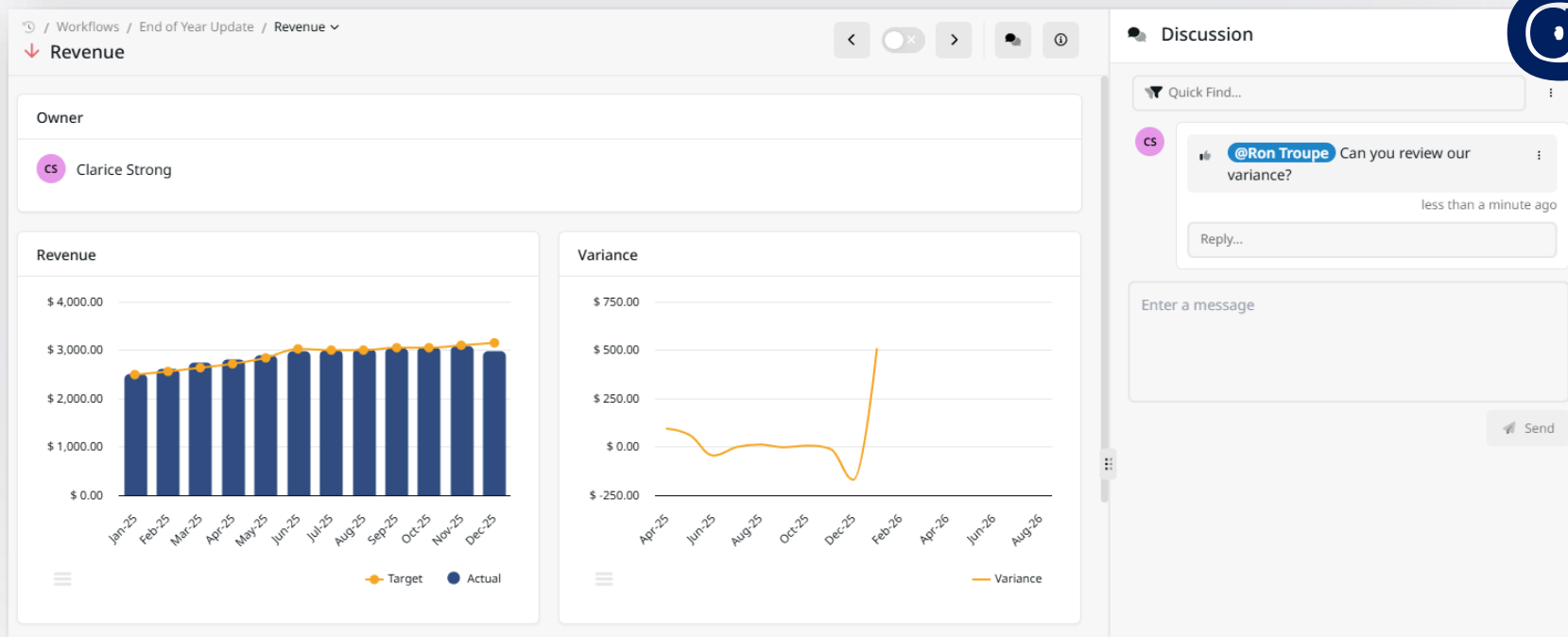
Budget Surplus

Parks and Recreation

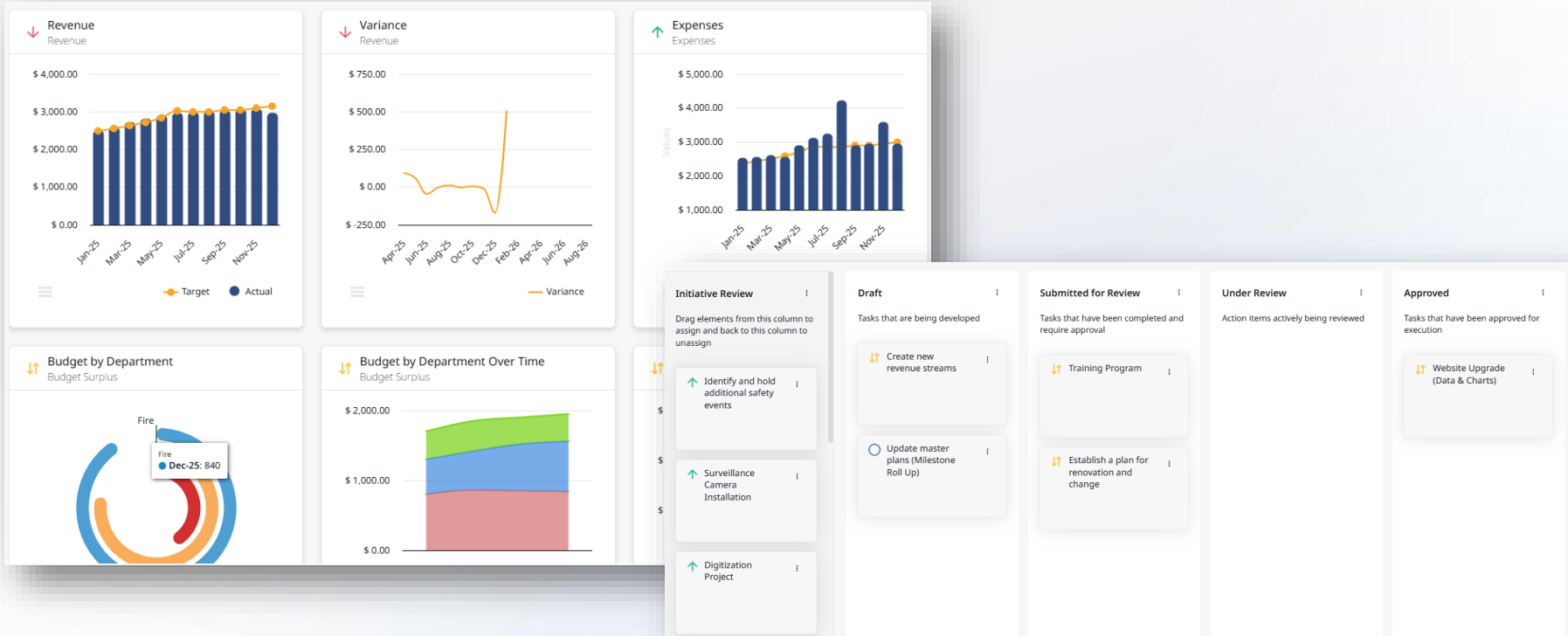
Number of Programs and Events Offered

Parks and Recreation

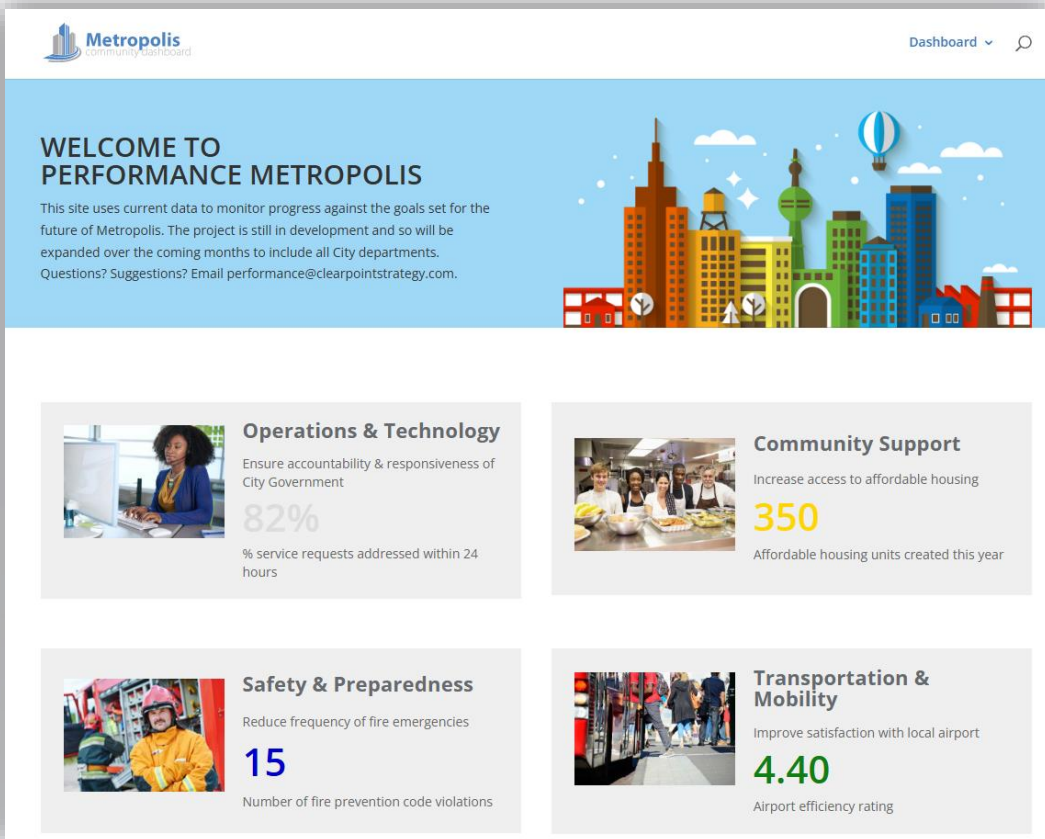
# Mentions link to MS Teams and Email



# Many ways to view information



# Public Dashboards for transparency



**THANK YOU**

Q&A | RAFFLE