

2.0 Strategic Planning

2.1 Strategy Development

Beginning in 1997, the Commission began a process of strategic planning (**Figure 2.1-1**) designed to identify the issues that must be addressed to achieve the City’s mission and that will persist over the lifetime of the Strategic Plan. Reviewed and updated annually, the Strategic Plan creates a shared vision for the future of the community. These long-range policy issues, or strategic priorities, developed by the City Commission, and reaffirmed during the Fiscal Years 2007-2009 strategic planning process, emphasize the values of the community:

- Customer-Involved Government
- Neighborhood & Environmental Vitality
- Financial Health & Economic Development
- Excellence in Education
- Youth Development & Family Values
- Strength in Diversity
- Traffic, Mobility & Connectivity

The traffic priority was added in 2007, the first time a new priority had been proposed, although minor changes in the focus of other priorities had been made in the past.

For each priority, a set of Directional Statements are developed, which define broad objectives that help focus activities on desirable outcomes. Then two to 10 Key Intended Outcomes (KIOs) are set for each priority to determine if a priority has been successfully addressed. KIOs are measurable outcomes at the strategic level.

City Staff then responds to the Strategic Plan (longer-term planning) with a Business Plan (short-term planning) for implementing the policy direction through specific programs and initiatives, an exercise that has been in continuous use since 1994. With the strategic priorities and indicators set, the operations of the City are reviewed and redirected to bring the strategic vision to life. Specific actions, programs, capital purchases, staffing requirements and funding levels are developed in response to the needs identified in the Strategic Plan. Through this process, policy formation and deployment cascades throughout the organization:

- *Strategic Priority*—The Commission identifies the vital issues;
- *Directional Statement*—The Commission sets broad goals;
- *Key Intended Outcomes*—The Commission identifies desired results;
- *Initiatives*—Staff allocates activities, resources, personnel, financial investment, and time planned for the year to achieve each Key Intended Outcome; and
- *Performance Measures*—Staff sets specific and measurable data points indicating the effectiveness of processes designed to support the Key Intended Outcomes.

The Business Plan document is a direct outgrowth of the strategic priorities, capturing the City’s vision in a quantifiable form, improving decision-making and resource allocation. A benefit of using a Business Plan is the direct link between strategic priorities and costs and activities. This model is used to monitor performance through variance analysis of goal to actual; linking budget line items to measurable activities; and identifying value-added and non-value-added activities.

The Business Plan is an organic document, in that it is continually revisited throughout the year and may be amended by a majority vote of the Commission. Changes in the environment may require realignment of resources to continue to keep City staff on target to meet the KIOs and strategic priorities.

In developing the annual operating budget, departments analyze existing and potential services in light of the strategic priorities. The Business Plan adds and removes services, which are then quantified in the line item budget. They reflect not only the strategic priorities as set by the City Commission, but also incorporate feedback from customer surveys and policy initiatives that contribute to the long-term financial health of the City.

Departments set goals to meet strategic needs. To meet these goals, programs within the departments have specific objectives that are measured through performance measures. Individual staff member’s objectives and performance measures are then linked to the program objectives. Each employee knows what the end result should be and how it contributes to the Strategic Plan. In this way, the budget becomes a tool for monitoring and controlling operating performance.

The performance measure tables included with each department’s summary in the Annual Budget document are designed to show how the program objectives support the strategic priorities. Performance measures are explicitly related to the KIO that they support and the strategic priorities that they fulfill.

It’s significant that the City deploys strategically important priorities in this fashion, minimizing the impact of special interest lobbying and political maneuvering in the decision-making process.

Sources of Customer Feedback and Input	
Elected Officials	Annual Citizen Survey
“Slice of the Springs” Meetings	Resident Advisory Committees
Visioning Exercises	Neighborhood Partnership Teams
Focus Groups	Service Requests
Complaint Tracking System	Workorder System
Internal Surveys	Transaction Surveys
SWOT (Strengths-Weaknesses-Threats-Opportunities) Analysis	City Commission Meetings and Planning Workshops
Comprehensive Plan	Operational Data
Trend Analysis	CityINFO Use Statistics
Website Use Statistics	Employee Surveys
Cross-Functional Task Teams	Internal Surveys
General Elections	Requests for Proposals
Senior Staff Retreats	Public Hearings
Local News Sources	Industry Associations
Benchmarking	Professional Literature
CityBlog	Unsolicited calls

Table 2.1-1 Sources of customer feedback.

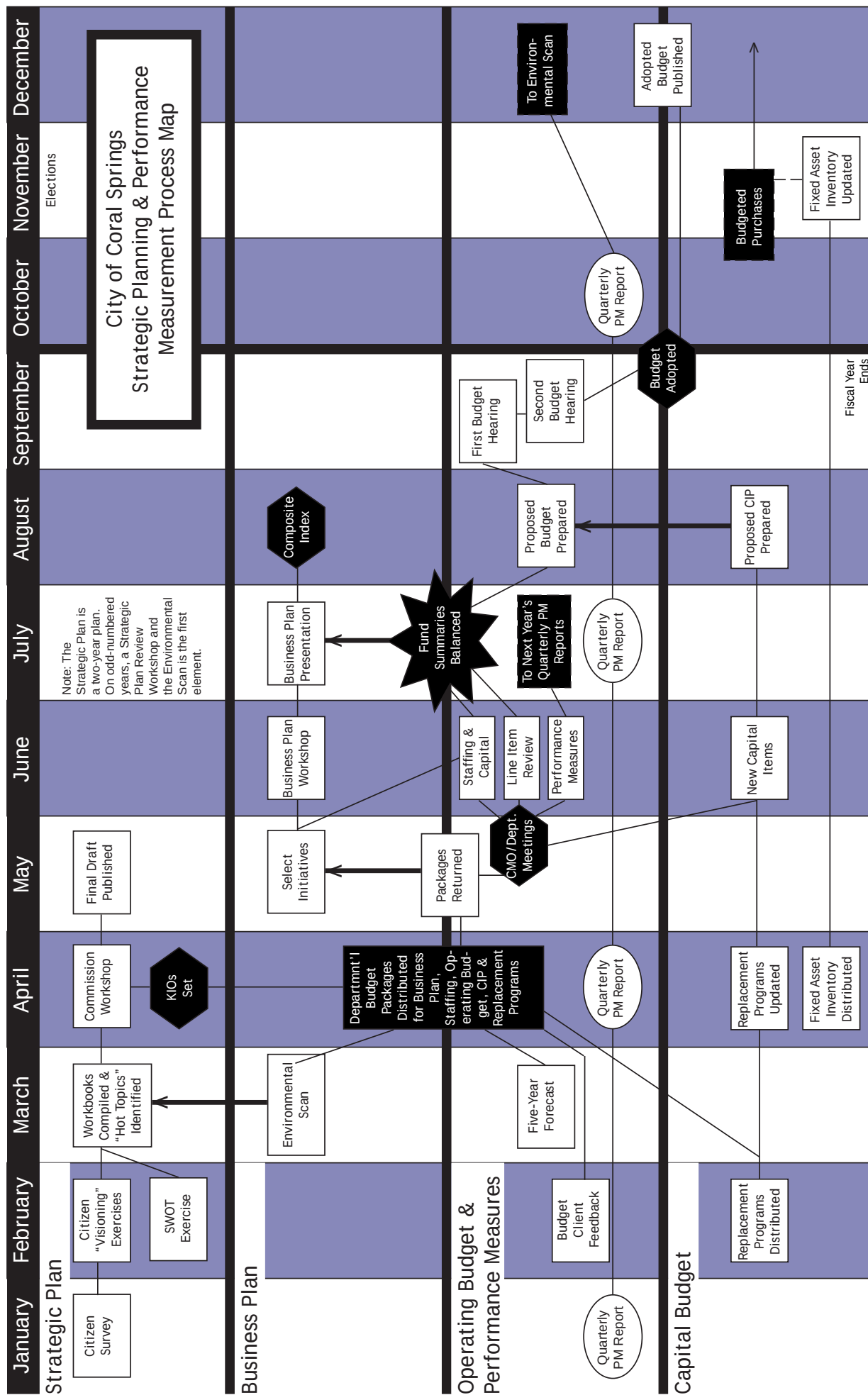


Figure 2.1-1 City of Coral Springs Strategic Planning System—This diagram shows how the Strategic Plan, Business Plan, Annual Budget, Capital Improvement Program, and related performance measures are linked and interdependent. It also shows how the plans are developed during the course of each year. This diagram first was developed in 1999 and has been used as a training tool, communication device, and as the starting point for improvement cycles.

The principal participants in the process are the City Commission and the senior management team. Staff and customers participate through numerous listening and learning opportunities in the planning process that provides plentiful data for appropriate decision-making (**Table 2.1-1**).

2.1a(1) The strategic planning process begins in January of even-numbered years (these time horizons are set based on the election of new Mayor/City Commissioners in November, every two years), when staff begins collecting data for the environmental scan, which includes input from various customer feedback sources (**Table 2.1-1**), as well as management and policy analysis of emerging issues, demographic trends, and financial conditions. A strategic planning workshop is convened in the Spring, where staff and the Commission discuss strategic challenges and advantages, using a workbook that consists of the following sections:

- *Financial Health*—A description of the current financial condition of the City with information on the Financial Trend Monitoring System (analysis of current data) and Five-Year Forecast (a long-term financial planning tool).
- *Environmental Scan*—Demographic trends, an economic analysis, land development trends, service demand generators, technology changes and issues, legislative challenges, and emerging issues are presented that will have an impact on the City during the next three to five years. There are other items of significant interest in this section, including a competitive environment analysis and a workforce analysis.
- *Customer Requirements Analysis*—Summaries of customer feedback from the Resident Survey, Business Survey, neighborhood meetings, SWOT (Strengths-Weaknesses-Opportunities-Threats) results, and public visioning exercises are included to identify trends and affinities. SWOT forms are completed by City Commissioners, senior management, and a sampling of City employees and advisory committee members.
- *Performance Analysis*—A summary of the Quarterly Performance Review, the current status of KIOs, and a projection of the Composite Index are included to describe the current performance of the organization.
- *Mission, Core Values, and Strategic Priorities*—Current versions are included to provide a basis for discussing future needs.
- *Benchmarking*—Comparative data on key areas with discussions of possible improvement projects.
- *Current Initiative Update*—A review of the current year Business Plan initiatives.

In-depth presentations are made on some of the emerging issues, important initiatives, or Cross-Functional Process Improvement Team results, as warranted. Typically, research on key issues uncovered in the Environmental Scan, such as shifts in technology or the regulatory environment are highlighted. Challenges to the organization's Continuity of Operations Plan (COOP), our emergency response plan, is also addressed when necessary. Time is also spent reviewing customer feedback and the strengths, weaknesses, opportunities and threats identified by key stakeholders.

Over the two-day workshop, the Commission informs staff of the direction the Strategic Plan should take and makes

specific changes as they respond to the data presented (as well as their own research and interaction with constituents). The senior management team is on hand to provide data, answer questions, and assess the organization's ability to execute proposed elements of the strategy.

Staff then develops proposed changes to the slate of KIOs designed to take into account requested changes, which are discussed and approved during later Business Plan workshops. An emphasis is placed on selecting leading indicators, rather than lagging, to facilitate the evaluation of progress during the year. Even in odd-numbered years, a strategic planning workshop is held to review the plan and performance measures and make proactive mid-course corrections as necessary and appropriate.

Potential blind spots are identified by ensuring the comprehensiveness of data from many sources, and through the forward-looking analysis of emerging issues facing the City.

2.1a(2) While proposing new Business Plan initiatives, staff develops performance targets for existing programs and identifies resources necessary for both existing and new services. A senior management team staff retreat is held in May to discuss proposed Business Plan initiatives and each initiative is discussed, analyzed, and weighed against the others until a slate of initiatives is reached through consensus. Immediately following this retreat, the City Manager meets with each department director to go over performance agreements and resource needs to negotiate and lock in specific budget requests.

A business planning workshop is held in June with the City Commission to present the proposed slate of Business Plan initiatives, including major capital projects and new programs, and to solicit feedback and input. A second workshop is held in July to present the refined plan with associated budget projections to the Commission. Both workshops are televised and open to the public. Once the Business Plan is approved, departments use it as their action plan for the next year. Supervisors link program milestones, individual work plans, and each employee's Incentive Pay System review objectives to the Business Plan during the October review period.

The City's ability to execute the Strategic Plan is built into the process by tying financial and staff resources directly to strategic priorities through the Business Plan. The City Manager and the senior management team meet weekly to discuss progress relative to the plan and any concerns are addressed through the business planning process. In addition, the City Manager meets quarterly with each department director to ensure the plan is progressing as expected by revisiting the KIOs. The City also maintains a contingency fund and a hurricane reserve to allow a quick response to unforeseen circumstances. Even after the plan is adopted, we are able to react to changing conditions through the review process or through emergency amendments. Because of the stability of core processes, this is rarely necessary.

The bulk of the strategy-level deployment is addressed by this point, so staff spends the rest of July and August preparing the proposed budget for public hearings in September. Because the City has assiduously sought input all along, there is very little discussion at budget hearings, which typically last less than an hour. Resolutions and ordinances are voted into place and the new Fiscal Year begins October 1. Budget staff prepares the adopted budget and planning documents by December and the cycle starts again in January.

This system has been steadily improved and refined year after year and is now widely considered to be a best-in-class benchmark by many organizations. The system has been featured as a “best practice” in the National Performance Review, American Productivity and Quality Center, Government Finance Officers Association publications, the Florida Institute of Government programs, Fitch - IBCA’s recommended practices for cities seeking bond rating upgrades, and in numerous university graduate programs in public administration as a case study. We were also one of the key case studies in Bob Paladino’s *Five Key Principles of Corporate Performance Management* published by John Wiley & Sons in early 2007.

To ensure continuous improvement and test the soundness of the system, an annual review of the system is made in January. Management & Budget Office staff gather feedback from departments, the commission, and other end-users on the ease of use and outcomes of the system. A standing Business SWAT Team for Business Planning Analysis meets to discuss recommendations and results of the process review, as well as feedback from senior management team retreats and individual staff efforts in evaluating the strategic planning process. Improvement cycles in 1998, 2000 and 2006 brought major changes to the system including a complete revamping of the development of KIOs and the timing of the planning schedule.

2.1b(1) and (2) The strategic objectives (priorities) are supported by Directional Statements and specific objectives called KIOs (**Table 2.1-2**), with the annual goal for each. Due to the nature of the planning process, the practice is always to set goals for each measure for both years, although many of the KIOs will be used over many years, with appropriate adjustments to the goals made on an annual basis. By creating the Strategic Plan through analysis of customer feedback, environmental conditions, and organizational performance, the City ensures that the challenges identified in the Organizational Profile are addressed through strategic priorities. Opportunities for innovation are identified the same way. Once challenges and opportunities are identified, the organization can deploy responsibility for achieving policy goals through the Business Plan, departmental work plans, and individual Incentive Pay System objectives.

We are able to balance short- and long-term challenges and opportunities by using many sources of input into the environmental scan. Sources include customer feedback, Slice of the Springs meetings, Comment/Complaint/Request tracking, and other immediate measures. Long-term information is included, such as visioning exercises, long-term financial plans, and the City’s Comprehensive Plan. In the same way, key stakeholders are identified and included to ensure adequate representation.

2.2 Strategy Deployment

2.2a(1) As mentioned before, the Strategic Plan, Directional Statements, and Key Intended Outcomes are the basis for the development of the City’s Business Plan and individual departmental work plans that constitute the action plan for meeting strategic objectives. The City Manager often says that the Business Plan “puts feet” on the Strategic Plan and, in turn, drives resource allocation through the

performance-based budget. Performance measures relative to the action plans are selected by departments based on how well they support KIOs, Business Plan initiatives, and successful delivery of basic services; as well as how well they leverage core competencies. Ongoing, program-level reviews and improvement cycles ensure that action plans can be sustained.

2.2a(2) The Financial Strategy in each year’s Business Plan is developed with the goal of ensuring that adequate financial resources are available to support the action plans, which is then reflected in the Performance-Based Budget, where resources are allocated to each program or service. The City’s Comprehensive Emergency Management Program and Continuity of Operations Plan are used to evaluate risk, and a contingency fund and a hurricane reserve have been established to fund unforeseen impacts. The Five-Year Forecast balances conservative revenue projections against realistic resource requirements as a basis for creating each year’s financial strategy.

2.2a(3) Each Business Plan initiative represents a change in operations that is strategy-driven. Any changes, including new, updated, or discontinued services must be formulated as an initiative. All staffing and capital requests are expressed as initiatives as well. One of the benefits of this is that all staffing decisions are tied to the Business Plan to ensure strategic alignment.

At any time, changes can be made to the action plans to react to a changing environment. Adjustments producing the same results can be made at the staff level, while changes that effect outcomes must be voted on by the Commission. New plans developed in response to changes in the environment are made on an ad hoc basis by the senior management team and can be implemented as quickly as necessary.

2.2a(4) **Table 2.2-2** (pg. 10) lists the initiatives of the Fiscal Year 2007 Business Plan, consisting of key action plans, including both short- and long-term initiatives linked to KIOs. No major changes were planned for this business cycle.

2.2a(5) Key workforce plans are listed in **Table 5.1-2** and are directly linked to the City’s short- and long-term plans. Changes in staffing necessitated by exogenous factors or strategic decisions are included in the Business Plan as initiatives.

2.2a(6) In addition to the Key Intended Outcomes and performance measures developed by the departments (**Tables 2.1-2** and **6.1-1**), the City also uses a Composite Index, the

Composite Index Measures	Chart
School Overcrowding	7.5-2
Volunteers in Government	*
Nonresidential Property Values	*
Residential Property Values	*
Employee Productivity	*
Customer Satisfaction	7.2-1
Athletic League Participants	*
Crime Rate	7.1-6
Employee Satisfaction	7.4-4
Accidents at Major Intersections	7.5-9

Table 2.2-1 Some measures of the Composite Index, a way of measuring the relative value and quality of City services over time, is made up of 10 key measures that tell us how we’re doing. *Results available on site.

Financial Trend Monitoring System, an Early Warning System, benchmarking, and individual performance measures to track progress on action plans. The Composite Index (**Table 2.2-1**) is a set of 10 key performance indicators that are used as an indication of the value provided to City residents. Often referred to as the City's "stock price," the index not only serves as a basis for relative performance evaluation, but also as a leading indicator of the City's well being. The Financial Trend Monitoring System (**Table 2.2-3**) is a set of twenty-five measures, balanced between objective and subjective information, that provide a snapshot of the financial condition of the City, with long-term trends identified and an analysis of the "meaning" of the measures, whether positive or negative. The Comment/Complaint/Request system is used as an in-process measure to monitor subjective changes in core business processes throughout the organization.

2.2b The City's strategic goals/projections (KIOs) can be seen in **Table 2.1-2**. Most of the measures that are used to evaluate performance by the City are included in the Annual Budget and the quarterly performance reports. Many Key Intended Outcomes are already performing at such high levels that sustaining such a high level of performance in these challenging economic times is the goal. For example, sustaining an overall quality rating of 94% is extremely challenging, particularly when you take into account the margin of error of the survey instruments ($\pm 3\%$).

Projections for most measures are based on trend analysis and modeling. Because there is a high degree of stability in most scores over the past 12 years, projections have limited use at the strategic level. Where the City gets the most traction with projections are with process measures that are directly affected by understood variables, such as emergency response time and cycle time for permits.

Key Intended Outcomes by Strategic Priority		FY 2007 Goal	Results
Customer-Involved Government			
• Number of volunteer hours donated to the City of Coral Springs each year	↑ c	31,000	7.6-4
• Percent of voter turnout	↑ a	40%	*
• Overall rating of the City in terms of communicating with residents	↑ a	93%	7.2-7
• Overall rating of the City in terms of communicating with businesses	↑ a	78%	7.2-9
• Customer service rating by residents	↑ a	93%	7.2-1
• Customer service rating by businesses	↑ a	90%	7.2-3
• Number of mentors trained	↑ a	50	*
• Overall quality rating for City services and programs by residents	↑ a	93%	7.1-1
• Overall quality rating for City services and programs by businesses	↑ a	91%	7.1-3
• Employees satisfaction rating	↑ a	93%	7.4-4
Financial Health & Economic Development			
• Bond ratings	↑ a	AAA	7.3-1
• Commercial square footage development initiated within the Downtown CRA	↑ a	400,000 ^a	*
• Percent of plan reviews completed within 15 days	↑ a	95%	*
• Non-residential value as a percent of total taxable value	↑ a	20%	*
• Residents value rating (City Survey)	↑ a	73%	7.2-4
• Percentage increase of operating millage rate	↓ a	0%	7.3-4
• Add \$2 million annually to financial reserves until policy is met	↑ c	\$2 million	*
Excellence in Education			
• Percent of school overcrowding (normalized)	↓ a	108%	7.5-2
• Number of students participating in partnering institutes of higher education	↑ a	1,000	*
• Achieve gains in reading/math mean scale score at the Charter School	↑ a	0.6%	*
Neighborhood & Environmental Vitality			
• Number of formal and informal neighborhood partnerships each year	↑ c	20	*
• Number of cooperative projects and the number of different partners (public, private and intra-city depts.) focused on enhancing the environment	↑ c	12 proj 8 part	*
• City crime rate (crimes/100,000 residents—Calendar Year)	↓ a	2,980	7.1-6
• Percent of code cases brought into voluntary compliance prior to judicial process	↑ a	70%	7.5-8
• Number of trees planted	↑ a	3,000 / year	*
Youth Development & Family Values			
• Number of youths involved in City-sponsored leadership opportunities	↑ c	2,000	*
• Number of teen volunteer hours donated to the City of Coral Springs each year	↑ c	11,000	7.6-4
• Number of middle school after-school programs offered annually	↑ a	13	7.6-7
Strength in Diversity			
• Minority residents who feel that the City is a great place to live (City Survey)	↑ a	82%	*
• Citizen rating of City for respecting religious and ethnic diversity (City Survey)	↑ a	92%	*
Traffic, Mobility, & Connectivity			
• Achieve overall reduction of 10% of speeds or 15% reduction of volume on traffic calmed roads	↑ c	15%	*
• Number of accidents at 16 major intersections	↓ a	165 / year	7.5-9
• Number of riders in intracity bus routes	↑ a	110,000	*
Key: arrows indicate positive direction, a = annual, and c = cumulative			

Table 2.1-2 Strategic planning cycle Fiscal Years 2005 and 2006 Key Intended Outcomes with 2005 goals. ^aThree-year cumulative goal. *Results available on site.

In general, the City's level of performance compares favorably to best-in-class performers, local competitors, and national benchmarks. Because of the difficulty in finding comparative data to highly idiosyncratic data points, we have worked diligently to establish valid comparisons as described in the Organizational Profile (**P.2a(3)**). When performance gaps against competitors are identified, cross-functional task teams are created to research and implement best practices to improve performance.

Priority/Initiative	Responsible Department
Customer-Involved Government	
Customer Care Center	Building Division
Enhanced Permit Notification	Building Division
Small Permit Pilot Project	Building Division
Parkland Partnership—Northwest Response Time Improvements	Fire Department
Improved Business Communications	Communications & Marketing
Youth Mentoring Opportunities	Police Department
Workforce Housing: Subordinated Second Mortgage Program	Community Development
New City Hall Building	Development Services
New Resident Outreach	Communications & Marketing
Community Branding	Communications & Marketing
Increased Fuel Storage and Availability	Development Services
Rehabilitation of Lift Stations 20A/B	Public Works
Restoration of Covered Bridge	Human Resources
Neighborhood & Environmental Vitality	
Neighborhood Aesthetics Improvement Program	Code Enforcement
Administrative Citation Program	Code Enforcement
Reestablish Bike Patrol Unit	Police Department
Zone 4 Action Plan II	Police Department
City Water Conservation Practices	Public Works
Green Design and Maintenance Policies	Development Services
Evening Parks Maintenance	Parks & Recreation
Entryway Signs II	Parks & Recreation
Meadows and Dells Drainage Improvements	Public Works
Valve Exercising and Dead-End Water Main Flushing	Public Works
Redevelopment Code Study II	Community Development
Post-Wilma Tree Canopy Recovery	Community Development
Financial Health & Economic Development	
Gas Saving Vehicles	Public Works
Water and Wastewater Cost Study	Public Works
Fire Impact Fees	Fire Department
Youth Development & Family Values	
Teen Programming	Parks & Recreation
Website Resource for Parents	Police Department
Parent Support Partnerships	Parks & Recreation
Drowning Prevention Program	Fire Department
Excellence In Education	
Linking At-Risk Youth to Career-Based Education	Human Resources

Charter School Advisor Program	City Manager
Workforce Housing: Affordable Housing for Teachers	Community Development
Strength in Diversity	
International Soccer Fest	Sportsplex
World Fest	Human Resources
MLK Golf Tournament	Human Resources
Traffic, Mobility & Connectivity	
Street Indexing Signage	Community Development
Downtown Pathways	Community Development
28th Street Pedestrian Crossing	Community Development
Linear Parks	Parks & Recreation
CRA Roadway Design	Community Development
Planning for One Cent Sales Tax	City Manager
University Drive Extension	Community Development

Table 2.2-2 Fiscal Year 2007 Business Plan Initiatives adopted in July 2006 for completion by September 30, 2007, with responsible department.

Financial Trend Monitoring System Measures	Results
Net Operating Revenues per Capita (in Constant Dollars)	*
Restricted Operating Revenues as a Percent of Total Net Operating Revenues	*
Intergovernmental Revenues as a Percent of Total Gross Operating Revenues	*
Elastic Tax Revenues as a Percent of Total Net Operating Revenues	*
User Fee Coverage as a Percent of Enterprise Expenditures	*
Net Operating Expenditures per Capita (in Constant Dollars)	7.3-7
Employees per 1,000 Population	*
Undesignated Fund Balance as a Percent of Total Net Operating Revenues	*
Net Direct Bonded Long-Term Debt as a Percent of Total Assessed Value	7.3-5
Population	*
Total Assessed Property Value (in Constant Dollars)	*
Commercial and Industrial Assessed Property value as a Percent of Total Assessed Property Value	*
Labor Force (Employment) in Coral Springs	*

Table 2.2-3 Some of the Financial Trend Monitoring System measures. The entire system is comprised of twenty-five financial ratios and statistics that can be used as leading indicators in assessing the financial health of the City. Currently, all trends are "positive," with the exception of Population, which is levelling off due to build-out. *Results available on site.