

**INDIAN RIVER COUNTY
2023 GOAL SETTING PROCESS & WORKSHOP
FINAL REPORT**





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Executive Summary

To review and define the mission, values, and goals for Indian River County Government to optimally serve citizens, the Indian River County Board of County Commissioners engaged in a best practice and evidence-based process. This process included community and organizational research, individual interviews with the BCC, senior staff, and department directors, an all-employee electronic survey, and a workshop for discussion and direction to the administrative leadership. The research was conducted by Dr. Levey and Dr. Saviak in close coordination with the senior staff. It was a multi-method research process involving a diverse set of reliable and valid sources of quantitative and qualitative data providing opportunities for cross-validation confirming valuable findings. Utilizing all of these tools of research, major recurring themes were identified. The workshop provided an additional opportunity for data collection and analysis. The focus of the workshop was to receive ideas and direction from the Board of County Commissioners to guide the staff in developing a draft mission, set of organizational values, and goals for the Board's review and approval, and inclusion within the upcoming budgetary process.

It is important to gain a good understanding of Indian River County and Indian River County Government to effectively conduct a successful goal setting process and workshop. The goal setting project team utilized reports, data, and metrics provided by the Office of the County Administrator as well as publicly available information from governmental and non-governmental organizations, to create and inform a productive goal setting process and workshop.

A goal setting process can clarify the mission, values, and goals and unify the organization in support of them, optimize organizational performance, enable efficient allocation of limited resources, energize the team, attract resources, and successfully lead positive change (Cohen & Eimicke, 1998). The mission is the rationale for the organization, goals are more broadly stated longer term purposes, and objectives are specific, measurable, actionable, realistic, time bound, and shorter term (Starling, 2008).

Community Overview

Created in 1925, Indian River County was home to 167,352 residents in 2020. 68% of residents live in the unincorporated county areas. The projected 2030 population of the county is 185,000. It ranks 31st of 67 counties in population. It is 503 square miles with 22 miles of beaches.

The county has five cities: Sebastian (27,700), Vero Beach (16,700), Fellsmere (4,900), Indian River Shores (4,400), and Orchid (522).

Indian River County has 20 public, private, and charter schools (20:1 student ratio) and a graduation rate of 95%. Recognized for excellence in education, the School District of Indian River earned the distinction of Cognia Systems Accreditation, is ranked by Niche the #11 Best School District in Florida, and is the only “A” rated school district located along the Treasure and Space Coast. It is home to Indian River State College with Florida Atlantic University and Keiser University in neighboring St. Lucie County.

It has 86,505 housing units, a 35-foot height limit on buildings, 100,000 acres of conservation land, 17 golf courses, and the Jackie Robinson Training Complex (training facility for the Dodgers from 1948-2008).

The county has two airports: Vero Beach Regional Airport and Sebastian Municipal Airport and a public transit system with 14 routes.

Demographically speaking, it has 14,824 veterans living in the county (11.9%), is 86.6% Caucasian, 9.2% Black, and 13.7% Hispanic, with a median age is 53.4. 35.2% of residents are age 65 or older – 6th in Florida in this category.

91.1% have a high school degree and 32% have a bachelor’s degree and 91.7% of homes have a computer.

The median household income is \$61,594 with a 10.3% poverty rate. It is 23rd of 67 Florida counties in terms of median household income (\$61,594).

The economy of Indian River County involves agriculture, tourism, healthcare, information technology, light manufacturing, wholesale, retail, and service. The largest private sector employers are Cleveland Clinic Indian River Hospital (1,920), Publix (1,324), Piper Aircraft (886), Sebastian Medical Center (581), John’s Island residential/resort (571), Indian River Estates retirement/life care (434), Visiting Nurse Association (376), and The Home Depot (352).

Indian River County has a comparatively low property tax rate, available building sites, and access to major transportation arteries to attract new employers/expand existing businesses.

Organizational Overview

Indian River County Government is a general-purpose government with 17 active dependent and independent special districts. Key budgetary priorities have included sustaining county services, investing in infrastructure, building organizational capacity, and employee professional development and growth. External budgetary factors include fuel costs, chemical prices, supply shortages, the property and casualty insurance market, and a higher Florida Retirement Service employee rate to pay

Recruitment and retention of employees and progress on needed maintenance and replacement of capital assets remain priorities.

Presently, there are 913 full time employee positions in county government with a current proposed budget of \$506,235,729 representing a 12.2% decrease from the prior fiscal year.

It ranks 54th of 67 counties in millage rate which is the 4th lowest general fund millage rate in the state. It is 9th of 67 Florida counties in government debt per resident (higher ranking is better). The debt per resident has significantly decreased from \$666 per resident in 2012 to \$29 per resident in 2021 to \$20 in 2022. It is 36th of 67 counties in government spending per resident.

The aggregate millage rate is 6.1307. The county government has multiple funding streams: MSTUs, MSBUs, half cent sales tax, state revenue sharing, optional sales tax, gas tax, tourist tax, waste collection fee, impact fees, and special districts (emergency services, streetlighting) – all have increasing revenue productivity except impact fees. In 2022, county voters approved \$50 million for environmental preservation. The County will issue two tranches of \$25 million debt, of which the first issuance is expected to occur during this fiscal year.

As with all local governments in Florida, there is potential for changes in revenue in the future if an economic slowdown occurs.

The 2022/2023 budget goals/objectives concerned public safety, effective planning and implementation of services, policies, ordinances, and regulations, protect and enhance natural resources, ensure solid transportation infrastructure, protect and promote the general welfare of residents, and preserve and enhance the quality of life with an array of recreational and cultural opportunities.

There are presently 15 fire stations.

Two public employee unions represent a significant share of county employees: Teamsters (261 employees) and International Association of Firefighters (269 employees)

The county sees 120 building permit applications per day.

The county government's 2024 State Legislative Program identifies the issues of funding opportunities, beach renourishment/restoration, home rule, opposition to unfunded mandates, concerns about homeowners' insurance, maintaining responsibility for local planning/zoning decisions, BCC member electronic participation in meetings on a limited basis, unfunded mandates/costs with septic to sewer upgrades, funding requests for specific septic to sewer and water system projects, and fulfilling significant septic to sewer requirements

The 2022-2026 five-year capital improvement plan includes (\$ figures are 5-year totals): beach renourishment (\$12,700,000), conservation and aquifer recharge (\$14,568,500), emergency services facilities (\$35,771,198), facilities management (\$33,968,317), parks and recreation (\$25,590,590), sewer and water (\$85,458,953), solid waste (\$26,315,000), stormwater management (\$14,400,000), and transportation (\$203,145,852).

The five-year Indian River County MPO Transportation Improvement Plan identifies specific priority projects and funding sources involving roads, traffic operations and maintenance, traffic safety, public transit, aviation, transportation studies, and bicycling, walking, and trails. There is an MPO 2045 Long Range Transportation Plan for the county which was approved in 2020. The total funds for all projects in this plan are just over \$400 million with \$295 million coming from federal support. The plan utilizes national performance metrics involving quality, safety, efficiency, environmental preservation, abating congestion, and successful project delivery.

Growth may occur through infill development within present urban areas, redevelopment, or development of undeveloped property. Urban development in the county is authorized to proceed as New Towns and Traditional Neighborhood Design.

A 2022 Indian River County MPO Land Use Vision Study identified these suggested guidelines for future land use planning: conserve environmentally valuable assets, provide a spectrum of housing options, ensure mobility through transportation infrastructure investment, promote economic growth, preserve agriculture, and protect rural areas. Flexible agricultural zoning policy options, studying the urban service boundary, and tools of low impact development design all could be considered by policymakers and staff. The County is currently engaged in the process to evaluate the impacts of future growth and its Comprehensive Plan through the Evaluation and Appraisal process as set forth in the Florida Statutes.

The 2021/2022 Annual Comprehensive Financial Report confirms the county government has effective internal controls and appropriate policies, an award-winning team of public finance professionals, and is financially sound.

The sources of support for these statistics and statements are:

- ✓ County Administrator’s 2023/2024 Budget Message (7/7/2023)
- ✓ The 2022/2023 Annual Budget for Indian River County Government – this included mission, goals, and objectives
- ✓ The 2023 County Administrator Position Advertisement
- ✓ Board of County Commissioner Biographies
- ✓ 2022-2023 news articles on county government meetings, issues, and events
- ✓ The Indian River County Government 2024 Legislative Program PPT
- ✓ A review of all BCC Meeting Agendas May-September 2023
- ✓ Five Year Capital Improvement Plan/Capital Improvement Expenditures
- ✓ The Chamber of Commerce website – economic development section
- ✓ A review of 2023 IRC Government FB posts
- ✓ The Transportation Improvement Program FY 2022/23-2026/2027 (MPO – IRC)
- ✓ Comparative and ranking data across Florida counties on government debt, taxes, government spending, median household income, total affordable housing expenditures, and total county budget (Florida Legislature’s Office of Economic and Demographic Research)
- ✓ The Metropolitan Planning Organization Land Use Vision Study (updated 8/2022)
- ✓ 2021/2022 Annual Comprehensive Financial Report
- ✓ A review of the Indian River County Government website
- ✓ University of Florida Bureau of Economic and Business Research. (2022). Retrieved at: https://www.bebr.ufl.edu/wp-content/uploads/2022/12/estimates_2022.pdf
- ✓ Indian River County Economic Development. Retrieved at: <https://indianrivered.com/community/demographics/>
- ✓ U.S. Census Data (2022). Retrieved at: <https://www.census.gov/quickfacts/indianrivercountyflorida>
- ✓ 2021 Annual Popular Financial Report by the Indian River Clerk of the Court and Comptroller. Retrieved at: https://indianriverclerk.com/wp-content/uploads/2021-FY-PAFR_searchable.pdf

Research Methods and Findings

On 10/23 and 10/24, Dr. Levey and Dr. Saviak interviewed all five Indian River County Commissioners, the County Administrator, the Deputy County Administrator, the County Attorney, a Deputy County Attorney, the Legislative Affairs and Communications Manager, nine department directors, and one assistant department director. The interviews focused on discussing the mission, values, and goals of Indian River County Government, a SWOT analysis (strengths, weaknesses, opportunities, and threats), the top three priorities for capital projects, policies and programs, and the organizational capacity of county government, and the highest three priorities across all categories (e.g., programs,

capital projects, and institutional capacity). Goals and expectations for the workshop and process were also discussed.

Utilizing the interview data, an electronic survey was developed which was conducted from 11/8 to 11/22 involving the elected and administrative leadership and all employees. The purpose was to acquire greater insights and increase clarity and focus for the goal setting workshop. For example, participants were asked to rank the priorities for capital projects, policies and programs and the capacity of county government. 483 responses were received constituting a 53% response rate and a valid and representative sample.

On 12/8, the Goal Setting Workshop with the Board of County Commissioners and administrative leadership was held.

Prior to the workshop, interviews with the elected and administrative leadership defined a successful workshop in terms of aiding in these outcomes:

- ✓ Long term vision – set priorities
- ✓ Identify and communicate mission, values, and goals
- ✓ Clarify organizational culture/values
- ✓ Identify resources for the mission
- ✓ Establish clear plans for implementation - timelines/milestones

The workshop included a presentation on the purposes, benefits, and process of goal setting, presentation of all research and findings, and discussion of the mission, values, and goals for Indian River County Government. The workshop helped facilitate questions and analysis and aid in decision-making by the elected leadership. A high degree of communication and collaboration among the elected and administrative leadership at the workshop resulted in significant productivity and meaningful progress. The role of the Board of County Commissioners was to provide staff with actionable feedback and key elements for possible revision and further development of the current mission, values, and goals for county government for the BCC to then review, discuss, and approve. Based upon this workshop, the staff will draft a proposed mission statement and list of values and goals. The approved mission, values, and goals can then be incorporated into the upcoming budgetary process and be communicated and acted upon throughout the organization.

Mission

This discussion began with the present mission statement found in the 2022/2023 budget:

“To protect and promote the general welfare of our residents and visitors and preserve and enhance the quality of life in our community and its natural resources through effective planning and implementation of services, policies, laws, and regulations.” (p. 31 Goal Setting Workshop PPT)

The workshop discussion involved the recurring themes from the interviews (Exhibit 1), the four phrases tested in the electronic survey derived from the interviews (Exhibit 2), and the ranking of mission phrases in the results of the electronic survey (Exhibit 3).

This is the key feedback and direction from the Board of County Commissioners on mission with input and ideas from the administrative leadership team:

- ✓ **Utilize the red bolded words and phrases on Exhibit 2 and Exhibit 3**
- ✓ **Make it more inspirational and personal – add “people”**
- ✓ **Live the mission statement**
- ✓ **Blend the current mission statement with new concepts generated from this goal setting process**
- ✓ **Add innovation – going beyond the norm**

Values

The workshop discussion involved the recurring themes from the interviews (Exhibit 5), four values statements tested in the electronic survey derived from the interviews (Exhibit 6), and the ranking of values statements in the results of the electronic survey (Exhibit 7).

This is the valuable feedback and direction from the Board of County Commissioners on values in collaboration with the administrative leadership team:

- ✓ **Personalize values statements**
- ✓ **Make more pointed**
- ✓ **Core values need to be formalized and expressed**
- ✓ **It is a statement of our organizational culture**
- ✓ **Add community well being**
- ✓ **Add action verbs**
- ✓ **Include community-oriented/sense of community well being**
- ✓ **Can apply internally and externally**

Goals

The discussion involved the 15 recurring themes from the interviews (Exhibit 8), 9 goals tested in the electronic survey derived from the interviews (Exhibit 9), and the ranking of the 9 goals from the results of the electronic survey (Exhibit 10).

Working together, the Board of County Commissioners and the administrative leadership team generated these ideas and insights on developing and confirming goals:

- ✓ **Add communicating with the community**
- ✓ **Can combine affordable housing with quality of life**
- ✓ **Goals should represent funding priorities**
- ✓ **Need a hierarchy of goals**
- ✓ **Could collapse goals into broader categories**
- ✓ **Goals are not mutually exclusive**
- ✓ **Need to define quality of life**
- ✓ **Goals need to become measurable objectives when developed further in the strategic plan**
- ✓ **Infrastructure and sustainable economic growth**
- ✓ **All are important and interconnected**
- ✓ **Internal communication and collaboration, a review of policies and procedures, and customer service are important to the organization (institutional capacity)**
- ✓ **Some goals could conflict**
- ✓ **Could reduce 9 goals into 5 goals: public safety, infrastructure, environment, sustainable economic growth, and quality of life (include affordable housing)**



Next Steps

The county administrator will engage a Strategic Planning Team to employ the feedback and direction from the Board of County Commissioners at the Goal Setting Workshop to craft a potential mission statement, defining values, and specific goals for the Board of County Commissioners to review and approve for Indian River County Government. The mission and values provide the county and employees with the purpose and the why the organization exists. The goals and priorities will inform and guide in the allocation of resources in the upcoming budgetary process. The mission, values, and goals will also be strongly communicated to all of county government and enable alignment of operations and activities to them to achieve optimal outcomes.

Conclusion

A mission statement is the rationale for the existence of the organization, values define how individuals think, talk, and behave within an organization or community, and goals are broadly stated long term purposes.

This is best viewed as a two-phase process with the first phase being goal setting and the second phase involving research, development, implementation, and evaluation of a county government strategic plan. The goal setting can aid in the upcoming budgetary process and set the foundation for a successful strategic plan. The goal setting will clarify mission, vision, values, and priorities in policies, programs, and services, capital projects, and ensuring organizational capacity.

Goal setting and strategic planning ask and answer this question: given our mission, strengths, weaknesses, opportunities, threats, stakeholders, history, capacity, and resources, what should our goals and objectives be, and which strategies can we design and implement to achieve them?

This goal setting process involved a SWOT analysis, review of community and organizational research, and identification of organizational goals. A strategic plan operationalizes those goals into specific, measurable, actionable, realistic, and time-bound objectives with specific implementation plans and tools for evaluation to confirm achievement. A strategic plan also engages citizens and helps ensure community support for specific objectives. The goal setting combined with a strategic plan should enable all operations and activities of the county government to attain selected objectives.

This goal setting process enables Indian River County to sustain positive progress, optimize economic, social, and cultural opportunities and outcomes, ensure strong organizational performance, align means with ends, and lead beneficial change.

Successful goal setting and strategic planning are research-driven, evidence-based, and outcome-oriented. Strategic management enables organizations to achieve identified objectives. Implementation, measurement, and accountability are critical.

Management scholar Dr. Peter Drucker once observed that “the best way to predict the future is to create it.” Through continued commitment to goal setting and strategic planning and management, Indian River County Government and the citizens it serves seek to create the best possible future for all residents and visitors.



Exhibit 1 - Interviews

1. What would you identify as the mission, values, and goals for Indian River County and County Government?

- Values could be responsiveness, fairness, flexibility, honesty/trust/transparency, accountability, competence, customer service, and dedication.
- What words come to mind for each of these – mission, values, and goals?

2. What would you identify as the strengths, weaknesses, opportunities, and threats for Indian River County? (can have more than one of each)

3. What would you identify as the top 3 priorities for each of these major aspects of county government:

- Infrastructure/Capital Projects – 3 priorities
- Public Policy/Programs/Services serving citizens – 3 priorities
- Budget/Workforce/Training/Operations/Administration/Technology – 3 priorities

4. Let's pick 3 priorities across all 3 categories.

- What are they? For your top 3 priorities across all 3 categories, what opportunities and challenges (e.g., resources, capacity, legal, political, etc.) exist for achieving them and how would you best ensure their attainment (e.g., design and implementation)?

5. Workshop - What issues would you like to see on the goal setting workshop agenda?

- What could be a challenge for the goal setting process and workshop? How would you solve it?
- How would you define success for the goal setting workshop? What will it take to produce that success?
- What would you like to see result from the goal setting workshop going forward?

Exhibit 2 – Recurring Themes from Interviews on Mission Statement

Mission

Recurring themes from Interviews



-
- Service delivery unity, pleasure, & pride/strong customer service
 - Serve & Protect the Public
 - Delivering Service with a sense of purpose to residents and visitors
 - Add Community Service to Existing Mission Statement
 - Equitable Governance
 - Protect quality of life and natural resources
 - Protect the environment/sustainable growth
 - Future with what residents cherish about community
-

Mission
Electronic
Survey
Results

Four Phrases Tested

1. Efficient and High-Quality **Customer Service** Should Make Indian River County Government Unique.
2. Indian River County Should **Serve and Protect** the Public Effectively.
3. Indian River County Should Provide **Equitable Services** to all Residents and Visitors.
4. Indian River County Government Should Reasonably **Balance Quality of Life, Natural Resources and Sustainable Growth** for Residents.

Exhibit 4 – Ranking of Mission Phrases

Ranking of Mission Phrases

Phrase	Score
Indian River County Should Serve and Protect the Public Effectively.	3.14
Indian River County Government Should Reasonably Balance Quality of Life, Natural Resources and Sustainable Growth for Residents.	2.53
Efficient and High-Quality Customer Service Should Make Indian River County Government Unique.	2.17
Indian River County Should Provide Equitable Services to all Residents and Visitors.	2.16

Exhibit 5 – Values – Recurring Themes from Interviews

Values

Recurring themes from Interviews



- Professional/Competent with citizens and fellow employees
- Cheerful/Customer Service (internal/external)
- Transparency
- Honesty/integrity
- Respect for residents & colleagues
- Accountability
- Pride/Confident
- Trust
- Dedication
- Collaboration

Values
Electronic
Survey
Results

Four Value Statements Tested

1. Indian River County Government Strives for Professional **Internal and External Customer Service**.
2. Indian River County Government Exemplifies **Integrity, Transparency, and Respect** with Residents and Colleagues.
3. Indian River County Government Values **Honesty and Trustworthiness**.
4. Indian River County Government Employees Demonstrate **Dedication and Collaboration** in the Workplace.

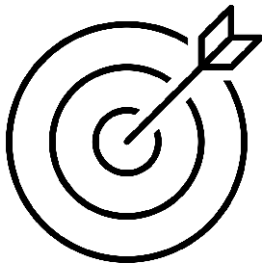
Ranking of Values

Value	Score
Indian River County Government Values Honesty and Trustworthiness .	2.72
Indian River County Government Exemplifies Integrity, Transparency, and Respect with Residents and Colleagues.	2.64
Indian River County Government Strives for Professional Internal and External Customer Service .	2.32
Indian River County Government Employees Demonstrate Dedication and Collaboration in the Workplace.	2.31

Exhibit 8 – Goals – Recurring Themes from Interviews

Goals

Recurring themes from Interviews



- Environment (wildlife, lagoon, greenspace)
- Infrastructure
- Quality of Life
- Responsive Governance
- Eliminate Internal Silos/Improve Communication/Collaboration
- Transparency
- Customer Service
- Orderly growth/sustainability
- Economy
- Public Safety
- Equity in Service Delivery
- Review/update policies and procedures
- Affordable housing
- Encourage innovation in county government/process improvement
- Use of technology

Goals
Electronic
Survey
Results

Nine Goals Tested

1. Protect and Preserve Our **Environment**.
2. Enhance Our Unique **Quality of Life**.
3. Invest in and Improve **Our Infrastructure**.
4. Ensure a High-Level of **Public Safety** Services.
5. Increase Overall **Internal Communication and Collaboration**.
6. Provide High Quality **Customer Service**.
7. Support **Sustainable Economic Growth**.
8. Improve Internal Operations by **Updating Current Policies and Procedures**.
9. Encourage **Affordable Housing** Opportunities.

Exhibit 10 – Ranking of Goals

Ranking of Goals

Value	Score
Ensure a High-Level of Public Safety Services.	5.99
Invest in and Improve Our Infrastructure .	5.48
Protect and Preserve Our Environment .	5.33
Provide High Quality Customer Service .	5.20
Support Sustainable Economic Growth .	4.99
Enhance Our Unique Quality of Life .	4.81
Increase Overall Internal Communication and Collaboration .	4.66
Improve Internal Operations by Updating Current Policies and Procedures .	4.31
Encourage Affordable Housing Opportunities.	4.23

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