

MEMO

TO: Mr. John Titkanich, County Administrator
FROM: Dr. Joe Saviak and Dr. Richard Levey
DATE: March 6, 2024
SUBJECT: Strategic Plan for Indian River County Government

We are pleased to submit this proposal to provide for the development of a strategic plan for Indian River County. We view this assignment as a logical extension of the initial engagement where we assisted the County in developing its Mission, Values, and Goals. The next logical step in the Strategic Planning process is to build the Plan around the prior established Goals.

Overview

To optimize opportunities for the long-term success of Indian River County, the county government will conduct a strategic planning process to produce a five-year plan and ensure successful implementation and effective evaluation.

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

The strategic plan will enable all operations and activities of Indian River County Government to attain important, specific, and measurable objectives during the next two, three, and five years. The strategic planning process includes a SWOT and historical analysis, community research, determination of organizational capacity, identification of objectives, development of action plans for each objective, identification of means of evaluation for achievement of each objective and to set a schedule for implementation. Quarterly progress reports on each objective would aid in achievement of SMART objectives (specific, measurable, actionable, realistic, and time-bound). The SWOT and historical analysis, and community research were conducted during our first engagement.

This is a specifically sequenced multi-stage process involving an orientation, face to face interaction with the County staff, a workshop, plan development, review, and approval, implementation, and evaluation. This team ensures the success of Indian River County Government at all stages.

Indian River County Government has successfully defined its mission, values, and goals. The focus for this strategic plan is objectives which could involve capital projects, programs/services/policies, and enhancing institutional capacity. Objectives will be SMART (specific, measurable, actionable, realistic, and time-bound). For example, increase citizen satisfaction with county government in an annual survey by 10% within 12 months.

Our Proposed Approach

The County desires a comprehensive strategic plan that addresses the key capital projects and service delivery systems to implement the pre-established Goals of the Board of County Commissioners. This plan will link the strategic direction of the County with the practical and operational systems required to implement the Goals.

- I. Kickoff Meeting with County Administrator and key leadership team
 - a. At this meeting, the consulting team will discuss the best overall approach for Indian River County. This discussion will focus on whether the County is best suited to develop the Strategic Plan along each business unit/department, or a cross-department team approach. The pros and cons of each approach will be analyzed to determine which model best suits the existing environment. Other items to be established include:
 - i. Clarifying the County Administrator's expectations of the assignment
 - ii. Any needed clarification or modification to the scope and schedule
 - iii. Identifying an internal Project Manager with whom the consulting team will coordinate all activities
- II. If needed, a two-hour orientation for key participants in strategic planning. This enables participants to come prepared to the interviews with their specific ideas for the objectives for the strategic plan.
- III. Interviews with the County Administrator, Assistant County Administrator, Deputy County Administrator, and Department Directors to identify plan objectives.
- IV. Draft plan production, review, revisions, and approval. Available to aid in and during successful implementation. The entire plan production process could be from March through July 2024. The Strategic Plan would generally adhere to the following format:
 - a. SWOT – completed
 - b. Vision for the Future
 - c. Mission – completed
 - d. Values (IRC SPT Working Group)
 - e. Goals (several broad categories/long-term purposes from goal setting process)
 - f. Objectives
 - g. Strategies
 - h. Tactics
 - i. Responsible Parties/Roles
 - j. Measures/Key Performance Indicators

The Team

Dr. Joe Saviak and Dr. Richard Levey bring extensive experience and proven success in facilitating goal setting/strategic planning with local governments and non-governmental organizations throughout Florida. They bring a unique combination of several decades of experience in local government in Florida along with regularly teaching goal setting and strategic planning to thousands of local government executives and professionals across Florida both in the classroom and at professional conferences.

Both Dr. Levey and Dr. Saviak regularly advise and assist local governments on a wide range of policy, administrative, operational, planning, and capital project issues. Our bios are attached. Our professional websites can be accessed at: <https://www.leveyconsulting.com/> and <https://drjoesaviak.com/>

In 2023, they aided Indian River Government in selecting a Mission, Goals, and Values for county government to best serve citizens.

Deliverables would include:

- ✓ **Conduct a strategic planning orientation for key participants**
- ✓ **BOCC Workshop on Draft Strategic Plan**
- ✓ **Community Strategic Plan Presentation (In-Person and Virtual)**
- ✓ **Draft Strategic Plan** The strategic plan would include the synthesis of the research, all objectives, and summary implementation plans for objectives over the next five years (Dr. Levey and Dr. Saviak). Depending on the specific objective, staff may produce more detailed implementation plans.
- ✓ **Continued advice and assistance during plan implementation and evaluation.**

Schedule

We would propose the following general schedule, which could be modified based on the initial meeting with the County Administrator:

- ✓ Kickoff meeting with County Administrator and key leadership team members – April 2024
- ✓ Strategic Planning Orientation Workshop for key participants – May 2024
- ✓ Meetings with Department Heads to establish Objectives, Strategies, and Tactics for each of the Goals established by the County Commission for production of draft plan. This step will involve ongoing interaction with Department Heads as the plan is crafted and refined – June/July 2024
- ✓ Draft Strategic Plan Delivery to County Administrator – August 2024
- ✓ BOCC Workshop on Draft Strategic Plan – August/September 2024
- ✓ Community Strategic Plan Presentation – September/October 2024
- ✓ Final Strategic Plan – November 2024

Resources Required

The consulting cost for Dr. Saviak and Dr. Levey to facilitate the design of this process and plan and aid during its successful implementation and evaluation would be \$45,000 plus normal expenses associated with travel (mileage, hotel, etc.). Indian River County Government is responsible for organizing the strategic planning workshop, supplying needed research, and actual implementation and resourcing of the plan. Dr. Saviak and Dr. Levey have enabled other organizations to experience significant success through this process and regularly teach this subject to executives and professionals