

Strategic Planning Process (“DRAFT REPORT”)

Town Hall Meeting

The Sanibel City Council began the strategic planning process by seeking public input via a town hall meeting on February 15, 2022. The meeting was exclusively designed to provide citizens an opportunity to offer their insights regarding what should be valued and protected during the forthcoming strategic planning workshops. City officials did not speak at this meeting. Instead, twenty-eight citizens civilly spoke, representing numerous groups and perspectives. Notable themes included emphasis on the environment, resiliency, water quality and stormwater management, preservation, education, infrastructure, maintaining home rule and small-town character, transportation issues, on-line service delivery, and senior and multi-generational program offerings.

Strategic Planning Workshops

Overview:

The city of Sanibel organized a diverse group of 42 people who, seating at seven tables, were willing to spend two-full days (March 12, 2022 and March 16, 2022) to actively participate in preparing the city’s strategic plan. The workshops were facilitated by Dr. Bob Lee, President of Local Government Advisors, Inc. and MPA Program Coordinator/Associate Professor at Florida Gulf Coast University.

Day 1 Workshop (March 12, 2022):

Participants spent the first half of the day learning details about the city’s history, current events, and trends. During the second half of the day, participants worked in groups to undergo an assessment of the city’s strengths, weaknesses, opportunities, and threats (SWOT). An opportunity for public comment was provided at the beginning and end of the day’s agenda.

Most notable regarding the historical overview portion of the agenda was a presentation from Porter Goss, recognized as one of the original architects of the “Sanibel Plan” (city’s state mandated comprehensive plan) and a person with a distinguished public service career representing Sanibel, Lee County, and the United States as a City Councilmember, County Commissioner, Congressman, and Director of the CIA. City Staff also gave presentations, most notably focusing on organizational structure, services, capital projects, and financial condition.

SWOT Analysis:

Workshop participants identified **S**trengths for Sanibel. The strengths achieving the most consensus among participants focused on the significance of the Sanibel Plan, the importance the Council/Manager form of government with nonpartisan officials and

talented staff, and the value of the community support systems that include nonprofit organizations and other community groups.

Workshop participants identified **Weaknesses** for Sanibel. The weaknesses achieving the most consensus among participants focused on technology improvements to improve delivery of city services, human resource challenges associated with compensation and affordable housing, an over-taxed infrastructure (roads, water, beaches) due to the city “being loved to death” by people desiring to visit the island, and traffic congestion.

Workshop participants identified **Opportunities** for Sanibel. The opportunities achieving the most consensus among participants focused on staff compensation and job classifications, technology, ARPA (American Rescue Plan Act, which is federal funding to replace loss revenues used most notably for infrastructure), renewal energy, and water quality, and transportation alternatives (causeway traffic relief/appropriate use).

Workshop participants identified **Threats** for Sanibel. The threats achieving the most consensus among participants focused on the erosion of Home Rule powers, a changing population with less focus on environmental issues, and the overtaxing of natural resources and infrastructure, sea level rise, and water quality.

The Town Hall meeting for public input, the historical overview and presentation on current city services and financial data, and the SWOT Analysis were all pre-requisites to enable workshop participants to discuss and reach a consensus on elements of the city’s strategic plan. The next section outlines those plan elements during the second day of the workshop.

Day 2 Workshop (March 16, 2022):

Participants spent the first half of the day working in groups to discuss and prepare a vision statement and a mission statement for the city’s strategic plan. The vision statement is an aspirational statement that communicates what the city wants to be and be known for in the future. The mission statement is an action statement that communicates how the city intends to achieve that vision. In the afternoon, participants discussed and prepared a set of core values which are intended to guide all stakeholders in terms of what values they will use in implementing the city’s mission and the strategic goals that support it.

During the second half of the day, participants discussed and prepared the set of strategic goals which directly support the mission statement. The proposed vision and mission statements, core values, and strategic goals are provided in the next section.

Recommendations for additional workshop/s and utilization of a final strategic plan will be summarized in the final section of this report.

SANIBEL STRATEGIC PLAN

Vision Statement

Sanibel is and shall remain a barrier island sanctuary; one where a diverse, multi-generational community lives in harmony with the island's wildlife, preserving natural habitats for the inspiration of future generations.

Note: While the City and the retreat participants remain committed to the Vision Statement provided in the Sanibel Plan, the above Vision Statement could serve as a more concise version of the Sanibel Plan's Vision Statement.

Mission Statement

Sanibel stakeholders are stewards of the island and will collaborate to protect environmental assets, promote economic stability, strengthen community engagement, and provide exceptional services and governance.

Core Values

Sanibel C A R E S

Conservation:

Preserve the environment and small-town community.

Adaptive:

Respond to changes in circumstances and the environment.

Respectful:

Value diverse experiences and different points of view.

Ethical:

Support honesty and transparency in all democratic processes.

Stewardship:

Ensure fiscal responsibility and accountability, and sustainability of natural resources.

Strategic Goals

1. Environmental Stewardship – Lead in environmental stewardship by engaging regional, state, and federal agencies to advocate on issues that impact local sustainability of water quality, land conservation, waste minimization, and renewable energy, and provide recurring education on the Sanibel Plan.

2. Infrastructure – Focus on quality-of-life infrastructure needs that sustain and protect the island’s roads, pathways, bridges, sewer and stormwater systems, and coastal resiliency initiatives.
3. Fiscal Health – Maintain and promote fiscal health of the city by providing efficient and transparent service delivery and maintain appropriate financial policies that ensure appropriate fund balances and diverse revenue streams.
4. Customer Service – Manage human capital to achieve customer-oriented service delivery by investing in technology, maintaining competitive pay and benefits for city employees, adjusting organizational structures as needed, and supporting feasible workforce housing initiatives.
5. Public Safety – Sustain the safety and well-being of residence and visitors of the island by ensuring that resources are provided for law enforcement and disaster preparedness, and that recreation activities are designed for a diverse multi-generational citizenry.

Follow-up and Recommendation

Public Comments and Adoption:

At the aforementioned workshops, City Council expressed an interest to continue to engage the public before a final decision is made on the strategic plan. Therefore, it is recommended that this report, or an amended version of this report, be formally presented to the City Council at a public meeting where the public will again have an opportunity to comment on the contents and language provided for the Vision, Mission, Core Values, and Strategic Goals. Subsequently, the city council should adopt a final version of these statements to be incorporated into a strategic plan. Given that the Fiscal Year 2022-23 budget process is near, it is paramount that the follow-up to adopt a final version of the plan be completed in the near future.

Use of the Strategic Planning Document:

The strategic plan should be a document that is used throughout the year.

First, in terms of budgeting, city staff will be able to provide SMART (Specific, Measurable, Applicable, Realistic, Time-bound) objectives that support each strategic goal provided in the strategic plan. These SMART objectives will correlate directly with the revenues and expenses outlined in the budget giving the reader a clearer understanding on the categories and numbers within the budget.

Second, these SMART objectives can be incorporated into the city’s annual employee evaluation process to ensure that employees are focusing their attention on city objectives

from the annual budget; thus, employees will be working on matters that have been prioritized to support the city's strategic goals.

Third, the city council could include a section on each agenda memorandum for each agenda item of their meetings which identifies how the agenda item supports the strategic plan (For example, the agenda item supports strategic goal 3, budget objectives 4, 5, and 9). That way, all City Council agenda items are first vetted to identify how they support the strategic plan and where support is budgeted, as applicable.

Forth, the city's state mandated Comprehensive Plan (referred to as the Sanibel Plan) is going through an evaluation process this year, known as the EAR (Evaluation and Appraisal Review process). Completion of the strategic plan at this time is perfect timing to enable the city to utilize it in order to proceed with that EAR responsibility, which is a sequential approach lauded by state planners.