

Islamorada, Village of Islands

Strategic Plan 2017-2023



THE VILLAGE COUNCIL OF ISLAMORADA, VILLAGE OF ISLANDS

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VICE MAYOR CHRIS SANTE
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COUNCILWOMAN DEB GILLIS
COUNCILWOMAN CHERYL MEADS

VILLAGE MANAGER SETH LAWLESS

Goals | Objectives | Completion Dates

ADOPTED NOVEMBER 16, 2017

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The Purpose

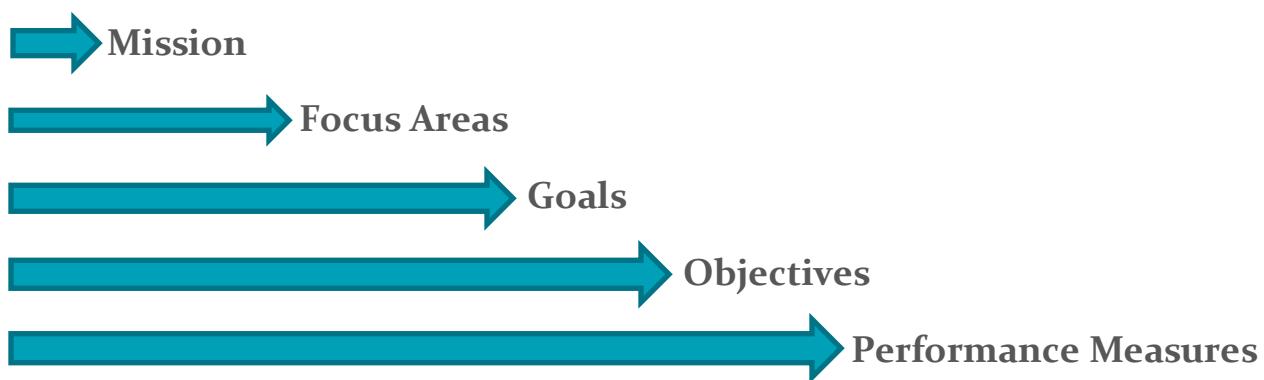
This Strategic Plan is intended as a guiding document to be utilized for annual goal-setting, budgeting and evaluation processes to direct the Village's actions, investments, and engagements with partners from October 1, 2017 to September 30, 2023. By formulating a long-term Strategic Plan, the Village can better focus on prioritized actions and investments required to support its vision of the future.

A good Strategic Plan serves as a roadmap to be used to prioritize resources, both financial and departmental, to achieve the identified goals. The Strategic Plan will serve as a management tool to evaluate performance and progress made by the Village Manager and Village departments to achieve the goals and objectives set forth.

Throughout this document, this Strategic Plan is referenced also as "the Plan".

The Process

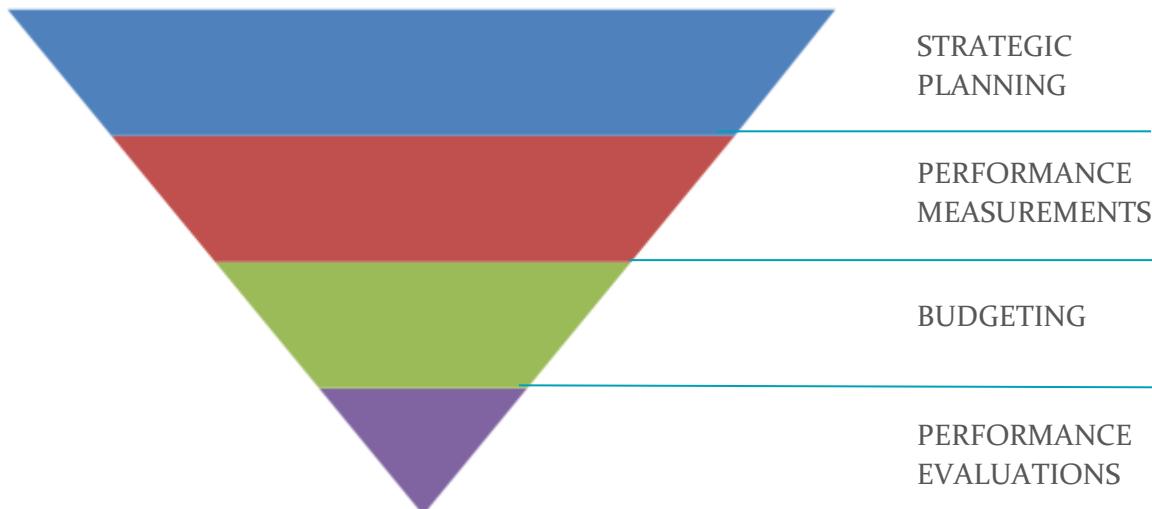
Four public workshops were held during June, July and August 2017. The workshops, held in the Founders Park Community Center, were facilitated by Village Manager Seth Lawless. The process moved forward during the workshops through the following discussion topics: Mission, Focus Areas, Goals, Objectives, Performance Measures.



The planning period of October 1, 2017 to September 30, 2023 was agreed upon by the Village Council. Rather than a traditional 5-year plan, the planning period is based on the milestone of 2023: the year the Florida Keys Area of Critical State Concern is projected to reach maximum build-out capacity.

WORKSHOP #1

Workshop #1 began with the Village Manager's explanation that the strategic planning process would essentially entail a narrowing of the focus, from strategic planning to performance measurements to lead to budgeting and performance evaluations.



The planning period of October 1, 2017 to September 30, 2023 was agreed upon, rather than a traditional 5-year planning period, based on the projected maximum build-out capacity of the Florida Keys Area of Critical State Concern in 2023.

Following identification of the planning period, the initial topic for discussion was the Village's Mission Statement. Mayor Jim Mooney acknowledged that the mission statement was created by the community, that it is a good mission statement and still relevant to this very young community. No changes were recommended or made to the Mission Statement. During discussion of the Mission Statement, it was noted that it is the Village Codes rather than the Mission Statement that must be reviewed and updated to meet the changing needs of the community such as addressing small breweries that did not exist when the Code was written.

*To Protect the Resident's Right to Quiet Enjoyment of Life
To Plan for Enhancing Our Village Character
To Preserve Our Community; Its People, Natural Resources, and Pride
To Provide Basic Services to Support our Quality of Life*
Islamorada, Village of Islands
Incorporated December 31, 1997

The process would move forward through the following discussion topics: Mission, Focus Areas, Goals, Objectives, Performance Measures. It was noted that Objectives must be measurable and that performance measurements would be developed for each Objective.

The first group exercise was to identify Focus Areas for the Strategic Plan. Following a free-flow of input from Village Council Members, Village staff and community participants, individual topics were identified and then combined into closely related topics to create fifteen agreed upon Focus Areas. (The list was reduced to fourteen with the agreement during Workshop #2 to remove a Civic Engagement category.)

THE FOURTEEN FOCUS AREAS

Land Acquisition/Conservation Properties

Streamline Business Processes/Code Review/Permit Extensions

Parking/Traffic/Public Transportation

Environmental Protection/Water Quality

Financial Condition

Village Character/Business Environment/Branding

Infrastructure/Capital Projects/Parks/Technology

Staffing: recruitment and retention

Disaster Recovery

Sea Level Rise/Climate Change

Election Cycle

Law Enforcement

Affordable Housing

What does 2023 look like?

The second group exercise was to create a SWOT analysis for each Focus Area. The SWOT analysis was a tool used to identify the strengths, weaknesses, opportunities and threats to be considered during the creation of Goals for the Strategic Plan. The SWOT analysis for all Focus Areas begun during Workshop #1 and completed during Workshop #2 is provided as Appendix A.

WORKSHOP #2

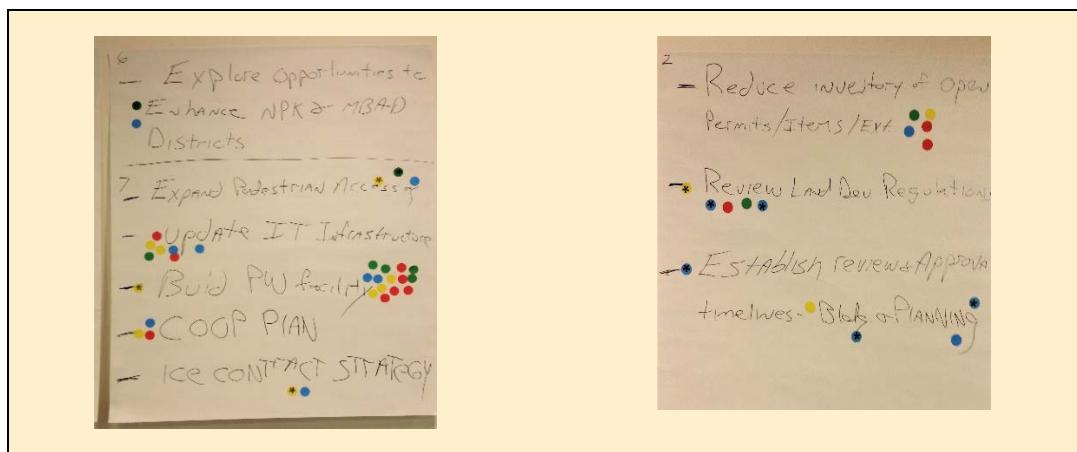
Completion of the SWOT analyses during Workshop #2 was followed by a review of the progress and accomplishments achieved for the 2014 Strategic Planning Report (Appendix B). Initial discussion was held about the Goals and Objectives to be created during future Strategic Planning Workshops.



WORKSHOP #3

The strategic planning process moved on to the development of Goals to address each of the Focus Areas identified in the first two workshops. The group was encouraged to create Goals based on the SWOT (strengths, weaknesses, opportunities, threats) analyses from the prior workshops (e.g., identifying Goals that build on a strength or eliminate a threat.) Worksheets were provided to all Village Council and staff participants in advance of the meeting to allow time for well thought out Goals to be discussed during the workshop.

Following completion of the goal identification, all Council Members and staff in attendance were given colored dots (of various colors that did not correspond to importance). Direction was given to place a dot next to Goals that they ranked as high priority.



Following completion of the prioritization exercise, Workshop #3 adjourned to allow time for the information to be compiled for presentation at a subsequent workshop.

WORKSHOP #4

At the fourth (final) Strategic Planning Workshop, the last exercise was to determine the Objectives to achieve the Goals identified and ranked at Workshop #3. A document was provided in advance of the meeting that included the rankings of the Goals identified and prioritized in order of highest to lowest rank and included a notation of the Focus Area for each Goal. Five of the Goals had received no votes during the ranking process at Workshop #3 and were noted in the document with a rank of zero. The document with the heading *Prioritization of Goals form July 12, 2017 Workshop* is provided for reference as Appendix C.

The goal of the final workshop was to identify Objectives to accomplish the identified Goals. Village Manager Seth Lawless encouraged Village Council and Village staff to offer SMART (Specific, Measurable, Achievable, Realistic and Time-bound) Objectives. During the workshop, the group completed the process through all Goals that had received three (3) or more votes and six (6) of the goals that had received two (2) votes. Due to time limitation of the workshop, Mr. Lawless received Village Council approval to complete Objectives for the final eight goals that had received one (1) or two (2) votes and have staff create a Strategic Plan for Council input and approval at a future meeting.

COMPLETING THE PROCESS

After the data from the four workshops was compiled and organized, the Village Manager identified the Village department or staff member responsible for the achievement of each Objective and set dates for completion of the Objectives. During drafting of the Strategic Plan, some goals were combined or transitioned closely-related goal. For example, the goal “Research transfer tax” was identified as a Goal during the Workshop and is included in the Strategic Plan as an Objective in Goal #7: “Acquire funding for land acquisition” because the stated intent of the proposed Transfer Tax would be to raise funds for land acquisition purposes.

With the exception of Goal #27 “Ask for more affordable housing permits”, the low-ranking Goals that had not been discussed during the Workshop #4 exercise to identify Objectives were not included in the Strategic Plan. Similarly, the Goals that received no votes during the ranking process were not included in the Plan. One higher-ranking Goal “Promote Employee Cross-training” was removed from the Plan during drafting at the discretion of the Village Manager based on the already existing cross-training of Village staff. The Goals that are not in the final Plan are provided as Appendix D.

The final step taken to complete the Strategic Plan was the transfer of the items from the existing Action Report into the Plan. The Action Report contains action items/goals identified by a majority of the Village Council during meetings for which direction has been given to accomplish the action. The former Action Items are clearly noted in the Plan by italicized font.

The Plan

The Strategic Plan is the product of a series of four public workshops attended by all members of the Village Council, Village Department Directors and other key Village staff. The Plan is comprised of 30 Goals organized generally in the order ranked during the workshop process.

The Plan combines the information gathered during the four public workshops into a guiding document to be utilized for annual goal-setting, budgeting and evaluation processes to direct the Village's actions, investments, and engagements with partners from October 1, 2017 to September 30, 2023.

The Strategic Plan is intended to serve as a roadmap to be used to prioritize resources, both financial and departmental, to achieve the identified Goals. The Plan will also serve as a management tool to evaluate performance and progress made by the Village Manager and Village departments to achieve the Goals and Objectives set forth.

For each Goal, the SMART objectives are documented, the responsible department or responsible party are identified and the date for completion of the objective is provided. The Focus Area for each Goal is noted to provide context.

The 14 Focus Areas

Land Acquisition/Conservation Properties

Streamline Business Processes/Code Review/Permit Extensions

Parking/Traffic/Public Transportation

Environmental Protection/Water Quality

Financial Condition

Village Character/Business Environment/Branding

Infrastructure/Capital Projects/Parks/Technology

Staffing: recruitment and retention

Disaster Recovery

Sea Level Rise/Climate Change

Election Cycle

Law Enforcement

Affordable Housing

What does 2023 look like?

OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #1	Build a Public Works facility Infrastructure/Capital Projects/Parks/Technology	1A: Seek long-term lease of Monroe County facility at MM 89 Oceanside. 1B: Prepare layout. 1C: Determine cost for retrofit. 1D: Identify alternate sites/properties. 1E: Determine cost for retrofit or new construction by April 2018.	1A: Village Manager 1B: Public Works Dept. 1C: Public Works Dept. 1D: Public Works Dept. 1E: Public Works Dept.	1A: June 2018 1B: June 2018 1C: September 2018 1D: September 2018 1E: September 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #2	Stay competitive with like areas Staffing: recruitment and retention	2A: Complete a salary and benefits comparison of like areas and Florida Keys municipalities by June 1, 2018.	2A: Human Resources Manager	2A: June 1, 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #3	Uniform bus stops & improvements Village Character/Business Environment/Branding	3A: Perform study to determine appropriate locations for bus stops.	3A. Public Works Dept.	3A: April 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #4	More presence on the water Law Enforcement	4A: Have local officers boat certified by December 2018. 4B: Support county-wide resolution in support of increased presence on the water by the Florida Fish and Wildlife Commission and Monroe County Sheriff's Office. 4C: Regulate liveaboard vessels.	4A: MCSO 4B: Mayor & Council 4C: Mayor & Council	4A: December 2018 4B: September 2018 4C: September 2019		

		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #5	Anchoring spot strategies Environmental Protection /Water Quality	5A: Research anchoring equipment. 5B: Identify sites for anchoring spots.	5A: Village Manager 5B: Village Manager	5A: September 2019 5B: September 2019
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #6	Update IT infrastructure Infrastructure/Capital Projects/Parks/Technology	6A: Connectivity for Public Works building, Park office and Marina office by end of fiscal year 2017-2018. 6B: Create replacement program by end of fiscal year 2018-2019. 6C: Replace audio & video equipment for meetings and broadcasts.	6A: Finance Dept. 6B: Finance Dept. 6C: Finance Dept.	6A: September 2018 6B: September 2019 6C: September 2019
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #7	Acquire funding for land acquisition Land Acquisition /Conservation Properties	7A: Research transfer tax and provide report to the Village Council regarding legality. 7B: Utilize transfer tax to purchase conservation properties and buildable upland properties. 7C: Acquire Florida Keys Stewardship Funds dedicated to land acquisition.	7A: Village Attorney 7B: Village Attorney 7C: Village Attorney	7A: November 2018 7B: October 2020 7C: Annually 2018 - 2023
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #8	Bonus policy Staffing: recruitment and retention	8A: Gather information from similar municipalities. 8B: Include in Employee Policy to be implemented during fiscal year 2018-2019.	8A: Human Resources Manager 8B: Village Attorney	8A: June 2018 8B: September 2018

OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #9	Build-out FCT parks to master plans Land Acquisition /Conservation Properties	9A: Plantation Hammocks Preserve 9B: Southwinds Park 9C: Green Turtle Hammock Park 9D: Key Tree Cactus Preserve	9A – 9D: Environmental Resources Manager	9A: September 2023 9B: September 2023 9C: September 2023 9D: September 2023		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #10	Implement traffic & parking study recommendations Parking/Traffic /Public Transportation	10A: Address new Publix development and adjoining neighborhood. 10B: <i>*Specifically consider recommendations regarding traffic calming devices on the Old Highway.</i>	10A: Public Works Dept. 10B: Public Works Dept.	10A: September 2022 10B: June 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #11	Establish expected review and approval timelines for Building and Planning items Streamline Business Processes /Code Review/Permit Extensions	11A: Establish expected review and approval timelines for Building and Planning items.	11A: Planning Dept. and Building Dept.	11A: September 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #12	Review of Land Development Regulations Streamline Business Processes /Code Review/Permit Extensions	12A: Prepare and publish RFP for consulting services. 12B: Award contract for services. 12C: Complete LDR amendments (<i>to include possible revisions to: conservation easements, increased floor area ratio for certain properties, parking regulations for commercial uses, long dock regulations, building height increase for sea level rise</i>).	12A: Planning Dept. 12B: Planning Dept. 12C: Planning Dept.	12A: March 2018 12B: June 2018 12C: June 2019		

*Items in italicized font were transferred from the Action Report rather than originating from workshop discussions.

		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #13	Examine public transportation alternatives Parking/Traffic/Public Transportation	13A.	13A.	13A.
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #14	Reduce inventory of open permits/items/extensions Streamline Business Processes /Code Review/Permit Extensions	14A: Close old permits. 14B: Implement fines and fees for non-compliance. 14C: Develop policy to limit permit extensions.	14A: Building Dept. 14B: Building Dept. 14C: Building Dept.	14A: March 2018 14B: March 2018 14C: March 2018
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #15	Investigate changes to the election cycle Election Cycle	15A: Hold Special Call Village Council Meeting to gather public input regarding change to election cycle. 15B: Meet deadlines for 2018 referendum.	15A: Village Attorney 15B: Village Attorney	15A: March 2018 15B: July 2018
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #16	Review Affordable Housing regulations for relief possibilities Affordable Housing	16A: Address during revisions to Land Development Regulations.	16A: Planning Dept.	16A: June 2019
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #17	Greater code enforcement & vacant lot use through visual corridor of US 1 Village Character/Business Environment/Branding	17A: Create Regulations to allow use of vacant lots on US 1 for business purposes with the requirement of the installation of opaque fences.	17A: Planning Dept.	17A. September 2018

OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #18	Expand Law Enforcement during peak tourist season Law Enforcement	18A: Budget additional Funds for extra employee hours during peak times. 18B: Expand enforcement and patrols on the Fills and beaches.	18A: Finance Dept. and Village Council 18B: MCSO	18A: September 2018 18B: October 2018		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #19	Expand pedestrian accesses Infrastructure/Capital Projects/Parks/Technology	19A: Complete construction of overhead pedestrian walkway at Founders Park. 19B: Complete construction of temporary overpass for US1 at Coral Shores High School.	19A: Public Works Dept. 19B: Public Works Dept.	19A: December 2019 19B: September 2023		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #20	Seek state & federal funding for water quality projects Environmental Protection /Water Quality	20A: Obtain \$20M (county-wide) Florida Keys Stewardship funds. 20B: Amend scope of work with the Army Corps of Engineers to obtain additional funding.	20A: Village Council 20B: Finance Dept.	20A: Annually 2018 to 2023 20B: September 2019		
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #21	Explore additional Founders Park programming Infrastructure/Capital Projects/Parks/Technology	21A: Research additional events at Founders Park. 21B: <i>*Seek ownership of jetty at Founders Park for consideration of development of a fishing/recreation pier.</i>	21A: Park and Recreation Dept. 21B: Village Manager	21A: September 2018 21B: September 2019		

**Items in italicized font were transferred from the Action Report rather than originating from workshop discussions.*

OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #22	Investigate and implement sea level rise infrastructure specifications Sea Level Rise /Climate Change	22A: Continue participation in Southeast Florida Climate Change Compact.		22A: Village Council	22A: Annually 2017 to 2023	
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #23	Continuity of Operations Plan (COOP) Disaster Recovery	23A: Create COOP to be included as an addendum to the Emergency Management Plan. 23B: Write a wastewater component for inclusion in the updated Emergency Management Plan.		23A: Fire Dept. 23B: Wastewater Dept.	23A: May 2018 23B: May 2018	
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #24	Be designated an All-American City What does 2023 look like?	24A: Apply for All-American City designation.		24A: Village Manager	24A: September 2023	
OBJECTIVES					RESPONSIBLE PARTY	COMPLETE BY
GOAL #25	Increase BPAS points for lot donation Land Acquisition /Conservation Properties	25A: Amend BPAS point system to increase number of points for lot donations.		25A: Planning Dept.	25A: September 2018	

**Items in italicized font were transferred from the Action Report rather than originating from workshop discussions.*

		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #26	Explore opportunities to enhance business districts (North Plantation Key and Morada Way Art & Cultural District) Village Character/Business Environment/Branding	26A: Develop and adopt a Master Plan for the Morada Way Art & Cultural District (* <i>to include additional parking</i>). 26B: Develop and adopt a Master Plan for North Plantation Key District.	26A: Planning Dept. 26B: Planning Dept.	26A: September 2019 26B: September 2020
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #27	Ask for more Affordable Housing Permits Affordable Housing	27A: Ask for more Affordable Housing Permits	27A: Village Council	27A: February 2018
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #28	*Address Plantings and other items placed in rights-of-way <i>Action Report Item</i> Village Character/Business Environment/Branding	28A: *Create Right-of-Way Ordinance	28A: Village Attorney	28A: February 2018
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #29	*Amend Impact Fee Schedule <i>Action Report Item</i> Financial Condition	29A: *Amend Impact Fee Schedule	29A: Village Manager	29A: April 2018
		OBJECTIVES	RESPONSIBLE PARTY	COMPLETE BY
GOAL #30	*Transition from contracted to in-house wastewater operations and maintenance services <i>Action Report Item</i> Financial Condition	30A: *Terminate operation portion of Wastewater Agreement. 30B: *Implement back-up staffing requirements.	30A: Village Manager 30B: Village Manager	30A: February 2018 30B: February 2018

*Items in italicized font were transferred from the Action Report rather than originating from workshop discussions.

Appendix A: SWOT Analysis of the 14 Focus Areas

Land Acquisition/Conservation Properties

<u>Strengths</u>	<u>Weaknesses</u>
State and other funds ROGO Regulatory protection GIS Quality of life	Available funding Willing sellers BPAS ranking system
<u>Opportunities</u>	<u>Threats</u>
Enhance recreation Utilize grant writer Public notifications Reduce liability	Cost of property Changing LDRs

Streamline Business Processes/Code Review/Permit Extensions

<u>Strengths</u>	<u>Weaknesses</u>
Close to electronic review implementation Best Practices Accountability	Dissatisfaction with current <ul style="list-style-type: none"> o time o cost o transparency Perception that it is difficult Need public education
<u>Opportunities</u>	<u>Threats</u>
IS-should mapping of processes Undergo 3 rd party review of Code Simplify Improve productivity Cost recovery	Staff time and willingness

Parking/Traffic/Public Transportation

<u>Strengths</u>	<u>Weaknesses</u>
Traffic study underway Regional bus service	Drawbridge Federal highway bisects community Weigh station Bus infrastructure
<u>Opportunities</u>	<u>Threats</u>
Circulator service Fast ferry Parking code review Bus infrastructure Toll proposal Traffic patterns	Cell phones Abandonment of ROWs Traffic lights

Environmental Protection/Water Quality

<u>Strengths</u>	<u>Weaknesses</u>
<p>Funding</p> <p>Preliminary engineering:</p> <ul style="list-style-type: none"> ○ Stormwater projects ○ Sea Oats Beach ○ Canal restoration projects <p>Wastewater project completion %</p> <p>Vessel pump-out program (County)</p> <p>Boating Regulations</p>	<p>Funding</p> <p>Staffing</p> <p>Trash and plastic bags</p> <p>Intergovernmental coordination</p>
<u>Opportunities</u>	<u>Threats</u>
<p>Funding for Florida Bay</p> <p>Mooring fields/anchoring fields</p> <p>Public education</p> <p>More idle zones</p> <p>Sea Oats Beach</p>	<p>Funding</p> <p>Boats moored without mooring fields</p> <p>Too popular</p> <p>Development pressures</p> <p>Sea level rise and erosion</p> <p>Invasives</p>

Financial Condition

<u>Strengths</u>	<u>Weaknesses</u>
<p>Good ad-valorem tax base</p> <p>Fund balance</p> <p>Low millage rate</p> <p>Sales taxes for infrastructure</p> <p>Grants</p>	<p>Large wastewater debt</p> <p>Wastewater is energy dependent</p> <p>Grant funding</p>
<u>Opportunities</u>	<u>Threats</u>
<p>Grant funding</p> <p>New revenue streams</p>	<p>Natural disasters</p> <p>Energy dependent</p>

Village Character/Business Environment/Branding

<u>Strengths</u>	<u>Weaknesses</u>
<p>ROW maintenance program</p> <p>Law enforcement</p> <p>Conservation lands</p> <p>Park</p> <p>Strong design review standards</p> <p>Size of lots/limited land area</p> <p>Cost of land</p> <p>Community events</p>	<p>US-1 dividing city</p> <p>Cost of doing business</p> <p>Traffic</p> <ul style="list-style-type: none"> ○ events
<u>Opportunities</u>	<u>Threats</u>
<p>Art District/Downtown</p> <p>Incentivize façade improvements</p> <p>Civic engagement</p> <p>North Plantation Key District</p> <p>Bus stops</p> <p>SBA & other resources</p> <p>Code Enforcement</p> <p>Pedestrian & biking improvements</p>	<p>Pro-growth changes to LDRs</p> <p>Corporate influences</p> <p>Lack of parking</p>

Infrastructure/Capital Projects/Parks/Technology

<u>Strengths</u>	<u>Weaknesses</u>
Community Building Administrative Building Parks Marina CityView Three Fire Stations	Lack of land mass Non-confirming businesses Funding Stormwater conveyances Lack of replacement schedule No internet redundancy Limited communications Contract with ICE – four years left
<u>Opportunities</u>	<u>Threats</u>
DOT Current studies Pedestrian overpasses CityView Street lighting Contract with ICE, Islamorada Foundation and other vendors	Increase in population DOT Climate change

Staffing: recruitment and retention

<u>Strengths</u>	<u>Weaknesses</u>
Good group now Desirable area Cross trained/many hats FRS One of best employers in the area	Applicant pool Vacation max out Lack of retention of Village Manager No growth opportunities/advancement Competitive remuneration Transportation
<u>Opportunities</u>	<u>Threats</u>
Retention strategies Advancement Partner with schools/internships Performance development plans	High cost of living Housing Other agencies

Disaster Recovery

<u>Strengths</u>	<u>Weaknesses</u>
Fire Rescue Public Works Fund balance 3 rd party contractors Highly trained staff Public awareness FEMA Mariners Hospital & supporting infrastructure	Dependence on others Complacency One way out Lack of equipment for self-sufficiency COP (continuity of operations) plans
<u>Opportunities</u>	<u>Threats</u>
Emergency Management network COP plans Strengthen WW disaster plan	Infrastructure stress (from resources coming in) Homeless population Transportation for those without vehicles Unlicensed contractors Re-entry process unclear

Sea Level Rise/Climate Change

<u>Strengths</u>	<u>Weaknesses</u>
SFRCCC and Islamorada Matters Plan US 1 partnerships (county, state)	Insurance rates Lower Matecumbe elevation Limited options
<u>Opportunities</u>	<u>Threats</u>
Infrastructure & LDR changes Living shorelines Communication to population	Economic impact

Election Cycle

<u>Strengths</u>	<u>Weaknesses</u>
2-year terms Requires referendum to change Term limits	2-year terms Long-term planning
<u>Opportunities</u>	<u>Threats</u>
Change to longer terms Seats Staggering	Turnover/entire Council could change

Law Enforcement

<u>Strengths</u>	<u>Weaknesses</u>
Own unit from MCSO Interlocal Agreement Chain of command Low crime rate Officer longevity Community support/involvement Village staff & Council support MCSO provides two positions Officers' involvement in community/public relations Sheriff has clear goals and objectives	Peak season demand Inter-agency coordination on the water Presence on the water Other agencies outside Village control Resources
<u>Opportunities</u>	<u>Threats</u>
Assist other agencies Continue to lobby (ask for more) Traffic study Utilize overtime	Attrition Housing Traffic issues

Affordable Housing

<u>Strengths</u>	<u>Weaknesses</u>
Two successful projects Studies Inclusionary zoning	Land and resources Building height Lack of public transit Oversight of eligibility
<u>Opportunities</u>	<u>Threats</u>
Increase/Improve Public transit Partner with the County Public/private partnerships Change perception Funding for rehabilitation of homes Lobby for more permits & greater density Caretaker housing for employees	Land values Rezoning for workforce housing Lose grant/bus funding NIMBY attitude

What does 2023 look like?

<u>Strengths</u>	<u>Weaknesses</u>
DEP land acquisition	
<u>Opportunities</u>	<u>Threats</u>
More building permits Identify funding to purchase lots/retire development Redevelopment Prioritize acquisitions	Takings-financial

Appendix B: 2014 Strategic Planning Report Accomplishments

2014 Strategic Planning Report Accomplishments through June 2017

On April 4, 2014, the Village Council and Department Heads participated in a Strategic Planning Workshop facilitated by Dr. Robert Lee, an advisor specializing in local government strategic planning, ethics, finance, public records, sunshine issues and charter review. During the workshop, participants discussed strengths and weaknesses of Village processes and policies and ultimately developed solutions and goals to be implemented in the near term and in the future. The goals and priorities listed below were considered during the FY 2014-2015 budget process. Accomplishments are provided in this report for consideration during 2017 Strategic Planning.

HIGH PRIORITY

EMPLOYEES: Promote happy, healthy, cooperative workforce in order to recruit and retain talented employees. [e.g., housing, cross-training]

Accomplishments:

- The Village Council approved the Village's participation in the Florida Retirement System for non-Fire Rescue personnel beginning January 2016.
- Supplemental insurance options and Employee Assistance Program added to employee benefits package in 2015.
- An Employee Wellness Program, including biometric events, Fresh Fruit Fridays, monthly fitness and outdoor group activities, wellness and fitness e-newsletters was initiated in 2015.
- Awarded American Heart Association Fit Friendly Work Place 2015 (Gold).

TRANSPARENCY/COMMUNICATION: Disseminate information in a more transparent and timely manner to the public (to improve perception; include staff and partners).

Accomplishments:

- Launched Village News e-mail distribution list in June 2014.
- Completed web portal access to current and historical building permit, planning development application and code compliance case information in CityView. Configuration of CityView modules required that existing processes be evaluated and streamlined for accurate representation of workflow in CityView. A management analyst was hired to oversee and guide this effort. The CityView portal is currently limited to viewing permits, property, and contractor licensing. By August 14, 2017 the public will have the ability to apply for building permits, apply for planning permits/licenses, file a code compliance complaint, upload documents, pay fees, request/cancel inspections, view reviews/conditions/corrections, send emails, and much more.
- Finalized three tri-fold brochures regarding Code Compliance, Solid Waste Services and Area of Critical State Concern Considerations for distribution to property owners.
- A new Village website has been developed enabling improved ability to update information. Go live is currently planned for August 1, 2017.
- Implementation of new financial management software, Incode 10, has been completed. Dashboard for access to financial information via a web portal is in process.
- New Village website in final stages of content migration for "go live" in August 2017; concurrent Facebook page introduction being considered.

ENVIRONMENT: Protect and enhance the environment (water quality and natural resources) through policy.

Accomplishments:

- Since 2015, Monroe County vessel pump-out program has been made available to all Islamorada vessels upon request.
- The Village's \$160 million wastewater collection and transmission system capital project was effectively completed in December 2015.
- Code Compliance activities related to wastewater connection requirements have been prioritized resulting in an overall connection rate of 83% as of May 2017.
- Implemented a Community Development Block Grant program for wastewater connection cost assistance to those that qualify; assisted 41 residents with sewer connection through the program.
- Completed three canal restoration capital projects utilizing weed barrier and aerator technologies.
- Hired a part-time Environmental Coordinator to allow the Environmental Resources Manager to focus on managing the Village's conservation areas and passive parks purchased with state grants, canal restoration projects and Sea Oats Beach.
- Adopted balloon ban ordinance in November 2016.

DISASTERS: Minimize vulnerability to natural disasters.

Accomplishments:

- Increased level of unassigned General Fund fund balance for costs associated with potential disaster recovery. Unassigned fund balance on September 30, 2014 was \$2,763,824 (25%); on September 30, 2015 was \$4,124,805 (39%); and unaudited balance on September 30, 2016 was \$4,331,883 (35%).
- Continue to require Village staff assigned to the Emergency Operations Center to train in and maintain knowledge of Incident Management System along with regular position responsibilities.
- Attained a level 6 rating after two years of participation in the Community Rating System; hired consultant to assist in the process and identify programs.
- Various members of staff have attended training on debris management, new federal rules relating to procurement and reimbursement from FEMA, and post-disaster initial assessments.

STABLE MANAGEMENT/TEAM BUILDING: Improve stability of Village Management and team-building to be able to accomplish Village goals.

INTERMEDIATE PRIORITY

FUNDING/PARTNERSHIPS: Build partnerships to secure funding, reduce unfunded mandates and cooperate with Monroe County on environmental issues.

Accomplishments:

- Utilized piggy-back on Monroe County RFP for sustainability action plan to achieve competitive cost and timely completion of sea level rise/sustainability action plan.
- Councilmembers began participating in the Southeast Florida Regional Climate Change Compact and Leadership Summits in 2014. Staff began participation in 2013.
- Combined federal lobbying efforts with the KLWTD and the City of Marathon to secure US ACOE funding for water quality projects, especially wastewater.

- Increased involvement and participation on the National Marine Sanctuary Water Quality Steering Committee Canal Restoration Subcommittee providing funding from Department of Environmental Protection (DEP) and Environmental Protection Agency (EPA) with Monroe County and other other agencies.

COMMUNITY HEALTH: Encourage health and wellness programs for the community.

Accomplishments:

- Rarely used skate park in Founders Park replaced with outdoor fitness facility, exercise equipment and a pickleball court. Equipment purchase approved by the Village Council in July 2015; facility opened in April 2016.
- New contract with a Fitness Program Operator approved following sealed bid process in April 2016 expanding fitness programs offered by the Village.
- In 2015, Aquafit program added to already existing swimming, diving, tennis, and team sport/fitness programs.
- Competed and won 2017 Healthy Weight Challenge from the Florida Department of Health.
- Additional and improved playgrounds and new beach pavilion added to Founders Park beach in 2014 and 2015.

INFRASTRUCTURE: Address infrastructure needs to include Council Chambers and Public Works facilities. (Funding sources must be addressed.)

Accomplishments:

- Impact Fee Study completed in June 2016 would establish a General Government Impact Fee category from which governmental infrastructure needs relating to new growth could be partially funded.

LOWER PRIORITY

SOCIAL/CULTURAL: Create social and cultural opportunities that go beyond drinking and fishing.

TECHNOLOGY: Utilize technology to provide increased efficient and cost-effective services that improve our quality of life without unreasonably impacting our quiet enjoyment of life.

Accomplishments:

- Implemented CityView for permitting, licensing, development application processing and code compliance case management was completed. Implementation included a web portal for access to information by the public beginning in December 2014. Electronic plans review and submission of applications and payment of related fees is in process with a “go live” date planned for August 14, 2017.
- Implemented Incode 10, a financial management software application, for use in the Finance Department and by all departments for submission of purchase requisitions and access to budget v. actual information. The software has improved the efficiency of the accounts payable, purchasing, payroll, cashiering and financial reporting processes of the Village thereby enabling existing staff to accept other responsibilities.

EDUCATION: Encourage educational outreach opportunities.

Accomplishments:

- In 2014 and 2015, the sea level rise planning project included community workshops and public outreach at local events to gather input and share information.
- In 2015, staff organized and hosted an Earth Day Event at Community Center.
- Village Council workshop with large public outreach effort conducted in February 2016 to encourage public input on ways to improve local quality of life.
- Classes open to the public were conducted at Green Turtle Hammock in 2016 in cooperation with the Extension Service.
- A marine biology day has been added to the Village's summer camp program.
- Outreach events to be scheduled to provide information and training for public use of CityView portal.

Priorities identified and not ranked - being addressed at time plan was created

VILLAGE CENTER / COMMUNITY CHARACTER: Create a Village "Center" that embraces and enhances our community character while managing growth and conserving the environment.

Accomplishments:

- Initiated in November 2014 and effective in July 2016, new development over 10,000 square feet is restricted.
- Initiated in November 2014 and effective in August 2015, regulations were created to allow microbreweries and brew pubs.
- In September 2015, Village staff assisted the Morada Way Arts District with an "Our Town" grant submission to fund planning for improvements in the Art District. (Grant was not awarded to the Art District.) Village staff has continued to collaborate with the Art District regarding future improvements.
- In 2015, Council approved approximately \$136,000 for the Village's portion of FDOT expenditures to relocate the bike path to allow for desired parking spaces in the Art District. \$73,000 authorized by Resolution No.15-01-13 and \$62,766 authorized by Resolution No. 15-03-22. In March 2017, stop signs were removed to create additional parking along the Old Highway in the Art District.
- In 2016, annual commercial BPAS square footage reduced from 15,000 annually to 2,500 annually.
- Initiated a Parking Master Plan in June 2017 to evaluate existing parking conditions and provide recommended solutions and improvements to enhance existing parking and provide new parking.

WASTEWATER: Complete wastewater project with focus of improving the condition of the Village, both environmentally and aesthetically.

Accomplishments:

- Achieved final completion of wastewater collection and transmission capital project (with transmission to the Key Largo Wastewater Treatment District) in December 2015 through the Design/Build/Operate contract with Reynolds Water Islamorada, meeting the state mandated deadline. Completed the original Grinder Pump Program and the paving of all Village roadways.

Appendix C: Prioritization of Goals from July 12, 2017 Workshop

Votes	Goals	Objectives
15 Total 1 Council 14 Staff	Build a Public Works facility Infrastructure/Capital Projects/Parks/Technology	
12 Total 1 Council 11 Staff	Stay competitive with like areas Staffing: recruitment and retention	
9 Total 3 Council 6 Staff	Uniform bus stops & improvements Village Character/Business Environment/Branding	
9 Total 0 Council 9 Staff	More presence on the water Law Enforcement	
7 Total 3 Council 4 Staff	Anchoring spot strategies Environmental Protection /Water Quality	
7 Total 0 Council 7 Staff	Update IT infrastructure Infrastructure/Capital Projects/Parks/Technology	
6 Total 3 Council 3 Staff	Research transfer tax Financial Condition	
6 Total 1 Council 5 Staff	Bonus policy Staffing: recruitment and retention	

Votes	Goals	Objectives
6 Total 1 Council 5 Staff	Build-out FCT parks to master plans Land Acquisition /Conservation Properties	
6 Total 1 Council 5 Staff	Implement traffic & parking study recommendations Parking/Traffic /Public Transportation	
5 Total 3 Council 2 Staff	Establish expected review and approval timelines for Building and Planning items Streamline Business Processes/Code Review/Permit Extensions	
5 Total 3 Council 2 Staff	Review of Land Development Regulations Streamline Business Processes/Code Review/Permit Extensions	
5 Total 1 Council 4 Staff	Examine public transportation alternatives Parking/Traffic/Public Transportation	
5 Total 1 Council 4 Staff	Promote employee cross-training Staffing: recruitment and retention	
5 Total 0 Council 5 Staff	Reduce inventory of open permits/items/extensions Streamline Business Processes/Code Review/Permit Extensions	
4 Total 3 Council 1 Staff	Investigate changes to the election cycle Election Cycle	

Votes	Goals	Objectives
4 Total 2 Council 2 Staff	Review Affordable Housing regulations for relief possibilities Affordable Housing	
4 Total 1 Council 3 Staff	Regulate liveaboard vessels Environmental Protection /Water Quality	
4 Total 1 Council 3 Staff	Purchase buildable upland properties Land Acquisition /Conservation Properties	
4 Total 1 Council 3 Staff	Greater code enforcement & vacant lot use through visual corridor of US 1 Village Character/Business Environment/Branding	
3 Total 3 Council 0 Staff	More deputies Law Enforcement	
3 Total 2 Council 1 Staff	Expand pedestrian accesses Infrastructure/Capital Projects/Parks/Technology	
3 Total 1 Council 2 Staff	Replacement funds for equipment (establish equipment reserves) Financial Condition	
3 Total 1 Council 2 Staff	Seek state & federal funding for water quality projects Environmental Protection /Water Quality	

Votes	Goals	Objectives
3 Total 1 Council 2 Staff	Explore additional Founders Park programming Infrastructure/Capital Projects/Parks/Technology	
3 Total 1 Council 2 Staff	Investigate and implement sea level rise infrastructure specs Sea Level Rise/ Climate Change	
3 Total 0 Council 3 Staff	Investigate county-wide transportation group Parking/Traffic/Public Transportation	
3 Total 0 Council 3 Staff	Acquire funding for land acquisition Land Acquisition /Conservation Properties	
3 Total 0 Council 3 Staff	Additional training Staffing: recruitment and retention	
3 Total 0 Council 3 Staff	Continuity of Operations Plan (COOP) Infrastructure/Capital Projects/Parks/Technology	
2 Total 1 Council 1 Staff	Expand Code with citations (the Fills, beaches, etc.) Law Enforcement	
2 Total 1 Council 1 Staff	Cut taxes Financial Condition	
2 Total 1 Council 1 Staff	Be designated an All-American City What does 2023 look like?	

Votes	Goals	Objectives
2 Total 1 Council 1 Staff	Improve Wastewater CEM Plan Disaster Recovery	
2 Total 1 Council 1 Staff	Increase BPAS points for lot donation Land Acquisition /Conservation Properties	
2 Total 1 Council 1 Staff	Explore opportunities to enhance business districts (North Plantation Key and Morada Way Art & Cultural District) Village Character/Business Environment/Branding	
2 Total 1 Council 1 Staff	Seek public/private partnerships Environmental Protection /Water Quality	
2 Total 1 Council 1 Staff	ICE Contract strategy Infrastructure/Capital Projects/Parks/Technology	
2 Total 0 Council 2 Staff	Expand communications to citizens, businesses and visitors Village Character/Business Environment/Branding	
2 Total 0 Council 2 Staff	Infrastructure replacement schedule Infrastructure/Capital Projects/Parks/Technology	
1 Total 1 Council 0 Staff	Ask for more Affordable Housing Permits Affordable Housing	

Votes	Goals	Objectives
1 Total 1 Council 0 Staff	Redevelopment processes & guidelines What does 2023 look like?	
1 Total 1 Council 0 Staff	Request additional market rate permits What does 2023 look like?	
1 Total 0 Council 1 Staff	Study facade grants Village Character/Business Environment/Branding	
0	Carry 25% - 35% Fund Balance Financial Condition	
0	Develop Affordable Housing incentives Affordable Housing	
0	Partner with public & private agencies Affordable Housing	
0	Team-building activities Staffing: recruitment and retention	
0	Additional storm prep communications Disaster Recovery	

Appendix D: Goals not included in Strategic Plan

Goal: Promote Employee Cross-training Focus Area: Staffing: recruitment and retention	Priority Votes: 5
Goal: Seek public/private partnerships Focus Area: Environmental Protection/Water Quality	Priority Votes: 2
Goal: ICE Contract strategy Focus Area: Infrastructure/Capital Projects/Parks/Technology	Priority Votes: 2
Goal: Expand communications to citizens, businesses and visitors Focus Area: Village Character/Business Environment/Branding	Priority Votes: 2
Goal: Infrastructure replacement schedule Focus Area: Infrastructure/Capital Projects/Parks/Technology	Priority Votes: 2
Goal: Redevelopment processes & guidelines Focus Area: What does 2023 look like?	Priority Votes: 1
Goal: Request additional market rate permits Focus Area: What does 2023 look like?	Priority Votes: 1
Goal: Study facade grants Focus Area: Village Character/Business Environment/Branding	Priority Votes: 1
Goal: Carry 25% - 35% Fund Balance Focus Area: Financial Condition	Priority Votes: 0
Goal: Develop Affordable Housing incentives Focus Area: Affordable Housing	Priority Votes: 0
Goal: Partner with public & private agencies Focus Area: Affordable Housing	Priority Votes: 0
Goal: Team-building activities Focus Area: Staffing: recruitment and retention	Priority Votes: 0
Goal: Additional storm prep communications Focus Area: Disaster Recovery	Priority Votes: 0