

MEMORANDUM

TO: CRC STRATEGIC PLANNING FILE
FROM: WCG
DATE: JANUARY 16, 2020
RE: CONFERENCES WITH PINELLAS COUNTY

.....

After going online to see if Pinellas County had a strategic planning process, on October 10, 2019, I spoke by telephone with Hank Hodde, who is in the Department of Administration and provided me some background information regarding their strategic planning process. He indicated he was not primarily involved in the initial strategic plan and suggested he would speak to others in his department and locate the best person to speak with us. Subsequently, the chair, Ms. Santiago, identified Aubrey Phillips as a responsible person knowledgeable about the strategic planning of Pinellas County and I undertook to communicate with Ms. Phillips.

Ms. Phillips was very helpful and we had a lengthy, productive conversation. We discussed some of the differences in our two forms of government that may impact strategic planning and the ability of local government to maintain long-term initiatives. As explained by Ms. Phillips, she works for Pinellas County in the office of the County Administrator and her team is part of the Office of Management and Budget of the County Administrator. Pinellas County is governed by a county commission and they do not have term limits. She believes their strategic plan has been effective in part because the county commission was integrally involved in creating it, there was high buy-in by the commission, and there is long-term continuity of the county commission. She also

mentioned that they limited the strategic plan to five strategic goals which are broad, thereby helping transition to priorities and obtain buy-in from the community. They are presently in the process of working to bring all departments' and agencies' "work plans" into alignment with their strategic plan. Getting every agency and department "on line" has been a work in progress.

The strategic plan is brought to the Board of County Commissioners during the first workshop of each new calendar year and is vetted and reviewed by the County Commission. The analysis and report for the Board is prepared by a team of six people with one lead and five assistants, who are part of the Office of Management and Budget. Presently they are looking at initiatives by all departments and agencies and attempting to establish milestones consistent with the strategic plan so the Board can annually review progress by each component of the government.

Ms. Phillips strongly believes that in order for the strategic plan to be effectively created and then implemented and monitored for accountability, it requires a dedicated staff. In Pinellas, the staff is housed in the County Administrator's office. This is particularly effective since all agency and department budgets come through their office and, ultimately, the budget drives accountability for compliance with the strategic plan.

In terms of community engagement and creation of the strategic plan and ongoing engagement, Ms. Phillips was not involved with the original creation of the plan, but understands it was based upon substantial input from community stakeholders and citizens with direct Board of County Commissioners involvement. At the time, they did some town hall meetings and they continue to do so on an annual basis. They also do "pop up" events where the community may be gathered for activities or attractions and an

event is held where the people are already gathered to get their input. They also do an online citizen "value survey" to get citizens' input as to how they view the success of the strategic plan. They have the survey online and they also do a telephone survey conducted by a hired vendor who does sampling. They presently sample some 800 residents and they are advised the survey has 95% accuracy. They intend to expand the sample size to get as close to 100% as they can.

Pinellas County is getting ready to do a relook at the strategic plan and they are employing an outside facilitator to assist with the process. Ms. Phillips believes it is critical to have an outside facilitator skilled in the process so as to have people focused on the big picture and not get mired in initiatives and activities as opposed to major goals and long-term planning. In talking to "peer" communities, it is her understanding that most strategic plans cover a ten-year span with a review or "refresh" on a much more frequent basis. She indicated that in Pinellas County, they are not doing a strategic plan for constitutional officers and independent authorities, although those entities have voluntarily started providing analysis of their activities as it supports the plan. Their hope is to bring all entities into more close alignment with the plan as they go forth.