

KEY WEST 2020 - 2024



# PROPOSAL FOR STRATEGIC PLANNING SERVICES

RFP# 005-20

ELISA LEVY CONSULTING

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## I. Introduction



**“A goal without a plan is just a wish.”**

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*Antoine de Saint-Exupery*

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### **Why Does Key West Need a Strategic Plan and Why Now?**

Key West is a community like no other. In a recent article, tourist and journalist Buzz Thomas observed, “Flying into Key West is like dropping into a bowl of sunshine and flowers.” He had an even more astute observation about the community: “Before scientists ever mentioned global warming, Key Westers understood that what unites us is more important than what divides us.” Most of us realize on a daily basis what good fortune we have to live here.

At this critical time, our good fortune is challenged. The current health pandemic of COVID-19 will have a potentially profound impact on the island’s economy. Beyond that immediate need, we have a housing and labor shortage. We are amongst the most vulnerable communities in North America for sea levels-rising and hurricanes damage. We face the need to be more environmentally self-sufficient, and we are continuously striving to maintain our ports, streets and fairways. Key West is not “business as usual.” These competing, even overwhelming challenges call for strategic deliberation. The first step is prioritizing the needs, and creating a plan of action.

### **A Strategic Plan as a “Blue Print for Action”**

In the last decade, the City of Key West has operated without a solid Strategic Plan. To some, the exercise seems lofty. The problem, however, isn’t the plan, it is the execution of it.

The proposal that follows describes a Strategic Plan that acts as a “blue print” for action. The Plan sets priorities and actions with time-lines to achieve them. It is tied to the Municipal budget and a funding strategy, and it includes systems of accountability. The plan engages Key West Citizens and is a “living, breathing” document that can adapt to new needs and challenges.



### **How Does This Proposal Differ from Others?**

The Commission will receive many proposals for a Strategic Plan. The steps in all of them will most likely be similar. This proposal, however, will differ from them in three ways: 1) It involves a Community Based Approach that takes into account the opinions of a diverse population, and keeps Citizens engaged throughout the process; 2) There is an “internal component” that focuses on the needs of City Employees – the implementors who make the plan happen; and, 3) the process is driven by a community member and business owner who has been in the Keys for two decades, and understands the needs as an “insider.”

The proposal that follows describes in detail the steps needed to form a solid and achievable Strategic Plan for 2020-2024. The process starts with an inclusive and widespread Stakeholder Analysis. Using that information as a guide, City Leadership<sup>1</sup> will create a Strategic Plan with goals, objectives, and measurable results. That Strategic Plan will be turned into annual “Work Plans” that detail and timeline specific actions to be taken in each fiscal year. The plan will be “branded” and shared with the community continuously, and evaluated quarterly.

### **In sum**

The Strategic Plan isn’t the answer to all of our community’s problems; but it is the path to prioritizing solutions, and staying accountable. In the words of Yogi Berra, “If you don’t know where you’re going, you might not get there.” To maintain our status as one of nation’s most desirable places to live and visit, we must know where we are going and have a plan to get there. We all recognize every day what Buzz Thomas saw in us – that we are a “united community” on an island of “sunshine and flowers,” but now more than ever, we need to keep it that way.

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<sup>1</sup> City Leadership refers to the Mayor, Key West City Commission Members, The City Manager, Assistant City Manager, the City of Key West Department Heads and the Strategic Action Planning Committee. It may also include as needed Managers and Key West City Commission Committee Members.



## II. Stakeholder Analysis (SWOT)



*"There is no power for change greater than a community discovering what it cares about."  
- Margaret J. Wheatley*

The success of a Strategic Plan depends on widespread input from the Key West community on the Strengths, Weaknesses, Opportunities and Threats (SWOT) for two reasons. First, it provides clarity on what matters most to Citizens; and second, it creates buy-in and support for the Plan.

The Stakeholder Analysis will extend beyond groups accessed in the City's past plans, to include businesses of all kinds, public institutions, civic groups, medical personnel, teachers and youth. The process consists of three steps: 1) Data gathering; 2) A review of existing reports and plans; and, 3) Presentation of a summary report. These steps will be the foundation for the three-year plan.

### 1. Data Gathering

The data gathering phase will take approximately three months. The Facilitators will use a variety of methods to reach citizens. To standardize feedback, all participants will be asked to take the same 10 question survey administered via E-surveys (Survey Monkey), Live Polling (Zeeting), and interviews (with individuals and focus groups). The survey will begin with a brief "snap shot" of the major projects planned and underway. The Facilitators will present a draft survey to City Leadership for approval prior to the implementation. Below is a sample list of Stakeholders, (not exhaustive), and methods of data gathering:





Stakeholder(s)	Method of Data Gathering
<b>General Population</b> of Key West (Long-time residents, partial-year residents)	Survey Monkey Mass E-surveys sent to Citizens posted on the City’s website, social media, radio and print
<b>KW City Commissioners, Leadership, City Employees and Department Heads</b>	Survey Monkey via email/text and interviews
<b>City Boards and Commissions</b> (BVRAC, LRA, Parks and Rec Board, SAB, Beautification Committee, Etc.)	Zeeting Live Polling at Meetings, focus groups and interviews
<b>Public Institutions</b> (Police and Fire Departments, School Board, Keys Energy, FKAA, KW Schools – Teachers Students, Etc.)	Zeeting Live Polling at Meetings, focus groups and interviews
<b>Businesses and Business Organizations</b> (Chamber of TDC, Rotaries, Lodging Association, KWAR, KW Business Guild, Lower Keys Medical Center, Etc.)	Zeeting Live Polling

## 2. Review of Existing Surveys and Plans

Past research and plans and from other communities can be instructive in the strategic planning process. The Facilitators will review information/documentation in three areas: 1) **Past Studies and Reports on Key West** (E.g., Key West Strategic Plans, The Citizen Survey of 2015, Bureau of Economic and Business Research of 2018 from the University of Florida, The current Monroe County Strategic Plan, Annual Surveys from the Chamber of Commerce, and relevant internal Employee Surveys (FKCC, the Key West City Police Department, Etc.); 2) **Current Plans** underway in the City of Key West (Infrastructure, Mitigation, Utilities, Pavement Plans, Etc.); and, 3) **Other Municipal plans** with similar challenges, (E.g., coastal areas, cities with a high rate of tourism and affordable housing shortages, Etc.)

## 3. The Summary Report

Quantitative data, (rated answers from the E-surveys, live polling and hand-written surveys), will give the City Leadership a quantifiable “snapshot” of the key priorities in the community across the board. Qualitative data, (narrative from the surveys, focus groups and interviews), will be collated by the Facilitators and presented in one summary report with the survey results clarifying common themes, needs and concerns.

A comprehensive, inclusive and extensive Stakeholder Analysis is the most instructive part of the Strategic Planning process. Without input from a wide variety of community members the Plan’s architects have neither specific insight into thoughts of Community members, nor the support to carry out the plan.



### III. Creating the 2020-2024 Strategic Plan for the City of Key West



*“Failing to plan is planning to fail.” - Winston Churchill*

A strong Strategic Plan requires a commitment that begins with the big picture needs, and funnels down into specific actions steps and a system to ensure accountability. The Plan consists of five parts:

1. **Strategic Directives:** What are our major goals and priorities?
2. **Outcomes:** What will change/improve as a result of achieving each Strategic Directive?
3. **Initiatives:** What are the major action steps that we must take to achieve our Outcomes?
4. **Performance Indicators:** What are the main milestones we need to achieve, and when must we accomplish them?
5. **Budget Allocations:** What is the estimated cost per Strategic Initiative? What is the City’s contribution and how much do we need to raise?

The Strategic Plan is accompanied by annual **Work Plans** per Strategic Directive that include detailed actions, time-lines and person(s) responsible, and an annual **Resource Mobilization Plan** that outlines the methods of financing each Initiative.

The process of creating the plan involves five steps, including a series of **Full-Day Workshops** and **Resource Meetings**, (described on page 7). In the fourth quarter of each year, another Full-Day Workshop and series of Resource Meetings will be held to plan the following year’s Work Plan.

#### **The Strategic Planning Action Committee (SPAC)**

The SPAC is a group of 5 to 7 individuals from the Community, selected by the Commission to advise and participate in the planning process. SPAC members may represent City Committees and/or have expertise in public administration, business or strategic planning. The SPAC should be involved from inception to completion. Their role is to bring to the table specialized knowledge and guidance to ensure that the plan is well supported and in line with community priorities.



## **EXAMPLE OF A STRATEGIC PLAN**

### **STRATEGIC DIRECTIVE, OUTCOMES, INITIATIVES, PERFORMANCE INDICATORS, AND BUDGET ALLOCATION**

#### **STRATEGIC DIRECTIVE #1:**

#### **INCREASE AFFORDABLE HOUSING IN KEY WEST**

#### **OUTCOMES:**

- INCREASED AVAILABILITY OF VERY LOW AND LOW INCOME HOUSING
- ESTABLISHED PRIVATE DEVELOPER TO PARTNER WITH THE CITY

#### **INITIATIVES:**

- ESTABLISH A COMPREHENSIVE CITY-WIDE PLAN ON HOUSING TO BUILD VERY LOW, LOW AND MEDIAN INCOME HOUSING UNITS
- DEVELOP AN RFP FOR A PUBLIC-PRIVATE PARTNERSHIP TO DEVELOP 10 MEDIAN INCOME HOUSING UNITS IN THE KMART PLAZA
- PREPARE A PROPOSAL FOR STATE FUNDING TO PRESENT TO THE LEGISLATURE FOR FUNDING IN 2021 (ETC...)
- BUILD 50 UNITS OF HOUSING FOR FAMILIES EARNING BELOW 100% OF THE AREA MEDIAN INCOME

#### **PERFORMANCE INDICATORS:**

- CITY WIDE PLAN IS APPROVED BY FEBRUARY 2021
- RFP IS POSTED BY JANUARY 2021 AND PARTNER SELECTED BY APRIL 2021
- PLANS APPROVED FOR KMART PLAZA BY JULY 2021
- BUILDING BEGINS BY OCTOBER 2021 (ETC...)

#### **ESTIMATED BUDGET ALLOCATION:**

- OVERALL BUDGET: \$40 MILLION
- CITY OF KW ALLOCATION: \$3 MILLION





### **Step 1: Workshop #1**

#### Develop Strategic Objectives and Outcomes for 2020 – 2024

Using the information gathered the Stakeholder Analysis, the Facilitators will hold the first day-long workshop with City Leadership to present the summary findings. The group will **identify and prioritize Strategic Directives for 2020 – 2024**, (E.g., Economic Revitalization post COVID-19, Affordable Housing, Revitalization of Duval Street and Mallory Square, KOTS, Pavement Management, Bayview Park, Etc.), and clarify **Outcomes for each Strategic Directive**.

### **Step 2: Resource Meetings Round #1**

#### Develop Initiatives, Performance Indicators, and Budget Allocations for 2020 – 2024

Individuals in City Departments, and Committee Members will work with Facilitators to draft specific **Initiatives, Performance Indicators and Budget Allocations** for each Strategic Directive. They will work closely with the Director of Finance to suggest potential budget allocations and plans for each Initiative.

### **Step 3: Workshop #2**

#### Finalize Draft of the Strategic Plan for 2020-2024

The second workshop will be dedicated to refining the details of the plan, reviewing suggested budget allocations, and revising key components of the plan.

### **Step 4: Resource Meetings Round #2**

#### Develop Work Plan for 2021-22 FY and Resource Mobilization Plan

After finalizing the Strategic Plan for 2020 – 24, the Facilitators will engage key departments and individuals to develop an annual Work Plan the details each initiative and corresponding actions for the year. The Work Plan is a chart with deadlines attached, and serves as basis for quarterly monitoring and evaluation. (See example on page 8.)

### **Step 5: Key West City Commission Meeting**

#### Approval of Strategic Plan, Corresponding Work Plan, and Resource Mobilization Plan

The last step is to present the final Strategic Plan, and Work Plan for approval at a Commission Meeting.



**Example Work Plan Per Year: 2021-22**

<b>Strategic Directive 1: Increase Affordable Housing in Key West</b>				
<b>Strategic Initiatives</b>	<b>Action Steps</b>	<b>Time Frame</b>	<b>Person or Dept Responsible</b>	<b>Budget Allocation</b>
<b>Strategic Initiative 1:</b> Prepare a Proposal to the State Legislature to lobby for funding in 2021	1. Identify funding opportunities 2. Contact State and Local Reps to gathering information on priorities for 2021 3. Work with City Attorney’s office to prepare a plan for meeting prior to funding discussions in Tallahassee, Etc.	August 2021 November 2021 January 2021	Department x	
Strategic Initiative 2: Etc				

Democracies are messy. The parts and steps of creating a Strategic Plan are time consuming, laborious and often contentious. Once completed, however, the process leads to an act of great intention and clarity. It gives leaders the direction, authority and support they need to make meaningful and long-lasting change in a community.



## IV. Monitoring, Evaluation and Ongoing Planning



*“Accountability is the glue that ties commitment to results.”*

- Bob Proctor

### Monitoring and Evaluation

The past is an excellent teacher. One of the lessons learned from the last decade of Strategic Plans in Key West is that in order for it to work, there must be a system in place for measurement and accountability. The **Monitoring and Evaluation** process for the proposed 2020-24 Strategic Plan will ensure accountability via two channels: 1) **Quarterly Updates in writing** on the Work Plans per individuals/departments. The updates will be presented prior to the Quarterly Workshops; and, 2) **An Annual Evaluation conducted by the Facilitators** based on Performance Indicators and Outcomes. The Evaluation will include results from a **Community “Pulse” Survey**, (described on Page 9).

#### 1. Quarterly Updates and Check Ins at the Commission Workshops

Facilitators will work with Department Heads on a quarterly basis to update the annual Work Plan. At this time, modifications can also be made to the Work Plan as needed. The updates will be presented at the Key West Commission’s Quarterly Workshops.

#### 2. Annual Evaluations of the Strategic Plan

Prior to the end of each fiscal year, the Facilitators will submit a report to the Commissioners, SPAC, and City Leadership on the progress of the Strategic Plan based on the Performance Indicators and Outcomes. They will also provide an overall summary of progress on the Work Plan. This documentation will serve as the foundation for the discussion and planning for the subsequent year’s Work Plans.



## Ongoing Planning for 2020 – 2024 and Annual Strategic Planning Workshops

### Community Pulse Survey

The Key West Community will be engaged in the Strategic Plan every step of the way. In the last quarter of each fiscal year, a sample of Stakeholders who took part in the original Analysis will receive a short five-question survey to measure their awareness of the Plan’s progress, and their priorities for the year ahead. Feedback from the Pulse Survey will be considered in the Annual Workshop and added to the Plan as directed by City Leadership.

In the fourth quarter of each fiscal year, there will be an opportunity to process the results of the annual Evaluation, adjust the Strategic Plan and prepare the following year’s Work Plan.

The annual workshop should take place in March 2022 and 2023 in accordance with the beginning of the budgeting process. Through Resource Meetings, the Facilitators will work with individual Departments and Committees to draft and Annual Work Plan. The Plan will be submitted to the Commission for Approval at a Commission Meeting prior to approval of the Budget.

Any good plan will fail without follow up and measurement. The key to action is clear goals, consistent check ins, and revisions as necessary to accommodate the unexpected. The plan itself does not incite change; the power lies in execution.



## V. Branding and Public Education



*“A brand is a promise. A good brand is a promise kept.”*

*- Muhtar Kent*

Key Westers love their community and they want to see it thrive. The Strategic Plan should excite them about the future, and give them a sense of pride in their community and hope for a brilliant future. The architects of the Plan have to share it in a way that reaches citizens and ensures their voices are heard. There are two ways to do achieve these results: **1) Branding; and 2) Public Education.**

### 1. Branding

Having a specific brand will help the community recognize immediately the goal and focus of the plan itself. With so much information being thrown at us simultaneously on a daily basis, we often lose track of the big picture. By branding the plan on social media, print media, publications and reports, everyone will be alerted to the purpose. This process increases awareness overall, and it incites a sense of inspiration about the future.

### 2. Public Education

On average, it is estimated that people need to see or hear a piece of information three times before they retain it. Stakeholders must receive regular updates on the progress of the Plan. On bi-monthly basis and when there is a major gain or accomplishment achieved in the plan, the Facilitators will work with the Public Relations Department of the City of Key West to share the information via social media, print media, radio, Twitter, our Website and E-blasts/texts to the community.



The only thing more important than asking people’s opinions, is making sure to follow up on them. A strategic plan may seem academic or bureaucratic to many at first glance. Once, however, people realize that their opinions were heard, and when they see them put into action, the plan becomes the hope and vision of the community.

## **VI. Mission, Vision and Core Values Revision**

In November 2019, the Commission and Department Heads reviewed the current Mission and Vision Statements, and suggested changes to update the verbiage. During the First Workshop, participants will review the drafts, and agree on the final verbiage (as drafted by the facilitators and vetted by the Commission and City Manager prior to the meeting).

The revised mission and vision statement will be included in the public education initiatives to the community.

## **VII. The City of Key West’s Internal “Employee Engagement” Plan**



*"The greatest compliment that was ever paid me was when one asked me what I thought, and attended to my answer."*

— Henry David Thoreau

A Strategic Plan is only as good as the people who carry it out. Employee retention is a challenge for most businesses in Key West, and the City is no different. For many Key West City employees, their commitment to service and the community are what keep them going. It is important for leadership to assess the needs of the employees in a way that allows for anonymous, genuine feedback. The information can be used to better their work lives and promote longevity.





An Employee Engagement Plan is not traditionally part of a Municipal Strategic Plan, but the Facilitators of this plan would highly recommend as an integral part of the process.

If approved by the Commission, the process would entail three steps: 1) **Employee Engagement Survey (EES)**; 2) **Plan Development** with Department Heads under the guidance of Human Resources; and, 3) **Monitoring and Evaluation of the Plan** once approved by the Commission. Each component is described below.

### **1. Employee Engagement Survey (EES)**

The survey will be administered via Survey Monkey to ensure anonymity. The survey will include up to 20 questions, mostly rated with an opportunity for narrative at the end. The Facilitators and Human Resources will submit the questions to the City Manager for approval before administering the survey.

### **2. Plan Development**

Based on the results, the Facilitators will prepare draft recommendations that are feasible and affordable based on survey feedback. These recommendations will be vetted by Human Resources first, and then shared with Department Heads to refine them prior to presenting them to the City Manager. The Facilitators will work with the City Manager to finalize the plan, and present it to the Commission for review.

### **3. Monitoring and Evaluation**

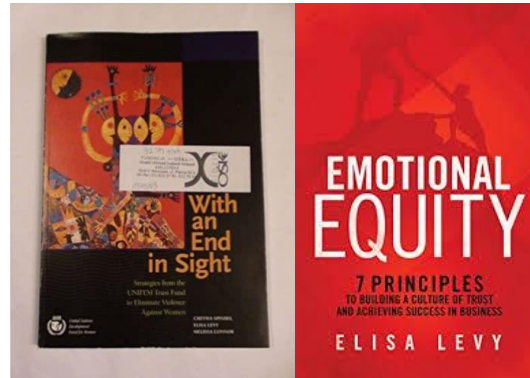
As part of the quarterly and annual review process of the City Strategic Plan, the Facilitators will include a progress report on the Employee Engagement Plan. The survey will be administered annually to measure progress and update the plan.

**Note:** The Employee Engagement Plan is not a necessary part of the Strategic Plan. The proposal, if selected for contract, could omit this action item as requested by the Commission/Selection Committee

The morale and culture of any institution play a vital role in the delivery of products and services. If there is an opportunity to improve these things in any way, it benefits leadership, the bottom line of the City of Key West, and it ultimately impacts the community at large.



## VIII. Facilitator’s Qualifications



Books Authored by Elisa Levy

### Overview of Elisa Levy’s Experience

Elisa Levy has been training and consulting on strategic planning for more than 20 years. Her experience in strategic planning runs the gamut from small, non-profit organizations in the Keys to the United Nations in countries around the world. Her experience globally, combined with her knowledge of the Keys, gives her a unique vantage point to facilitate Key West’s Strategic Plan.

### Work in the Public Sector

Elisa began her career as a volunteer in United States Peace Corps in the former Soviet Union, where she co-facilitated strategic planning workshops with the Peace Corps Director for international NGOs. At that time, the United Nations recruited her to develop a strategic plan and lead their first Women in Development (WID) program in country. Elisa was then offered a position at UN Headquarters in New York City in 1996. She continues to consult on UN projects today.

Elisa earned her Master’s Degree from Columbia University in 2000 from the School of International and Public Affairs, with a focus on Organizational Psychology. At that time, she also co-authored a book for the United Nations, “With an End in Sight” on Best Practices to End Violence Against Women in seven countries around the world.

### Key West

In 2001, opened her own business in Key West, and began to apply her skills to the private sector. Over 17 years, she has developed a robust practice with approximately 70 percent of her clients based in the Keys. In addition to facilitating strategic plans for organizations, she trains on conflict resolution, leadership and customer service. Elisa’s articles on these topics are published in trade journals, books and in the local Key West newspaper, *The Key West Citizen*. She authored her second book, “Emotional Equity” on leadership in 2019.



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Below is a sampling of organizations internationally, Nation-wide and in the Keys with whom Elisa has worked:

Organization	Description of Services Provided by Elisa Levy Consulting
<b>Local Organizations – Public Institutions</b>	
The City of Key West	Strategic Planning/Facilitation of Workshops, Training in Customer Service
Florida Keys Aqueduct Authority	Leadership Training
Keys Energy	Leadership Training
The 16 <sup>th</sup> Judicial Circuit	Sexual Harassment and Conflict Resolution Training
Monroe County Health Department	Teambuilding and Conflict Resolution Training
Florida Keys Community College	Conflict Resolution, Customer Service Training
Lower Keys Medical Center and Fishermen’s Hospital	Conflict Resolution, Customer Service Training
Mosquito Control	Conflict Resolution Training
May Sands Montessori School	Strategic Planning
<b>Local Organizations – Private and Non Profit Institutions</b>	
<u>Service Organizations:</u> Wesley House Family Services, Womankind, SOS Mission, United Way, Habitat for Humanity, The Children’s Shelter, Domestic Abuse Shelter, The Dolphin Research Center	Strategic Planning, Customer Service, Leadership Training
<u>Theaters and Arts Organizations :</u> The Studios of Key West and the Waterfront Theater, The Key West Literary Seminar, the Studios of Key West	Strategic Planning, Mediation
<u>Businesses:</u> (Sample) Highgate Hotels, Historic Key West Inns, the Spottswoods Companies, Historic Tours of America, Fury Water Sports, Keys Federal Credit Union, Centennial Bank	Leadership, Conflict Resolution, Customer Service Training
<b>Major Corporations and International Organizations</b>	
The United Nations: UNDP, UNIFEM, UNFPA – Globally	Strategic Planning
Oxfam International: Globally	Strategic Planning
USAID: Iraq	Conflict Resolution Training
Delta Airlines	Leadership Training
Astrazenica	Customer Service and Leadership Training
Ricoh Corporation	Conflict Resolution and Leadership Training



## IX. Time Line for Strategic Plan Development: FY 1: 2020 -21

FY 1: 2020 – 2021

	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Review of Materials														
Internal Employee Survey and Analysis														
Develop Employee Engagement Plan														
Community Data Gathering														
Workshops Resource Meetings														
Final SP with Budget RM Plan & Work Plan														

**Note:** Given the time/month in which the Strategic Plan will be awarded, it would be advantageous to begin with the Internal Employee Engagement Plan. Many community members are away in the summer months and return in the early to late Fall.

## X. Budget

The majority of the funds for the Strategic Plan will be allocated to the first year. During that time, the initial Stakeholder Analysis will take place, along with the workshop and meetings necessary to draft the overall plan, and the corresponding Work Plan for 2021-22. In subsequent years, the costs will primarily involve PR/Media, annual Work Plans, updates to the Strategic Plan, and Monitoring and Evaluation.

The Budget below is broken down by the major action steps, and includes costs for: 1) The Stakeholder Analysis; 2) Creating the Plan; 3) Monitoring, Evaluation and Ongoing Planning; 4) Branding and Public Education; 5) The Internal Employee Engagement Plan; and, 6) Other Costs.



Item	Description	Time/Cost Increments	Cost
<b>A. Stakeholder Analysis</b>			
Survey Design	Create Zeeting and Survey Monkey for Approval	10 hours	\$2,000
Survey Monkey Subscription	Survey Monkey Subscription (Year 1: 4 months, Year 2: 2 Months, Year 3: 2 months) 8 Months Total	\$75 per month	\$600
Zeeting Subscription	Same as Above	\$75 per month	\$600
Live Polling, Focus Groups and Interviews	Attending meetings with Community Stakeholders to share the SP, and conduct live polling and focus groups	20	\$4,000
Print Ads	The Citizen (\$700 per ad x3), Keys Weekly (\$175 per ad x 4)	7 ads	\$2,800
Radio Ads	\$10 per add x 5 times per day x 2 weeks	70 ads	\$700
Review of Plans	Identify and Review relevant past and related plans	10 hours	\$2,000
Preparation of Summary Report	Collate data from surveys, interviews and focus groups and develop a report to present to City Leadership	20 hours	\$4,000
<b>Sub Total for Stakeholder Analysis</b>			<b>\$16,700</b>

Item	Description	Time/Cost Increments	Cost
<b>B. CREATING THE STRATEGIC PLAN</b>			
<b>Workshop 1: Strategic Objectives and Outcomes</b>			
Agenda Preparation, Facilitation and Notes	Year 1: Facilitator’s agenda, leading the workshop, time afterwards to collate information in writing (8 hours prep, 8 hours for facilitation, 8 hours for follow up)	24 hours	\$4,800
Materials	Room rental, refreshments for approximately 50 people	\$30 per head \$1,000 room	\$2,500
<b>Resource Meetings: Major Initiatives, Performance Indicators and Budget Allocations</b>			
Meetings with Department Directors	Year 1: Resource Meetings to flesh out the major initiatives, performance indicators and proposed budget allocations with the Finance Director and Department Heads	60 hours	\$12,000
<b>Workshop 2: Consensus Building on Strategic Objectives, Outcomes, Initiatives, Performance Indicators and Budget Allocations</b>			
Agenda Preparation, Facilitation and Notes	Year 1: Facilitator’s agenda, leading the workshop, time afterwards to collating information in writing (8 hours prep, 8 hours for facilitation, 8 hours for follow up)	24 hours	\$4,800



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Materials	Room rental, refreshments for approximately 50 people	\$30 per head \$1,000 room	\$2,500
<b>Finalization of Strategic Plan</b>			
Prepare Finalized Strategic Plan and Year 1 Work Plan for Commission Approval	Write, edit and circulate the plan for final approval prior to the meeting, including final meetings with the Finance Director	15 hours	\$3,000
<b>Subtotal for Creating the Strategic Plan</b>			<b>\$29,600</b>

Item	Description	Time/Cost Increments	Cost
<b>C. MONITORING, EVALUATION AND ONGOING PLANNING</b>			
Meetings with Department Directors	Years 1, 2 & 3: Meetings at the beginning of year 1, 2 and 3	40 hours	\$8,000
Agenda Preparation, Facilitation and Notes	Year 2 and 3: Facilitator’s agenda, leading the workshop, time afterwards to collating information in writing (8 hours prep, 8 hours for facilitation, 8 hours for follow up)	48 hours	\$9,600
Materials	Room rental, refreshments for approximately 50 people (years 2 and 3)	\$30 per head \$1,000 room	\$5,000
Pulse Survey with Stakeholders	Design and administer survey and collate results years 2 and 3	30 hours	\$6,000
Preparation of Evaluations (Quarterly and Annually)	Gather information and write report to submit to leadership (8 quarters years 2 and 3 + 2 annually = 10 in Total) 5 hours per report	50 hours	\$10,000
<b>Subtotal for Monitoring, Evaluation and Ongoing Planning</b>			<b>\$38,600</b>

Item	Description	Time/Cost Increments	Cost
<b>D. Branding and Public Education</b>			
Print Ads	The Citizen (\$700 per ad x3), Keys Weekly (\$175 per ad x 4)	7 ads	\$2,800
Radio Ads	\$10 per add x 5 times per day x 2 weeks	70 ads	\$700
Social Media Updates	Twitter and Facebook Updates (weekly for 3 years)	156 hours	\$31,200
<b>Subtotal for Public Education and Branding</b>			<b>\$34,700</b>





Proposal for The Key West Strategic Plan – Elisa Levy Consulting

Item	Description	Time/Cost Increments	Cost
<b>E. INTERNAL EMPLOYEE ENGAGEMENT PROGRAM</b>			
Survey Development and Execution	Create, deliver and collate the results of the survey and present them in a report to Leadership	20 hours	\$4,000
Development and Monitoring of the Plan	Ongoing, Quarterly x3 years	40 hours	\$8,000
<b>Subtotal for Internal Employee Engagement Program</b>			<b>\$12,000</b>

Item	Description	Time/Cost Increments	Cost
<b>F. ADDITIONAL COSTS</b>			
General Communication	Daily emails, calls, texts and updates with relevant City employees, the Mayor, Commission Members and City Commission Members, Attendance and Commission and relevant Committee Meetings – .5 hour per week x 3 years	75 hours	\$15,000
Materials	Workbooks when needed, print copies, refreshments for meetings	\$1,000 per year	\$3,000
<b>Subtotal for Additional Costs</b>			<b>\$18,000</b>
<b>Overall Total Budget</b>			<b>\$149,600</b>

**Budget Breakdown by Category**

Category	Cost per year	Total Cost
Contractor Time/Hours for 3 years	\$32,400	\$97,200
TV and Radio Advertising, Branding, Public Education, Social Media	\$12,733	\$38,200
Materials, Venue	\$4,333	\$13,000
Technology (Zeeting, Survey Monkey)	\$400	\$1,200
<b>TOTAL</b>	<b>\$49,866 (per year)</b>	<b>\$149,600</b>