



PALM BEACH
Florida

Strategic Planning

Town of Palm Beach





Trainnovations

Based in Palm Beach County

Local Government consulting for over 25 years

Our Focus is:

Strategic Planning and Deployment

Leadership Development

Utilizing the National Baldrige Excellence Framework

We help your organization Move from Better to Brilliant!



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Scope of Work

Facilitate the Strategic Planning Board meetings in order to provide recommendations to the Town Council regarding:

- 5-10 Year Vision
- Mission
- Strategic Goals

Facilitate 2 Public Community Engagement meetings to get feedback on the Community Survey Results and the Strategic Planning Board outputs. Outputs and Deliverables include:

- SWOT Analysis
- Development and Analysis of Critical Success Factors
- Development and Analysis of Strategic Focus Areas
- Vision
- Mission
- Town Council Final Presentation



Our Journey!

The Strategic Planning Board

The SPB consists of nine Community Leaders

Mayor Dani Moore

Mr. Skip Aldridge	Mr. Peter McKelvy
Ms. Beth Dowdle	Ms. Katherine Ostberg
Ms. Kristen Kelly-Fisher	Mr. Michael Pucillo
Ms. Nicki McDonald	Mr. Michael Reiter

The SPB met 11 times over a period of 15 months through 2022 and 2023.

Community Engagement

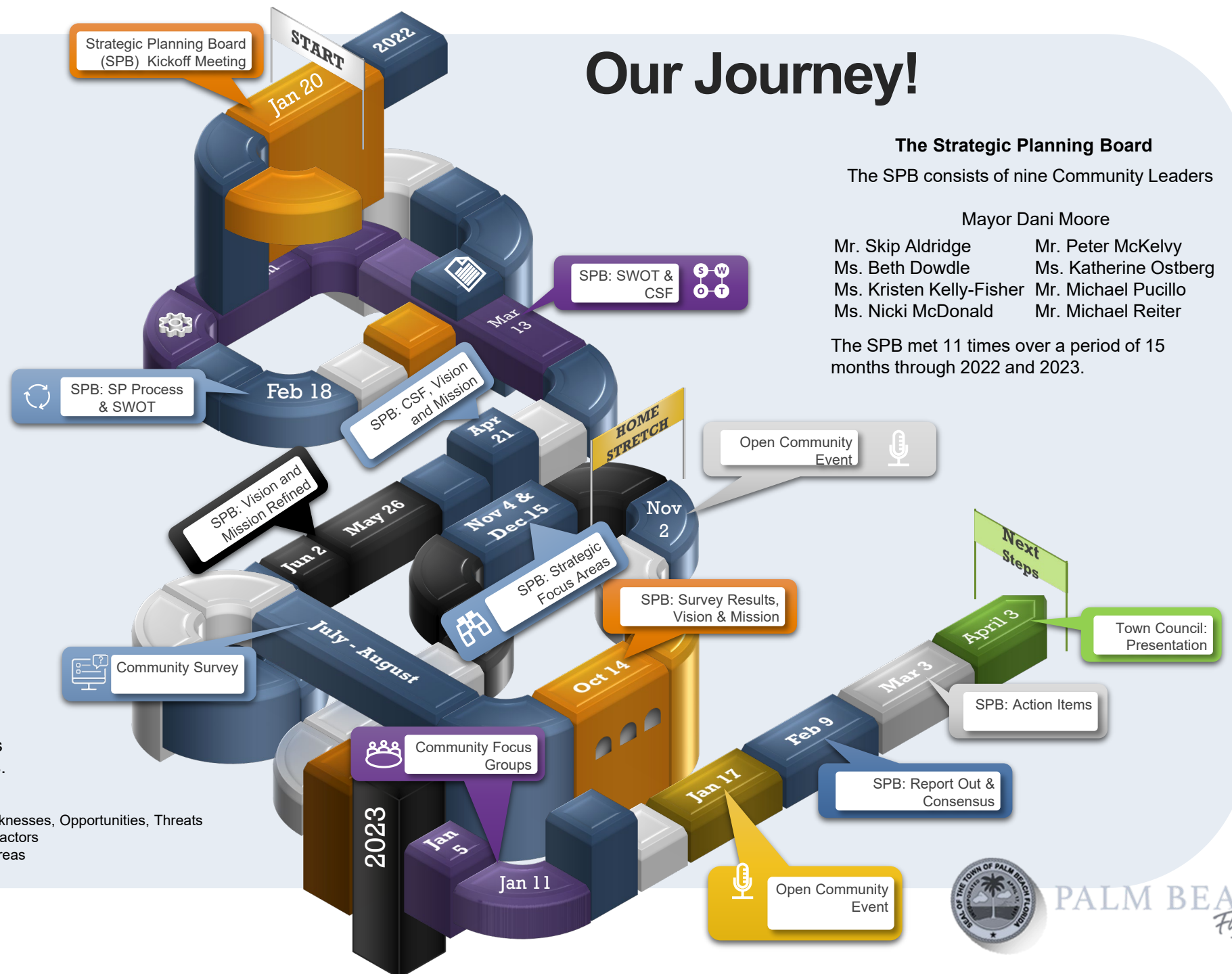
Throughout the process, the community has been involved through a variety of vehicles

- A community-wide survey conducted by Community Data Platforms, an independent Survey Company
- Two Community Focus Groups facilitated by Traininnovations
- Two Open Community meetings facilitated by the Mayor and Town Staff
- Eleven SPB Public Meetings
- Solicitation of input by SPB members in their neighborhoods and community meetings.

Staff Engagement

Parallel to the Strategic Planning Boards efforts, Town Staff (Directors, Asst. Directors, and emerging leaders) have engaged in workshops working on strategies, objectives, goals, actions items and measures relative to Town operations.

SWOT – Strengths, Weaknesses, Opportunities, Threats
CSF – Critical Success Factors
SFA – Strategic Focus Areas



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By the Numbers!

Community Survey

Community Data Platforms
July-August 2022

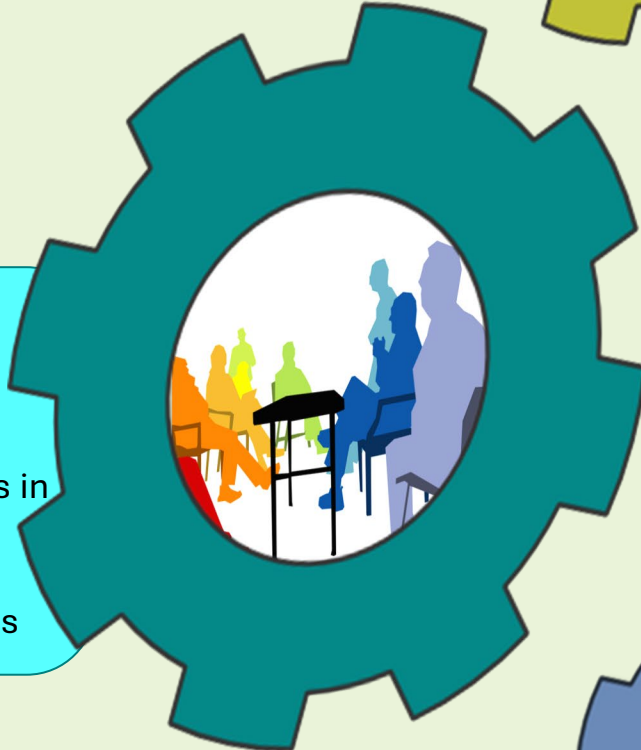
1500 respondents:

- Median Age-67
- Women 54%
- Full time residents-67%
- Part time residents-18%
- Non-residents-12%



Strategic Planning Board

- Approximately 36 hours in meetings as a team
- Many hours of “home” committee assignments



Community Engagement:

Open Community Event
2 meetings with approximately 100 attendees

Focus Groups

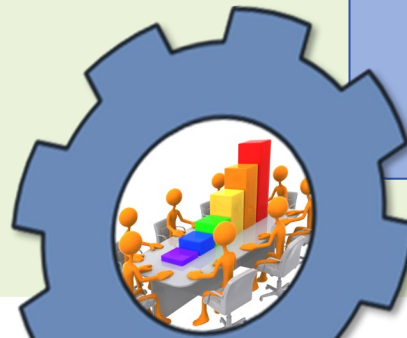
January 5 & 11, 2023

Focus Group Demographics

	Invited	Attended
Participants	61	41
Midtown	33	20
South end	10	8
North end	18	13
Full time	31	22
Part time	30	19

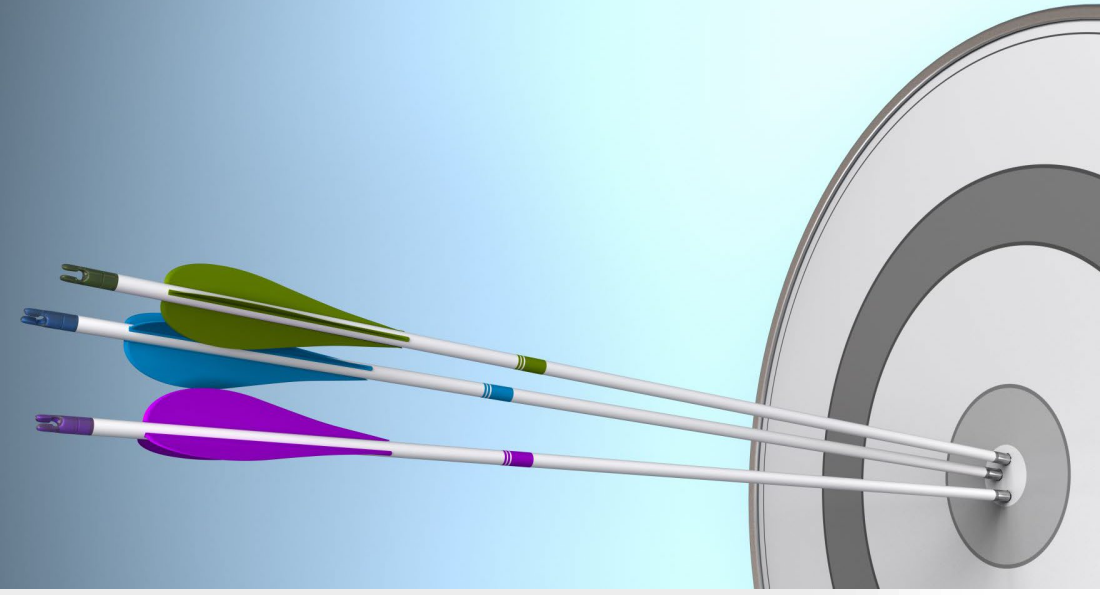
Staff Process

Leadership Staff process supports the consented SPB Strategic Focus Areas and dovetails with the Budget Process.



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Our Outcomes



SWOT ANALYSIS

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STRENGTHS

1. Town Government, working in partnership between residents, elected officials, and staff, is responsive to community needs.
2. Palm Beach enjoys a unique historic architecture and landscape character.
3. A variety of cultural, recreational, transportation, health care and educational amenities are available within Palm Beach and neighboring communities.
4. The community is engaged and supportive.
5. Palm Beach provides a safe and secure Town through Police and Fire departments.
6. The Town is financially solid and is in a position of financial sustainability.

OPPORTUNITIES

1. Regional opportunities may be leveraged to increase access to amenities: Cultural, Transportation, Recreation, Health Care, Education.
2. The Palm Beach community is supportive and generous in its philanthropic support of the Town.
3. There is an opportunity to “lead by example” including but not limited to policy and education on environmental impact issues and concerns.
4. Emerging and desirable technologies may, through thoughtful management, present opportunities for partnerships and/or mitigation of existing or new challenges.

WEAKNESSES

1. Mobility, Traffic, and Parking are adversely impacted by an increase in people, autos, and bicycles.
1. This creates an impact to the “Palm Beach Way” defined as kind, polite, and slower paced.
2. The Town code is outdated, inconsistent, and does not represent the Town’s historic character.
3. There is limited availability to in-town amenities such as public transportation and health care.
4. There is a lack of data for decision making.

THREATS

1. Natural (climate change, sea level rise, hurricanes, etc) and man-made (pesticides, e.g.) environmental conditions represent threats to the Town.
2. The current water utility service and contract represents an insecurity in availability and quality and presents a long-term environmental threat.
3. The current political environment is eroding home rule, producing unfunded mandates, and resulting in a dependence on other governmental entities.
4. Congestion due to population growth, additional people and vehicles, and increase delivery of goods and services adversely impacts quality of life and burdens the Town’s limited infrastructure capacity.



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Critical Success Factors

Quality of Life

Means...

Our Palm Beach lifestyle is sustained by preservation of our community beauty through its built and natural environment; management of traffic, parking, and mobility impacts; enjoyment of cultural, recreational, and educational opportunities; expectations for respectful community conduct; and a safe and secure community.

Collaborative Town Government

Means...

Elected officials, Town staff, volunteers, residents, and businesses work together to respond positively and proactively to the needs of residents, businesses, and visitors.

Preserve Community Culture and Character

Means...

The Town promotes the small-town feel of Palm Beach by preserving its exceptional architectural character, rich history, and unique character.



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Critical Success Factors

Proactive Management of Environmental Threats

Means...

The Town creates resilience to environmental (natural and man-made) threats by identifying and planning for immediate and future threats such as climate change impacts, pollution from pesticides and chemicals, invasive species, sewage/stormwater/garbage impacts, and intrusive new technologies.

Sound Fiscal Management

Means...

The Town thrives financially over the long term because of decision making and budgeting based on accurate and relevant data, setting organizational priorities across all government services considering needs, and basing fiscal policies on governmental accounting best practices.

Safe, Clean, On-demand Drinking Water

Means...

The Town's drinking water is healthy, both for consumption and the environment. It is readily available without worry or limitations. The Utility infrastructure is sound and meets current and future needs.



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Vision and Mission

Vision:

The Town of Palm Beach will promote an exceptional quality of life for current and future generations. We take pride in our small town honoring our heritage as a unique legacy worth keeping while creatively managing future challenges.

Mission:

The Town of Palm Beach provides unparalleled services to residents, businesses, and visitors. Through leadership and community engagement we:

- Promote our gracious community character and culture;
- Ensure a safe and secure Town;
- Respect our history and architecture; and
- Conserve the health of our environment.





Strategic Focus Areas

SFA: *Provide a framework for supporting the Town of Palm Beach before, during and after a natural or manmade disaster.*

Outcome: *Through mitigation, the impacts for potential natural and manmade disasters are reduced while maintaining community resilience. A culture of preparedness and responsiveness for all residents, businesses, and government is built and fostered.*

SFA: *Control, regulate and stabilize on-island mobility including traffic, parking, and pedestrian thoroughfares.*

Outcome: *Traffic congestion and parking are managed for residents and visitors consistent with the Town's charm and character. Pedestrian thoroughfares are protected and secured for safety.*

SFA: *Promote sustainable management and enhancement of the Town of Palm Beach's outstanding parks and natural environment through conservation and environmental protection.*

Outcome: *Biodiversity including its coastal, marine, terrestrial and water ecosystems is protected and restored through environmental awareness education, promoting healthy landscape practices, encouraging use of native fauna and flora, and reducing use of chemical pesticides.*



Strategic Focus Areas

SFA: *Preserve and honor our unique community, rich history, and architectural character.*

Outcome: *Overcrowding is safeguarded against. Traditional and well-established land use standards and best practices are upheld. A focus on urban planning and zoning is created with a consideration for charm, appeal and long-term resilience and protection of our values.*

SFA: *Actively engage with federal, state, and local governments and agencies to protect home rule in the Town of Palm Beach.*

Outcome: *Available resources, including collaboration with other agencies and engagement in coalitions, that help us protect the right to self-govern, craft ordinances, and make decisions based on our community's needs are encouraged, utilized, and prioritized.*

SFA: *Provide reliable and sustainable management of drinking water, wastewater, and storm water.*

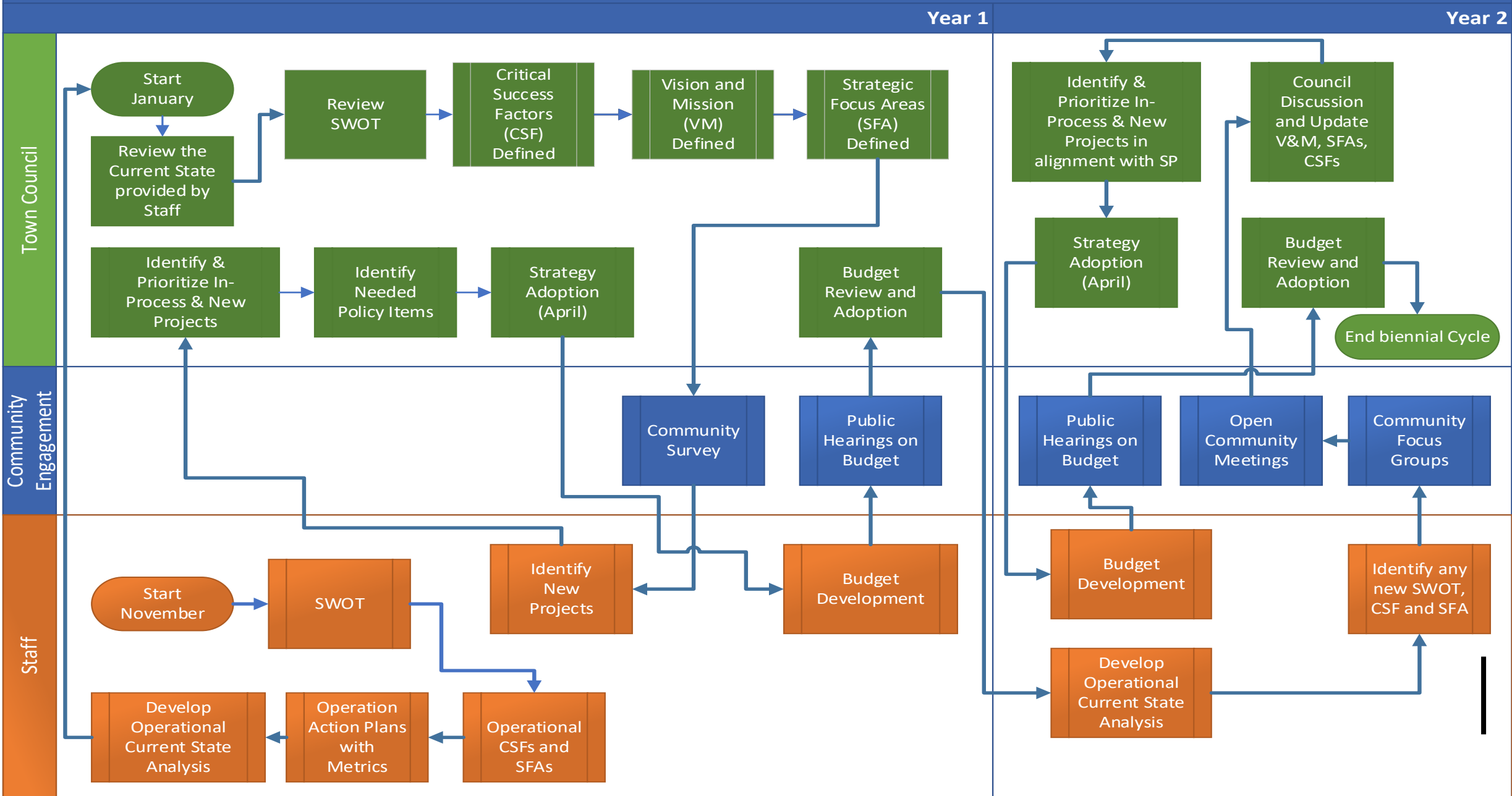
Outcome: *The Town's drinking water is of high quality and healthy. It is abundant and readily available. The infrastructure is reliable, sustainable, well maintained and meets current and future needs. Water resources, including waste and storm water, are managed in an environmentally friendly and sustainable way.*

Recommendations

- 1 Adopt a **Multi-year, ongoing Strategic Planning Process**
- 2 Review and **Adopt the Vision and Mission** statements
- 3 Adoption of broad **Strategic Objectives** that capture the essence of the Community Survey, SWOT, CSFs, and SFAs
- 4 In collaboration with Staff, **Create and Prioritize Action Items and Initiatives** important for the Community
- 5 Identify **Metrics that Matter** for each Strategic Objective, Project and Initiative



Biennial Strategic Planning Process



Strategic Objectives for Your Consideration

Community Culture and Character

CSF: Quality of Life

CSF: Preserve Community Culture and Character

SFA: Preserve and honor our unique community, rich history, and architectural character

Environmental Stewardship

CSF: Proactive Management of Environmental Threats

SFA: Promote sustainable management and enhancement of the Town of Palm Beach's outstanding parks and natural environment through conservation and environmental protection.

Mobility and Transportation

CSF: Quality of Life

SFA: Control, regulate and stabilize on-island mobility including traffic, parking, and pedestrian thoroughfares.

Safe and Resilient Community

CSF: Safe, Clean, On Demand Drinking Water

SFA: Provide a framework for supporting the Town of Palm Beach before, during and after a natural or manmade disaster.

SFA: Provide reliable and sustainable management of drinking water, wastewater, and storm water.

Governmental Leadership and Innovation

CSF: Collaborative Town Government

CSF: Sound Fiscal Management

SFA: Actively engage with federal, state, and local governments and agencies to protect home rule in the Town of Palm Beach.



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Next Steps

Council Actions

- Review SPB inputs for creation of an actionable Town Strategic Plan
- Adopt a 10-year Vision for the Town
- Adopt a Mission statement as an execution strategy to achieve the Vision
- Consent on:
 - Strategic Objectives
 - Critical Success Factors and Strategic Focus Areas
 - Identify, with Staff, Key Action Items and Initiatives in alignment with Strategic Objectives, CSFs and SFAs
 - Identify and adopt funding and resource allocations for Action Items and Initiatives







Thank You!