



Town of Belleair

901 Ponce de Leon Blvd.
Belleair, FL 33756

Meeting Agenda

Special Meeting

Monday, May 10, 2021

11:00 AM

Town Hall

Town Commission - Budget Workshop

Please click the link below to join the webinar:

<https://us02web.zoom.us/j/82161275092>

Or Telephone:

Dial(for higher quality, dial a number based on your current location):

US: +1 646 558 8656 or +1 301 715 8592 or +1 312 626 6799 or +1 669 900 9128 or +1 253
215 8782 or +1 346 248 7799 Dial *9 to "raise hand"

Webinar ID: 821 6127 5092

COMMISSIONER ROLL CALL

CITIZENS COMMENTS

(Discussion of items not on the agenda. Each speaker will be allowed 3 minutes to speak.)

GENERAL AGENDA

[21-0126](#) 2021-2022 Budget Workshop

Attachments: [Strat Plan Progress Report](#)

ADJOURNMENT

ANY PERSON WITH A DISABILITY REQUIRING REASONABLE ACCOMMODATIONS IN ORDER TO PARTICIPATE IN THIS MEETING, SHOULD CALL (727) 588-3769 OR FAX A WRITTEN REQUEST TO (727) 588-3767.



Legislation Details (With Text)

File #: 21-0126 **Version:** 1 **Name:**
Type: Discussion Items **Status:** General Agenda
File created: 5/7/2021 **In control:** Special Meeting
On agenda: 5/10/2021 **Final action:**
Title: 2021-2022 Budget Workshop
Sponsors:
Indexes:
Code sections:
Attachments: [Strat Plan Progress Report](#)

Date	Ver.	Action By	Action	Result
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Summary

To: Town Commission
From: Ashley L. A. Bernal
Date: 5/10/2021

Subject:
2021-2022 Budget Workshop

Summary: As the Town of Belleair enters another budget year, staff felt that a budget workshop would be incredibly beneficial for the Commission and residents of the town. We are continuing to understand the full fiscal impacts that COVID-19 has had on the budget, and will continue to have on the budget. Included in this item are discussions and summaries of revenues and expenditures, as well as ARPA funding and strategic planning items.

Previous Commission Action: Discussion on COVID-19 protocols, reimbursement methods, and expenditure challenges within the budget year.

Background/Problem Discussion:

Revenue Discussion

As Florida returns to normal operations after the COVID-19 pandemic, consumption based revenues are expected to slowly return to their normal baselines. However, it is important to note that the Town is heading into the second year of budgeting with COVID-19 effects.

Revenue Pressures

- Interest will experience a larger decrease this year of roughly 90%, bringing this account to \$2,500 (\$2.5 million at yield of 10 basis points).
- Communication Services Tax is expected to decrease, as similar to previous years. Staff has conducted an analysis to identify an average trend of about \$12,000 per month from this account, resulting in a

new total of \$143,000 (-8%).

Revenue Opportunities

- Electric Franchise will find a new baseline of \$370,000 (6% increase) after a historical analysis. Every year, this account surpasses \$390,000 in revenue, though numerous larger projects, such as the Pelican Golf Course and Belleview units are coming to a final close. Because of this, staff has added a small buffer of \$20,000.
- Recreation revenue
 - Prior year increase in revenue expectations, this number is likely to increase as Florida returns to normal (non-limited capacity) functions after COVID-19
 - Recreation permits should return to normal as well
- ARPA Funds (details below)
- Ad Valorem estimations are still at a preliminary level. Staff is currently expecting an increase of around \$399,000 (9%) based on the prior forecast. These numbers will be updated after the Pinellas County Property Appraiser releases more estimates on June 1st.

American Rescue Plan Act of 2021 (ARPA)

According to the text of the American Rescue Plan Act legislation, the Coronavirus State and Local Fiscal Recovery Funds, the Secretary of the Treasury “shall pay from such allocation the First Tranche Amount for such city, State, or county not later than 60 days after the date of enactment of this section.” Enactment of the American Rescue Plan Act occurred on March 10; therefore, for all states and Community Development Block Grant (CDBG) cities and counties distribution of the funds will occur on May 10. For non-CDBG communities, funds will flow through the state and may take up to sixty additional days for distribution.

At this point, the Town of Belleair is focusing on preparing to certify these proceeds by reviewing the guiding principles for ARPA spending. The Treasury Secretary will be releasing more information in the coming week about what expenditures could be reimbursed by ARPA funds.

Unfortunately, there is still much we do not know about using those funds for lost revenue, such as how the lost revenue would need to be calculated if we use funds for that purpose. One aspect of interest is that the funds may be used for sewer infrastructure. At this time, we believe that may include storm sewer conveyance, such as curbing, drainage inlets, and concrete pipe.

Expenditure Discussion

The Town of Belleair is currently focusing on prioritizing funding action items from the Strategic Plan, while also connecting programs within the budget and determining how they are already supporting the strategic plan. Additionally, the salary and compensation study has come back and this will be a major change across the town’s entire budget.

Expenditure Pressures

- Salary and Compensation Study - Every year, the Town of Belleair includes a minimum 3% merit raise and a Cost of Living increase, which averages around 2%. However, this year the Town is looking to include results from a recently conducted Salary and Compensation study. This has numerous options for implementations, which are currently being inspected by staff. It is important to note that this compensation study does not include a Cost of Living increase, so individuals who remain unaffected by the selected option will still receive a COLA based on the CPI. The fiscal impacts of this range from \$69,041 to \$468,000.
- Property and Casualty Insurance - Staff is currently estimating this number to increase by 10% to 15%. Presently, this number is utilizing a conservative estimate of 15%, which increases this expenditure line from \$355,500 to \$385,825 (\$50,325 increase).

- **Health Insurance** - This line is expected to increase by 8% (\$53,820), bringing the total to \$726,569 across the General, Water, and Solid Waste Funds.
- **Fire Services** - This is expected to increase by 5%, or \$32,681. Historically, this number has increased by the maximum 5% allowable, so staff feels confident in this estimate.

Recommendation: There is no recommendation at this time, as this is only for discussion.

Proposed Motion: No proposed motion, as this it only for discussion.

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme A - Communication: Fostering a connected, engaged, and accessible community

																				Planned Duration			Actual Duration			Plan Deviation			
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)										RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)												
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029			2030											
GOAL A.1 Communications initiatives, tools, and projects that foster a connected and engaged community																													
OBJECTIVE A.1.1 Strategically and regularly communicate with the Belleair community																													
A.1.1.1 Maintain a cross-departmental Communications Team of employees to manage and plan for town-wide communications and marketing	2020	2030			-											Communications Team	Cathy DeKarz												
A.1.1.2 Have the Communications Team update a Town-wide Communications Plan annually in December, to be approved by the Town Manager (<i>Dependent on</i> : A.1.1.1)	2020	2030			-											Communications Team	Cathy DeKarz												
A.1.1.3 Ensure that this Communications Plan includes a breakdown of tools and standards of maintenance for each tool (<i>Dependent on</i> : A.1.1.2)	2020	2030			-											Communications Team	Cathy DeKarz												
A.1.1.4 Continuously seek new and innovative options to expand and increase communications tools, techniques, and processes, to be included in the annual Communications Plan	2020	2030			-											Communications Team	Cathy DeKarz												
OBJECTIVE A.1.2 Continuously adjust or create new communications strategies, activities, and projects in order to maximize engagement and the sharing of information																													
A.1.2.1 Have the Communications Team compile a Communications Summary Report, to be presented to the Commission each March	2020	2030			-											Communications Team	Cathy DeKarz												
A.1.2.2 Have this report use the analytics from communications tools to discuss goals, successes, and guide areas for improvement for the previous and current year (<i>Dependent on</i> : A.1.2.1)	2020	2030			-											Communications Team	Cathy DeKarz												
OBJECTIVE A.1.3 Use survey or qualitative tools to annually assess how residents' communications preferences																													
A.1.3.1 Use the results of the Citizen Satisfaction Survey to analyze how, when, and at what frequencies residents wish to be communicated with and to (<i>Dependent on</i> : B.1.1.2)	2022	2023			-												Communications Team	Cathy DeKarz											
A.1.3.2 Use this data to plan for the annual Communications Summary Report (<i>Dependent on</i> : A.1.3.1)	2022	2030			-												Communications Team	Cathy DeKarz											
OBJECTIVE A.1.4 Ensure digital communications are accessible per ADA WCAG 2.1 AA standards																													
A.1.4.1 Determine needs to bring the Town's digital presence into WCAG 2.1 AA compliance	2020	2020			-												Leadership Team, Communications Team	Cathy DeKarz, Stefan Massol											
A.1.4.2 Develop a Digital ADA Transition Plan (<i>Dependent on</i> : A.1.4.1)	2021	2021			-												Leadership Team, Communications Team	Cathy DeKarz, Stefan Massol											
A.1.4.3 Follow through with the Digital ADA Transition Plan until accessibility standards are met (<i>Dependent on</i> : A.1.4.2)	2022	2023			-												Leadership Team, Communications Team	Cathy DeKarz, Stefan Massol											
GOAL A.2 A Town commission and staff that is accessible and responsive to communication and feedback from residents and community members																													
OBJECTIVE A.2.1 Develop strategies that combine online and in-person opportunities for residents to explore their preferences and offer their input on high priority issues																													
A.2.1.1 Use results from the Citizen Satisfaction Survey to determine how residents prefer to be engaged with Town affairs and then design outreach efforts to fit those needs (<i>Dependent on</i> : B.1.1.2)	2022	2023			-												Commission, Leadership Team	JP Murphy, Cathy DeKarz											
A.2.1.2 Hold more on-site public meetings for specific issues and topics	2020	2030			-											Commission, Leadership Team	JP Murphy, Cathy DeKarz												

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)												RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030			
OBJECTIVE A.2.2 Consider creative approaches to soliciting public input on decisions																			
A.2.2.1 Continue to host virtual public meetings that are interactive and accessible (<i>Dependent on: A.1.4.2</i>)	2020	2030			-													Commission, Leadership Team	JP Murphy, Christine Nicole, Cathy DeKarz
A.2.2.2 Create opportunities for impromptu discussions of Town services and activities that make it easy for staff to hear and share ideas with the community	2020	2030			-													Commission, Leadership Team	JP Murphy

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme B - Community Character: Designing and preserving public spaces and facilities for all to enjoy

						Planned Duration					Actual Duration					Plan Deviation				
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)										RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)			
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029			2030		
GOAL B.1 Public facilities, spaces, programs, and services that encourage Belleair residents to know each other and identify as part of the Belleair community																				
OBJECTIVE B.1.1 Periodically conduct a repeatable Citizen Satisfaction Survey to be benchmarked in subsequent surveys																				
B.1.1.1 Work with all departments and elected officials to identify needs for a Citizen Satisfaction Survey	2021	2021			-												Commission, Leadership Team	JP Murphy, Cathy DeKarz		
B.1.1.2 Engage a contractor to draft, publish, and analyze a survey on behalf of the Town (<i>Dependent on</i> : B.1.1.1)	2021	2021			-												Leadership Team, Communications Team	JP Murphy, Cathy DeKarz		
B.1.1.3 Repeat this survey on a regular basis (at least every two years) in order to benchmark results and note both areas of success and areas that need improvement (<i>Dependent on</i> : B.1.1.2)	2022	2030			-												Leadership Team, Communications Team	JP Murphy, Cathy DeKarz		
OBJECTIVE B.1.2 Use the results of the Citizen Satisfaction Survey to develop new programs, improve existing services, and develop and implement best practices																				
B.1.2.1 Use the results of the Citizen Satisfaction Survey in departmental and town-wide planning and decision making (<i>Dependent on</i> : B.1.1.2)	2022	2023			-												Commission, Leadership Team	JP Murphy		
B.1.2.2 Develop relevant level-of-service standards using the feedback of the survey (<i>Dependent on</i> : B.1.1.2)	2022	2023			-												Leadership Team	JP Murphy		
OBJECTIVE B.1.3 Evaluate opportunities to preserve existing green spaces in order to encourage community use and promote community gathering																				
B.1.3.1 Review the requirements of the Town's Comprehensive Plan for open space and consider additional requirements for publicly accessible green space per capita	2022	2023			-												Leadership Team	JP Murphy		
B.1.3.2 Further define and create criteria for determining green space eligibility in the Comprehensive Plan (<i>Dependent on</i> : B.1.3.1)	2022	2023			-												Leadership Team	JP Murphy		
B.1.3.3 Through the Citizen Satisfaction Survey or other forums, determine features to promote community gathering in public spaces (<i>Dependent on</i> : B.1.1.2)	2022	2023			-												Leadership Team	JP Murphy, Ricky Allison		
B.1.3.4 Consider creating a policy around donation and gift acceptance of real property	2022	2023			-												Leadership Team	JP Murphy		
OBJECTIVE B.1.4 Design and/or renovate public spaces to accommodate community-building activities as opportunities arise and/or as infrastructure improvements are made in adjacent locations																				
B.1.4.1 Establish a baseline standard for park restoration during capital projects utilizing standardized cost indexes	2021	2021			-												Commission, Public Works Team, Park & Tree Board	Keith Bodeker, Ricky Allison		
B.1.4.2 Prioritize park development to coincide with Capital Improvement Plan (CIP) road projects (<i>Dependent on</i> : B.1.4.1)	2021	2030			-												Public Works Team, Park & Tree Board	Ricky Allison, Mike Shumaker		
OBJECTIVE B.1.5 Develop design guidelines and standards to maintain a high level of maintenance for Belleair's parks																				
B.1.5.1 Define levels of maintenance service for various park sizes and uses using industry standards and levels of service (from minimal level to higher quality of care)	2021	2021			-												Public Works Team, Park & Tree Board	Ricky Allison, Mike Shumaker		
B.1.5.2 Understand and define maintenance costs for each of these levels of service (<i>Dependent on</i> : B.1.5.1)	2021	2021			-												Public Works Team, Park & Tree Board	Ricky Allison, Mike Shumaker		
B.1.5.3 Incorporate Florida-friendly or integrated pest management strategies in the maintenance of Belleair's parks (<i>Dependent on</i> : B.1.5.2)	2022	2023			-												Public Works Team, Park & Tree Board	Ricky Allison, Mike Shumaker		

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)														RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030					
GOAL B.2 Preserved and protected natural resources, including the bluff																					
OBJECTIVE B.2.1 Cooperative with the Southwest Florida Water Management District to conduct a feasibility study of the bluff to determine permissible repair solutions																					
B.2.1.1 Instruct the Town’s Engineer of Record (EOR) to begin reviewing the current condition of the bluff	2020	2020			-													Commission	JP Murphy		
B.2.1.2 Utilizing the Engineer of Record (EOR), apply for funding through the Southwest Florida Water Management District and other funding sources (<i>Dependent on</i> : B.2.1.1)	2020	2020			-													Commission	JP Murphy		
B.2.1.3 Authorize the Engineer of Record (EOR) to conduct a feasibility study for repair options (<i>Dependent on</i> : B.2.1.2)	2021	2021			-													Commission	JP Murphy		
OBJECTIVE B.2.2 Implement the findings of the feasibility study to mitigate further erosion of the bluff																					
B.2.2.1 Conduct public hearings on the findings of the Engineer of Record's (EOR's) report with the Commission and the public within 6 months of the engineer's report (<i>Dependent on</i> : B.2.1.3)	2022	2023			-													Commission	JP Murphy		
B.2.2.2 Evaluate short and long-term solutions and pricing from the feasibility study to halt and/or repair erosion (<i>Dependent on</i> : B.2.1.3)	2024	2025			-													Commission	JP Murphy		
B.2.2.3 Using input from the Engineer of Record (EOR) and the public, consider phased approaches toward erosion mitigation (<i>Dependent on</i> : B.2.2.1)	2024	2025			-													Commission	JP Murphy		
B.2.2.4 Bid out and contract work to mitigate and/or repair erosion (<i>Dependent on</i> : B.2.2.3)	2026	2030			-													Commission	JP Murphy		
OBJECTIVE B.2.3 Protect the trees and the urban canopy of the Town of Belleair																					
B.2.3.1 Engage a consultant to develop a Grand Tree Ordinance for the Town	2021	2021			-													Park & Tree Board	Ricky Allison		
B.2.3.2 Lobby the legislature to consider a carve-out of new tree statutes for municipalities that are previously designated as a Tree City USA	2021	2021			-													Commission, Leadership Team	JP Murphy		
B.2.3.3 Consider dedicating regular dollars to the tree replacement fund in response to new State statutes (<i>Dependent on</i> : B.2.3.2)	2022	2023			-													Commission	JP Murphy, Ricky Allison		
B.2.3.4 Encourage shade tree planting opportunities by educating the public on the importance of urban tree canopies	2022	2023			-													Public Works Team, Park & Tree Board	Ricky Allison		
GOAL B.3 A natural, native, and park-like atmosphere throughout town that is maintained through planning and development initiatives																					
OBJECTIVE B.3.1 Consider developing residential landscape standards																					
B.3.1.1 Consult the Town Planner to review options for residential landscape standards	2024	2025			-													Leadership Team	JP Murphy		
B.3.1.2 If residential landscape standards were to be adopted, seek to limit impermeable surfaces, consider a percentage of Florida-friendly plants per property, and recommend low water usage standards (<i>Dependent on</i> : B.3.1.1)	2024	2025			-													Leadership Team	JP Murphy		
OBJECTIVE B.3.2 Develop a Landscape Master Plan for Belleair’s parks																					
B.3.2.1 Review existing work (from the Comprehensive Plan) and determine the work needed to complete the Town's Landscape Master Plan	2024	2025			-													Public Works Team, Park & Tree Board	Ricky Allison		
B.3.2.2 Engage a consultant to complete the necessary work alongside staff, the Park & Tree Board, and the Commission (<i>Dependent on</i> : B.3.2.1)	2026	2030			-													Commission, Public Works Team, Park & Tree Board	Ricky Allison		
GOAL B.4 Future land-use decisions that have an emphasis on low-density development																					
OBJECTIVE B.4.1 Review and monitor legislation to minimize the use of short-term rentals in Belleair																					

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
B.4.1.1 Annually reaffirm Belleair’s commitment to home rule and the local control of short-term rentals through the Commission’s annual Legislative Action Agenda	2020	2030			-													Commission	JP Murphy	
B.4.1.2 Take a proactive approach to legislative outreach regarding short-term rentals	2020	2030			-													Commission	JP Murphy	
OBJECTIVE B.4.2 Utilize the Land Development Code to develop land use regulations that encourage the redevelopment of existing single-family housing stock in order to maximize property value																				
B.4.2.1 Consider amending dimensional regulations to allow for larger home size for single-family zones	2022	2023			-													Commission, Planning & Zoning Board	JP Murphy	
OBJECTIVE B.4.3 Consider land use regulations that maximize traditional single-family streetscapes and curb appeal																				
B.4.3.1 Discuss the removal of non-conforming elements from public rights-of-way	2021	2021			-													Commission, Planning & Zoning Board	JP Murphy, Keith Bodeker, Chief Doyle, Ricky Allison	
B.4.3.2 Instruct the Town Planner to revise street design standards to eliminate conflicts between Belleair’s Code of Ordinances and other regulatory specifications in order to set a uniform standard throughout town	2024	2025			-													Commission, Planning & Zoning Board	JP Murphy, Keith Bodeker	
B.4.3.3 Create a system of enhanced enforcement for land use violations (<i>Dependent on</i> : B.4.3.1)	2024	2025			-													Commission, Planning & Zoning Board	JP Murphy, Keith Bodeker	
B.4.3.4 Prioritize the use of low ground cover for right-of-way plantings	2020	2030			-													Commission, Planning & Zoning Board	JP Murphy, Ricky Allison	
OBJECTIVE B.4.4 Consistent with the low-density character of Belleair, and as opportunities arise, consider whether and where additional commercial and multi-family development may be appropriate for the purposes of economic development																				
B.4.4.1 In the next Evaluation Appraisal Review (EAR) process, specifically study the zones which include multifamily housing, or other zones where multifamily might be added, and consider dimensional regulations and densities appropriate for the residential character of the Town	2022	2023			-													Commission	JP Murphy	
B.4.4.2 In the next Evaluation Appraisal Review (EAR) process, specifically study the zones which include commercial uses, or other zones where varying intensities of commercial use might be added, such as allowing home-based businesses; consider commercial uses appropriate for the residential character of the Town	2022	2023			-													Commission	JP Murphy	
GOAL B.5 Programs and initiatives that preserve historic buildings and structures and educate the public on the importance of historic preservation																				
OBJECTIVE B.5.1 Maintain and update a local historic registry																				
B.5.1.1 Periodically reach out to properties eligible for Belleair’s Historic Registry while emphasizing the importance and benefits of preservation	2020	2030			-													Historic Preservation Board	Cathy DeKarz	
B.5.1.2 Every five years, seek grant funding from the State of Florida Division of Historical Resources to catalog properties eligible for Belleair’s Historic Registry	2024	2030			-					2024						2029		Historic Preservation Board	Cathy DeKarz	
OBJECTIVE B.5.2 Educate the public on the history of Belleair and the benefits and importance of historic preservation																				
B.5.2.1 Research historic preservation and education efforts from neighboring communities	2022	2023			-													Historic Preservation Board	Cathy DeKarz	
B.5.2.2 Create and launch purposeful public awareness campaigns and stories with the emphasis on persevering and remembering Belleair’s unique people, events, and sense of community (<i>Dependent on</i> : B.5.2.1)	2022	2023			-													Historic Preservation Board	Cathy DeKarz	
B.5.2.3 Within these campaigns and stories, also emphasize particular historic properties and neighborhoods in Belleair (<i>Dependent on</i> : B.5.2.2)	2022	2023			-													Historic Preservation Board	Cathy DeKarz	
B.5.2.4 Promote these campaigns in line with results of the Citizen Satisfaction Survey and leverage local events and facilities for cross-promotion (<i>Dependent on</i> : B.5.2.2 and B.1.1.2)	2022	2023			-													Historic Preservation Board	Cathy DeKarz	

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						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030					
B.5.2.5 Assist with celebrating Belleair’s centennial year in 2025	2024	2025			-													Historic Preservation Board	Cathy DeKarz		
OBJECTIVE B.5.3 Adopt or create design guidelines for the preservation of historic buildings and structures in Belleair																					
B.5.3.1 Research existing design guidelines from neighboring communities to determine needs	2020	2020			-													Historic Preservation Board	Cathy DeKarz		
B.5.3.2 Research grant funding opportunities from the State of Florida Division of Historical Resources to fund a consultant to create design standards for the Town of Belleair (<i>Dependent on</i> : B.5.3.1)	2020	2020			-													Historic Preservation Board	Cathy DeKarz		
B.5.3.3 Decide whether to create custom design guidelines for the Town or to adopt those of a neighboring community (<i>Dependent on</i> : B.5.3.2)	2021	2021			-													Historic Preservation Board	Cathy DeKarz		

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme C - Infrastructure: Building and installing smarter systems for tomorrow while maintaining what we have today

																					Planned Duration			Actual Duration			Plan Deviation		
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)									
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030													
GOAL C.1 Roads: A road maintenance program that delivers consistently high levels of pavement quality throughout all areas of town																													
OBJECTIVE C.1.1 Develop a road maintenance program that delivers an aggregate Pavement Condition Index (PCI) score of 70 or greater within 5 years																													
C.1.1.1 Engage a consultant to re-evaluate Pavement Condition Index (PCI) scores throughout town and to train Town staff to continuously evaluate conditions	2021	2021			-														Public Works Team, Infrastructure Board	Keith Bodeker									
C.1.1.2 Prior to each budget year, provide cost estimates to the Commission for work that must occur both in-house and through contractors in order to bring aggregate the Pavement Condition Index (PCI) score to 70 or greater (<i>Dependent on</i> : C.1.1.1)	2022	2030			-														Commission, Public Works Team, Infrastructure Board	Keith Bodeker, Ashley Bernal									
C.1.1.3 Use Pavement Condition Index (PCI) scores and cost estimates to assemble the Capital Improvement Plan (CIP) each budget year (<i>Dependent on</i> : C.1.1.2)	2022	2030			-														Commission, Public Works Team, Infrastructure Board	Keith Bodeker, Ashley Bernal									
OBJECTIVE C.1.2 Do not allow any road to fall below a Pavement Condition Index (PCI) score of 50, and correct any current roads below 50 within 3 years																													
C.1.2.1 Update the Pavement Condition Index (PCI) every three years and adjust the Capital Improvement Plan (CIP) as needed (<i>Dependent on</i> : C.1.1.1)	2022	2030			-			2022			2025					2028			Commission, Public Works Team, Infrastructure Board	Keith Bodeker									
C.1.2.2 Using the same Pavement Condition Index (PCI) data, identify pavement segments at risk of falling below a score of 50 within the next 5 years and prioritize those projects to be corrected through the annual Capital Improvement Plan (CIP) each budget year (<i>Dependent on</i> : C.1.1.1)	2022	2030			-														Commission, Public Works Team, Infrastructure Board	Keith Bodeker, Ashley Bernal									
OBJECTIVE C.1.3 Conduct regular Pavement Condition Index (PCI) evaluations in order to devise a management pavement quality and standards																													
C.1.3.1 Assign staff to re-evaluate road segments utilizing Pavement Condition Index (PCI) methodology to provide an up-to-date score of roadway segments regularly (<i>Dependent on</i> : C.1.1.1)	2022	2030			-														Public Works Team	Keith Bodeker, Mike Shumaker									
C.1.3.2 Consider other data sources such as traffic counts, pavement condition, drainage, financing, and other factors alongside the Pavement Condition Index (PCI) when prioritizing projects (<i>Dependent on</i> : C.1.3.1)	2022	2030			-														Public Works Team	Keith Bodeker, Mike Shumaker									
C.1.3.3 Continuously update the Pavement Condition Index (PCI) on this standard every three years (<i>Dependent on</i> : C.1.2.2)	2022	2030			-			2022			2025					2028			Public Works Team	Keith Bodeker, Mike Shumaker									
OBJECTIVE C.1.4 Continuously explore creative strategies to accelerate road maintenance projects																													
C.1.4.1 Achieve Local Agency Program (LAP) certification to allow the Town to apply for new funding mechanisms through the Florida Department of Transportation	2021	2021			-														Public Works Team	Keith Bodeker									
C.1.4.2 Regularly seek grant and alternate funding opportunities for future capital improvement projects	2020	2030			-														Public Works Team	Keith Bodeker									
GOAL C.2 Traffic: Street designs that control speed and minimize traffic volume throughout town																													
OBJECTIVE C.2.1 Conduct a long-term traffic study to understand speed, traffic patterns, and volume																													
C.2.1.1 Determine locations and scope for a long-term traffic study and request a cost breakdown for completion of the study from the Engineer of Record (EOR)	2021	2021			-														Public Safety Team	Keith Bodeker									
C.2.1.2 Authorize the Engineer of Record (EOR) to conduct a long-term traffic study (<i>Dependent on</i> : C.2.1.1)	2022	2023			-														Public Safety Team	Keith Bodeker									

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
C.2.1.3 Have the Commission hear a report from the Engineer of Record (EOR) on the results and recommendations of this study (<i>Dependent on</i> : C.2.1.2)	2022	2023			-													Commission, Public Safety Team	JP Murphy, Keith Bodeker	
OBJECTIVE C.2.2 Develop a plan based on the results of the traffic study to manage speed and cut-through traffic with traffic calming measures																				
C.2.2.1 Develop a plan utilizing data collected from the Engineer of Record's (EOR's) long-term traffic study and other data points to guide the Capital Improvement Plan (CIP) (<i>Dependent on</i> : C.2.1.3)	2024	2025			-													Commission, Public Safety Team	JP Murphy, Keith Bodeker	
OBJECTIVE C.2.3 Investigate alternatives strategies to reducing speed to 25 miles-per-hour throughout town																				
C.2.3.1 Use data and recommendations from the Engineer of Record's (EOR's) long-term traffic study to evaluate options for speed reduction and visibility triangle clearance (<i>Dependent on</i> : C.2.1.3)	2024	2025			-													Commission, Public Safety Team	JP Murphy, Keith Bodeker, Chief Doyle	
C.2.3.2 Consider implementing speed reductions in specific locations, as deemed appropriate (<i>Dependent on</i> : C.2.3.1)	2024	2025			-													Commission, Public Safety Team	JP Murphy, Keith Bodeker, Chief Doyle	
GOAL C.3 Traffic: A connected system of multi-modal routes throughout town that emphasize safe pedestrian travel via sidewalks, trails, bike lanes, and crosswalks																				
OBJECTIVE C.3.1 Conduct a connectivity study that assess the safe connection of the Town's public spaces																				
C.3.1.1 Determine locations and scope for an infrastructure connectivity study and request a cost breakdown for completion of the study from the Engineer of Record (EOR)	2021	2021			-													Public Works Team	JP Murphy, Keith Bodeker	
C.3.1.2 Authorize the Engineer of Record (EOR) to conduct a connectivity study (<i>Dependent on</i> : C.3.1.1)	2021	2021			-													Public Works Team	JP Murphy, Keith Bodeker	
C.3.1.3 Have the Commission hear a report from the Engineer of Record (EOR) on the results and recommendations of this study (<i>Dependent on</i> : C.3.1.2)	2022	2023			-													Commission, Public Works Team	JP Murphy, Keith Bodeker	
OBJECTIVE C.3.2 Develop a Town plan for multi-modal transportation based on the results of the connectivity study																				
C.3.2.1 Use data and recommendations from the Engineer of Record's (EOR's) connectivity study to prioritize work areas (<i>Dependent on</i> : C.3.1.3)	2022	2023			-													Commission, Public Works Team	JP Murphy, Keith Bodeker	
C.3.2.2 Use this data and prioritization to schedule and budget for work to be completed in both the short-term and the long-term (<i>Dependent on</i> : C.3.2.1)	2022	2023			-													Commission, Public Works Team	JP Murphy, Keith Bodeker	
OBJECTIVE C.3.3 Develop an ADA Accessibility Transition Plan and implement recommendations to accommodate needs within Town rights-of-way																				
C.3.3.1 Use data and recommendations from the Engineer of Record's (EOR's) connectivity study to prioritize accessibility transition activities (<i>Dependent on</i> : C.3.1.3)	2022	2023			-													Public Works Team	Keith Bodeker, Ricky Allison	
C.3.3.2 Use this data and prioritization to schedule and budget for work to be completed in both the short-term and the long-term (<i>Dependent on</i> : C.3.3.1)	2022	2023			-													Public Works Team	Keith Bodeker, Ricky Allison	
GOAL C.4 Water: A reliable supply of high-quality potable water at a consistent and reliable cost																				
OBJECTIVE C.4.1 Evaluate of the cost of retaining an updating the water plant versus the cost of transferring ownership of the water plant to an external supplier																				
C.4.1.1 Engage an engineer to conduct a water rate study	2021	2021			-													Leadership Team	JP Murphy	
C.4.1.2 Update the Preliminary Engineering Report (PER) for construction of a modular reverse osmosis plant	2021	2021			-													Leadership Team, Utilities Team	JP Murphy, David Brown, Keith Bodeker, Ashley Bernal	
C.4.1.3 Contract out a reverse osmosis pilot study (<i>Dependent on</i> : C.4.1.2)	2021	2021			-													Utilities Team	David Brown, Keith Bodeker	
C.4.1.4 Begin construction of an exploratory injection well	2021	2021			-													Utilities Team	David Brown, Keith Bodeker	
C.4.1.5 Obtain and interpret results of an 18-month testing period of the exploratory injection well (<i>Dependent on</i> : C.4.1.4)	2022	2023			-													Utilities Team	David Brown, Keith Bodeker	

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
C.4.1.6 Update the Town’s water model	2020	2020			-													Utilities Team	David Brown, Keith Bodeker	
OBJECTIVE C.4.2 Develop a plan based on the results of the above studies to present to the Commission for final decision making																				
C.4.2.1 Hold a public hearing upon receiving data from the water rate study (<i>Dependent on</i> : C.4.1.1)	2022	2023			-													Commission	JP Murphy	
C.4.2.2 Publicly advertise this meeting through print and digital means including but not limited to press coverage, social media, web presences, and mailers (<i>Dependent on</i> : C.4.2.1)	2022	2023			-													Commission	Cathy DeKarz	
C.4.2.3 At the meeting, compare rate-payer costs, quality, and customer service levels between supplier options (<i>Dependent on</i> : C.4.2.1)	2022	2023			-													Commission	JP Murphy	
C.4.2.4 Make a staff recommendation on plant options to the Commission following the public hearing (<i>Dependent on</i> : C.4.2.1)	2022	2023			-													Commission	JP Murphy	
OBJECTIVE C.4.3 Actively identify and pursue state and alternative funding sources to offset the cost of a potential reverse-osmosis conversion																				
C.4.3.1 Continuously request funding for the reverse osmosis pilot study and plant improvements	2020	2030			-													Commission	JP Murphy	
C.4.3.2 Pursue any and all grant or alternative funding options available	2020	2030			-													Commission	JP Murphy	
C.4.3.3 Consider obtaining dollars from the State Revolving Fund for improvements for the Water Treatment Plant	2020	2030			-													Commission	JP Murphy	
GOAL C.5 Undergrounding Utilities: A feasible approach to the undergrounding of utilities that enhance the resilience and aesthetics of Belleair																				
OBJECTIVE C.5.1 Host a presentation by Duke Energy on the possible costs of undergrounding Town utilities																				
C.5.1.1 Engage representatives from Duke Energy to present the Commission a cost analysis on undergrounding utilities	2021	2021			-													Commission	JP Murphy, Keith Bodeker	
OBJECTIVE C.5.2 Based on information from Duke Energy, consider conducting a feasibility study for the undergrounding of Town utilities																				
C.5.2.1 Use cost estimates from Duke Energy to consider undergrounding utilities (<i>Dependent on</i> : C.5.1.1)	2021	2021			-													Commission	JP Murphy	
OBJECTIVE C.5.3 For all upcoming capital projects, evaluate costs to underground utilities within project scope																				
C.5.3.1 When making capital improvement plans and decisions, consider the cost of undergrounding utilities (<i>Dependent on</i> : C.5.2.1)	2021	2030			-													Commission	JP Murphy, Keith Bodeker	
C.5.3.2 Consider prioritizing specific public areas in town that may be good candidates for undergrounding (<i>Dependent on</i> : C.5.2.1)	2021	2030			-													Commission	JP Murphy, Keith Bodeker	
C.5.3.3 Consider grant programs for blocks or neighborhoods that may wish to underground rear-lot easements (<i>Dependent on</i> : C.5.2.1)	2021	2030			-													Commission	JP Murphy, Keith Bodeker	
GOAL C.6 Drainage: A stormwater system that protects roadways, persons, property, and public health																				
OBJECTIVE C.6.1 Develop Stormwater Management Design Standards to preclude street flooding to meet the requirements of a 10-year storm event																				
C.6.1.1 Engage the Engineer of Record (EOR) to conduct a study of current stormwater conditions	2021	2021			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.6.1.2 Obtain Stormwater Management Design Standards from the Engineer of Record (EOR) to set standards for stormwater system quality and maintenance (<i>Dependent on</i> : C.6.1.1)	2021	2021			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.6.1.3 Develop or select an evaluation tool as a part of the Stormwater Management Design Standards that staff can use to inspect and benchmark at least half of the Town’s stormwater segments annually (<i>Dependent on</i> : C.6.1.2)	2021	2021			-													Public Works Team	Keith Bodeker, Mike Shumaker	

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
C.6.1.4 Consider engaging the Southwest Florida Water Management District (SWFWMD) for cooperative funding opportunities to survey and revamp the stormwater master plan (<i>Dependent on</i> : C.6.1.2)	2021	2021			-													Public Works Team	Keith Bodeker, Mike Shumaker	
OBJECTIVE C.6.2 Identify areas within Town that do not meet the Stormwater Management Design Standards and prioritize these roadway segments based on traffic volume																				
C.6.2.1 Use the Stormwater Management Design Standards and data from the long-term traffic study and the Capital Improvement Plan (CIP) to prioritize and schedule work to be completed (<i>Dependent on</i> : C.1.1.3, C.2.1.3, and C.6.1.2)	2024	2025			-													Public Works Team	Keith Bodeker, Mike Shumaker	
OBJECTIVE C.6.3 Evaluate the stormwater utility fee rate on a periodic basis to determine if any increases are necessary to cover current and future operating costs																				
C.6.3.1 Develop and adopt stormwater system maintenance standards and identify the costs associated with those standards	2022	2023			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.6.3.2 Compile maintenance costs and capital costs for stormwater improvements (<i>Dependent on</i> : C.6.3.1)	2024	2025			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.6.3.3 Consider adjusting the stormwater utility fee to fund this work (<i>Dependent on</i> : C.6.3.2)	2024	2025			-													Public Works Team	Keith Bodeker, Mike Shumaker	
GOAL C.7 Drainage: A proactive system of stormwater treatment that meets or exceeds federal water quality standards to promote environmental sustainability																				
OBJECTIVE C.7.1 Annually create an action plan based on Pinellas County's Ambient Water Quality Monitoring Report in order to improve water quality																				
C.7.1.1 Read and interpret data and recommendations in Pinellas County's annual stormwater quality monitoring report	2020	2030			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.7.1.2 Consider these recommendations when making decisions for the Capital Improvement Plan (CIP), stormwater management, and/or stormwater quality decisions (<i>Dependent on</i> : C.1.1.3 and C.7.1.1)	2020	2030			-													Public Works Team	Keith Bodeker, Mike Shumaker	
OBJECTIVE C.7.2 Develop a maintenance plan for all major stormwater outfalls																				
C.7.2.1 Annually identify any new stormwater outfalls in town	2020	2030			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.7.2.2 Develop best management practices from stormwater maintenance standards	2022	2023			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.7.2.3 Identify the costs associated with maintenance of major outfalls (36-inches and larger) (<i>Dependent on</i> : C.7.2.2)	2022	2023			-													Public Works Team	Keith Bodeker, Mike Shumaker	
C.7.2.4 Use standards and cost estimations in future Capital Improvement Plan (CIP), stormwater management, and/or stormwater quality decisions (<i>Dependent on</i> : C.7.2.3)	2022	2030			-													Public Works Team	Keith Bodeker, Mike Shumaker	
OBJECTIVE C.7.3 Communicate educational pieces to residents on doing their part to reduce stormwater nutrient runoff annually																				
C.7.3.1 Seek grant funding for increased resident education materials or programs	2020	2030			-													Public Works Team	Mike Shumaker, Cathy DeKarz	
C.7.3.2 Establish an annual public education and outreach program centered around National Pollutant Discharge Elimination Systems (NPDES) standards, initiatives, and requirements	2020	2030			-													Public Works Team	Mike Shumaker, Cathy DeKarz	
GOAL C.8 Smart City: Smart city tools and strategies that understand, maintain, and protect the Town of Belleair's physical and digital infrastructure																				
OBJECTIVE C.8.1 Identify and evaluate smart city tools for their implementation and use																				
C.8.1.1 Inventory and evaluate the Town's smart city devices or tools that create data (for both physical and digital infrastructure)	2021	2021			-													Leadership Team	JP Murphy, Stefan Massol	
C.8.1.2 Design interfaces that combine datasets to inform decision making and ensure this data is open and transparent for public access (<i>Dependent on</i> : C.8.1.1)	2021	2030			-													Leadership Team	JP Murphy, Stefan Massol	

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
C.8.1.3 Issue a Request for Information (RFI) to evaluate opportunities for capital improvement through the use of smart cities infrastructure that encourage public-private-partnerships	2021	2021			-													Leadership Team	JP Murphy, Keith Bodeker	
OBJECTIVE C.8.2 Generate and update Geographic Information System (GIS) maps for all utilities and infrastructure																				
C.8.2.1 Develop a plan to create a unified system of GIS mapping	2022	2023			-													Leadership Team	JP Murphy, Stefan Massol	
C.8.2.2 Assign or contract work to generate and update all necessary GIS maps and components (<i>Dependent on</i> : C.8.2.1)	2022	2023			-													Leadership Team	JP Murphy, Stefan Massol	
C.8.2.3 Publish GIS data where appropriate	2020	2030			-													Leadership Team	JP Murphy, Stefan Massol	
OBJECTIVE C.8.3 Implement cybersecurity measures to protect the Town's infrastructure and data																				
C.8.3.1 Regularly conduct cybersecurity training for all employees	2020	2030			-													Leadership Team	Stefan Massol	
C.8.3.2 Maintain a cybersecurity framework for all technological resources via a town-wide Information Technology Security Policy to be approved by the Commission	2022	2023			-													Leadership Team	Stefan Massol	
C.8.3.3 Purchase adequate insurance coverages to mitigate cybersecurity risks annually	2020	2030			-													Leadership Team	Stefan Massol	
GOAL C.9 Smart City: Intuitive technology and processes that advance and improve Town services																				
OBJECTIVE C.9.1 Consider innovating public safety technologies to assist law enforcement and increase the safety of Belleair																				
C.9.1.1 Evaluate technologies such as license plate readers, cameras, and Bluetooth beaconing for use in Belleair	2022	2023			-													Leadership Team	JP Murphy, Stefan Massol	
C.9.1.2 Collaborate with other law enforcement agencies to seek options for joint procurement of smart city technology that helps the Town make informed decisions about infrastructure improvements and public safety	2020	2030			-													Public Safety Team	Chief Doyle	
OBJECTIVE C.9.2 Utilize Bluetooth beaconing and similar technologies in infrastructure planning and decision making																				
C.9.2.1 Consider acquiring Bluetooth beaconing (and similar technologies) throughout major intersections in Belleair to understand traffic patterns	2021	2021			-													Leadership Team	JP Murphy	
C.9.2.2 Use Bluetooth beaconing (and similar technologies) on a regular basis to track traffic flow and consider this data when making future infrastructure decisions (<i>Dependent on</i> : C.9.2.1)	2022	2030			-													Leadership Team	JP Murphy	
OBJECTIVE C.9.3 Consider investing in smart city initiatives																				
C.9.3.1 Engage a consultant to conduct a valuation study of data points available	2022	2023			-													Leadership Team	JP Murphy	
C.9.3.2 Determine available revenue sources as a result of the study (<i>Dependent on</i> : C.9.3.1)	2022	2023			-													Leadership Team	JP Murphy	

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme D - Leadership and Management: Investing in a high-quality workforce to best manage finances, data, and services

						Planned Duration			Actual Duration			Plan Deviation						
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)										RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)	
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029			2030
GOAL D.1 A data-driven approach to utilizing and collecting information that helps the Town make better decisions																		
OBJECTIVE D.1.1 Collect, analyze, and leverage metrics from programs																		
D.1.1.1 Identify key performance indicators for each budgeted program that align with strategic planning objectives	2021	2021			-												Leadership Team	Ashley Bernal
D.1.1.2 Determine means to capture these metrics for each program and gather baseline data for each (<i>Dependent on</i> : D.1.1.1)	2021	2021			-												Leadership Team	Ashley Bernal
D.1.1.3 Establish a streamlined system to connect these metrics with a user-friendly data collection and reporting tool (<i>Dependent on</i> : D.1.1.2)	2021	2021			-												Leadership Team	Ashley Bernal
D.1.1.4 Use program metrics to inform decision-making processes and policy decisions (<i>Dependent on</i> : D.1.1.3)	2021	2030			-												Leadership Team	Ashley Bernal
OBJECTIVE D.1.2 Where appropriate, the Town should transparently share data and performance metrics																		
D.1.2.1 Continually report progress on strategic planning objectives and budgeted programs to the community (<i>Dependent on</i> : D.1.1.1)	2022	2030			-												Leadership Team	JP Murphy, Cathy DeKarz
GOAL D.2 A high-quality workforce that is engaged, trained, and retained																		
OBJECTIVE D.2.1 Conduct a salary survey to evaluate the market and make adjustments as necessary																		
D.2.1.1 Hire a consultant to conduct a salary and benefits survey every three years and align compensation targets with Commission goals	2020	2030			-												Leadership Team	Stefan Massol
OBJECTIVE D.2.2 Research and analyze employee healthcare options and costs that better fit the needs of Belleair's workforce																		
D.2.2.1 Complete an employee survey to identify health insurance and benefit needs within the town and use the data to identify plan options (<i>Dependent on</i> : D.2.1.1)	2020	2020			-												Leadership Team	Stefan Massol
D.2.2.2 Assemble an employee workgroup to study benefit options and make recommendations to the Town's leadership staff and officials (<i>Dependent on</i> : D.2.2.1)	2021	2021			-												Leadership Team	Stefan Massol
D.2.2.3 In conjunction with other action items, collect information on comparable employers and their health care costs and plan options every three years (<i>Dependent on</i> : D.2.2.1)	2021	2030			-												Leadership Team	Stefan Massol
D.2.2.4 Use all of this data and input to develop plan offerings that meet the needs of employees (<i>Dependent on</i> : D.2.2.3)	2022	2023			-												Leadership Team	Stefan Massol
OBJECTIVE D.2.3 Develop a plan for training employees to increase job resiliency																		
D.2.3.1 Cross-train employees to mitigate risks from positions and tasks that fall to the responsibility of single employees while prioritizing tasks and positions that present the highest amount of risk to the disruption of services	2020	2030			-												Leadership Team	Stefan Massol
D.2.3.2 Draft instructions for essential procedures and tasks for each position that encourages the retention of organizational knowledge	2020	2030			-												Leadership Team	Stefan Massol
D.2.3.3 Develop a program of training and/or onboarding that exposes employees to all elements of the organization, familiarizes them with policies and procedures, and prepares them for organizational success	2021	2021			-												Leadership Team	Stefan Massol

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)														RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030					
OBJECTIVE D.2.4 Develop a diverse milestone program of incentive and promotion that encourages employee growth and development																					
D.2.4.1 Develop a milestone program for the promotion and/or professional growth for each position	2021	2021			-													Leadership Team	Stefan Massol		
D.2.4.2 Ensure this milestone program creates meaningful paths for pay or responsibility increases for employees (<i>Dependent on</i> : 2.4.1)	2021	2030			-													Leadership Team	Stefan Massol		
D.2.4.3 Communicate this program with employees and track progress on individual levels as a part of annual employee evaluation and goal setting (<i>Dependent on</i> : 2.4.2)	2021	2030			-													Leadership Team	Stefan Massol		
OBJECTIVE D.2.5 Develop a program of minimal essential training for all employees																					
D.2.5.1 Create a training plan for all positions that considers town-wide and position-specific requirements and opportunities	2022	2023			-													Leadership Team	Stefan Massol		
D.2.5.2 Ensure that a portion of required training includes cybersecurity, use of technology, emergency management, safety, Florida Sunshine Law, diversity and inclusion, and innovation topics (<i>Dependent on</i> : D.2.5.1)	2022	2023			-													Leadership Team	Stefan Massol		
D.2.5.3 Annually commit funds to accomplish these tasks (<i>Dependent on</i> : D.2.5.2)	2022	2030			-													Commission, Leadership Team	JP Murphy, Stefan Massol		
OBJECTIVE D.2.6 Develop succession plans for employees																					
D.2.6.1 For each supervisory position and above, develop succession plans that seek to grow and retain employees	2022	2023			-													Leadership Team	JP Murphy		
OBJECTIVE D.2.7 Annually hold a Commission work session to consider workforce topics																					
D.2.7.1 Have departments analyze the effectiveness of their workforce size and utilization annually	2021	2030			-													Leadership Team	JP Murphy		
D.2.7.2 Prior to the budget season each year, hold a regular or special Commission meeting or workshop to discuss workforce size and utilization in each department, where staff and the Commission may consider changes to the workforce that optimize efficiency (<i>Dependent on</i> : D.2.7.1)	2021	2030			-													Commission, Leadership Team	JP Murphy		
D.2.7.3 Consider hiring strategies that optimize the productivity, quality, and retention of employees	2021	2030			-													Leadership Team	JP Murphy		
D.2.7.4 Develop recruitment strategies that position the Town as a highly desirable workplace	2022	2023			-													Commission, Leadership Team	JP Murphy, Cathy DeKarz		
D.2.7.5 Develop diverse and inclusive recruitment strategies that target and engage employees of all backgrounds	2022	2023			-													Commission, Leadership Team	JP Murphy, Stefan Massol		
GOAL D.3 Strong financial reserves available to meet unforeseeable issues																					
OBJECTIVE D.3.1 Conduct and publish annual strategic financial forecasts																					
D.3.1.1 Annually produce a financial forecast for the upcoming five-year period based on the adopted assumptions consisting of projected revenues, projected expenditures, projected fund balances for each major fund, a guide to current revenue sources, and a review of upcoming capital improvement needs	2021	2030			-													Commission, Finance Board	Ashley Bernal		
OBJECTIVE D.3.2 Periodically review and revise the Fund Balance Policy																					
D.4.3.1 Once every five years, consider any floor, ceiling, and indexing as a percentage of revenues and expenditures for each fund, updating the policy based on Town Commission targets	2021	2030			-													Commission, Finance Board	Ashley Bernal		
D.4.3.2 As a part of the Comprehensive Annual Financial Report (CAFR), have the Town Commission review the reserves available for general reserves as well as emergency management costs and consider if they are sufficient	2021	2021			-													Commission, Finance Board	Stefan Massol		

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)														RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030					
GOAL D.4 A strong, stable, and diverse financial position that is transparently communicated to the community																					
OBJECTIVE D.4.1 Ensure revenues are sufficient to cover annually-required expenditures																					
D.4.1.1 Develop a definition of deficit for purposes of the strategic plan and acceptable reserve spending such as treatment of non-operating transfers, capital purchases, and improvements	2021	2021			-													Finance Board	Stefan Massol		
D.4.1.2 Clearly connect revenue sources with any expenditures that are directly related in the budget and any amendments, down to a program level of detail	2022	2023			-													Finance Board	Ashley Bernal		
D.4.1.3 Compile budgetary reports for the Finance Board each quarter to update any emerging financial changes (<i>Dependent on: D.5.1.2</i>)	2022	2030			-													Finance Board	Ashley Bernal		
D.4.1.4 At least once every five years, perform a market analysis for any programs, considering those with related rates and fees, with phased implementation	2021	2030			-													Commission, Leadership Team, Finance Board, Recreation Board	Ashley Bernal		
OBJECTIVE D.4.2 Develop and maintain a diverse portfolio of funding sources																					
D.4.2.1 Consider the merits of a public services tax on water utility services for the annual budget	2020	2020			-													Finance Board	Stefan Massol		
D.4.2.2 Consider hiring an employee or consultant to seek and apply for grants on behalf of the Town	2020	2030			-													Commission	JP Murphy		
D.4.2.3 Compile a list of any grants Belleair could benefit from based on three-year outlook of initiatives in each fund as part of the annual budget process	2022	2030			-													Leadership Team	Stefan Massol		
D.4.2.4 Consider a policy for bequests and donations of items other than real property	2021	2021			-													Commission, Leadership Team	Stefan Massol		
D.4.2.5 Actively seek out opportunities for bequests and donations to the Town (<i>Dependent on: D.5.2.3</i>)	2021	2030			-													Commission, Leadership Team	Stefan Massol		
OBJECTIVE D.4.3 Avoid long-term indebtedness, limiting exposure to 20 years or less																					
D.4.3.1 Develop and adopt an official benchmark guide for public borrowing based on factors and limitations, including definitions of borrowing	2024	2025			-													Finance Board	Stefan Massol		
OBJECTIVE D.4.4 In conjunction with budget processes, communicate the Capital Improvements Plan (CIP) and provide updates as to current projects																					
D.4.4.1 Before April of each year, hold a joint meeting of the Finance Board and Infrastructure Board to review current and future capital projects	2021	2030			-													Finance Board, Infrastructure Board	JP Murphy		
D.4.4.2 Have staff provide quarterly updates on capital projects to the Finance Board describing amounts paid and deliverables received	2021	2030			-													Finance Board	Ashley Bernal, Keith Bodeker		
D.4.4.3 Based on the adoption of the Capital Improvements Plan (CIP), provide information on upcoming capital projects in the annual budget document that describe current phasing and plans for projects expected to begin within the next three years	2021	2030			-													Finance Board	Ashley Bernal, Keith Bodeker		
OBJECTIVE D.4.5 Review and revise investment policy and strategies																					
D.4.5.1 Perform an analysis of investment policy and strategies once every two years, considering issues of legal compliance, internal control, and market performance	2020	2030			-													Finance Board	Stefan Massol		

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme E - Partnering and Intergovernmental Collaboration: Maintaining mutually-beneficial relations with our neighbors and partners

						Planned Duration			Actual Duration			Plan Deviation							
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)												RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030			
GOAL E.1 Mutually-beneficial relations and partnerships with surrounding agencies																			
OBJECTIVE E.1.1 Seek out capital improvement projects that engage multiple agencies or entities to leverage resources																			
E.1.1.1 Consider opportunities to partner with the legislature and other public entities to achieve economies of scale through cooperative funding and purchasing	2020	2030		-													Leadership Team	JP Murphy	
E.1.1.2 Engage Forward Pinellas and Pinellas County to consider Indian Rocks Road as a complete streets project	2022	2023		-													Leadership Team	JP Murphy, Keith Bodeker	
E.1.1.3 Engage Pinellas County and the City of Largo to consider joint improvements of Rattlesnake Creek	2020	2020		-													Leadership Team	JP Murphy, Keith Bodeker	
OBJECTIVE E.1.2 Seek out and prioritize shared purchasing approaches resources with neighbors																			
E.1.2.1 Maintain a database and tracking system that lists purchasing agreements and piggybacks that are existing and potential	2022	2023		-													Leadership Team	Stefan Massol	
E.1.2.2 Upon making large-scale purchasing decisions or renewals, consider options for purchasing agreements and/or piggybacks that could benefit the Town	2020	2030		-													Leadership Team	Stefan Massol	
OBJECTIVE E.1.3 Explore opportunities to partner with neighboring communities to take advantage of economies of scales for operational maintenance																			
E.1.3.1 As a part of the annual budgeting process, identify programs that could benefit from intergovernmental agreements	2020	2030		-													Leadership Team	Stefan Massol	
E.1.3.2 Use this annual identification to make smarter decisions for operations (<i>Dependent on</i> : E.1.3.1)	2020	2030		-													Leadership Team	Stefan Massol	
OBJECTIVE E.1.4 Proactively identify projects that are good candidates for State funding																			
E.1.4.1 Regularly seek out groups and partnerships that connect town staff and officials to funding opportunities and experts	2020	2030		-													Leadership Team	JP Murphy	
E.1.4.2 Retain a lobbyist to advocate for the state funding on behalf of the Town	2020	2030		-													Commission	JP Murphy	
E.1.4.3 Upon consideration of any large-scale infrastructure or other project, apply for grants, cooperative funding, or other programs that can benefit Belleair	2020	2030		-													Public Works Team	Keith Bodeker	

TOWN OF BELLEAIR STRATEGIC PLANNING PROGRESS REPORT

Theme F - Town Services: Providing people-first services that emphasize safety and efficiency, while building a sense of community

																				Planned Duration		Actual Duration		Plan Deviation	
ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)										RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)								
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029			2030							
GOAL F.1 Public Safety: Community-oriented and proactive police services																									
OBJECTIVE F.1.1 Adopt a Town charter amendment to require the dissolution of the Police Department to (1) be approved by a majority vote of the Commission and (2) be approved by majority referendum of Belleair residents																									
F.1.1.1 Draft a charter amendment to be approved by ordinance for ratification at the next regular election	2022	2023			-												Commission	JP Murphy							
OBJECTIVE F.1.2 Develop level-of-service standards that set expectations for a community-oriented Police Department																									
F.1.2.1 Use the results of the Citizen Satisfaction Survey to develop level-of-service standards for the Police Department (<i>Dependent on: B.1.1.2</i>)	2022	2023			-												Public Safety Team	Chief Doyle							
F.1.2.2 Ensure that these standards include specific deliverables such as house checks, community policing, and code enforcement (<i>Dependent on: F.1.2.1</i>)	2022	2023			-												Public Safety Team	Chief Doyle							
F.1.2.3 Ensure that these level-of-service standards include specific and measurable benchmarks, as set by the Commission (<i>Dependent on: F.1.2.1</i>)	2022	2023			-												Commission, Public Safety Team	Chief Doyle							
GOAL F.2 Public Safety: Proactive and responsive emergency management services																									
OBJECTIVE F.2.1 Update and operationalize an Emergency Management Plan for the Town of Belleair																									
F.2.1.1 Update and get Commission approval on a Town Emergency Management Plan annually	2020	2030			-												Commission, Leadership Team	JP Murphy							
OBJECTIVE F.2.2 Collaborate with Pinellas County Emergency Management and other local agencies to optimize operations in an emergency event																									
F.2.2.1 Per the Emergency Management Plan, maintain active contracts or property rights as needed to ensure prompt availability of a TDSRS site in the case of an emergency (<i>Dependent on: F.2.1.1</i>)	2020	2030			-												Commission, Leadership Team	JP Murphy							
F.2.2.2 Per the Emergency Management Plan, ensure that just-in-time contracts and pre-positioned assets are prepared in advance of hurricane season annually (<i>Dependent on: F.2.1.1</i>)	2020	2030			-												Commission, Leadership Team	JP Murphy							
F.2.2.3 Consistently and strategically communicate to the public the Town's plan for emergency response (<i>Dependent on: F.2.1.1</i>)	2020	2030			-												Commission, Leadership Team	JP Murphy, Cathy DeKarz							
GOAL F.3 Public Safety: Consistently timely, professional, and service-oriented fire and emergency medical services with a contracted entity																									
OBJECTIVE F.3.1 Maintain and prioritize a low response time with the Town's contracted fire and emergency medical services provider																									
F.3.1.1 Ensure contracted response time with the fire and emergency medical services vendor is less than five minutes	2020	2030			-												Leadership Team	Stefan Massol							
F.3.1.2 Prioritize maintenance of this response time while considering future infrastructure projects (<i>Dependent on: F.3.1.1</i>)	2020	2030			-												Leadership Team	Stefan Massol							
OBJECTIVE F.3.2 Develop level-of-service standards that set expectations for fire and emergency medical services																									
F.3.2.1 Use the results of the Citizen Satisfaction Survey to develop level-of-service standards for fire and emergency medical services (<i>Dependent on: B.1.1.2</i>)	2022	2023			-												Leadership Team	Stefan Massol							
F.3.2.2 Ensure that these standards include specific deliverables such as response time, special event participation, Insurance Services Office rating, training requirements, and community outreach and education requirements (<i>Dependent on: F.3.2.1</i>)	2022	2023			-												Leadership Team	Stefan Massol							

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)													RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030				
F.3.2.3 Ensure that these level-of-service standards include specific and measurable benchmarks, as set by the Commission (<i>Dependent on</i> : F.3.2.1)	2022	2023			-													Commission, Leadership Team	Stefan Massol	
GOAL F.4 Trash Collection: Concierge-level solid waste services, programs, and events																				
OBJECTIVE F.4.1 Optimize the efficiency of twice-weekly residential pickup while maintaining customer service standards																				
F.4.1.1 Engage a consultant to conduct a solid waste rate study	2021	2021			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
F.4.1.2 Consider changes to the solid waste fleet in order to optimize the efficiency of twice-weekly pickup (<i>Dependent on</i> : F.4.1.1)	2022	2023			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
F.4.1.3 Seek new opportunities and/or services to increase revenues for the Solid Waste Department in conjunction with the rate study (<i>Dependent on</i> : F.4.1.1)	2022	2030			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes, Ashley Bernal	
OBJECTIVE F.4.2 Increase education and marketing around solid waste services and events such as the shredding events, side-yard pickup, and special pickup																				
F.4.2.1 Consider creative methods to communicate solid waste services, especially those associated with revenues	2020	2030			-													Utilities Team	Cathy DeKarz	
OBJECTIVE F.4.3 Evaluate recycling disposal alternatives																				
F.4.3.1 Engage a consultant to obtain complete data on recycling alternatives	2021	2021			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
F.4.3.2 Based on recommendations from the consultant and feedback from the community, evaluate the costs and benefits of Belleair’s recycling program (<i>Dependent on</i> : F.4.3.1)	2022	2023			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
F.4.3.3 Consider long-term funding mechanisms to retain the recycling program and/or creative alternatives to the program (<i>Dependent on</i> : F.4.3.2)	2022	2023			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
OBJECTIVE F.4.4 Develop level-of-service standards for the Solid Waste Department																				
F.4.4.1 Use the results of the Citizen Satisfaction Survey to develop level-of-service standards for trash and recycling collection, disposal, and services (<i>Dependent on</i> : B.1.1.2)	2022	2023			-													Utilities Team	JP Murphy, Wilfred Holmes	
F.4.4.2 Ensure that these standards include specific topics such as pickup frequency, special event frequency, and special service offerings (<i>Dependent on</i> : F.4.4.1)	2022	2023			-													Utilities Team	JP Murphy, Wilfred Holmes	
F.4.4.3 Ensure that these level-of-service standards include specific and measurable benchmarks, as set by the Commission (<i>Dependent on</i> : F.4.4.1)	2022	2023			-													Commission, Utilities Team	JP Murphy, Wilfred Holmes	
GOAL F.5 Recreation: Town-wide events and programs that foster a sense of community in Belleair																				
OBJECTIVE F.5.1 Increase resident participation in events and programs																				
F.5.1.1 Target marketing efforts to focus on engaging resident groups such as condo associations and families (consider implementing neighborhood ambassadors to assist)	2021	2021			-													Recreation Team, Recreation Board	Ricky Allison, Kevin Trapp, Rachel Hobbs	
F.5.1.2 Develop a strategy that supports or creates opportunities to provide smaller, neighborhood-centered events (<i>Dependent on</i> : F.5.2.1)	2022	2023			-													Recreation Team, Recreation Board	Ricky Allison, Rachel Hobbs	
F.5.1.3 Create and recommend strategies to provide safe, multi-modal access to main event locations around the town center (i.e. Town Hall, the Dimmitt Community Center, Hunter Memorial Park) (<i>Dependent on</i> : C.3.1.3)	2022	2023			-													Public Safety Team	Ricky Allison, Mike Shumaker	
OBJECTIVE F.5.2 Identify and implement the types of events and programs residents would attend																				
F.5.2.1 Consider feedback from the Citizen Satisfaction Survey and other surveys and data sources in future planning (<i>Dependent on</i> : B.1.1.2)	2022	2023			-													Recreation Team, Recreation Board	Ricky Allison, Kevin Trapp, Rachel Hobbs	
F.5.2.2 Provide an event and program schedule that focuses on meeting the needs of all demographics (<i>Dependent on</i> : F.5.2.1)	2022	2023			-													Recreation Team, Recreation Board	Ricky Allison, Kevin Trapp, Rachel Hobbs	

ACTION ITEM	PLANNED START	PLANNED COMPLETION	ACTUAL START	ACTUAL COMPLETION (OR PROGRESS)	PERCENT COMPLETE	YEAR(S)												RESPONSIBLE TEAM(S)	LEAD EMPLOYEE(S)
						2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030			
OBJECTIVE F.5.3 Evaluate the cost-benefit of events and programs																			
F.5.3.1 Determine appropriate metrics for evaluating both the costs and the benefits of each type of event and program	2022	2033			-													Recreation Team, Recreation Board	Ricky Allison
F.5.3.2 Present a report of these metrics to the Recreation Board at least three times per year and to the Commission (<i>Dependent on : F.5.3.1</i>)	2022	2030			-													Commission, Recreation Team, Recreation Board	Ricky Allison
F.5.3.3 Continuously seek creative revenue streams to support recreation events, programs, and capital improvements	2020	2030			-													Commission, Recreation Team, Recreation Board	Ricky Allison
OBJECTIVE F.5.4 Develop a strategy that defines the objectives of Town events and programs																			
F.5.4.1 Continue to provide recreation events and programs that meet residents' needs, consider all demographics, and build community (<i>Dependent on : B.1.1.2 and F.5.3.2</i>)	2022	2030			-													Recreation Team, Recreation Board	Ricky Allison, Rachel Hobbs
F.5.4.2 Support community organizations that foster a sense of community and align with the identified strategies	2020	2030			-													Recreation Team, Recreation Board	Ricky Allison, Rachel Hobbs