



# Strategic Planning: Unleash Your Team's Talents on What Matters Most





# Strategic Planning

Unleash Your Team's Talents  
on What Matters Most

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Executive Consultant/Strategic Planning

# Are Strategic Plans Like Annual Resolutions?

*Not Everyone Makes Resolutions, Fewer Keep Them*

**54%**  
**make a resolution**

46% of Americans say they will not make any type of New Year's resolution for 2023

Source: YouGov

**9-12%**  
**keep a resolution**

Approximately one in 10 U.S. Americans who make a resolution are successful at keeping it

Source: [insideoutmastery.com](https://insideoutmastery.com)

**GOAL FOR THIS SESSION<sup>1</sup>: To outline a process for engaging stakeholders in creating a strategic plan and to increase the odds of successful implementation**

<sup>1</sup> This presentation plus the accompanying presentation from Dan Sabino of Keys Energy Services

# So Much Competing for Our Attention

*What's Most  
Important for the  
Organization  
Now?*



A word cloud of energy and infrastructure topics. The words are arranged in a roughly triangular shape, with 'Transmission' at the top and 'Workforce' at the bottom. The words are in various colors: blue, red, orange, and yellow. The size of the words varies, with 'Transmission' and 'Electric Bills' being the largest. The words are: Transmission, Electric Bills, Energy Storage, Safety, Energy Efficiency, Customer Service, Generation, Resilience, Disaster Response, Rates, Community Engagement, Distributed Energy Resources, Environment, Cybersecurity, Mutual Aid, Reliability, Electricity Markets, Grid Modernization, Financing, Electric Vehicles, Bonds, Security, Physical Security, Power Costs, and Workforce.

# In an Era of Changes, Challenges & Choices

*It's Never Been More Important to Do Three Things*

1

Define a compelling purpose for the organization

2

Identify the most important strategies for success

3

Unleash the team's talents on what matters most

**These are the  
essential outcomes  
of effective strategic  
planning**



<b>Vision</b>	Image of the future an organization seeks to create. If successful at achieving the Mission, this is what the future looks like.
<b>Mission</b>	A statement of the overall purpose of an organization. It describes what the organization does, for whom it does it, and what are the benefit.
<b>Values</b>	General guidelines that set the foundation for how an organization operates.
<b>Goals</b>	Broad, long-term aims that define accomplishment of the Vision and Mission. Goals can be external or internal.
<b>Strategies</b>	Broad activities required to achieve a Goal.
<b>Action Plans</b>	Specific steps to be taken, by whom and by when, to implement a Strategy.

## Let's Start with a Shared Understanding of Terms

### *Definitions of Common Strategic Planning Terms*

# Strategic Planning Can Vary Based on Utility

## *Four Phases of a Typical Planning Process*



# Action Items in Brainstorming Phase

*Desired Outcome: List of Potential Goals, Strategies*

Action Items	Due Date
Launch online survey of utility staff participating in the strategic planning process to brainstorm potential Goals and Strategies	Ten weeks before the workshop
Close online survey of utility staff participating in the planning process	Nine weeks before
Utility staff participating in the process meet to review the brainstorm list of Goals and Strategies to clarify, fine-tune, expand or condense them. Finalize the list of potential Goals and Strategies	Eight weeks before
Hold phone calls with governing board members to discuss the strategic planning process, as well as discuss potential Goals and Strategies	Eight weeks before



# Suggestions for Effective Brainstorming

*Individual Brainstorm First, Group Collaboration Next*

## The Process

- ▶ Individual brainstorming to generate ideas without the influence of others
- ▶ But if you only do individual brainstorming, it lacks diverse perspectives
- ▶ So, a combination of individual brainstorming followed by group review and discussion is best to clarify, fine-tune, expand or condense ideas

## Types of Questions in the Survey

- ▶ Organizational strengths
- ▶ Organizational weaknesses
- ▶ Organizational opportunities
- ▶ Organizational threats
- ▶ Customer service enhancements
- ▶ Operational enhancements
- ▶ Workforce needs
- ▶ Departmental excellence ideas
- ▶ Additional comments/suggestions

# Action Items in Ranking Phase

*Desired Outcome: Initial Ranking of Goals, Strategies*

Action Items	Due Date
Launch an online pre-workshop survey of utility governing board members and staff participating in the process with the following objectives: 1) Obtain initial feedback on the Vision, Mission and Values, 2) Produce an initial ranking of potential Goals and Strategies, 3) Explain the desired Workshop objectives and seek confirmation and any feedback	Seven weeks out
Close pre-workshop survey of governing board and staff	Five weeks out
Finalize a report on the pre-workshop survey results	Four weeks out
Create initial draft of the Workshop agenda	Four weeks out

# Survey Intended to Produce Initial Rankings

*Provides Quantitative Data; Not Meant to Be Final*

- 1 To obtain initial feedback on Vision, Mission and Values
- 2 To produce an initial ranking of potential Goals
- 3 To produce an initial ranking of potential Strategies
- 4 To obtain feedback on expectations for the planning workshop
- 5 To obtain any other comments associated with the process

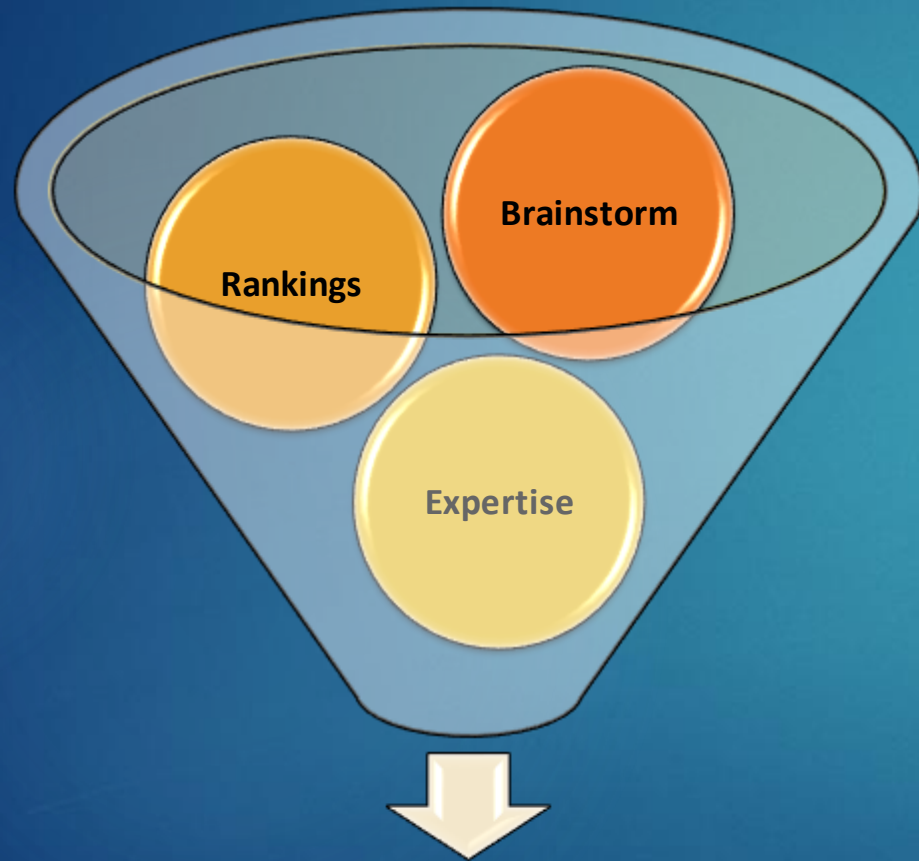
# Action Items in Shortlisting Phase

*Desired Outcome: Shortlist of Key Goals, Strategies*

Action Items	Due Date
Utility staff assigned responsibility for beginning to draft PowerPoint presentations for the workshop regarding the potential Goals and Strategies	Four weeks before
Initial draft PowerPoint slides due from utility staff	Three weeks before
Finalize PowerPoint presentations from staff	Two weeks before
Finalize workshop agenda. Send the pre-workshop survey report and PowerPoint to the workshop participants	One week before

# Staff Creates a PowerPoint for Workshop

## *Recommend a Shortlist of Strategies to Achieve Goals*



**Shortlist**

- ▶ PowerPoint provides information and a recommended shortlist of Strategies to achieve Goals
- ▶ Staff utilize input from prior phases and apply their subject-matter expertise to make recommendations
- ▶ Presentations sent to governing board in advance of planning workshop and presented by staff at the workshop



# Action Items in Deciding Phase

*Desired Outcome: Finalizing the Strategic Plan*

Action Items	Due Date
Hold Strategic Planning Workshop	The target date
Management creates Action Plans for each Strategy and develops an accountability plan with periodic progress reports to the governing board	Two weeks after
Develop a report on the Strategic Planning Workshop, including Vision, Mission, Values, Goals and Strategies	Three weeks after
Hold a project debrief with utility leadership to document what went well and what could be done differently in the future	Four weeks after

# Key Benefits of This Planning Process

*Unleash Your Team's Talents on What Matters Most*



# Contact Information

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Hometown Connections, Inc.



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Mobile 407-951-3668





# Strategic Planning

Dan Sabino – Assistant General Manager and  
Director of Engineering & Control

# Implementing a Strategic Plan

- Developing the Plan
- Action Plans
- Communicate the Plan
- Accountability



# Develop the Plan

- Workshop Goals And Strategies
  - Involve governing body and upper management



# Action Plans

- Assign Goals & Strategies to Departments

**From:** Tejeda, Lynne

**Sent:** Friday, May 13, 2022 4:06 PM

**To:** Department Directors <[DepartmentDirectors@KeysEnergy.com](mailto:DepartmentDirectors@KeysEnergy.com)>; Adam, Michelle <[Michelle.Adam@KeysEnergy.com](mailto:Michelle.Adam@KeysEnergy.com)>

**Subject:** Strategic Planning - Follow up

Yesterday's Strategic Planning session went very well. I have received great feedback from the Utility Board members. They really enjoyed hearing from each of you.

Thank you for all your prep work and for staying so engaged yesterday.

Now that we have our Goals and Strategies, it is time to develop Action Plans. I have attached a draft of the Strategic Plan and added names for who will be working on Action Plans. I also included some *possible* topics based on the comments yesterday. Also, if you have "outside your lane" ideas, please share with me or the appropriate director.

Tentative Schedule:

May 20 – Submit list of Action Plan ideas - could be an email list or the Action Plan forms

May 26 – Finalize list of Action Plans

May 26 – June 8 – Complete Action Plan Forms

May 27 – Strategic Plan AIS submitted

June 8 – UB Approves Strategic Plan



# Action Plans

- Departments develop Action Plans

**Goals #1 - Provide reliable electric service that exceeds industry standards**

Strengthen the transmission system by fortifying the infrastructure and collaborating with FMPA to solve transmission concerns

- Fred – 69/138 kV Breaker Replacement
- Dan/Fred – Reinsulate 69kV Lines (in-house or contractor?) FY23/24
- Dan - Steel pole coating FY25
- Fred - TSS MO7 Repair/Replacement FY22/23
- Dan – Reinsulate 138 kV Line 4 FY23/24
- Fred/Dan – Upgrade DVAR system (Replace poles in DVAR (order placed)/ Replace Hercules boards/re-terminate fiber at

**Lynne's Notes**

- Transmission Study in 2025? – *we can add if you want, but we have a lot already.*
- Line 4?
- Reinsulate 69kv lines?
- Do we include HMG again? Since it is will occur during these fiscal years? Or chalk that up to a last plan success? – *Since*
- Capacity????? – *I put the DVAR upgrade in for this.*

Enhance reliability best practices and storm hardening of the distribution system

- Dan – Remove electromechanical switches from feeder controls (not budgeted)
- Dan/Fred – Separate Lines 2/10/11 – FY 25
- Dan -50% PSC Inspection and pole replacement FY23/24
- Dan - Airport Feeder extension underground?
- Dan – Storm harden XX poles in addition to those in PSC inspection (\$500K FY23, \$1,000K each FY after that) – Could also acceptance criteria to storm harden at least 10% additional poles”.




# Action Plans

## Action Plans



Tejeda, Lynne

To  **Department Directors**



You forwarded this message on 6/10/2022 8:03 AM.



Strategic Plan FY 2023 with names.docx

446 KB



Please find attached the listing of Action Plans.

Please let me know if you see anything that needs fixing or tweaking.

Otherwise I believe the Action Plans are now ready for each of you to commit to the forms.

Please complete the forms over the next four weeks by June 23<sup>rd</sup>.


Thank you!



# Action Plans

- Action plan sheets with schedules completed by each section

"Updated 5/13/2022"

  
Strategic Plan FY 2023-2025 ACTION PLAN

GOAL # (PLEASE SELECT ONE) & STRATEGY # (PLEASE SELECT ONE)

☐ **Goal #1 – Provide reliable electric service that exceeds industry standards**

- ☐ 1. Strengthen the transmission system by fortifying the infrastructure
- ☐ 2. Enhance reliability best practices and storm hardening of the distribution system
- ☐ 3. Successfully start Stock Island generating units when called into operation and improve the availability factor of units
- ☐ 4. Measure, monitor and improve KEYS' cybersecurity maturity

☐ **Goal #2 – Provide exceptional customer service and contribute value-added benefits to our community**

- ☐ 1. Maintain high levels of customer satisfaction
- ☐ 2. Benchmark KEYS' customer services programs to identify opportunities
- ☐ 3. Inform customers about changing fuel prices and provide information to help reduce power bills
- ☐ 4. Enhance and communicate KEYS' value to the community

☐ **Goal #3 – Provide affordable electricity at the lowest reasonable rates**

- ☐ 1. Increase reserve funds to respond to natural disasters and limit financial stress
- ☐ 2. Evaluate benefits, costs, risks, options and timelines to prioritize major initiatives
- ☐ 3. Pursue federal funding opportunities
- ☐ 4. Develop options to reduce the energy charge rate

☐ **Goal #4 – Maintain a highly effective workforce and foster a positive, safe working environment.**

- ☐ 1. Maintain a safety-first culture
- ☐ 2. Expand training and development programs to prepare internal candidates for promotional opportunities
- ☐ 3. Ensure KEYS remains competitive in the employment market
- ☐ 4. Enhance communication among departments and between union and management

ACTION PLAN # (GOAL # STRATEGY # ACTION PLAN # = 1.1.1): XXX

ACTION PLAN DESCRIPTION: INSERT DESCRIPTION HERE

LEAD PERSON: INSERT NAME HERE

STATUS (PLEASE CHECK ALL OF THE FOLLOWING WHICH APPLY):

- ☐ PLANNING (OUTLINING STEPS TO COMPLETION)
- ☐ EXECUTING (IMPLEMENTING AND COORDINATING)
- ☐ MONITORING (OBSERVING AND MEASURING PERFORMANCE)
- ☐ COMPLETE (WRAPPING UP PROJECT ACTIVITIES, APPROVALS, OR CONTRACTS)
- ☐ ONGOING (ACTION PLAN ITEMS CONTINUE TO TAKE PLACE ON A REGULAR BASIS)
- ☐ NOT STARTED – REASON (I.E. PROJECT SCHEDULED FOR FY 2021):

**NARRATIVE** (Initially this section should include steps /milestones in achieving the action plan and target dates for each. Twice a year, this should be updated with completion dates or description of how the project has changed): INSERT NARRATIVE HERE





# Communicating the Plan

- Approve Goals & Strategies



## Agenda Item Summary Sheet

Meeting Date: June 8, 2022

Proposer: Lynne E. Tejeda, General Manager & CEO

Department: Executive

Agenda Item #: D3

**AGENDA ITEM WORDING:** Approve Strategic Plan for Fiscal Years 2023 - 2025

**REQUESTED ACTION:** Motion to Approve Strategic Plan for Fiscal Years 2023 – 2025, including Mission, Vision, Values, Goals and Strategies

**DISCUSSION:** As part of KEYS' strategic planning efforts, the Utility Board met for a publicly noticed workshop session on May 12, 2022. The Utility Board reviewed potential changes to the 2023 – 2025 Strategic Plan, including the Mission and Vision Statements, Values, Goals, and the Strategies associated with each Goal.

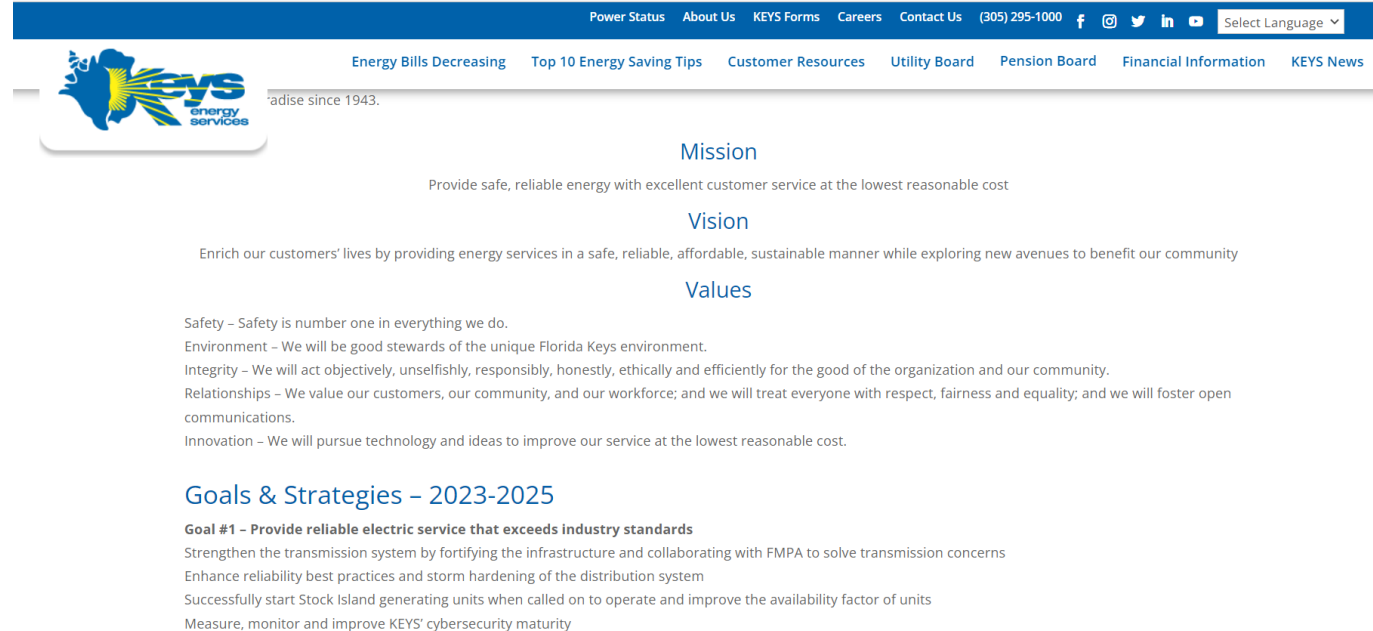
The Utility Board determined that the existing Mission and Vision Statements should remain the same, but proposed revisions to KEYS' Values. The Board identified four Goals, each with four Strategies, to guide KEYS' operations for the planning horizon.

Staff recommends approval of the Strategic Plan for Fiscal Years 2023 – 2025, in the form attached. The Staff-developed action plans for each strategy are also included for your information.









# Communicating the Plan

- Issue press release
- Post on social media
- Post on company website



The screenshot shows the homepage of the Keys Energy Services website. The header is blue with white text for navigation links: Power Status, About Us, KEYS Forms, Careers, Contact Us, (305) 295-1000, and social media icons for Facebook, Instagram, Twitter, LinkedIn, and YouTube. A language selection dropdown is on the right. Below the header is a white banner with the KEYS logo on the left and a list of links: Energy Bills Decreasing, Top 10 Energy Saving Tips, Customer Resources, Utility Board, Pension Board, Financial Information, and KEYS News. The main content area has a light blue background. It features a 'Mission' section with the text 'Provide safe, reliable energy with excellent customer service at the lowest reasonable cost'. Below this is a 'Vision' section with the text 'Enrich our customers' lives by providing energy services in a safe, reliable, affordable, sustainable manner while exploring new avenues to benefit our community'. The 'Values' section lists five principles: Safety, Environment, Integrity, Relationships, and Innovation. The 'Goals & Strategies – 2023-2025' section lists three goals: Goal #1 (reliable electric service), Goal #2 (transmission system strengthening), and Goal #3 (stock island generating units).

Power Status About Us KEYS Forms Careers Contact Us (305) 295-1000      Select Language ▼

 Energy Bills Decreasing Top 10 Energy Saving Tips Customer Resources Utility Board Pension Board Financial Information KEYS News

Paradise since 1943.

### Mission

Provide safe, reliable energy with excellent customer service at the lowest reasonable cost

### Vision

Enrich our customers' lives by providing energy services in a safe, reliable, affordable, sustainable manner while exploring new avenues to benefit our community

### Values

Safety – Safety is number one in everything we do.  
Environment – We will be good stewards of the unique Florida Keys environment.  
Integrity – We will act objectively, unselfishly, responsibly, honestly, ethically and efficiently for the good of the organization and our community.  
Relationships – We value our customers, our community, and our workforce; and we will treat everyone with respect, fairness and equality; and we will foster open communications.  
Innovation – We will pursue technology and ideas to improve our service at the lowest reasonable cost.

### Goals & Strategies – 2023-2025

**Goal #1 – Provide reliable electric service that exceeds industry standards**  
Strengthen the transmission system by fortifying the infrastructure and collaborating with FMPA to solve transmission concerns  
Enhance reliability best practices and storm hardening of the distribution system  
Successfully start Stock Island generating units when called on to operate and improve the availability factor of units  
Measure, monitor and improve KEYS' cybersecurity maturity



# Accountability and Reporting

- Action items assigned to individuals within section

## Strategic Plan



Sabino, Dan

To ○ Gaccione, Samuel

Sam,

We are doing strategic planning, here is what I have for you:

HMGP contract

Electromechanical relay replacement

Automatic Cap Bank Controllers – budgeted in FY24, Specs in September 2023

Dan Sabino

AGM and Director of Engineering & Control

Keys Energy Services


(Desk) 305-295-1041

(Cell) 305-304-4556



# Accountability & Reporting

- Staff maintains action plans



Strategic Plan FY 2023-2025 ACTION PLAN

GOAL # (PLEASE SELECT ONE) & STRATEGY # (PLEASE SELECT ONE)

☒ **Goal #1 – Provide reliable electric service that exceeds industry standards**

☐ 1. Strengthen the transmission system by fortifying the infrastructure and collaborating with FMPA to solve transmission concerns

☒ 2. Enhance reliability best practices and storm hardening of the distribution system

☐ 3. Successfully start Stock Island generating units when called on to operate and improve the availability factor of units

☐ 4. Measure, monitor and improve KEYS' cybersecurity maturity

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☐ 3. Inform customers about changing fuel prices and provide information to help reduce power bills

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☐ 1. Increase reserve funds to respond to natural disasters and limit financial stress

☐ 2. Evaluate benefits, costs, risks, options and timelines to prioritize major initiatives

☐ 3. Pursue federal funding opportunities

☐ 4. Develop options to reduce customer's energy charge

☐ **Goal #4 – Maintain a highly effective workforce and foster a positive, safe working environment.**

☐ 1. Maintain a safety-first culture

☐ 2. Expand training and development programs to prepare internal candidates for promotional opportunities

☐ 3. Ensure KEYS remains competitive in the employment market

☐ 4. Enhance communication among departments and between union and management

**ACTION PLAN # (GOAL #, STRATEGY #, ACTION PLAN # = 1.1.1): 1.2.7**

**ACTION PLAN DESCRIPTION: Remove all electromechanical switches from feeder controls**

**LEAD PERSON: Dan Sabino**

**STATUS (PLEASE CHECK ALL OF THE FOLLOWING WHICH APPLY):**

☒ PLANNING (OUTLINING STEPS TO COMPLETION)

☐ EXECUTING (IMPLEMENTING AND COORDINATING)

☐ MONITORING (OBSERVING AND MEASURING PERFORMANCE)

☐ COMPLETE (WRAPPING UP PROJECT ACTIVITIES, APPROVALS, OR CONTRACTS)

☐ ONGOING (ACTION PLAN ITEMS CONTINUE TO TAKE PLACE ON A REGULAR BASIS)

☐ NOT STARTED – REASON (I.E. PROJECT SCHEDULED FOR FY 2021):

**NARRATIVE** (Initially this section should include steps /milestones in achieving the action plan and target dates for each. Twice a year, this should be updated with completion dates or description of how the project has changed): **INSERT NARRATIVE HERE**

1. Issue Bid 3<sup>rd</sup> quarter FY22
2. Review and approve proposed modifications 1<sup>st</sup> quarter FY23
3. Work performed 3<sup>rd</sup> quarter FY23



# Accountability & Reporting

- Mission And Vision are read at each Utility Board Meeting
- Annual updates to the Utility Board

## Goal #1 Progress

### *Goal #1 – Continually improve the Customer Experience regarding Reliability and Service*

- Maintain High Levels of Customer Satisfaction
  - Strive for a SAIDI level that exceeds the Florida Municipal SAIDI average - **Complete**
  - Maintain an annual average customer satisfaction rating of at least a 4.5 or above - **Complete**
- Increase direct customer contacts
  - Increase number of customers who receive KEYS Emergency Notifications using traditional communications efforts, new envelope sniping, and vehicle wrap advertising - **Complete**
  - Launch mobile application to enable convenient customer portal access and bill payment - **Completes**
  - Launch text messaging of new bill notification - **Complete**
- Strengthen system resiliency
  - Fortify KEYS' cybersecurity - **Complete**
  - Identify telephony and internet backup following a storm or fiber break - **In Progress**
  - Design and build redundancy to Kennedy Drive Feeder 9 - **In Progress**
  - Identify Critical Inventory and Develop Stocking Plan - **In Progress**
  - Determine if KEYS should pursue Advanced Metering Infrastructure (AMI) - **In Progress**





# Questions - Thank you!

- Don't let this be you!





# Connections Summit Breakout

## Session #1 Feedback





*The energy behind public power*

[www.electricities.com](http://www.electricities.com)

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