

2020-2025

# Lee County Tax Collector Strategic Plan





May 15, 2020

Dear Customers, Valued Partners, Stakeholders, and Employees:

I am pleased to present the 2020-2025 strategic plan for Lee County Tax Collector. The organization began the process of developing a new strategic plan in January of 2020 with a cohesive approach to gathering critical partner, stakeholder, and employee feedback to identify the processes and outcomes working effectively, and those needing improvement.

The resulting information was used to conduct further analysis by leadership and multi-functional teams to determine the long-term goals and objectives. The long-term focus areas were then analyzed to determine the most critical areas to be addressed in the first year of the plan. An extensive organizational analysis was conducted addressing capacity and capability, and alignment between the focus areas and the feedback received. The focus areas were prioritized based on feedback and five areas were selected for focus in year one of the plan.

Each year LCTC will evaluate the progress made and will identify the next set of critical items for completion, providing a continuous focus on performance in alignment with the strategic plan. The plan will be reviewed monthly by LCTC leadership to ensure consistent and responsible plan oversight.

Representatives from each group customer, stakeholder and employee group were included in the strategy development process through feedback sessions and surveys. We embraced the feedback received and appreciate efforts to assist with the development of a plan to position LCTC to deliver exceptional outcomes through collaborative relationships for the benefit of those we serve.

Regards,

A handwritten signature in blue ink that reads "Larry D. Hart".

Larry Hart

Lee County Tax Collector



## Executive Summary

The office of the Tax Collector was established in 1885 when the Florida Constitution, Article VIII, Section 6, provided for an independently elected office accountable to the people. Lee County Tax Collector (LCTC) collects and distributes taxes and fees on behalf of local taxing authorities and the State of Florida. Every citizen in Lee County that drives a vehicle, owns a home or business, enjoys hunting and/or fishing, desires to carry a concealed weapon, needs a copy of their Florida birth certificate, or owns/operates a taxi or taxi company is a customer of LCTC. Eight locations provide a convenient forum for the citizens of Lee County to conduct various government and business-related transactions. The annual budget of approximately \$23 million is fee based, which means operating capital is derived from the fees for the transactions performed or the money collected on behalf of the state and local government agencies, and investment programs. Services are delivered in person, traditional mail, email, telephone, web, fax, informational meetings, and training programs.

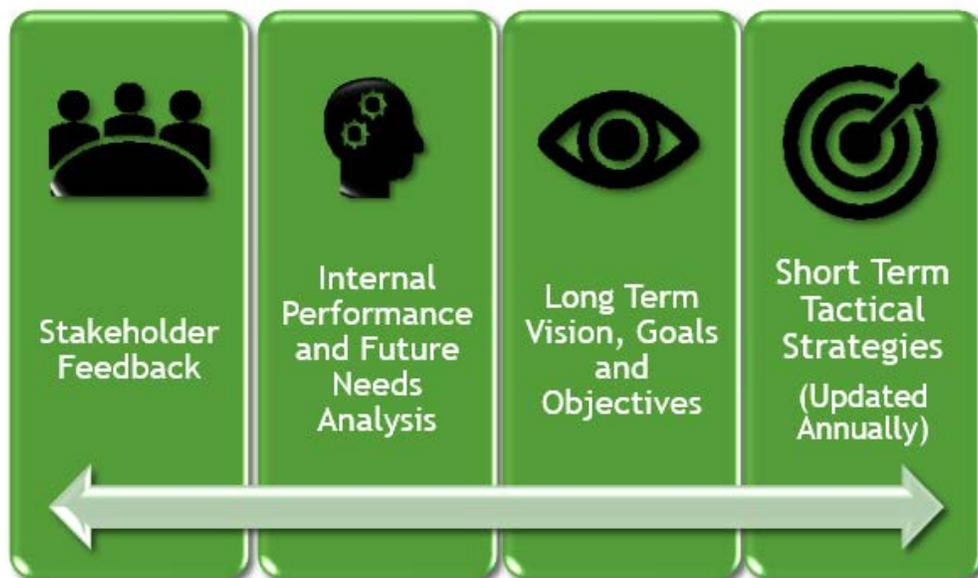
### Customers and Stakeholders

Key Customer Groups	Key Stakeholder Groups
<ul style="list-style-type: none"> <li>• Motor Vehicle Operators</li> <li>• Identification Card Holders</li> <li>• Motor Vehicle/Vessel Owners/Dealers</li> <li>• Mobile Homeowners/Dealers</li> <li>• Disabled/Handicapped Persons</li> <li>• Property Owners (Real Property; Tangible Personal Property)</li> <li>• Business Owners; Licensed and/or Registered Professionals</li> <li>• Taxicab Drivers</li> <li>• Tax Certificate Holders/Investors</li> <li>• Concealed Weapons Carriers</li> <li>• Individuals Born in Florida</li> <li>• Anglers/Hunters</li> <li>• Title Service Companies</li> </ul>	<ul style="list-style-type: none"> <li>• Department of Highway Safety and Motor Vehicles</li> <li>• Department of Revenue</li> <li>• Department of Health</li> <li>• Department of Agriculture and Consumer Services</li> <li>• Florida Fish &amp; Wildlife Conservation Commission</li> <li>• County Taxing Authorities</li> <li>• City Taxing Authorities</li> <li>• Individual Taxing Authorities</li> </ul>



## Strategic Plan Development Process

LCTC followed a structured strategic plan development process to establish systematic approaches, increase organizational knowledge, and manage workforce capacity to deploy the plan. Resources from all parts of the organization were engaged in the development of the plan, increasing plan embedment. This approach will provide a foundational basis on which the organization will build each year as the plan is reviewed and updated.



Lee County Tax Collector recognizes the importance of an inclusive approach to consider the perspectives, needs, and requirements of a diverse group of stakeholders. Feedback from customers, stakeholders, partners, and employees was obtained through focus groups and surveys. The feedback was used as an input into the internal performance and future needs analysis.

The strategic planning development process should be viewed as two phases. The long-term strategic plan highlights the five-year focus areas and improvement opportunities identified by stakeholders and internal analysis. In the second phase, tactical strategies for 2021-2022 will be developed based on identification of the most important priorities. Implementation plans will be established with consideration for the organization's financial and human resource capacity.



Execution of the strategic plan begins with the long-term direction, which is used to develop tactical action plans each year. Deployment plans are developed and reviewed regularly to ensure forward progress and to resolve any barriers to successful completion of the plans. Measures are developed at strategic and tactical levels to evaluate ongoing progress.





## Strategy Map

The strategy map represents the organization’s strategic framework for the next five years. Development of the five-year focus areas were based on identification of execution strategies in alignment with the organizational Vision and Mission. Both were reviewed during the internal analysis phase of strategic plan development and found to be a solid foundation. A SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) was conducted with strategic elements of each written as Strategic Advantages, Strategic Challenges, and Strategic Opportunities. Best practice approaches to strategic planning align the strategic plan to ensure each element is integrated.

