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Submitted by:



TABLE OF CONTENTS

CHAPTER 1: EXECUTIVE SUMMARY	3
CHAPTER 2: ABOUT SOUTHWEST RANCHES	5
CHAPTER 3: STRATEGIC PLANNING PROCESS	12
CHAPTER 4: KEY FINDINGS & INSIGHTS	13
CHAPTER 5 : VISION, MISSION, AND VALUES	14
CHAPTER 6: STRATEGIC PRIORITY AREAS	17
CHAPTER 7: STRATEGIC GOALS	20
CHAPTER 8: COMMUNITY VALIDATION	28
CHAPTER 9: SWOC ANALYSIS	31
CHAPTER 10 : PLAN IMPLEMENTATION	37
CHAPTER 11: STRATEGIC PERFORMANCE & ACCOUNTABILITY FRAMEWORK	40
CHAPTER 12: CONCLUSION & RECOMMENDATIONS	44
CHAPTER 13: STRATEGIC PLAN SUMMARY	47

CHAPTER 1: EXECUTIVE SUMMARY

E2W Consulting Services appreciates the opportunity to be engaged by the Administration of the Town of Southwest Ranches to facilitate the preparation of the Town's Strategic Plan. For a local government organization, a comprehensive strategic plan serves as the roadmap to guide budgetary priorities, resource allocation, and overall decision-making both at the governance and administrative levels of the organization. For Southwest Ranches, this Strategic Plan Document spans the period of Fiscal Year 2026-2031.

The overarching focus during this engagement was to provide the Town with a Strategic Plan Document (the "Document") that provides a framework for achieving targeted, meaningful, and measurable outcomes. It is noted that the development of this Document was driven by the Town's leadership, and whereby this Consultant's role was to provide guidance, facilitate discussions and ensure progress toward the intended objective. This Strategic Plan intentionally limits the Town's strategic priorities to three areas: **Infrastructure**, **Technology**, and **Town Services** to maximize organizational focus and ensure that limited fiscal and human resources produce measurable community outcomes.

It is recognized that the Town of Southwest Ranches undertook a similar strategic planning process in 2015, followed by an updated report in 2021 where resident feedback was obtained via a mailed survey to all 2,564 households. Four years later (in 2025), the Town performed an online resident survey-TownPOV, to further solicit feedback about how the Town was performing and determine updated opinions about what the desired areas of priority were. All past collected data was reviewed and analyzed as part of this engagement. In addition, several community engagement efforts were undertaken. In the end, residents' feedback generally validated what previous reports yielded.

The challenge for many organizations (especially small, local municipalities) is to craft a strategic plan that will take large amounts of data and streamline it into an actionable framework that will enable the administration to advance the outcomes desired by residents. This Document provides the Town with an onramp for enhanced organizational effectiveness by highlighting the following:

- Three strategic priority areas (areas of resource allocation)
- Measurable strategic goals
- A defined plan period (five years)

The remaining chapters of this Document provide important information about Town demographic data, and how Southwest Ranches compares to its neighboring communities. The structure of this Document outlines an approach to the strategic planning process and how the strategic focus areas were developed.

Recognizing that a strategic plan only creates value through implementation, this Document concludes with a Strategic Performance & Accountability Framework designed to connect the Town Council's strategic priorities to departmental goals, annual budget decisions, measurable performance indicators, and public reporting. Together, these elements establish a practical roadmap for preserving Southwest Ranches' unique identity while ensuring accountable and measurable progress over the next five years.

On behalf of the E2W Consulting Services team, we want to sincerely thank the Town's Administration for its commitment to serving its residents, stakeholders and team members, and for prioritizing organizational improvement through this engagement.

Sincerely,

Daniel A. Rosemond

Daniel A. Rosemond, President
E2W Consulting Services, LLC

CHAPTER 2: ABOUT SOUTHWEST RANCHES

Community Profile

The Town of Southwest Ranches (the “Town”) remains one of Broward County’s most distinctive residential communities, characterized by its rural lifestyle, large-lot residential development pattern, and high quality of life. The Town’s population is estimated at approximately 7,650 residents, reflecting relatively stable growth since the 2020 Census, which recorded a population of 7,607. Population growth has remained modest, consistent with the community’s commitment to preserving its rural character and limiting higher-density development.

Southwest Ranches exhibits a mature and family-oriented demographic profile. The median age is approximately 45 years, significantly higher than many neighboring communities, reflecting a well-established residential population. While families with children continue to comprise an important segment of the community, nearly one-quarter of residents are age 65 or older, indicating a growing senior population that may influence future service, recreation, transportation, and healthcare needs.

The Town is increasingly diverse while maintaining a predominantly residential character. Hispanic and Latino residents account for approximately 40 percent of the population, while non-Hispanic White residents represent about 45 percent. Smaller but growing Asian, Black, and multiracial populations contribute to the Town’s cultural diversity. Recent demographic trends suggest increasing racial and ethnic diversity, consistent with broader patterns observed throughout South Florida.

Household characteristics further distinguish Southwest Ranches from many urban communities. The Town is overwhelmingly composed of family households, with high rates of homeownership and larger-than-average household sizes. Approximately 96 percent of occupied housing units are owner-occupied, reflecting long-term residential stability and strong community investment. Housing is dominated by single-family detached homes situated on large lots, reinforcing the Town’s rural residential identity.



Figure 1

Southwest Ranches is among the most affluent communities in Broward County. Median household income exceeds \$160,000 annually, substantially higher than county and state averages. Educational attainment levels are also notably high, with more than 40 percent of adult residents holding a bachelor's degree or advanced degree. These characteristics contribute to a highly skilled workforce, strong property values, and a robust local tax base. Poverty rates remain very low compared to regional averages.

Looking forward, demographic trends suggest that Southwest Ranches will continue to experience slow population growth, increasing diversity, and gradual aging of its resident population. These trends reinforce the importance of maintaining the Town's rural lifestyle while planning for evolving community needs, including recreational amenities, public safety services, transportation options, environmental stewardship, and programs that support residents across all stages of life. The Town's strong socioeconomic indicators position it well to preserve its unique character while adapting to future demographic and economic changes.

COMMUNITY	POPULATION	MEDIAN AGE	MEDIAN HOUSEHOLD INCOME
Southwest Ranches	7,650	45 years	\$161,000
Weston	68,000	42 years	\$140,000
Davie	107,000 *	42 years	\$90,000 - \$100, 000 *
Pembroke Pines	171,000 *	41 years	\$85,000 - \$95,000 *
Broward County	1.95 million*	41 years	\$78,000 *

Figure 2

*Approximate ACS estimates. Sources: U.S. Census Bureau ACS 2023/2024 estimates.

Regional Context and Comparative Analysis

While Southwest Ranches shares geographic proximity with several of Broward County's largest municipalities, its demographic and socioeconomic profile remains distinct. Compared to Broward County, Weston, Davie, and Pembroke Pines, Southwest Ranches is characterized by a smaller population, lower residential density, higher rates of homeownership, larger residential lots, and a stronger rural-residential identity. These differences shape community expectations, service delivery needs, and long-term planning priorities.

Population and Growth

Southwest Ranches remains one of the smallest municipalities in Broward County, with a population of approximately 7,650 residents. By comparison, neighboring Weston has nearly nine times the population, while Davie and Pembroke Pines are substantially larger regional population centers. The Town's limited population growth reflects its long-standing commitment to preserving a rural lifestyle through large-lot residential development and agricultural uses. Unlike many neighboring communities that continue to accommodate higher-density residential growth, Southwest Ranches has intentionally prioritized land-use policies that protect open space, equestrian activities, and low-density neighborhoods.

Age and Household Characteristics

Southwest Ranches has an older demographic profile than many surrounding communities. Nearly one-quarter of residents are age 65 or older, compared with approximately 12 percent in Weston and lower shares in many parts of Broward County. At the same time, the Town continues to attract families seeking larger properties and a rural quality of life. Household sizes are larger than county averages, and family households represent a significant share of occupied housing units. These trends suggest growing demand for both family-oriented amenities and services that support an aging population.

Income and Educational Attainment

Southwest Ranches ranks among the most affluent communities in Broward County. Median household income exceeds \$160,000 annually, substantially higher than Broward County and higher than neighboring municipalities, including Weston. Educational attainment is similarly strong, with more than half of adult residents possessing a bachelor's degree or advanced degree. These characteristics contribute to a highly educated workforce, strong property values, and a stable local tax base. The Town's economic profile reflects a community with significant resources and expectations for high-quality public services and infrastructure.

Housing and Community Characteristics

Perhaps the most significant distinction between Southwest Ranches and neighboring municipalities is housing form and density. Whereas Weston, Davie, and Pembroke Pines are primarily suburban communities with a mix of single-family neighborhoods, townhomes, and multifamily housing, Southwest Ranches remains overwhelmingly composed of minimum one (1) acre lot single-family homes. Nearly all occupied housing units are owner-occupied, and detached single-family homes dominate the housing inventory. This development pattern reinforces the Town's rural identity while contributing to higher property values and lower population density.

Diversity and Regional Integration

Like much of South Florida, Southwest Ranches has become increasingly diverse over time. Hispanic and Latino residents comprise approximately 40 percent of the population, reflecting broader demographic trends throughout Broward County. However, the Town's demographic composition remains somewhat different from neighboring Weston and Pembroke Pines, which have experienced larger increases in international migration and population growth. These trends highlight the importance of maintaining inclusive community engagement strategies while preserving the Town's unique cultural and rural character.

Strategic Planning Implications

The comparison with neighboring municipalities demonstrates that Southwest Ranches occupies a unique position within Broward County. While surrounding communities continue to urbanize and increase residential density, Southwest Ranches remains committed to preserving its rural lifestyle, agricultural heritage, and equestrian character. As a result, future strategic planning efforts should focus on balancing preservation with evolving community needs, including infrastructure resiliency, environmental stewardship, public safety, recreational opportunities, mobility enhancements, and services for an aging population. The Town's strong socioeconomic profile and stable residential base provide a solid foundation for achieving these goals while maintaining the qualities that distinguish Southwest Ranches from neighboring jurisdictions.

How Southwest Ranches Compares to Neighboring Communities

INDICATOR	COMMUNITY				
	SOUTHWEST RANCHES	WESTON	DAVIE	PEMBROKE PINES	BROWARD COUNTY
Population	7,650	68,000 – 71,000	107,000	171,000	1.95 million
Land Area (sq. Mi.)	13.0	26.3	35.7	34.8	1,205
Population Density	590/sq. mi.	2,700/sq. mi.	3,000/sq. mi.	4,900/sq. mi.	1,600/sq. mi.
Median Age	45.3	42	42	41	41
Median Household Income	\$161,000	\$140,500	\$95,000	\$92,000	\$78,000
Bachelor's Degree or Higher	43-52%	68%	39%	36%	35%
Homeownership Rate	95.8%	79%	69%	74%	67%
Median Home Value	\$900,000	\$644,000	\$520,000	\$480,000	\$410,000
Residents Age 65+	24.9%	16%	15%	17%	18%

Figure 3

Sources: U.S. Census Bureau American Community Survey (ACS) 2023–2024 estimates

What Makes Southwest Ranches Unique?

Rural Character

- ◆ Lowest population density among neighboring communities.
- ◆ Large-lot residential development pattern.
- ◆ Extensive equestrian, agricultural, and open space uses.
- ◆ Nearly all housing consists of detached single-family homes.

Exceptional Residential Stability

- ◆ Nearly 96% homeownership rate.
- ◆ Long-term resident base with strong community investment.
- ◆ Limited turnover compared to more urbanized municipalities.

Strong Economic Profile

- ◆ Highest median household income among neighboring communities.
- ◆ One of Broward County's wealthiest municipalities.
- ◆ Very low poverty levels.
- ◆ Strong tax base supported by high residential property values.

Highly Educated Population

- ◆ More than half of adults possess a bachelor's degree or higher.
- ◆ Professional and executive occupations comprise a significant share of the workforce.
- ◆ Strong civic engagement and expectations for quality municipal services.

Mature and Family-Oriented Population

- ◆ Median age exceeds neighboring municipalities.
- ◆ Nearly one-quarter of residents are age 65 or older.
- ◆ Continues to attract families seeking larger lots, privacy, and rural living.

Strategic Implications for Demographic Data

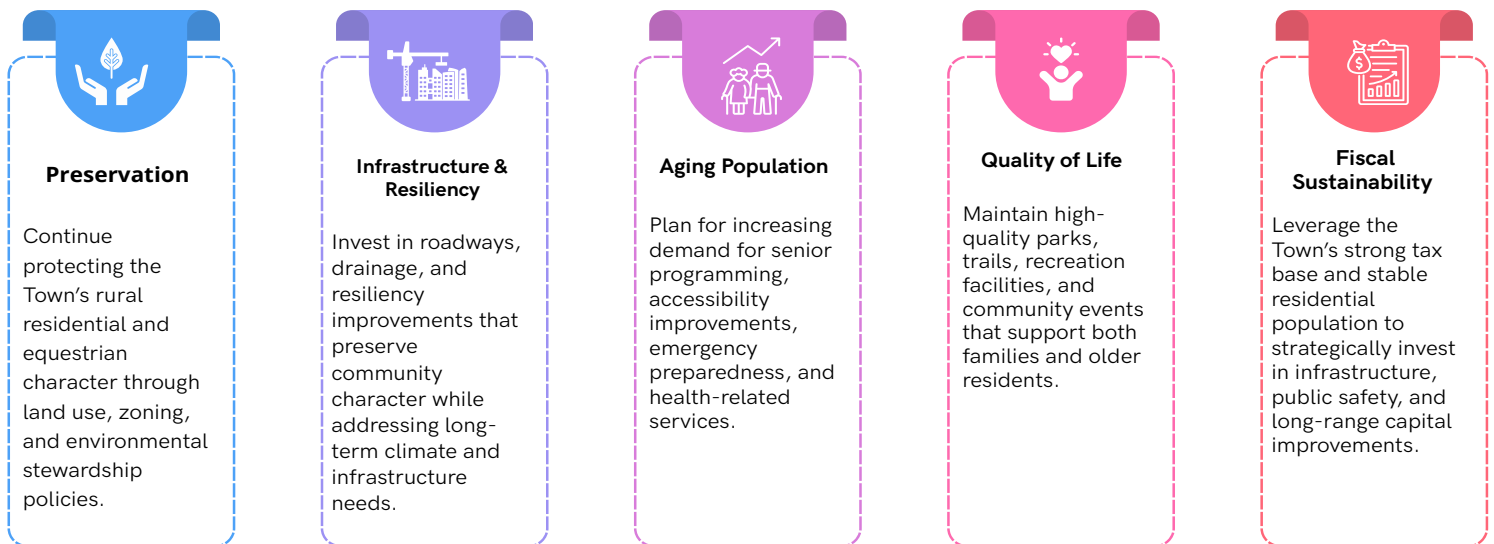


Figure 4

Why Demographics Matter

The demographic profile presented in this chapter illustrates that Southwest Ranches is not experiencing the rapid urbanization common among neighboring municipalities. Instead, the Town's strategic challenge is preserving its unique rural identity while adapting to changing resident expectations, infrastructure needs, and fiscal realities. These observations provide the context for the strategic planning process described in the following chapter.

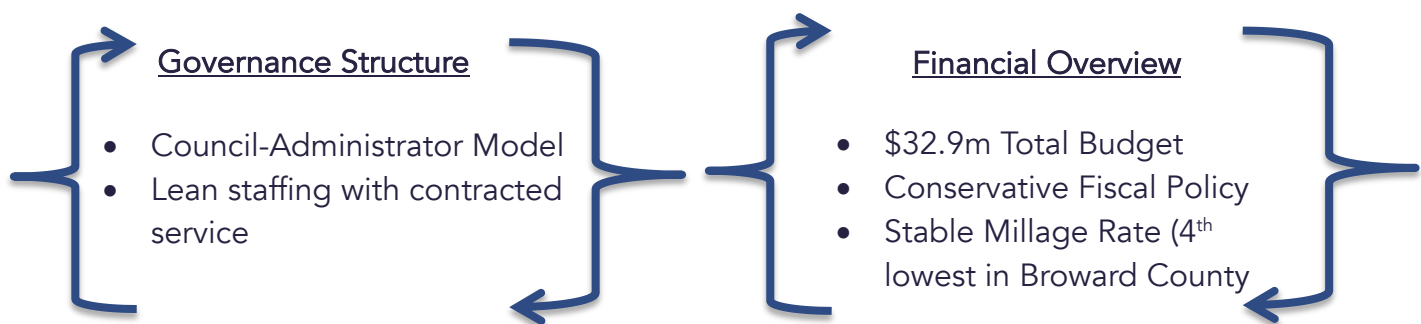


Figure 5

CHAPTER 3: STRATEGIC PLANNING PROCESS

Approach

This engagement was approached by fully respecting the scope of work (SOW) outlined in the solicitation. A foundational principle of this approach is process continuity; As the Town performed a strategic plan in 2015, with a later updated version in 2021. Moreover, in 2025, the Town engaged in a comprehensive community survey that yielded meaningful information about resident priorities and overall resident satisfaction with living in the Town of Southwest Ranches.

The approach uses the Town's current guiding statements as a starting point, applying a proven vision-values-mission clarity framework to assess whether they remain clear, compelling, and actionable, or whether thoughtful evolution is warranted based on validated data, stakeholder input, and community needs. In the end, the primary objective of this planning process was to generate a strategic plan document that provides a framework within which the Town can effectively function, using measurable outcomes as indicators of progress and alignment with the established strategic priorities.

Some of the key activities performed included:

- ◆ Document & Data Review
- ◆ Program & Partnership Inventory
- ◆ Leadership & Governance Engagement
- ◆ Town Council Visioning & Goal Setting Retreat
- ◆ Staff Engagement (Strategic Planning Committee)
- ◆ Community outreach
- ◆ SWOC Assessment (strengths, weaknesses, opportunities, and challenges)

Moreover, as expressed during the project kick-off meeting with the Town's Strategic Planning Committee, this Consultant was engaged to facilitate (not decide) the development of the Town's strategic goals. Objectivity was critical during its interactions with the Town's leadership, staff, and residents to support arriving at a Strategic Plan that reflects the priorities, values, and benchmarks set collectively.

To do so, there were overarching guiding principles followed:



Figure 6

CHAPTER 4: KEY FINDINGS & INSIGHTS

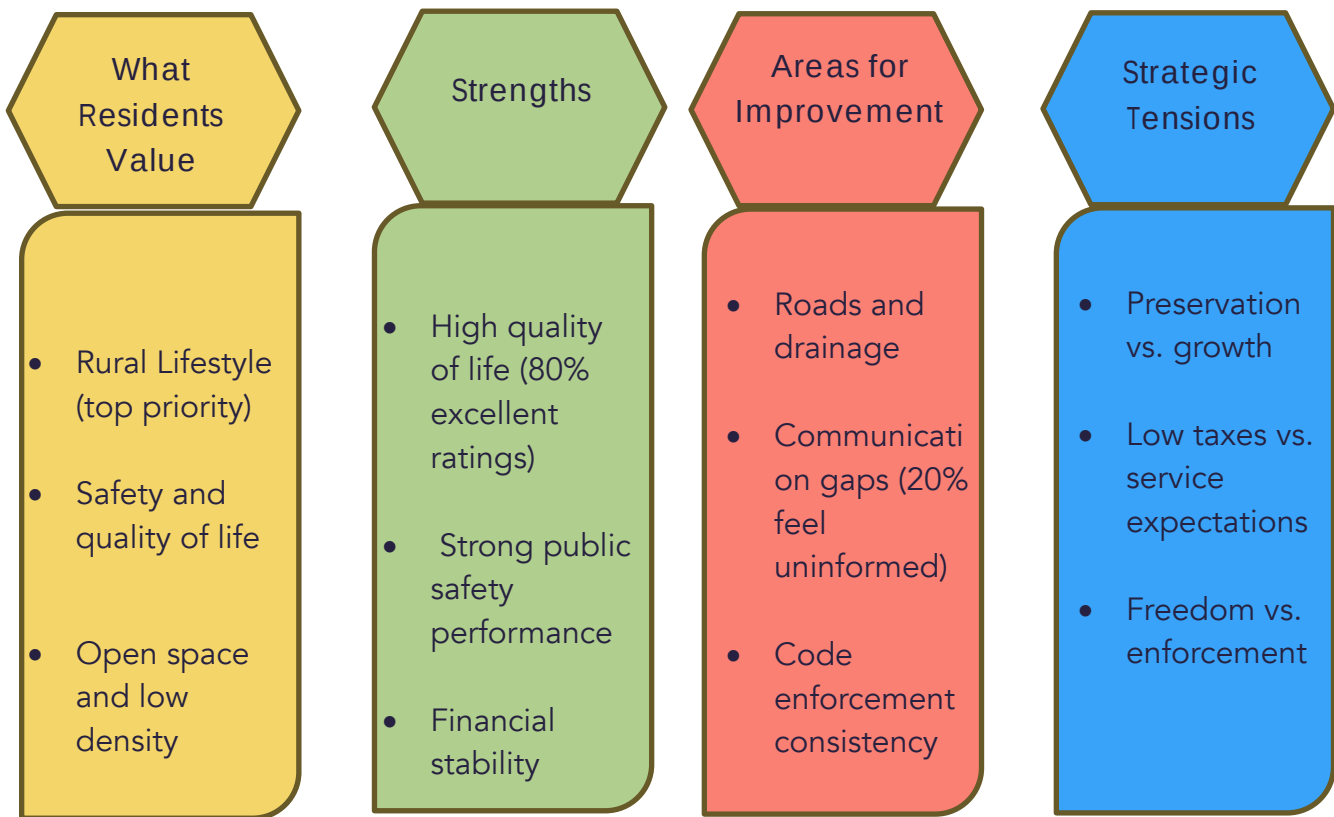


Figure 7

Collectively, these findings reveal that residents are not seeking transformational change. Rather, they expect the Town to preserve the qualities that distinguish Southwest Ranches while making disciplined investments in infrastructure, technology, and municipal services. These findings ultimately informed the Town Council's identification of the Strategic Priority Areas discussed in Chapter 6.

CHAPTER 5 : VISION, MISSION, AND VALUES

An integral part of developing an effective Strategic Plan is ensuring its alignment with an organization's vision, mission, and values. As indicated in Chapter 3, a Town Council visioning & goal setting retreat was held on Saturday, April 4, 2026. The objective of this session was to provide the Council with an opportunity to reach consensus on strategic priorities moving forward over the next five (5) years. This session would also allow the Council, as the Town's governing body, to revisit the Vision Statement to confirm it still reflected the sentiments of the Town's residents through its elected leaders. The session was held away from Town Hall, at Rolling Oaks Barn. Although it was a public meeting and advertised accordingly, this informal setting afforded each Council Member the opportunity to express their viewpoint on strategic priorities for the Town without the time constraints of a typical Council Meeting.

After open discussion by the Council, the Town's Vision statement was unanimously updated as follows:

Vision Statement

"To remain a uniquely rural, equestrian, and environmentally protected community where open space, low-density living, and natural habitats are preserved for current and future generations."

It is important to mention that one-on-one meetings were held with each Council Member prior to the visioning & goal setting retreat. The objective of these individual meetings was to allow greater leeway for each member to express their personal viewpoints on several issues, not the least of which were the biggest threats to the Town. These individual meetings also allowed for the establishment of rapport between the governing body and this Consultant prior to the retreat, thus stimulating greater comfort for candid discussion.

The visioning & goal setting retreat was also attended by the Town Administrator and his leadership team. Participants noted that shifting priorities can make it difficult for staff to sustain momentum on capital projects and program initiatives. A disciplined strategic

framework can help the council and administration maintain continuity while still allowing flexibility for urgent issues.

As part of this meeting, attendees were also asked to revisit the Town's Mission Statement to ensure that it captured the clarity and direction inherent in an effective Mission Statement. To that end, a few recommended changes were mentioned with the understanding that the final edits would be brought back in the form of a modified Mission Statement.

Mission Statement

“To safeguard the Town's rural character through community-driven service delivery, emphasizing the protection of open space and land use, while enhancing a high quality of life that promotes and protects the Town's equestrian and agricultural heritage.”

Beyond the vision and mission of the Town of Southwest Ranches, the strategic planning process also included revisiting the values that are core to the Town, its residents, and the Administration.

Core Values

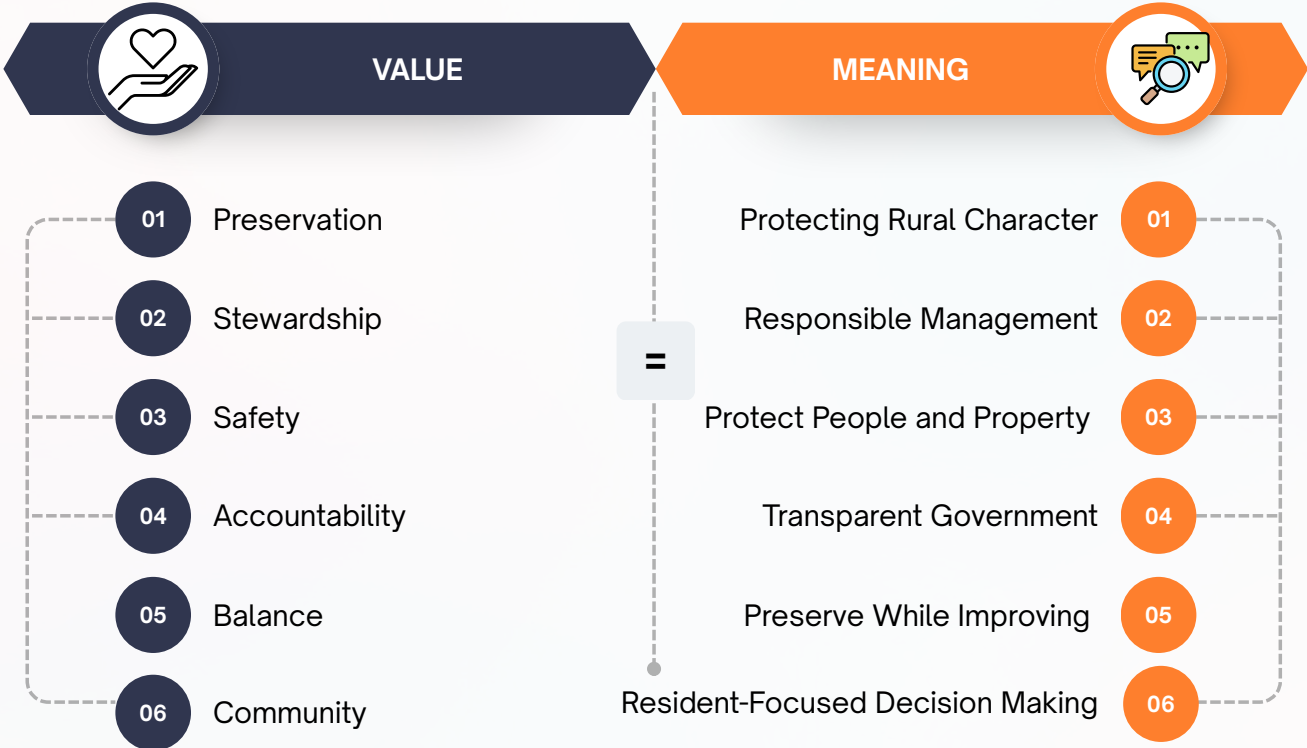


Figure 8

(Each supported by survey data)

CHAPTER 6: STRATEGIC PRIORITY AREAS

Areas of Strategic Resource Allocation

Another critical component of an effective strategic plan is the identification of organizational priorities. Regardless of the type of organization, the absence of strategic priorities can result in aimless and unfruitful activities. Moreover, without identifying strategic priorities, the allocation of financial and human resources can fail to yield meaningful results commensurate with the value of said resources.

For local government organizations such as the Town of Southwest Ranches, identifying strategic priority areas is paramount. As stewards of taxpayer dollars, the Town's governing body and its administration have a fiscal responsibility to ensure that the allocation of resources adhere to state requirements *and* are aligned with the expressed sentiments of its residents and stakeholders. To that end, the Town's governing body has emphasized that the term strategic priority areas are more appropriately referred to as areas of strategic resource allocation.

During the visioning and goal setting retreat, the identification and consensus of the Town's strategic priorities was at the center of the discussion. For starters, it was necessary to recognize that like many local government organizations, there are many categorical areas that vie for the attention and commitment of resources. Figures 9 & 10 below reflects the suggested areas of strategic focus.

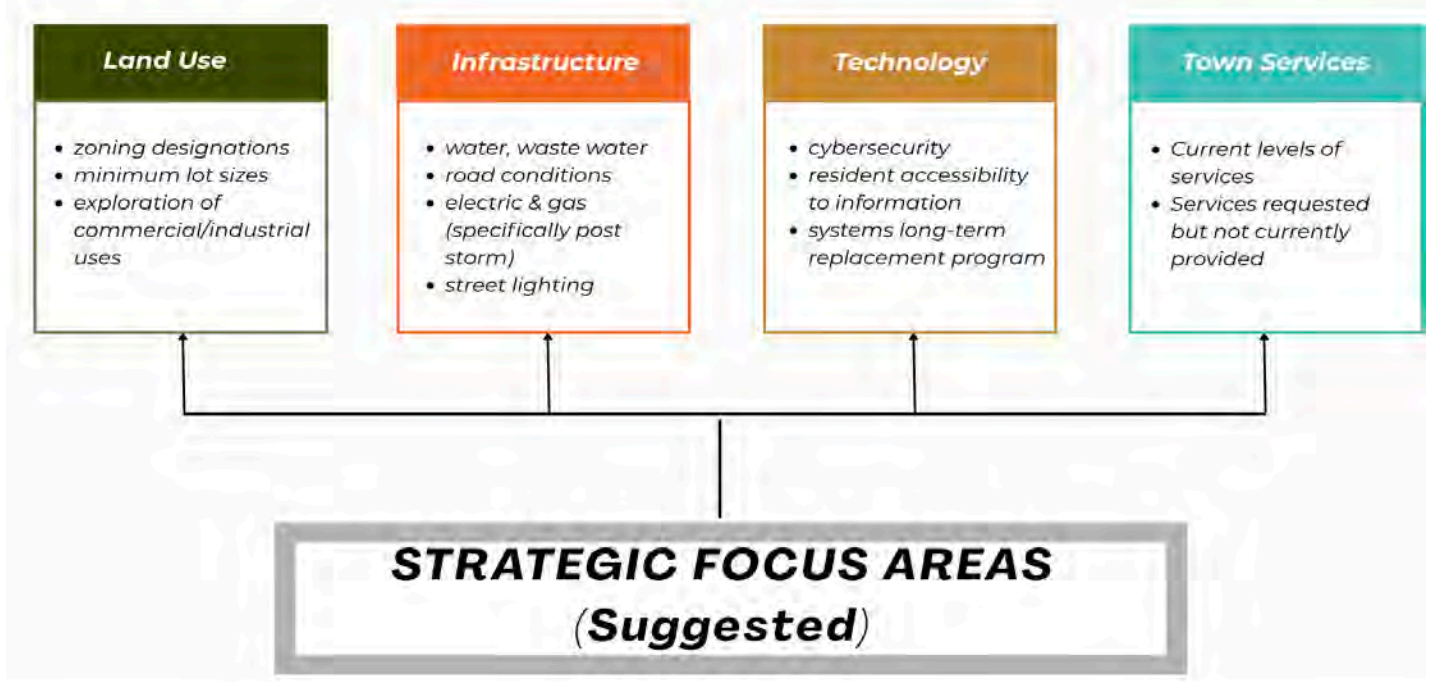


Figure 9



Figure 10

Second, for an organization like the Town of Southwest Ranches, limiting the strategic focus areas to no more than three (3) was advisable considering the Town's fiscally conservative policy. Lastly, it was emphasized that the identification of the strategic focus areas would drive the strategic plan period spanning the next 3-5 years. This is an important highlight because it does not mean that some of the other categorical areas will be ignored. What this approach *does* mean is that the Town is demonstrating seriousness in its desire to make meaningful progress in the selected areas within the designated plan period.

The facilitated discussion among the Town Council yielded a consensus of 3 strategic priority areas (categorized as *areas of resource allocation*) . These areas are not listed in order of importance.

◆ Technology (Capital & Operational)

- o Utilization of technology to improve service delivery (including AI)
- o Focus on Cybersecurity to protect against unauthorized access to resident data

- ◆ Town Services (Operational)
 - o Productivity improvements to existing services
 - o New programs (Parks) that align with equestrian heritage
 - o Enhancing communications with residents

- ◆ Infrastructure Improvements (Capital Projects)
 - o Roadway resurfacing
 - o Stormwater management system
 - o Sea level rise and other environmental threats to existing systems

The designation of these strategic priority areas by the Town Council served as the framework for the development of strategic goals by the Town Administration. In the following chapter, this Document will outline the integration of the strategic priority areas with the (initial) strategic goals prepared by each department.

CHAPTER 7: STRATEGIC GOALS

Strategic goals serve as both a roadmap and measurement tool to aid the organization's team members in preparing their budget requests and structuring their daily tasks and activities. Like strategic priorities, the absence of strategic goals (at the department level) can result in the performance of misaligned and unfruitful activities. Conversely, well-structured strategic goals offer the following benefits:

- ❖ Clarity among team members as to the purpose of the daily work
- ❖ Supports the budget request with a basic cost-benefit rationale
- ❖ Allows for better management of expectations of the Town's stakeholders
- ❖ Creates an objective framework for measuring/evaluating work performance

During the planning process, Town departments were invited to prepare strategic goals and KPIs aligned with the Town's strategic priorities. These submissions represent an important first step in building a performance-oriented implementation culture. They demonstrate staff engagement, identify potential projects and service improvements, and provide a useful starting point for future planning and budgeting. For this task, the S.M.A.R.T. Goals (specific, measurable, achievable, relevant, time-based) framework was introduced (Figure 11). This framework is considered a best practice for organizations across a variety of industries. Each department was asked to develop strategic (SMART) goals that are aligned to one or more of the three strategic priority areas identified by the Council.

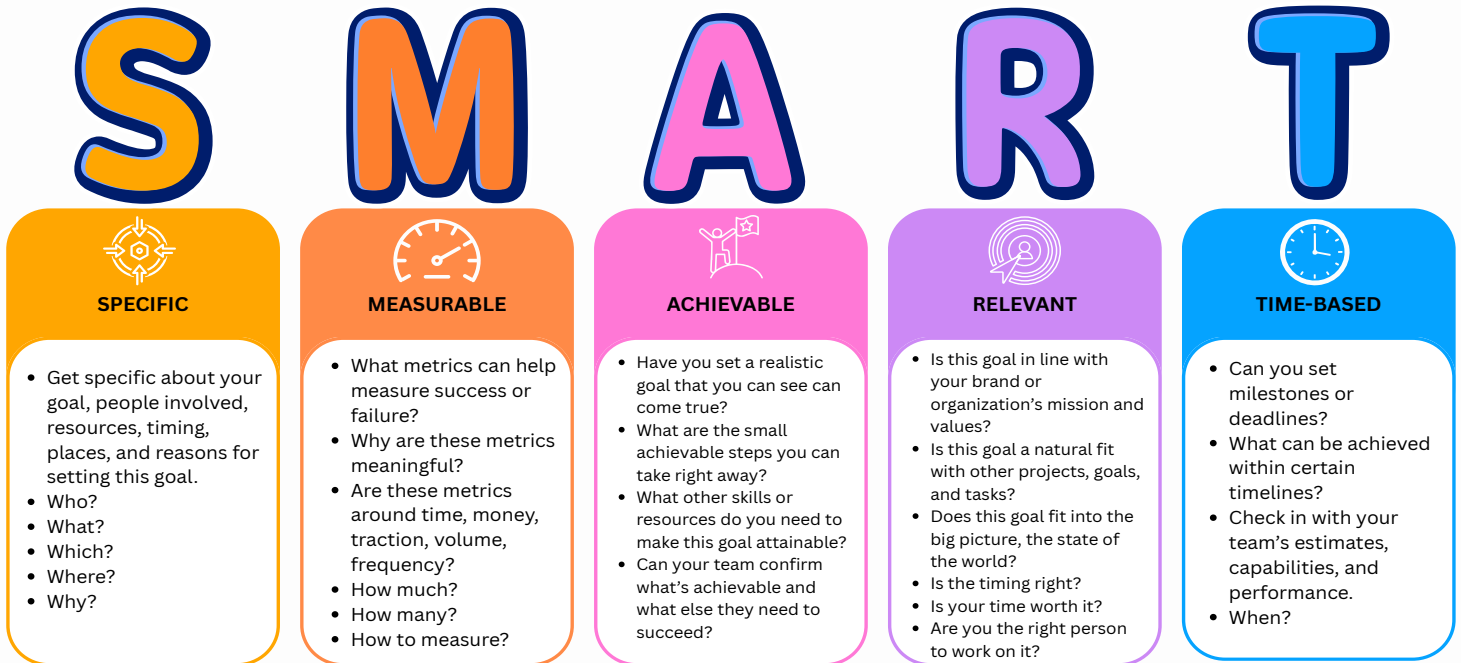


Figure 11

However, because SMART goal development was a new exercise for many departments, the submissions should be treated as preliminary strategic goal concepts rather than fully adopted budget commitments for the upcoming fiscal year (see Appendix A). As a result, a transition plan for departmental goals and KPIs is recommended. The proposed transition plan provides a practical pathway for converting those draft concepts into validated, measurable, and budget-aligned departmental goals.

Figure 12 below reflects the integration between the strategic priority areas and the SMART goals to be developed by each department. Ultimately, the objective of this exercise was to assist the Town Administration with a pathway to connect strategic priorities to annual strategic goals and the budget requests that support the completion of those goals. This proposed pathway can then serve to allow the Town Council to more objectively evaluate the Administration's draft budget submission against the expected outcomes articulated, by department, for the upcoming fiscal year.



TOWN OF SOUTHWEST RANCHES



FROM STRATEGIC PRIORITIES TO STRATEGIC GOALS

A CLEAR PATH FROM PRIORITIES TO MEASURABLE RESULTS



PRIORITIES GUIDE. GOALS FOCUS. RESULTS DELIVERED.

Figure 12

Departmental Goals and KPIs- Implementation Transition

This Strategic Plan establishes the Town's long-term direction by identifying its Vision, Mission, Values, and three Strategic Priority Areas: Technology, Town Services, and Infrastructure Improvements. To move from strategic direction to measurable implementation, the Town must now translate these priorities into department-level goals, objectives, Key Performance Indicators (KPIs), budget requests, and reporting practices.

Purpose of the Transition Plan

The purpose of this transition plan is to help the Town move from planning to execution in a disciplined and realistic manner. Specifically, it is intended to:

- ✓ Standardize how departments define strategic goals and KPIs
- ✓ Ensure each goal is clearly aligned with the Town's Vision, Mission, Values, and Strategic Priority Areas
- ✓ Confirm that proposed goals are supported by baseline data, staffing capacity, budget assumptions, and implementation timelines
- ✓ Provide the Town Administrator and Town Council with a consistent framework for evaluating annual budget requests against strategic priorities
- ✓ Establish a transparent reporting process that allows the Town to track progress and communicate results to residents

Transition Year: F.Y. 2026-2027

FY 2026-2027 should be treated as a transition and baseline year for departmental goal development. During this period, departments should refine their submitted goals, identify missing data, validate assumptions, and develop consistent KPIs before the goals are formally relied upon as single year or multi-year implementation commitments.

This transition year does not delay implementation of the Strategic Plan. Rather, it strengthens implementation by ensuring that adopted goals are realistic, measurable, and connected to available resources. Departments may continue advancing priority projects during this period,

but the Town should use FY 2026-2027 to establish the measurement discipline necessary for long-term accountability.

Departmental Goal Validation Process

Each department should revise its draft goals using a standardized SMART Goal Development Sheet. At a minimum, each goal should include the following fields:

REQUIRED FIELD	PURPOSE
Department	Identifies the responsible department or lead owner.
Strategic Priority Area	Shows alignment to Technology, Town Services, Infrastructure Improvements, or another Council-approved priority.
Strategic Goal	States the intended outcome in clear, specific language.
Objective(s)	Breaks the goal into actionable steps or milestones.
Baseline Data	Establishes the current condition, performance level, cost, service level, or demand measure.
KPI(s)	Defines how progress and success will be measured.
Target Outcome	Identifies the desired measurable result.
Timeline	Establishes annual milestones and expected completion date.
Budget Impact	Identifies required funding, staff time, grants, contracts, or capital resources.
Dependencies	Notes cross-department coordination, policy decisions, technology needs, vendor support, or outside approvals required.
Reporting Cadence	Establishes how often progress will be reported.

Figure 13

KPI Development Standards

KPIs should be designed to measure meaningful progress, not simply activity. For example, a department should avoid measuring success only by whether a project was discussed, researched, or initiated. Stronger KPIs should measure changes in service delivery, resident experience, infrastructure condition, response time, completion rate, cost efficiency, risk

reduction, community participation, or other tangible outcomes. Industry standards for the various departments should also be considered in the development of strong KPIs.

Each KPI should answer four basic questions:

1. What are we measuring?
2. Why does this measure matter?
3. What is the current baseline?
4. What target are we trying to reach, and by when?

Where baseline data does not currently exist, the first-year objective should be to collect and validate the baseline before final targets are adopted.

Cross-Department Review

Before departmental goals are finalized, the Town should conduct a cross-department review led by the Town Administrator or designee. This review should test each proposed goal against the following criteria:

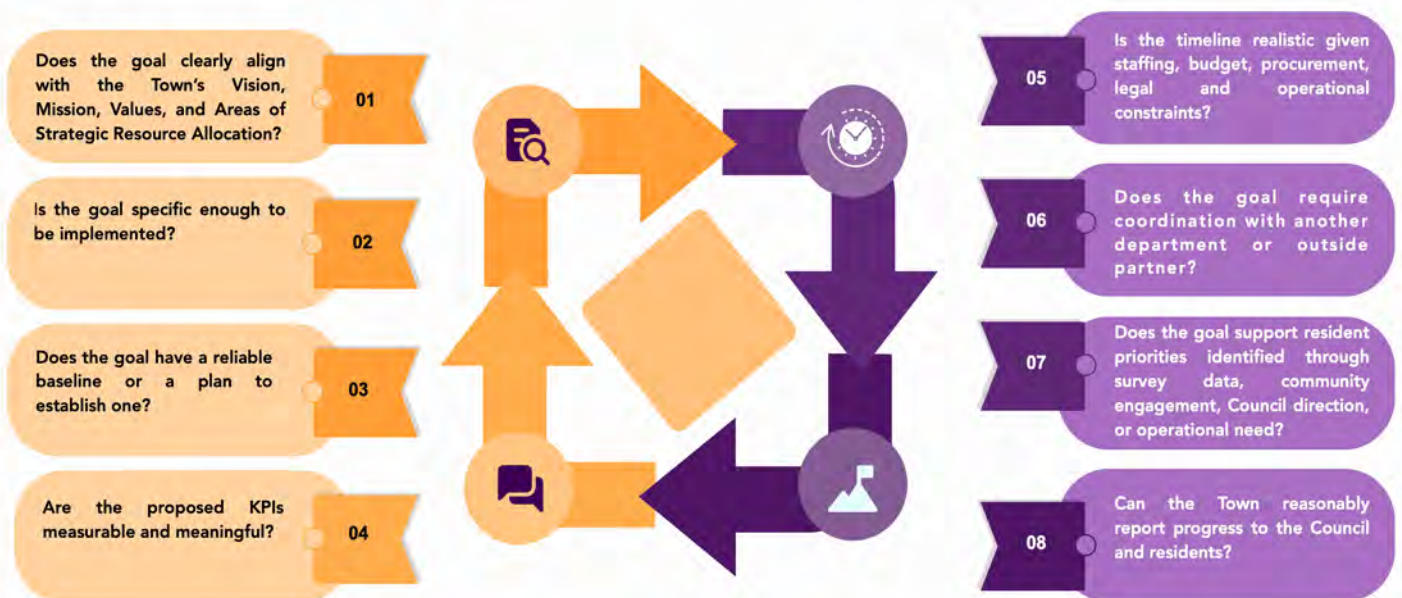


Figure 14

This review process will help prevent departmental goals from becoming disconnected projects and will ensure that limited fiscal and human resources are directed toward the highest-value outcomes.

Integration with the Annual Budget Process

Once departmental goals are refined, they should be integrated into the Town's annual budget process. Each department should be asked to identify which budget requests directly support strategic goals and which requests are required to maintain existing service levels.

This approach allows the Administration and Town Council to distinguish between operational maintenance, service enhancements, capital investment, technology improvements, and new strategic initiatives. It also creates a clearer basis for evaluating tradeoffs when fiscal resources are limited.

Beginning with the FY 2027-2028 budget cycle, departments should be expected to connect major budget requests to one or more of the following:

- A Council-approved Strategic Priority Area
- A validated departmental SMART goal
- A defined KPI or service-level target
- A resident priority or operational need supported by data
- A capital improvement, technology, or service-delivery requirement

Summary

The departmental goals developed during this planning process provide the Town with a meaningful starting point for implementation. The next step is to strengthen those goals through standardization, validation, budget alignment, and performance reporting. By treating FY 2026-2027 as a transition and baseline year, the Town can build the internal capacity needed to convert strategic priorities into measurable outcomes.

This approach protects fiscal responsibility, supports staff clarity, improves Council decision-making, and strengthens public trust. Most importantly, it ensures that the Town's daily work, annual budget, and long-term investments remain aligned with the community's desire to preserve the rural, equestrian, and environmentally protected character of Southwest Ranches while making steady and practical improvements in the areas residents value most.

CHAPTER 8: COMMUNITY VALIDATION

As part of the strategic planning process, additional community engagement was conducted to test, confirm, and add context to the 2025 TownPOV survey findings. This included a public meeting, advisory board conversations, and an online resident questionnaire/poll. While this additional engagement was not intended to replace the statistically broader 2025 survey, it provided an important validation point by allowing residents to react to, reinforce, and clarify the priorities already identified.

The validation graphics show that the 2025 TownPOV survey remains a relevant and reliable foundation for the strategic plan. The newer engagement did not reveal a substantially different set of priorities. Instead, it confirmed that residents continue to prioritize preservation of the Town's rural lifestyle while also expecting practical progress on infrastructure, public safety, roads, drainage, code compliance, and responsible long-term planning.

Importance/Performance Validation Graphic

The Importance/Performance validation graphic (Figure 15) compares the 2025 TownPOV Top 20 priorities with the themes that emerged from the most recent community engagement. The purpose of this graphic is to demonstrate that the Town's highest-priority issues remain consistent across multiple forms of resident input.

The results show continued alignment around several core issues: preserving the small-Town and rural lifestyle, protecting large acreage lots, maintaining and resurfacing roads, addressing drainage and stormwater needs, supporting neighborhood safety and police patrols, strengthening code compliance, and planning infrastructure for the future. These findings suggest that the strategic plan should remain anchored in the Town's identity while also addressing the service and infrastructure needs that residents consistently identified.

This graphic also highlights the importance of distinguishing between what residents' value most and where they believe improvement is needed. For example, residents continue to express strong support for the Town's rural character and public safety, while roads, drainage, sidewalks/curbs, code compliance, and infrastructure planning represent areas where additional attention may be needed. The strategic plan should therefore balance preservation with targeted improvements that protect the Town's character rather than shift it toward a more urban development model.

Importance/Performance (Top 20) + Community Validation

The follow-up engagement reinforces the 2025 TownPOV priorities and shows where the new data maps back into the Top 20.

2026 validation inputs:

Public meeting: 15

Online questionnaire: 16

Advisory board sessions: 3

2025 Importance / Performance Baseline

	% Most Important	Poor / Very poor	2026 validation (theme match)
Preserve small town community and rural lifestyle	53	24	Rural 14/16
Large acreage lot preservation	32	24	Rural 14/16
Street and road resurfacing and maintenance	30	62	Roads 8/16
Neighborhood police patrols provided by Davie PD	28	27	Safety 2/16
Water, wastewater, stormwater drainage	23	46	Drainage 2/16
Dark skies (minimize light pollution)	22	22	QoL code 5/16
Crime prevention initiatives	20	25	Safety 2/16
Equestrian and animal friendly	18	16	Rural/animal 14/16
Show fiscal responsibility	16	23	Fiscal/tax 11/16
Traffic enforcement provided by Davie PD	16	38	Traffic 8/16
Code Compliance	12	43	Code/noise 5/16
Infrastructure planning: ensure systems can support growth	12	38	Roads+drain 5/16
Plan strategically for the future	10	17	Plan/tax 11/16
Multipurpose sport courts (tennis, pickleball, etc.)	9	N/A	No direct mention
Trail system for people and equestrian (multi-use)	9	33	Roads/trails 8/16
Town events (Holiday, farmers market, etc.)	9	7	Parks/events 5/16
Equestrian safety	8	35	Rural/animal 14/16
Curbs and sidewalks (maintain/expand)	8	71	Roads/trails 8/16
Fire rescue services provided by Southwest Ranches Volunteer FD	8	4	Safety 2/16
Maintenance of parks and open spaces	7	8	Parks/open 5/16

New poll themes

- Rural lifestyle / character** 14/16
Confirms the top two 2025 priorities.
- Fiscal responsibility / taxes** 11/16
Supports fiscal responsibility and strategic tradeoff discussions.
- Roads / traffic / speeding** 8/16
Maps to roads, traffic enforcement, trails, curbs/sidewalks.
- Code / noise / permitting** 5/16
Reinforces code compliance and quality-of-life enforcement.
- Parks / events / open space** 5/16
Supports parks, events, and open-space maintenance.
- Communication / accessibility** 4/16
Affects implementation and resident trust.
- Drainage and public safety** 2/16 each
Still present and aligned to 2025.

Sentiment context from poll

Quality of life satisfied: 14/16
Communication satisfied: 14/16
Town services satisfied: 12/16

Interpretation for the report:

The 2025 TownPOV survey remains the quantitative baseline (n=409). The 2026 engagement confirms the same major priority areas and helps clarify implementation emphasis, especially around rural character, fiscal tradeoffs, and roads/traffic.

Sources: 2025 TownPOV Importance/Performance Top 20 chart; 2026 community engagement slide; Resident Questionnaire responses (n=16). Theme counts are interpretive from open-ended poll comments; one response may map to multiple themes.

Figure 15

Growth & Development Validation Graphic

The Growth & Development validation graphic (Figure 16) focuses more specifically on how residents view future growth, preservation, and development pressure. The 2025 TownPOV results identified large acreage lot preservation as the highest growth and development priority, followed by equestrian and animal-friendly character, street and road resurfacing, water/wastewater/stormwater drainage, dark skies, and access to nature.

The additional community engagement reinforced these findings. Residents continue to define Southwest Ranches by its rural lifestyle, open space, animal-friendly environment, large lots, and lower-density character. At the same time, the feedback also confirms that residents want the Town to address practical infrastructure needs, particularly roads, drainage, and long-term systems planning.

This graphic helps clarify that resident sentiment is not simply about resisting change. Rather, residents are asking the Town to pursue thoughtful, disciplined, and mission-aligned improvements that preserve what makes Southwest Ranches unique. Future growth and development decisions should therefore be evaluated through the lens of rural preservation, infrastructure capacity, quality of life, and protection of the Town's long-term identity.

Growth & Development + Community Validation

The follow-up engagement reinforces the 2025 TownPOV growth/development priorities and shows where the newer input maps back to the baseline.



Sources: 2025 TownPOV Growth & Development chart (n=409); 2026 community engagement slide; Resident Questionnaire responses (n=16). Theme counts are interpretive from open-ended poll comments; one response may map to multiple themes.

Figure 16

Overall Interpretation for the Strategic Plan

Together, the two graphics show that the 2025 TownPOV survey has been validated by the community engagement efforts undertaken during this engagement. The new input confirms the same central message: residents value Southwest Ranches because it is different from surrounding urban communities, and they want the Town to protect that difference while responsibly addressing infrastructure, safety, service, and quality-of-life needs.

For the strategic plan, this means the Town should focus on priorities that preserve rural character, protect large-lot development patterns, maintain public safety, improve roads and drainage, strengthen code compliance, plan infrastructure intentionally, and ensure fiscal responsibility. These priorities should serve as the foundation for the Town's goals, initiatives, and implementation roadmap.

CHAPTER 9: SWOC ANALYSIS

(Strengths, Weaknesses, Opportunities, Challenges)

Approach

Based on the Town visioning and goal setting retreat, it was determined that greater clarity would be gained if SWOC analysis was structured around two distinct lenses:

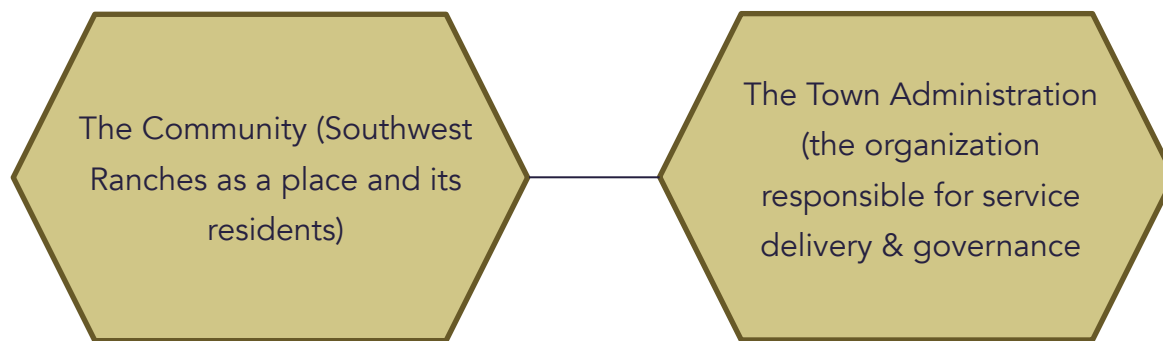


Figure 17

This distinction is important because many municipal strategic plans inadvertently blend community characteristics with organizational capabilities. Separating them provides greater clarity when developing strategic priorities and performance measures.

Community SWOC Analysis

Community Strengths

Southwest Ranches' greatest strength is its distinctive identity and quality of life. The Town has successfully preserved its rural, equestrian, and agricultural heritage while maintaining a high standard of living and strong property values. Residents consistently value the community's open spaces, large-lot residential development pattern, dark skies ordinance, and commitment to protecting its unique character.

The community also benefits from a culture of local stewardship and civic pride. Southwest Ranches has earned a reputation as a community that values personal freedom, neighborly relationships, and a "live and let live" philosophy. This identity is reinforced by strong zoning regulations that have helped protect the Town from incompatible development pressures experienced elsewhere in Broward County.

Another significant strength is the Town's stable governance environment. The collaborative relationship between residents and elected officials, coupled with a cohesive Town Council, provides continuity in long-term decision-making and reinforces the community's commitment to preserving its rural lifestyle.

Community Weaknesses

The same characteristics that make Southwest Ranches unique also create certain limitations. The Town's limited commercial tax base restricts opportunities for economic diversification and reduces the availability of locally generated revenues. As a result, residents rely heavily on residential property taxes to support municipal services and infrastructure investments.

Community perceptions regarding crime and public safety, whether based on actual conditions or perceptions, also emerged as an area of concern. In addition, residents continue to identify roadway maintenance and infrastructure improvements as ongoing challenges, particularly given the costs associated with maintaining a low-density community.

Community Opportunities

Several opportunities exist to strengthen community identity and enhance quality of life. Participants identified the promotion of the Southwest Ranches brand as a significant opportunity. The Town's unique rural character, equestrian heritage, and high quality of life distinguish it from neighboring municipalities and provide a compelling foundation for community marketing, resident attraction, and civic engagement efforts.

Additional opportunities include educating residents about the Town's history, traditions, and core values to foster a deeper understanding of community identity and strengthen intergenerational connections.

The potential sale or redevelopment of Town-owned property also presents an opportunity to generate resources for new community facilities, recreational amenities, or public gathering spaces that further enhance resident quality of life.

Community Challenges

The community faces several external and long-term challenges that could affect its future character and sustainability. Most pressing is Amendment 3 scheduled to be on the November General Election Ballot. This proposed legislation represents one of the most significant changes to Florida's property tax system in modern history which "would increase the state's

homestead exemption, reduce the assessment growth cap on non-homesteaded properties, and create a pathway for the full elimination of non-school property taxes on homesteads. If approved by voters, Amendment 3 would increase the homestead exemption for all levies other than school districts. Specifically, the amendment would increase the state's non-school homestead exemption to \$150,000 in 2027, followed by an increase to \$250,000 in 2028. Thereafter, starting in 2029, the \$250,000 homestead exemption would be adjusted annually for inflation. The amendment would give the Legislature the authority to 'prescribe a uniform procedure for counties and municipalities, for their respective levies, to increase the amount of assessed valuation exempt from taxation ... up to all remaining assessed valuation.' The amendment would also give special districts (e.g., Children's Services Councils, Water Management Districts) the ability to increase the exemption up to all remaining assessed valuation through procedures outlined by the Legislature." (Florida Policy Institute, June 2026)

For municipalities such as the Town of Southwest Ranches, Amendment 3 presents significant fiscal and operational challenges because of the Town's unique governmental structure, land use patterns, and revenue composition.

Unlike many Florida municipalities that generate substantial revenues from commercial development, tourism, utility taxes, or large retail centers, Southwest Ranches is intentionally a low-density residential community. The Town has consistently maintained policies that preserve its rural character by limiting commercial and industrial development. As a result, property taxes constitute one of the Town's most significant and stable sources of general fund revenue.

Because a substantial percentage of the Town's taxable value consists of homesteaded residential property, the gradual elimination of municipal property taxes on those properties would disproportionately reduce the Town's primary revenue source. While residents would seemingly benefit from lower tax bills, the Town would experience a corresponding decline in the financial resources necessary to sustain municipal service delivery at the levels residents have come to expect.

Infrastructure needs, particularly roadway improvements and long-term maintenance requirements, also remain a significant concern. At the same time, changing socioeconomic and demographic trends may gradually alter resident expectations and community priorities.

Perhaps most importantly, the Town must continue building community support for initiatives that require investment or policy changes while balancing the desire to preserve the community's rural character. Maintaining consensus around future priorities will be critical as the Town addresses evolving infrastructure, resiliency, and quality-of-life needs.

Town Administration SWOC Analysis

Administrative Strengths

The Town Administration's greatest strength is its people. Visioning participants consistently highlighted the quality, professionalism, and longevity of Town staff. Long employee tenure has created significant institutional knowledge, allowing the organization to operate effectively despite its relatively small size.

The Town's contract-service delivery model also represents a key organizational strength. Through strategic partnerships and outsourced service arrangements, Southwest Ranches can deliver a broad range of municipal services while maintaining a lean organizational structure. This approach provides flexibility and cost efficiency while allowing the Town to leverage specialized expertise.

The Administration has also demonstrated creativity and adaptability in addressing community needs with limited resources. Its successful partnerships with neighboring agencies and service providers have helped maximize service levels while maintaining fiscal responsibility. The Town's sustainability achievements, including its zero-waste designation, further reflect an organizational commitment to innovation and environmental stewardship.

Administrative Weaknesses

As a small organization, the Town faces several operational limitations. Participants identified a need for greater standardization of internal processes, particularly within development review and building-related services. Standardized procedures can improve consistency, efficiency, and customer service outcomes.

The Town's reliance on contracted service providers, while beneficial in many respects, can also create limitations in responsiveness and direct operational control. Additionally, some municipal services remain less accessible through digital platforms than residents increasingly expect in a modern service environment.

Administrative Opportunities

Several opportunities exist to strengthen organizational performance and service delivery. Improving communication with residents has emerged as one of the most frequently cited opportunities. The addition of communications resources and enhanced public engagement strategies can help strengthen transparency, improve resident understanding of Town initiatives, and increase participation in community activities.

Expanding partnerships with governmental, nonprofit, and private-sector organizations offers another opportunity to improve service delivery while maximizing limited resources. Additional investments in employee development, professional education, and workforce retention programs can further strengthen organizational capacity and succession planning efforts.

Participants also identified opportunities to improve sustainability programming, recycling initiatives, and operational efficiencies that align with community values while reducing long-term costs.

Administrative Challenges

The Town Administration faces ongoing challenges related to fiscal sustainability, workforce management, and service expectations. Limited revenue streams constrain the organization's ability to expand services while simultaneously addressing infrastructure needs and maintaining desired service levels. Looming eerily over all these elements is the possibility of the passage of Amendment 3. Planning for natural disasters or other environmental events may offer a certain level of predictability based on forecasts and experience. However, planning for the elimination of the Town's primary revenue source represents a challenge of unknown proportions.

Recruiting and retaining high-quality employees has become increasingly difficult in a competitive labor market, particularly for specialized municipal positions. Maintaining institutional knowledge and workforce continuity will remain critical as workforce demographics evolve.

The Administration must also balance resident expectations for high-quality services with the realities of limited staffing and financial resources. As community needs become more complex, the organization will need to continue adapting its service delivery model while preserving the personalized and responsive approach that residents value.

Finally, maintaining long-term continuity of adopted policy priorities can be challenging in an environment shaped by changing state legislation, funding opportunities, and evolving community expectations.

Strategic Implications

The SWOC analysis reveals a community that is exceptionally strong in identity, quality of life, and resident commitment, supported by an administration that is lean, innovative, and highly effective despite limited resources. The central strategic challenge for Southwest Ranches is not managing rapid growth but rather preserving its unique character while ensuring that

organizational capacity, infrastructure investment, and service delivery evolve to meet future needs.

Future strategic initiatives should therefore focus on four overarching themes:

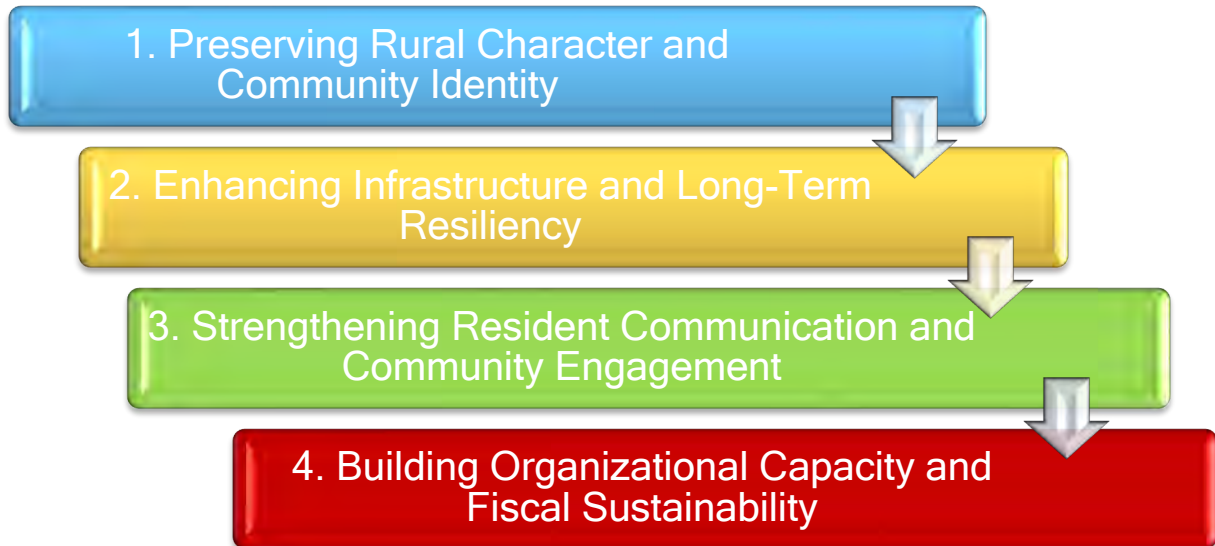


Figure 18

Together, these priorities can help ensure that Southwest Ranches remains a distinctive, resilient, and highly desirable community while maintaining the operational excellence necessary to serve residents effectively.

CHAPTER 10 : PLAN IMPLEMENTATION

Many professionally developed plans remain unused after being delivered to a municipality. This reality underscored the importance of emphasizing that the Town owns the strategic plan, while the Consultant's role was to guide and facilitate the process. Completing the Strategic Plan Document is therefore not the goal; the ultimate goal is to ensure the plan is implemented, monitored, and used as a practical tool for decision-making, budgeting, and performance measurement.

The proposed implementation considers the fact that the budget process for the 2026-27 Fiscal Year was underway when the strategic plan engagement was kicked off. Therefore, an abrupt pivot to the framework suggested herein would likely prove disruptive and ineffective. Moreover, Town Council needs to be given the opportunity to review and formally adopt the final Strategic Plan Document.

Instead, it is suggested that the 2026-27 Fiscal Year be treated as a transitional year for the strategic plan implementation, where the administration be afforded the opportunity to fully align the Town's team members to the three (3) strategic priority areas identified by Council, and provide additional training on developing strategic goals and KPIs as outlined in Chapter 7.

Going forward, it is suggested that the framework outlined in this Document be incorporated into the Town's regular budget process but serve to inform departmental budget requests and Town Council budget approvals. Figure 18 below represents the strategic plan implementation progression over the next 5-year period.

PLAN IMPLEMENTATION (RECOMMENDED)

Strategic transformation journey from vision to sustainable excellence delivery

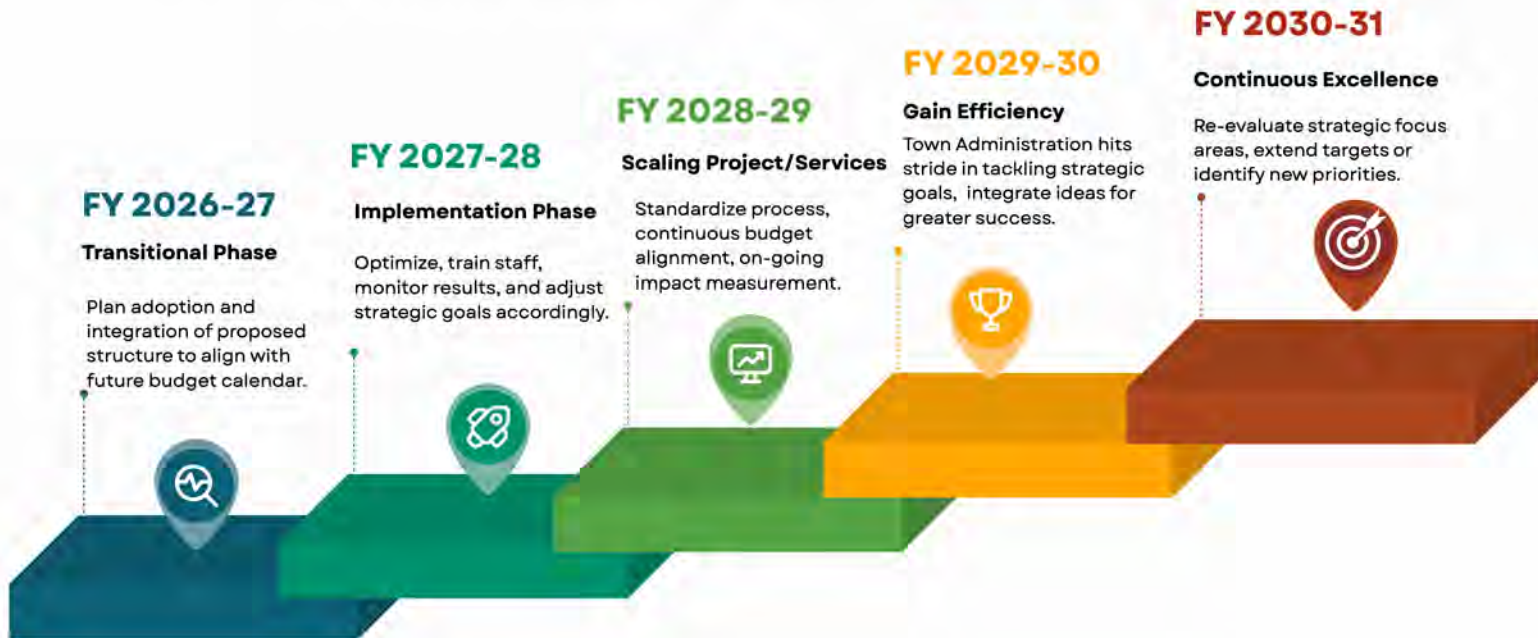


Figure 19



Figure 20

One of the ways to ensure effective strategic plan implementation is to assign a team member to “champion” the prioritization of all things strategic planning. Given the Town’s lean staffing structure, this responsibility will likely fall to the Town Administrator’s office. This is also where the performance measurement and reporting responsibilities should reside.

CHAPTER 11: STRATEGIC PERFORMANCE & ACCOUNTABILITY FRAMEWORK

Completing a strategic plan is not, in itself, an accomplishment. Rather, the true measure of success lies in an organization's ability to consistently implement its priorities, measure its progress, and adapt its actions as conditions evolve. Throughout the strategic planning process, the Town Council emphasized that this Strategic Plan should become more than a policy document; it should serve as a practical management tool that guides decision-making, budget development, departmental planning, and organizational accountability over the next five years.

To accomplish this objective, the Town will utilize a Strategic Performance & Accountability Framework that directly links the Town Council's Strategic Priority Areas to departmental SMART goals, annual budget investments, measurable performance indicators (KPIs), and public reporting. The framework is intentionally designed to remain simple, transparent, and scalable for a lean municipal organization while reinforcing the Town's commitment to fiscal responsibility, operational excellence, and preserving the unique rural character that defines Southwest Ranches.

Why Performance Measurement Matters

Local governments are increasingly expected to demonstrate not only that public funds are spent responsibly, but also that those investments produce meaningful results for residents. Traditional budget documents often emphasize expenditures rather than outcomes, making it difficult to determine whether strategic priorities are advancing the community's long-term vision.

The Strategic Performance & Accountability Framework addresses this challenge by establishing a direct relationship between Council priorities, departmental work, annual budgets, and measurable community outcomes. Rather than creating additional administrative processes, the framework is intended to strengthen existing planning and budgeting activities by providing a common method for measuring organizational success.

The Strategy Map (Figure 21) demonstrates how the Town's Vision, Mission, and Values are translated into measurable organizational action. Each Strategic Priority Area serves as the foundation for departmental SMART goals, which in turn guide annual budget requests, performance reporting, and continuous organizational improvement. This relationship ensures that the Town's limited financial and staffing resources remain focused on the priorities established by the Town Council.

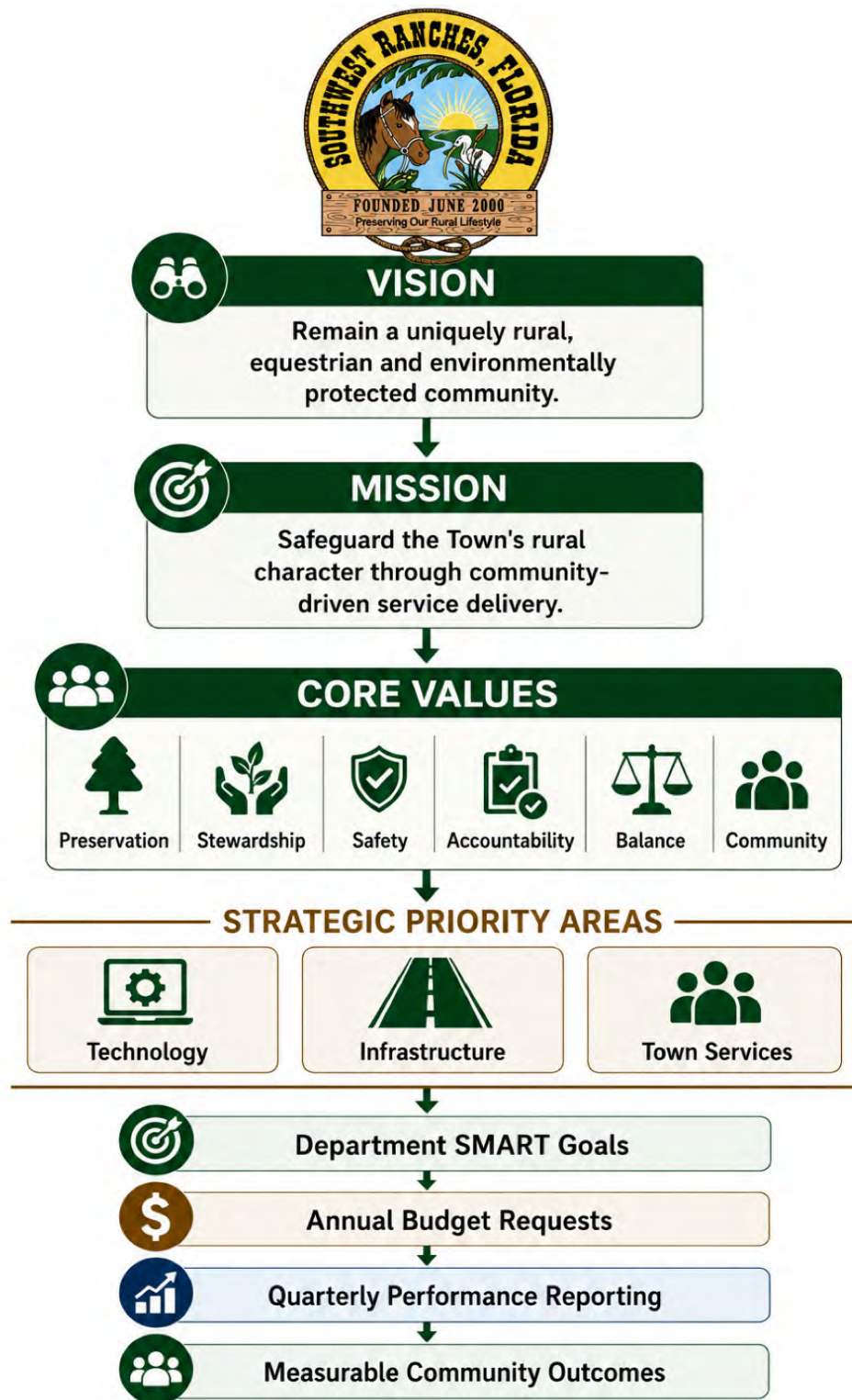


Figure 21

Performance Reporting and Public Accountability

It is suggested that along with adoption of the strategic plan document, the Town should develop a simple performance dashboard to track plan implementation progress. The dashboard need not be complex. Its purpose should be to provide a consistent and transparent way to monitor whether strategic goals are progressing, delayed, completed, or in need of revision.

At minimum, the dashboard should include:

DASH ELEMENT	DESCRIPTION
Strategic Priority Area 	Technology, Town Services, Infrastructure Improvements, or other approved priority.
Department Goal 	The validated SMART goal.
KPI 	The measure used to track progress.
Baseline 	The starting point.
Annual Target 	The expected result for the current fiscal year.
Current Status 	On Target, Monitor, Needs Attention, or Completed.
Budget Status 	Funded, Partially Funded, Unfunded, or Grant/External Funding Pending.
Notes 	Short explanation of progress, delay, risk, or next steps.

Figure 22

The Town should consider establishing periodic reporting using the prescribed dashboard. The level of details within the reporting dashboard may vary, depending on public-facing reporting, governance-level reporting, or internal administrative reporting. This will reinforce accountability, improve decision-making, and demonstrate to residents that the Strategic Plan is being actively implemented rather than simply adopted.

Moving From Planning to Performance

This Strategic Plan reflects the Town Council's vision for preserving the unique identity of Southwest Ranches while responsibly addressing the opportunities and challenges of the coming years. The Strategic Performance & Accountability Framework provides the mechanism for transforming that vision into measurable action. By consistently linking strategic priorities to departmental goals, annual budgets, and performance reporting, the Town will be better positioned to demonstrate accountability, improve organizational effectiveness, and maintain the trust of its residents.

Ultimately, the success of this Strategic Plan will not be measured by the number of projects completed, but by the Town's continued ability to preserve its rural character, responsibly steward public resources, and deliver the exceptional quality of life that residents expect and deserve.

CHAPTER 12: CONCLUSION & RECOMMENDATIONS

The Town of Southwest Ranches is indeed one of the most unique communities within Broward County. Long-term residents of the Town understand the unique characteristics of the community and have resolved to preserve these characteristics and lifestyle. Conversely, the Town's demographics are changing, as are the style and magnitude of new residential developments being undertaken by new residents. To this end, the Town's current leadership must strive to balance the wishes of an evolving constituency.

Notwithstanding, the Town has a clear and distinct vision for the type of community it aspires to be (or remain). The governance of the Town (its elected officials) operates cohesively and is overwhelmingly supportive of the current Administration. Residents have also expressed strong support for the way the services are delivered by the current Administration. Although preservation is a value widely supported by most residents, it is important to recognize that for the municipal organization to continue to meet the needs of its stakeholders, it must continually strive to improve.

To enhance organizational effectiveness, the *proposed Strategic Plan* emphasizes:

- Three (3) Strategic Priority Areas
- Measurable strategic goals, developed annually
- Defined Strategic Plan period (F.Y. 2026-2031)

To further solidify the Town's probability of achieving the outcomes desired, there are several recommendations being offered. For clarity, the recommendations are divided into two (2) categories:

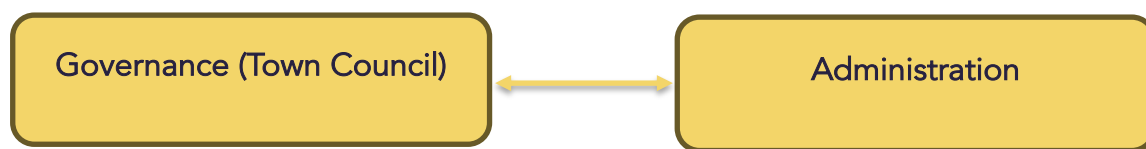


Figure 23

Governance Recommendations

◆ *Commitment to Strategic Priority Areas through F.Y. 2031*

- It is understood that there are many competing interests that can come to the attention of elected officials. While some matters may require immediate attention, many matters can be tabled and planned for a later date. It is important for the effectiveness of this Strategic Plan that there not be deviation (or drift) from the strategic priority areas for the duration of the strategic plan period.

◆ *Annual budgetary commitment to strategic goals directly aligned with focus areas*

- Along with the commitment to the strategic priority areas, it is strongly recommended that the Council adjust its annual budgetary considerations to reflect funding allocations primarily to strategic goals that are directly aligned with the priority areas. This tactic further ensures alignment between the budget and the strategic priority areas.

◆ *Establish a consistent process for new projects & initiatives to ensure alignment with Town's vision & values*

- It is understood that on a regular basis, the Town Council may have to consider unexpected new projects or initiatives. These could be because of external threats or environmental urgencies. To stay aligned with the strategic priority areas, it is recommended that the Council establish a defined methodology for considering the funding of a new project or initiative. Some initial questions to ask are: *How does this project or initiative align with the established strategic priority areas? Is this project or initiative something that will serve a majority of the residents and stakeholders? If pursued, how will the Town determine that the project or initiative has been completed? What does success look like?* Establishing a consistent evaluative process that is rooted in objectivity, fiscal responsibility, and measurable outcomes will demonstrate to the Town's residents that the governing body is focused on advancing the established priorities in a systematic fashion.

Administration Recommendations

- ◆ **Create alignment between departmental budget requests and strategic priorities**
 - In Chapter 7 of this Document (Strategic Goals), a suggested framework is provided, aimed at assisting the various Departments when preparing their annual budget requests. Rather than having budget preparation and strategic planning be treated as incongruent functions, following the proposed format links both functions, and will strengthen periodic reporting of departmental performance.
- ◆ **Consider implementing a clear link between performance review instrument and established strategic goals**
 - The next step in the progression of moving the organization toward a more strategic focused culture is [formally] connecting the achievement of approved strategic goals to the individual performance review instrument. It is not suggested that the typical performance competencies such as communication, teamwork/collaboration, and dependability should be eliminated. What is suggested, however, is that the performance evaluation instrument be augmented to include a category called “goal achievement” that is tied directly to the strategic goals that have been approved by the Town Administrator for each Department. This category should be weighted heavily and commensurate with the value and significance the Town is placing on advancing strategic goals.
- ◆ **Implement a Strategic Priority Performance Framework (often referred to as “Balanced Score Card) to track overall performance (includes on-going assessment of KPI’s for each department)**
 - Chapter 11 of this Document (Strategic Performance & Accountability Framework) provides details of one of the keys to a successful strategic plan. That is the organization’s ability to track overall performance of its strategic goals that are aligned with the strategic priority areas. Former IBM CEO Louis V. Gerstner, Jr. popularized the sentiment, “People do what you inspect, not what you expect.” To this end, to maintain the focus on measurable outcomes, the implementation of a formal reporting system is paramount.

CHAPTER 13: STRATEGIC PLAN SUMMARY

The recommendations provided herein are intentionally succinct and achievable. They are also specific to each component of the Town of Southwest Ranches organization, the governing body and the administration. When considering strategic planning efforts, less is more. This is especially true when the recommendations being presented represent a refinement and narrowing of focus rather than a major redirection. It is hoped that as the Town of Southwest Ranches moves to formal adoption of this Strategic Plan Document, the contents herein will serve as a true roadmap for the next five years.

Strategic planning is not about predicting the future; it is about intentionally preparing for it. By remaining disciplined in its strategic priorities, committed to measurable outcomes, and faithful to the values that define the community, the Town of Southwest Ranches is well positioned to preserve its unique identity while continuing to provide exceptional service to its residents for generations to come.



Figure 24

Appendix A

Departmental SMART Goals Readiness Assessment

Town of Southwest Ranches Strategic Plan

Purpose of this exhibit. During the strategic planning process, Town departments were invited to draft strategic goals and key performance indicators (KPIs) that could support the Town's Mission, Vision, Values, and key areas of focus. The submissions demonstrate meaningful effort and early alignment; however, SMART goal development was a new exercise for many participants. This exhibit summarizes common strengths and gaps in the submitted goals and recommends a standardized training and validation process before the Town relies on the goals as adopted five-year implementation commitments.

1. Summary Assessment

The departmental submissions should be treated as draft strategic goal concepts rather than fully validated SMART goals. They are useful as a starting point because they identify desired improvements, potential projects, and areas of departmental priority. They should not yet be treated as fully measurable, resource-validated, or outcome-certified commitments without additional department-level research, baseline development, budget validation, and cross-department review. This assessment is not a criticism of staff effort. It reflects the practical reality that strong SMART goals require more than a planning workshop. They require reliable baseline data, clear ownership, realistic resource assumptions, resident or operational demand evidence, implementation milestones, and a consistent Townwide method for defining and reporting KPIs.

2. Alignment to Mission, Vision, Values, and Strategic Pillars

The Town's planning framework emphasizes preserving the rural, equestrian, and environmentally protected character of Southwest Ranches while supporting responsible governance, public safety, infrastructure, community engagement, fiscal integrity, and long-term sustainability. Therefore, every departmental goal should show a clear line of sight to one or more of the Town's strategic pillars, not only to a departmental activity or project. The submitted goals generally align with the Town's pillars in direction. Public Works goals connect to infrastructure, technology, environmental resilience, and resident communication. Finance goals connect to fiscal integrity, transparency, and administrative excellence. Parks, Recreation & Open Spaces goals connect to rural recreation, equestrian/agricultural heritage, and community programming. Town Clerk goals connect to public trust, transparency, records, and resident service. The next step is to standardize how each goal proves that alignment and how the Town will measure whether the goal is working.

3. SMART Goal Readiness Findings

For purposes of this exhibit, SMART means Specific, Measurable, Attainable, Realistic, and Timebound. A goal can contain several SMART elements and still not be fully SMART if it lacks baseline data, target rationale, ownership, funding assumptions, or a credible way to measure results.

SMART Element	Observed Strength	Development Need
Specific	Several goals identify a project or initiative, such as ERP implementation, GIS dashboards, trails planning, chamber technology upgrades, and visitor/call tracking.	Some goals are still broad activities rather than clearly scoped outcomes. Examples include "increased use of technology" or lists of KPI categories without a defined intervention, owner, or standard process.
Measurable	Many submissions include possible KPIs, counts, percentages, or milestone dates.	Several KPIs are metric names rather than targets. Baselines are often missing, and some target levels appear unvalidated, such as staff training percentages, asset verification rates, participation rates, or reductions in repetitive calls.
Attainable	Departments identified practical projects and some budget estimates.	Attainability is not yet proven through staffing capacity, procurement timing, vendor dependencies, technology feasibility, grant/funding assumptions, or workload impact.
Realistic	The goals are directionally reasonable and connect to operational needs.	Some goals need more evidence that they can be delivered within five years and that the benefit justifies the cost, especially for technology buildouts, GIS platforms, dashboards, studies, or programs dependent on contractors and resident participation.
Timebound	Most goals include FY or calendar-year deadlines.	Some timelines are ranges, conflicting, or not milestone based. A five-year goal should include near-term milestones, annual targets, and a reporting cadence, not only a final date.

4. Department-Level Observations

Department	Directionally Strong Elements	SMART Development Needs
Public Works	Public Works submitted the most detailed and time-oriented goal set, including permit intake software, GIS/asset management, elevation certificate digitization, digital service requests, field work order tools, resident communications, capital project dashboards, roadway resurfacing, stormwater planning, septic-to-sewer feasibility, and vulnerability assessment integration.	The goals need stronger validation of baseline conditions, target rationale, cost estimates, owner/dependency mapping, and implementation feasibility. Some KPIs measure project completion rather than performance impact. Some timelines and target dates appear inconsistent. One planning phrase referencing sidewalks should be reviewed for consistency with Town policy and rural mobility expectations.
Parks, Recreation & Open Spaces	PROS goals are clearly connected to community programming, equestrian/agricultural heritage, trails, recreation, and modest use of technology. The veteran's social cafe includes an early participation target, and the trails master plan has an estimated budget.	Several goals need clearer outcome targets and demand evidence. KPIs are mostly counts of activities or participants, but do not yet define success thresholds, baseline participation, resident interest validation, cost per participant, contractor feasibility, or long-term program sustainability.
Financial Services	Finance goals are strongly aligned with administrative excellence, fiscal integrity, transparency, modernization, paperless workflows, procurement improvement, and public access to budget information.	Many KPIs are useful categories but not yet SMART targets. Examples include transaction processing time, workflow digitization, online payment use, procurement cycle time, budget cycle time, and rebate revenue. These require current baselines, target levels, calculation methods, and data owners. Comments in the document also show unresolved assumptions related to resident education, rebate estimates, and one-time versus ongoing costs.
Town Clerk	Town Clerk goals connect to resident service, public trust, public records, meeting transparency, and technology-enabled customer service. The chamber camera/display projects and electronic sign-in concept are practical improvements.	The goals need clearer wording, consolidation of related technology improvements, defined methods, formal KPI targets, and benchmarks for records, meeting minutes, public notices, and visitor/call tracking. Existing comments in the submission already point to the need for restated goals, clearer methods, generic KPI formats, electronic records retention considerations, and industry standards.

5. Common Gaps Across the Submitted Goals

Baselines are often missing. Goals should show the current condition before establishing a five-year target. Examples include current processing times, current participation, current resident inquiries, current asset inventory, current staff adoption, current digital usage, current project update cadence, current cost per activity, and current service demand. Targets are not always defined. A KPI such as "processing time" becomes SMART only when it defines the current baseline, the desired target, the measurement period, and the data source. Attainability is not fully validated. Many goals assume staff time, vendor availability, technology readiness, funding approval, resident participation, or interdepartmental coordination without documenting those assumptions. Some goals measure completion rather than impact. Project completion matters, but the Town also needs to know whether the project improved service, reduced cost, increased transparency, improved safety, strengthened trust, or advanced the Town's rural character. Some goals are initiatives rather than strategic goals. A software purchase, dashboard, or event may be an action step. The strategic goal should explain the outcome the Town expects the action to produce. Cost and budget information is inconsistent. Some goals list one-time costs, some list annual costs, and some rely on existing resources without specifying staff capacity or opportunity cost. Ownership and reporting cadence are often unclear. Each goal should name the lead department, supporting departments, decision authority, reporting schedule, and escalation path if risks arise.

6. Benefits of SMART Goal Training and Standardization

A Townwide SMART goal standard would help departments translate good ideas into accountable, fundable, and reportable commitments. Training would also create a shared language between Council, administration, departments, advisory boards, and residents.

Improves credibility. Goals backed by baseline data, targets, and assumptions are easier for Council and residents to trust. Strengthens budget decisions. SMART goals help distinguish high-priority investments from attractive but lower-impact activities. Supports fiscal integrity. Clear cost, staffing, and benefit assumptions reduce the risk of committing to unfunded or unsustainable work. Improves performance reporting. Standardized KPIs make it possible to create a dashboard that compares progress consistently across departments. Clarifies accountability. Staff know who owns each goal, what success looks like, and when progress will be reviewed. Encourages cross-department coordination. Many goals require collaboration among Public Works, Finance, Town Clerk, Communications, administration, vendors, and outside agencies. Keeps the strategic plan connected to the Town's identity.

SMART alignment helps ensure projects serve rural preservation, environmental stewardship, resident trust, fiscal responsibility, and long-term sustainability.

7. Risks of Using Goals That Are Not Fully SMART

If the Town relies on goals that are not fully SMART, several risks could emerge during implementation: A false sense of accountability: goals may appear measurable on paper but lack the baseline or target definition needed to prove progress. Unclear prioritization: departments may pursue visible activities without knowing which initiatives most advance the Mission, Vision, Values, and strategic pillars. Budget pressure and unfunded commitments: goals may require technology, staffing, consulting, maintenance, or training resources not fully identified during planning. Difficulty explaining progress to residents: without consistent metrics, the Town may struggle to show whether a project improved service or only completed an activity. Inconsistent department reporting: each department may define success differently, making Townwide performance management difficult. Reduced public trust: residents may interpret vague or shifting goals as lack of follow-through, even when staff are working diligently. Program drift: current or future programs may continue because they are familiar or politically visible rather than because they measurably advance the Town's adopted priorities.

8. Recommended SMART Goal Development Standard

Before any departmental goal is included in the final implementation dashboard, the Town should require a completed SMART Goal Development Sheet. The following fields are recommended:

Required Field	Purpose
1. Goal statement	One sentence beginning with a clear action, target result, responsible owner, and completion date.
2. Strategic alignment	Identify the specific Mission, Vision, Value, and strategic pillar advanced by the goal.
3. Problem or opportunity	Describe the resident, operational, fiscal, infrastructure, environmental, or service issue being addressed.
4. Baseline data	Document current performance and source of data. If no baseline exists, the first milestone should be to establish one.
5. Target outcome	State the desired end condition numerically or in verifiable terms.
6. KPIs	Define each metric, formula, source, frequency, owner, and target.
7. Resource assumptions	Identify staffing, budget, technology, vendors, grants, training, and maintenance costs.
8. Dependencies and risks	List internal/external dependencies and likely barriers.

9. Milestones	Break the five-year goal into annual or quarterly checkpoints.
10. Reporting cadence	Specify how progress will be reported to administration, Council, and the public.

9. Examples of Strengthening Draft Goals

The examples below are illustrative. They are not final recommended goals because the Town would still need to confirm baselines, cost, staff capacity, policy direction, and data availability.

Area	Draft Direction	SMART-Strengthened Example	Possible KPI Set
PROS technology use	Increase the use of technology for department functions.	By September 30, 2027, PROS will implement standardized digital workflows for at least four recurring department functions, including meeting summaries, resident correspondence tracking, program registration/support documentation, and internal reporting, with 100% of designated staff trained and quarterly usage reports submitted to the Town Administrator.	Number of workflows digitized; staff training completion; average time to complete recurring documentation; number of resident communications tracked; staff adoption rate.
Town Clerk visitor/call tracking	Track and report on the subject and number of calls received at Town Hall.	By Q2 FY2027, the Town Clerk will implement a standardized visitor and call tracking method with defined request categories, monthly reporting, and a 12-month baseline. By Q4 FY2028, the Clerk's Office, departments, and Communications Coordinator will use the data to publish targeted information for the top recurring request categories and reduce repetitive informational calls by a Council-approved target percentage.	Visitor/call categories tracked; monthly reporting completion; top request categories; web/social content published; change in repeat inquiry volume; website traffic on targeted topics.
Finance P-Card program	Implementation of Purchasing Card program.	By the end of FY2028, Finance/Procurement will transition eligible low-dollar, high-frequency purchases to a controlled P-Card program after establishing a FY2027 baseline for purchase order/check volume, cost per transaction, and eligible vendor spend. The program will target a defined reduction in manual purchase orders/check payments while maintaining audit compliance and documenting any rebate revenue generated.	Baseline PO/check volume; percent eligible spend shifted to P-Card; processing time; cost per transaction; vendor participation; rebate revenue; audit exceptions.

Public Works GIS/asset management	Implement a GIS-based real-time asset visualization platform.	By December 2027, Public Works will implement a GIS-based asset visualization platform for critical infrastructure after establishing a verified baseline inventory and phasing field verification by asset class and risk level. Annual targets should identify the percentage of critical assets mapped, verified, maintained, and used in capital planning decisions.	Assets inventoried; assets field-verified; data accuracy rate; staff training completion; updates completed within reporting period; number of CIP decisions informed by verified GIS data.
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10. Application to Current Programs and Projects: Composting Program

The Town should apply the same SMART goal discipline to current programs and projects, including the composting program. The composting program may align with Environmental Stewardship, Community Engagement, Fiscal Responsibility, and Rural Lifestyle Preservation; however, its strategic value should be demonstrated through data and alignment rather than assumed because of its history or visibility. Programs that began as a response to a specific community concern can remain valuable, but they should be periodically evaluated to confirm whether they still advance the Town's Mission, Vision, Values, and current strategic pillars. This is especially important when a program receives high attention, but participation, measurable impact, or Townwide benefit is unclear. Illustrative SMART evaluation goal: By Q4 FY2027, the Town will complete a formal evaluation of the composting program to determine its alignment with Environmental Stewardship, Fiscal Responsibility, Community Engagement, and Rural Lifestyle Preservation. The evaluation will document participation, cost, operational requirements, resident awareness, environmental impact, and options for continuing, redesigning, scaling, partnering, pausing, or sunseting the program. Potential participation KPIs: households enrolled, active households, participation rate by month/quarter, repeat usage, and participation by district or area when available. Potential environmental KPIs: volume or weight diverted, contamination rate, estimated waste reduction, and consistency of collection/processing.

Potential fiscal KPIs: program cost, staff time, vendor cost, cost per participating household, cost per ton diverted, and funding source. Potential engagement KPIs: resident awareness, educational contacts, event participation, survey feedback, and number of residents requesting information. Potential decision criteria: minimum participation threshold, maximum cost per outcome, demonstrated environmental benefit, alignment to strategic pillars, and resident demand. Using this approach does not predetermine the future of the composting program. It gives the Town a credible and transparent way to decide whether the program should continue as-is, be redesigned, be integrated into broader sustainability education, be scaled only if thresholds are met, or be paused if it does not produce sufficient strategic value.

11. Recommended Next Steps

Adopt a Townwide SMART Goal Development Sheet using the fields listed in this exhibit. Provide department training on writing SMART goals, distinguishing strategic outcomes from projects, defining KPIs, and using baseline data. Ask each department to revise submitted goals using the standard template and to identify missing data that must be collected before targets are finalized. Create a cross-department review process to test alignment with Mission, Vision, Values, strategic pillars, budget, staffing, policy direction, and resident priorities. Convert approved goals into a five-year implementation dashboard with annual milestones, owners, reporting cadence, and public-facing progress summaries. Apply the same standard to existing programs, including composting, to ensure ongoing initiatives remain aligned, measurable, realistic, and accountable.

12. Suggested Report Conclusion

The departmental goals submitted during this planning process represent an important first step toward building a performance-oriented strategic plan. They demonstrate staff engagement and provide a useful inventory of potential projects, service improvements, and operational priorities. However, before the goals are used as five-year commitments, the Town should invest in SMART goal training, standardize its goal-development process, and require supporting data for all major targets and KPIs. Doing so will protect public trust, support fiscal responsibility, strengthen implementation discipline, and ensure that departmental work remains connected to the Town's Mission, Vision, Values, and long-term identity as a rural, equestrian, environmentally protected community.

Sources Reviewed

Public Works Department, Town of Southwest Ranches: SMART Goals with KPIs. Parks, Recreation & Open Spaces: FY 2027 Strategic Plan submission. Financial Services Department: Strategic Goals draft, edited May 14, 2026. Town Clerk: Departmental Strategic Goals and KPI Outline with review comments. Southwest Ranches Mission, Vision, Values, and Strategic Pillars document. Town strategic planning scope and related background materials reviewed during the engagement.