



Fort Myers Beach Management & Planning Session

**Town Hall Council Chambers
6231 Estero Boulevard
Fort Myers Beach, FL 33931**

Minutes**Thursday, May 7, 2026****9:00 AM**

ORDER OF BUSINESS

DRAFT

I. CALL TO ORDER

Members Present: Mayor Dan Allers, Vice Mayor Scott Safford, and Council Members John King, Rebecca Link, and John McLean.

II. PLEDGE OF ALLEGIANCE

III. ITEMS FOR DISCUSSION

A. Strategic Plan — FGCU

Town Council Strategic Plan — USF Collaboration

Angela Crist of USF Florida Institute of Government provided that this was part two of the second forum. She welcomed the newly elected Town Council members. She introduced the rest of her team, including Dr. Stephen Neely, and Brittany Tibbett. She also recognized their partners with SPC Collaborative Labs: Tina Fischer, Annemarie Boss, PJ Petrick, and Jonathan Massie. After providing a brief overview of the agenda, she emphasized the participatory nature of the process. Data and information had been gathered from different stakeholder groups, and real-time records were completed. Figures collected from previous steps were then used for subsequent stages. She announced that all documents were available on the town's website.

Responding to Mayor Allers' request, Ms. Crist noted that work had begun around January 2025 and that Phase One, which included a Town Council Kickoff, stakeholder interviews, a resident survey, two community forums, an employee survey, and the Employee Focus Group Forum, concluded around November 2025. This session would finish 2.4a of the timeline. Following this meeting, a draft version of the final report will be presented at the June 15, 2026 Town Council meeting. Phase Three would then focus on the implementation of the plan. She acknowledged Town Manager McKannay and his team for their excellent work.

She reported that the work done so far represents a culmination of numerous meetings and information gathering sessions. The proposed vision was as follows: an eclectic coastal community where you can safely live, prosper, and enjoy island life. She also provided the recommended mission statement: The Town of Fort Myers Beach serves and protects our coastal community by fostering safety, sustainability, and economic vitality. She requested that the participants review the core values and guiding principles. These, along with the vision and mission, make up the core of the strategic plan. She reminded the participants that the guiding principles are non-negotiable and serve as the foundation for communication and interaction. Currently, there are, in addition to the 18 goals and 44 objectives, five strategic themes: Infrastructure, Leadership, Communications, Community & Economic Development, and Environmental Sustainability.

Council Member Link confirmed with Ms. Crist that residents can view the documents through the "Strategic Plan" page on the town's website. Mayor Allers asked if the homestead property tax issue was brought up in the team's conversations. Ms. Crist responded that local governments are experiencing a lot of uncertainty from the State and that they may need to take time to reassess and regroup. There will be studies available in the future, and she hopes that they can be accessed before the impact reaches the town. Council Member Link commented that change is inevitable and that, while reprioritization may occur, the strategic plan remains as a goal and source for guidance.

Finance Director Joe Onzick provided an overview of the status of the bridge loan. The town has borrowed \$11.9 million and plans to use \$9.7 million. There is a remainder of \$2.2 million which can be utilized in the future. The Town has received \$7.6 million in state revenue replacement grant, which is held aside for the purpose of repayment. That same fund has also accumulated almost \$1.2 million in interest. The town will need to identify a funding source for the remaining amount. Mr. Onzick explained that the \$2.2 million that is currently not in use can be utilized to repay the loan. He believes that the town must repay by 2033. Until the bridge loan is paid, the town is limited by its restrictions and would not be able to use non-ad valorem revenue to start any new programs or fund any capital improvements.

Anything that comes into the general fund, aside from property tax, must go towards repayment of the bridge loan, after deducting the essential operating expenses. Revenues cannot be pledged for any type of debt the town considers, such as the issuance of bonds. The town would, however, be able to use grants and restricted revenue, including those from park and road impact fees, the gas tax, savings set aside for capital replacement, and the utility fund. Ms. Crist noted that this was an excellent example where, if repayment occurs, the focus may shift, but the goals and objectives would not. She referred the participants to the strategic themes as well as their definitions and goals.

Deputy Town Manager Traci Kohler explained what the Strategic Plan reporting platform would look like in the future. The public will be able to see the overall plan and individual goals.

The internal view will display goals and objectives. Mayor Allers commended the Deputy Town Manager and the staff who worked on this digital tool, which he considers to be an excellent form of good communication and transparency. Ms. Fischer also acknowledged the team and their work and response to feedback. She emphasized that the goal was to make everything measurable and that the success metrics were meant to be a starting point. From the 18 goals, the participants of this session will identify the top three to five. They will start the prioritization process by going through each theme and selecting the two that they desire to be prioritized. They will then narrow down to the desired number. Mayor Allers confirmed that they will be focusing on the goals and not on the strategic themes, which are considered to be equally important. Council Member Link asked what would happen to the goals that were not selected. Ms. Fischer stated that those would not be removed or cast aside. Reprioritization may occur in the future, and she cited the homestead property tax issue as a potential catalyst. The leadership group will have the opportunity to weigh in on the priorities for that respective strategic theme. She provided that participants will rank each item based on community impact, financial sustainability, and do ability. Discussions and questions were allowed during the polling period. Vice Mayor Safford commented that the school is missing from the strategic plan and believes that this should be included. Town Manager McKannay provided that he would be willing to add the school as an objective under one of the goals.

There was a follow-up question on how new items could be added. Ms. Fischer answered that, during Phase Three, there will be discussions on the frequency of plan review, the manner in which information will be relayed, and the process for incorporating changes. Ms. Crist added that, because the town does not have complete control over the school, it is essential that this aspect is placed in the correct area of the plan. Ms. Fischer noted that the team would take this feedback and include it in the final report. She also invited other suggestions for additions. Council Member Link confirmed with the team that the strategic plan is flexible and allows for shifts over time through reprioritization and modifications in the action items and tasks. The themes, goals, and objectives should, on the other hand, remain the same.

Mayor Allers asked how a public information request would be handled for the polled items. Ms. Fischer responded that raw data of the voting can be provided. Ms. Crist requested that participants review the worksheet, including the anticipated timeline and proposed success metrics, during the decision-making process. Council Member Link asked that Finance Director Onzick notify members before voting on any issues that may be financially impacted by the bridge loan. Town Manager McKannay confirmed that Mr. Onzick would be available. Mayor Allers noted that he and the Town Manager can also provide information as needed.

The following two goals received the highest results for the first round: Goal A.3 (well-lit and safe "Town-owned" streets and sidewalks) and Goal A.1 (robust, adaptable, and capable infrastructure systems).

There was discussion on whether goals with projects that are closer to completion should receive the most attention and prioritization, as they rank higher in the do ability factor and thus increase their total score. Without objections, the group moved forward with Goals A.3 and A.1.

In the second round, Council selected Goal B.1 (succession planning through organizational alignment) and Goal B.4 (organizational effectiveness). The leadership team, however, selected Goal B.4 (organizational effectiveness) and Goal B.3 (workforce development). Deputy Town Manager Kohler stated that the standardized performance evaluation framework, which was described in the third goal, was important to her. Staff member Hauge emphasized the importance of developing a good workforce, which he believes is connected to the other items and outcomes. He asserts that productivity would be enhanced under this system. Mayor Allers noted that there was never a succession plan for this island. Ms. Fischer provided that the first objective under Goal B.1 was "to conduct an organizational assessment of the Town's workforce structure to validate operational best practices for success," with a timeline starting next year. She asked the participants if they were in agreement to move forward with Goal B.3 and Goal B.4. Vice Mayor Safford asked Human Resources Director Talissa Oliveira what her top goal would be. She responded that succession planning was the most critical for her. Council Member Link, Council Member McLean, and Vice Mayor Safford expressed their preferences to defer to Ms. Oliveira's opinion and to move forward with Goal B.1. The final decision was to move forward with Goal B.1 and Goal

B.4. In the third round, Goal C.1 (transparent, responsive, and inclusive communication and leadership) and C.4 (emergency management services) were tied as the top goals. Council Member McLean requested additional feedback from the leadership team on the first objective under Goal C.3 (to "ensure 95% of public inquires routed through Communications receive acknowledgment within two business days"). Town Manager McKannay commented that this was one of the first directives or goals that he gave to staff and noted its importance and the intention to maintain this aspect no matter what. He acknowledged its connection with overall organizational effectiveness and the opportunities to expand. Public Information Officer Abilgail Eberhart explained that the number is 95% because there is no established definition for a public inquiry yet. This value can be increased to 100% once there is a clear understanding of what should receive a town response. Mayor Allers remarked that Goal C.2 and Goal C.3 are encompassed in the first goal, which is why it may have ranked so highly in the results. Council Member Link asked her if she agreed to the ranking. PIO Eberhart stated that she did. For the fourth round, Goal D.1 (economic growth through business development and year-round tourism) was selected, and there was a tie between Goal D.3 (supportive redevelopment decisions for a thriving, resilient island community) and Goal D.4 (stewardship of community assets). Community Development Director Frankie Kropacek stated that the community needs an avenue that focuses on both the residential and commercial side.

He also acknowledged the tourism aspect, mentioning that the town has been a cash cow for the TDC but does not see the benefits from that. The bed tax that is collected does not go directly to the town. He provided that Goal D.2, which revolves around short-term rentals, is a factor but is not an essential driver for this community. He noted that, once they collect one year's worth of data from the new software and management system, there will be a better idea on how these rentals will fit into the overall picture. He highlighted the importance of redevelopment and resilience.

Mayor Allers indicated that Goal D.4 could tie into Goal D.1 and that Goal D.2 could roll into Goal D.1. Vice Mayor Safford expressed his agreement. Ms. Fischer reported Ms. Crist's recommendation that the school item could fit within Objective D.4.2. Mayor Allers expressed his preference to place it under Objective D.1.4., which can then be rolled into Objective D.1.3. Town Manager McKannay suggested that it may fit under both objectives, as the town will need to develop ways to acquire the funding. Council Member Link asked if the town owns the user-friendly software for the permitting process for Objective D.1.1. Mr. Kropacek answered that this system belonged to the town. Mayor Allers confirmed that the participants would like to move forward with Goal D.1 and Goal D.3. The top results for the last round were Goal E.1 (shoreline and coastal resilience) and Goal E.2 (storm surge mitigation), respectively. Mayor Allers provided that Goal E.3 could roll into Goal E.1.

Vice Mayor Safford acknowledged the need to clean up the canals and conduct dredging but also mentioned that the do ability factor is not there for the short-term. Council Member McLean expressed his agreement. Town Manager McKannay stated that he would have placed the second goal as his highest priority but acknowledged that it was one of the two selected to move forward.

Ms. Fischer provided that participants will now vote for three of the items that were chosen from the previous rounds. Mayor Allers confirmed that there is no ranking among the choices that they are voting for. Goals A.1, D.1, C.1, and E.2 were the top choices. The group ultimately decided to move forward with the top four items.

Ms. Fischer announced that there was a visual illustration, with Jonathan Massie presenting his work. She then outlined the next steps. The report would be submitted on June 1, 2026, with a presentation on June 15, 2026. There is a planned session scheduled in July. She mentioned that there will be opportunities to review changes and pivot, as needed, at an implementation session. She emphasized that the entire plan would be moving forward. There was discussion amongst members of Council on the re-emerging aspect of the town's vision. Participants agreed that the vision should be aspirational, as re-emergence has already started. Council Member Link inquired about the relationship between the comprehensive plan and the strategic plan. Ms. Crist responded that the two documents are complementary to each other but also acknowledged the different content that each provides. She provided that the comprehensive plan was a part of the strategic plan. Ms. Fischer referred the participants to Objective C.1.4. She recognized the town's progress and thanked the attendees.

IV. AGENDA MANAGEMENT**A. May 2026**

Council Member Link requested that public benefits be considered at a future Management & Planning Session. Vice Mayor Safford asked if she would like a combined meeting with the Local Planning Agency. She noted that she would like to hear from other members of Council but expressed her preference for a joint meeting. Town Manager McKannay stated that this type of meeting would be possible. Mayor Allers requested additional information on the discussions at the session. Council Member Link stated that she wished for an opportunity for the members to think about public benefit and provide criteria so that developers would know what would be evaluated.

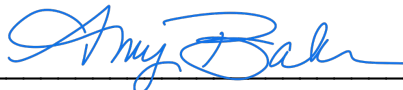
Town Manager McKannay offered two potential dates. There was general agreement to schedule this item for the August session.

V. ADJOURNMENT

The meeting was adjourned, without objection, at 11:11 a.m.

Minutes adopted as presented, June 15, 2026. Motion by Council Member King, seconded by Council Member McLean.

Passed 5-0.



Amy Baker, Town Clerk