THE CITY OF BURLINGTON, WISCONSIN STRATEGIC PLAN

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CENTER FOR GOVERNMENTAL STUDIES
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Center for Governmental Studies
Outreach, Engagement, and Information Technologies

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November 30, 2015

RE: 2016-2019 Strategic Plan—City of Burlington

Dear Mayor Miller,

On behalf of the Center for Governmental Studies at Northern Illinois University, I am pleased to present this 2016-2019 Strategic Plan and Summary Report to the City of Burlington.

The plan reflects the organization's commitment to strategic planning, and to delivering measurable results. I appreciate the dedicated effort put forth by you, the City Council, and senior staff.

I also want to thank City Administrator Walters for her assistance and support during the process.

Yours truly,

Craig R. Rapp
Senior Associate
President, Craig Rapp LLC

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Executive Summary

The City of Burlington engaged in a strategic planning process over three meetings during October and November 2015. The sessions yielded a draft strategic plan for the three-year period 2016-2019.

The strategic plan consists of five *strategic priorities*, which are the highest priority issues for the next three years; a series of *desired outcomes*, which provide a vision of success, *key outcome indicators,* which will be monitored to determine success; and a set of *performance targets*, which define the successful outcome.

The Council engaged in two major efforts to examine their operations, and the needs and expectations of their customers. The first, an environmental scan, conducted by staff, examined the current conditions of City operations and the external influences affecting those operations. The second was a strategic planning retreat held October 16-17, 2015.

On October 16, the Council began the process of developing the strategic plan. The group reviewed the environmental scan, and also examined the organization's strengths, weaknesses, opportunities and threats (SWOT analysis). They identified the major challenges facing the City.

On October 17, the group reviewed the challenges facing the community, and adopted a set of five strategic priorities. They then developed a set of desired outcomes, key indicators and performance targets for each priority, which established the desired performance for the next three years.

On November 12, the senior management team met and developed a set of strategic initiatives. The initiatives are the projects and programs that will be necessary to achieve the outcomes identified.

The strategic priorities, key outcome indicators, targets and initiatives are summarized on the following page.

City of Burlington-Strategic Plan Summary 2016-19

Strategic Priority	Desired Outcome	Key Outcome Indicator (KOI)	Target	Strategic Initiatives
Financial Sustainability **FINANCE**	A stable system that supports operations	--Fund balance --Bond Rating --Policies	- Compliance w/ all financial policies - >/= AA-	a) Monthly reporting system b) Long-term, comprehensive financial plan-all funds c) Develop financial policies
	Long-term revenue strategy that supports intended growth	-- Financial Plan --Fund balance	- Long-term revenue strategy in place	
	Expenditure system that supports growth	Expenses	Meet state req. exp. restraint	
Economic Development **FINANCE**	Increase quality jobs	Jobs above median income	200	a) Focused business dev program b) Develop business retention program c) Create a business incentive policy
	Thriving retail areas	Empty storefronts/vacancies	Decrease to 35	
	Expanded tax base	New A/V	$20 million	
Infrastructure Maintenance and Expansion **OPERATIONS**	Meet current infrastructure needs	Plans and funding	Funded plan for each system	a) Dev vehicle, equipment, facilities replacement schedule & funding strategy b) Create plan for moving General Transportation Aid for intended purpose c) Create stormwater utility d) Limit water & wastewater treatment Limits e) Complete schedules and strategy for major facilities
	Meet the managed mandated requirements for ater/storm/wastewater systems	--Water requirements --Stormwater reqs. --Wastewater reqs.	100% compliance	
	Clear direction on facility needs/wants	Feasibility	Council decision: --City Hall, Pool, Library, Police Dept.	
A Competitive Workforce **WORKFORCE**	Retention of high quality employees	Turnover rate	Reduce turnover rate	a) Total compensation study b) Succession plan for organization c) Employee survey d) Exit interviews
	Trained workforce to assume leadership positions	Internal hires	Increase % internal candidates or > hired	
	Consistently attaining higher # of qualified applicants for openings	Qualified applicants	50% increase in qual. applicants	
Citizen Engagement **CUSTOMER**	Improved two-way communication	Responses to communication from city	Increase feedback 10% annually @sponsored events	a) Develop community engagement & education program b) Citizen Survey c) Recruitment & application process
	More citizen involvement	Participation	Increase 10% annually	
	Increased volunteerism at city functions & services	Volunteers for City functions & services	Full pool of volunteers-all functions	

City of Burlington Strategic Planning Process

Overview

Strategic planning is a process that helps leaders examine the current state of the organization, determine a desired future state, establish priorities, and define a set of actions to achieve specific outcomes. The process followed by the City was designed to answer four key questions: (1) Where are we now? (2) Where are we going? (3) How will we get there? (4) What will we do?

Environmental Scan—Assessing the Current Environment

To begin the strategic planning process, the senior staff conducted an environmental scan, which is a review of elements in the external and internal environments that impact performance. Included in the scan was a detailed review and summary of finance, operations, staffing, facilities and equipment. The scan revealed the most difficult challenges facing the City overall, as well as in each of the departments. The scan was presented to the Council on October 5th, and used as foundation and background for the strategic planning retreat.

Strategic Plan Development—SWOT, Setting Priorities, Defining Outcomes

On October 16, the leadership team held a retreat for the purpose of developing a strategic plan. As part of the exploration of "Where are we now?" the group was challenged to define the current organizational culture and its value proposition—understanding that an organization's culture, and the value proposition it puts forth provide the foundation for the way in which services are delivered and strategic direction is set.

The three value propositions and core cultures are summarized below:

<u>Three Value Propositions</u>

Operational Excellence (Wal-Mart, Southwest Airlines)

- ❑ They adjust to us (command and control)

Product/Service Leadership (Apple, Google)

- ❑ They 'ooh and 'ah' over our products/services (competence)

Customer Intimacy (Nordstrom, Ritz-Carlton)

- ❑ We get to know them and solve their problems/satisfy their needs (collaborative)

<u>Four Core Cultures</u>

Control Culture (Military - command and control)

- ❑ Systematic, clear, conservative
- ❑ Inflexible, compliance more important than innovation

Competence Culture (Research Lab – best and brightest)

- ❑ Results oriented, efficient, systematic

- ❑ Values can be ignored, human element missing, over planning

Collaboration Culture (Family-teams)
- ❑ Manages diversity well, versatile, talented
- ❑ Decisions take longer, group think, short-term oriented

Cultivation Culture (Non-profit/religious group-mission/values)
- ❑ Creative, socially responsible, consensus oriented
- ❑ Lacks focus, judgmental, lack of control

The group engaged in an extended discussion regarding the value proposition and the relationship to the culture. While there were a variety of different perceptions regarding the value proposition, it was generally believed that while the customer intimacy reflects the current approach, operational excellence is important and will continue to be important for operational stability, therefore it should be the primary value proposition, with customer intimacy as a secondary focus.

The team then conducted a brief review of their Mission, Vision and Values. In the case of the mission statement and the organizational values, the team felt that each needed slight adjustments to reflect current reality. The group worked on new ideas for each. Because there was no City vision statement, the group brainstormed key vision concepts, which were used to create a draft statement. The proposed statements are listed below:

Mission Statement:
The mission of the City of Burlington is to build and enhance our community by safely, respectfully, proudly and effectively executing our daily work activities. As an organization we are committed to continuous improvement.

Vision Statement (draft)**:**
The vision of the City of Burlington is to be a location of choice and a great place to call home. We achieve our vision by offering a welcoming, safe environment and a strong sense of community. Our diverse business sector and multi-generational population provides a sound foundation for our future.

Values:
Our organizational values are:
1. Communication
2. Teamwork
3. Integrity
4. Continuous Learning
5. Positive Work Environment.

Following the mission, vision and values discussion, the group conducted an assessment of the environment within which the City operates. This was done via a SWOT (Strengths, Weaknesses,

Opportunities, and Threats) analysis: a process that examines the organization's internal strengths and weaknesses, as well as the opportunities and threats in the external environment. To facilitate this, a SWOT questionnaire was distributed to the Council and senior management team in advance of the planning session. The SWOT process revealed the most frequently mentioned characteristics in each area:

STRENGTHS

- Staff, quality of life, fiscal, citizens

WEAKNESSES

- Levy limits/funding, expenditure restraint, aging infrastructure/facilities, employee retention/benefits/compensation, lack of comprehensive financial plan, slow residential/business growth

OPPORTUNITIES

- Economic development/growth, attraction/charm, collaboration/community involvement, location/communication/friendly-helpful, emergency services

THREATS

- Capital concerns, mandates, slow population/business growth, employee issues, crises/disasters, uninformed populace, community members unable to improve financially, cyber security

The group then engaged in an exercise using the summarized SWOT data. They compared strengths with opportunities and weaknesses with threats, to determine which opportunities would maximize strengths, and which weaknesses would be exacerbated by the threats. This effort helped to crystalize the current challenges and opportunities facing the community. The results of this analysis are listed below:

STRENGTHS-OPPORTUNITIES
(Make good things happen)

- Economic development and growth
- Attraction, having an attractive and charming city
- Collaboration of staff and joint services and community involvement

WEAKNESSES-THREATS
(Keep bad things from happening)

- Long-term financial health
- Finding and retaining employees
- Slow population and business growth
- Economic development

This led to the identification of a broad set of issues and challenges facing the community:

ISSUES/CHALLENGES

- Financial
- Economic development
- Competitive workforce
- Beautifying city
- Branding-telling story "why"
- Aging infrastructure
- Mandates-unfunded
- Population growth
- Volunteers-recruiting
- Succession planning
- Citizen engagement
- Keep and attract young families
- Housing options

On October 17, the group discussed the strategic challenges and the issues that were most important to the success of the City in the next three years. From that discussion, a set of five Strategic Priorities emerged. They are:

STRATEGIC PRIORITIES

1. Financial Sustainability
2. Economic Development
3. Maintain and Expand Infrastructure
4. A Competitive Workforce
5. Citizen Engagement

Defining the Strategic Priorities

In order to clarify the meaning of each priority in the context of Burlington, the group identified key concepts for each. These will be used for the development of final definitions.

Financial Sustainability

Revenue/expenditure balance, plan-long-term, depreciation funds, less reliance on state-aid, funding operations/core services robustly

Economic Development

New business (C/I) jobs, redevelopment (Commercial and residential), expansion-industrial parks, annexation, residential expansion (housing)

Maintain and Expand Infrastructure

Underground/in-ground, facilities, fixed assets, ROW improvements, maintain integrity

A Competitive Workforce
Attraction, retention, mentoring, succession planning, training, total competitive compensation

Citizen Engagement
Volunteers, communication (two-way, outward/inward), branding, transparency, new forms-social media, plan needs and expectations, know the customer

Determining Success: Defining the Desired Outcomes, Indicators, Targets

After identifying strategic priorities, the group focused on developing a set of desired outcomes. Once the outcomes were established, Key Outcome Indicators (KOI's) were defined and Performance Targets were developed. KOI's are indicators of the desired outcomes that were established. Performance Targets define successful outcomes, expressed in measureable terms.

Clarifying outcomes provides organizational focus by establishing a limited set of desired outcomes and performance targets for achievement for each strategic priority. The alignment created between outcomes and strategic priorities is important, not only for clarity, but also for maintaining a disciplined focus on the desired results.

Key Outcomes, Indicators, and targets by priority are:

Financial Sustainability

Outcome: A stable system that supports operations; **KOI**: Fund balance, Bond Rating, Policies; **Target**: Compliance with all financial policies, >/= AA-,

Outcome: Long-term revenue strategy that supports intended growth; **KOI**: Financial Plan, Fund balance; **Target**: Long-term revenue strategy in place

Outcome: Expenditure system that supports growth; **KOI**: Expenses; **Target**: Meet State required expenditure restraint

Economic Development

Outcome: Increase quality jobs; **KOI**: Jobs above median income; **Target**: 200

Outcome: Thriving retail areas; **KOI**: Empty storefronts/vacancies; **Target**: __#__Decrease

Outcome: Expanded tax base; **KOI**: New A/V; **Target**: $20 million

Maintain and Expand Infrastructure

Outcome: Meet current infrastructure needs; **KOI**: Plans and funding; **Target**: Funded plan for each system

Outcome: Meet the managed mandated requirements for water/storm/wastewater systems; **KOI**: Water requirements, Stormwater requirements, Wastewater requirements; **Target**: 100% compliance

Outcome: Clear direction on facility needs/wants; **KOI**: Feasibility; **Target**: Council decision:
City Hall, Pool, Library, Police Dept.

A Competitive Workforce

Outcome: Retention of high quality employees; **KOI:** Turnover rate; **Target:** Reduce rate from _ to __

Outcome: Trained workforce to assume leadership positions; **KOI:** Internal hires; **Target:** __% internal candidates or > hired

Outcome: Consistently attaining higher # of qualified applicants for openings; **KOI:** Qualified applicants; **Target:** 50% increase in qualified applicants

Citizen Engagement

Outcome: Improved two-way communication; **KOI:** Responses to communication from city; **Target:** Increase feedback 10% annually

Outcome: More citizen involvement **KOI:** Participation; **Target:** Increase participation 10% annually at sponsored events

Outcome: Increased volunteerism at city functions & services; **KOI:** Volunteers for City functions & services; **Target:** Full pool of volunteers-all functions

Implementing the Vision: Developing Strategic Initiatives and Action Plans

To successfully address the strategic priorities and achieve the intended outcomes expressed in the KOI's, it is necessary to have a focused set of actions, including detailed implementation steps to guide organizational effort. The City of Burlington accomplished this through development of strategic initiatives for each priority—listed below. Strategic initiatives are broadly described, but narrowly focused activities that are aligned with the priorities, and targeted to the achievement of outcomes expressed in the KOI's.

1. Financial Sustainability
    a. Monthly reporting system
    b. Long-term, comprehensive financial plan-all funds
    c. Develop financial policies

2. Economic Development
    a. Focused business development program
    b. Develop business retention program
    c. Create a development incentive policy

3. Maintain and Expand Infrastructure
    a. Develop vehicle, equipment, and facilities replacement schedules and funding strategy
    b. Create plan for moving General Transportation Aid to its intended purpose
    c. Create a Stormwater Utility
    d. Commit efforts to limit water and wastewater treatment limits
    e. Comprehensive schedules and strategy for major facilities

4. A Competitive Workforce
   a. Total Compensation Study
   b. Succession plan for organization
   c. Employee survey
   d. Exit interviews

5. Citizen Engagement
   a. Develop community engagement and education program
   b. Citizen survey
   c. Recruitment and application process

Strategic Planning Participants

The strategic plan was developed with the hard work and dedication of many individuals. The Council led the way, defining a direction and a set of outcomes that are important to the community. The Trustees and senior staff all spent time engaged in new ways of thinking to come up with a set of plans that will help the Council successfully measure and achieve the outcomes they defined.

Mayor and City Council

Mayor	Robert Miller
Alderman	Ed Johnson
Alderman	John Ekes
Alderman	Ruth Dawidziak
Alderman	Bob Grandi
Alderman	Tom Vos
Alderman	Jon Schultz
Alderman	Tom Preusker
Alderman	Todd Bauman

Administrative Staff

City Administrator	Carina Walters
Director of Administrative Services	Megan Watkins
City Treasurer & Budget Officer	Steve DeQuaker
Police Chief	Mark Anderson
Fire Chief	Perry Howard
Public Works Supervisor	Dan Jensen
Library Director	Gayle Falk

Strategic Priority: Financial Sustainability **Strategic Initiative: Financial Reporting System**

Desired Outcome: A stable system that supports operations

Target: Compliance with all financial policies: Greater or equal to AA-

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Financial Tracking/Monthly Reporting System	Upgraded Accounting Software and Excel Access	Steve	12/31/2015
Develop Budget To Actual spreadsheets for each department with links to Financial Data	Working spreadsheets	Steve	3/31/2016
Upgrade Departmental and Department head desktops to Clarity Icon and Excel plug in to read data	Add-In implementation and successful Inquiry Access to Clarity software	Steve	3/31/2016
Distribute Excel sheets to Department Heads for testing	Worksheets work as planned	Steve	4/15/2016
Final modifications if needed on Excel sheets	No Modifications	Steve	4/22/2016
Training for department heads on Clarity "Inquiry Access"	Departmental Meetings	Steve	4/29/2016
Department heads pulling own budget to actual and accessing data in Clarity as needed	Implementation	Steve	5/1/2016

Strategic Priority: Financial Sustainability **Strategic Initiative: 5 Year Financial Plan**

Desired Outcome: Long-term revenue strategy that supports intended growth

Target: Long-term revenue strategy in place

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
5 Year Financial Plan 2016 Budgeted expenditure	Council Approved/Adopted Expenditure	Steve	12/31/2015
Meeting with Ehlers to discuss process and identify all areas of 5 year plan and data collection needed	Written plan of action going forward	Steve, Ehlers	2/28/2016
Coordinate data collection for plan review	Review of data collection with rough draft of plan	Steve, Ehlers, Dept. Heads	4/15/2016
Coordinate final draft of 5 year plan	Dept head approval, City Administrator approval	Steve	4/30/2016
Draft Resolution and Cover Sheet for Council	Accepted resolution by City Administrator	Steve	5/6/2016
Submission of 5 year plan to COW	Final form of plan to COW with Ehlers presentation	Steve Ehlers	5/17/2016
Approval of 5 year plan by Common Council	Final approval/resolution	Council	6/7/2016

Strategic Priority: Financial Sustainability **Strategic Initiative: Develop Financial Policies**

Desired Outcome: Expenditure system that supports growth

Target: Meet state required expenditure restraint

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Review and check current financial policy	Docs on hand and implemented currently	Steve	3/31/2016
Review for changes/corrections	Acceptance by City Administrator	Steve	4/30/2016
Cover Sheet and Resolution to COW	Questions answered	Steve	6/6/2016
COW worksheets move on to Council	Approved by Council	Steve	6/20/2016
Implementation and issuance of policy to Ehlers and Ehlers Investment Partners	Docs on File	Steve	6/30/2016
Incorporate financial policies as part of 2017 and beyond budget process	Approved 2017 Budget	Steve	12/15/2016

Strategic Priority: Economic Development **Strategic Initiative: Create a Focused Business Development Program**
Desired Outcome: Jobs Above Median Income
Target: 200 New Quality Jobs

Initiative:	Measure of Success	Who's Responsible	Target Date
Work with Racine County Economic Development Corporation (CORP) to update Downtown Strategic Plan from 2009	Meet with Business and Building owners to identify what resulted of downtown economic development assessment to including overall assessment on City services	Administration & RCEDC	December 2015
Contract with Racine County Economic Development Corporation to complete Gap Analysis of Retail leakage	Deliver a copy to the Common Council for review and approval. Findings should also be presented to the downtown merchants	Administration & RCEDC	February/ March 2016
Review and Discuss the chamber published community wide survey of summer 2015	Findings should also be presented to the downtown merchants	Chamber of Commerce & RCEDC	February/ March 2016
Work with Racine County Economic Development Corporation (CORP) to Interview larger businesses within City	Findings should be presented and/or incorporated into the overall Economic Development Profile	Administration & RCEDC	November 2016
Identify action plan for downtown economic development	Downtown revitalization begins to occur	Administration & RCEDC	2017-2018
Identify action plan for overall City wide economic development	City wide revitalization begins to occur	Administration & RCEDC	2017-2018

Strategic Priority: Economic Development **Strategic Initiative: Develop Business Retention program**

Desired Outcome: Reduction of Empty Store Fronts

Target: 42 Decrease to 35 by 2018

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Create and Adopt a Resolution by the Common Council to identify parameters for business Attraction and Retention Plan	Elected Body approves Strategic Plan and approves resolution to assist with sustainability of existing business within the City and new businesses	Administration	March 2016
Work with Racine County Economic Development Corporation (CORP) update downtown strategic plan	Identify Action Plans from Downtown work groups	Administration & RCEDC	April 2016
Partner with Code Enforcement Consultant to create a program that educates commercial and retail businesses and residential home owners that improves overall community services and aesthetics to attract and retain businesses	Contract with consultant to support building inspector, reviews and update property maintenance and nuisance codes where necessary.	Administration & Building Inspector	October 2016
Continue to Strengthen City/ Chamber Relationships to promote and enhance marketing tools for City	Continue to partner on City/Chamber Board, support Chamber Programs and implementation, provide necessary support for marketing etc.	Administration	On-Going
Work with RCEDC and Chamber of Commerce to quarterly update vacant storefronts master document	Continue to maintain a solid data base of empty storefronts allowing staff to track and reduce number	Administration & RCEDC Staff	September 2016

Strategic Priority: Economic Development **Strategic Initiative: Create a Focused Business Incentive Policy**
Desired Outcome: Expanded tax base
Target: $20 Million

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Work with Racine County Economic Development Corporation (CORP) to create a Business Incentive Program that incorporates Retail Market Analysis.	Meet with Business and Building owners to identify what resulted of downtown economic development assessment to including overall assessment on City services	Administration & RCEDC	December 2015
Identify all possible funding mechanisms that the City of Burlington uses as Economic Development Incentives and incorporate in a marketing pamphlet	Utilize the Marketing Pamphlet for potential businesses that could and/or may want to relocate to the City of Burlington	Administration	October 2016
Identify all possible funding mechanisms that the City of Burlington uses as Economic Development Incentives and incorporate in a marketing pamphlet	Formally Adopt (if it hasn't been adopted) funding mechanisms and incentives by Common Council.	Administration	August 2016

Strategic Priority: Infrastructure Maintenance & Expansion

Strategic Initiative: Develop Vehicle, Equipment, Facilities Replacement Schedule & Funding Strategy

Desired Outcome: Meet current infrastructure/equipment needs

Target: Funding plan for each system

Initiative	Measure of Success	Who's Responsible	Target Date
Identify comprehensive Capital Improvement Plan to include current Equipment Replacement Fund.	Variables and needs are identified with associated funding needs	Department Heads	August 2016
Keep vehicle replacement needs.	Schedule for vehicle equipment replacement for each department	Department Heads	August 2016
Determine current life cycles of existing equipment	Defined methods used to justify replacement	Department Heads	August 2016
Construct a life cycle/cost of existing equipment and vehicles	Create spreadsheet showing costs, projections, and life cycles	Department Heads	October 2016
Determine best financing options for Capital Improvement Plan	Provide options for capitol purchases	Department Heads	October 2016
Calculate yearly funding cost for equipment and capital needs	Set number for annual budget	Department Heads	Ongoing

Strategic Priority: Infrastructure Maintenance & Expansion

Strategic Initiative: Create Plan for Moving General Transportation Aid for Intended Purpose

Desired Outcome: Meet current infrastructure needs

Target: Funded plan

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Move General Transportation Aid (GTA) funds to intended purpose	Identify projects for GTA funds in 2017 and show the impact on the 2017 budget	City Admin, Treasurer and Staff	August 1, 2016
Complete GTA yearly	Grant Awarded	DPW	annual
Develop 5year right of way plan	Developed 5year right of way plan	DPW	annual

Strategic Priority: Infrastructure Maintenance & Expansion **Strategic Initiative: Create Stormwater Utility**

Desired Outcome: Meet the managed requirements for stormwater systems

Target: 100% compliance

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Start investigative work and mapping existing storm water system	Identified and mapped all known storm water components	Kapur	Jan 2017
Submit data to DNR for future MS4 permit	DNR accepts data with no modifications	Kapur, DPW	Ongoing
Implement best management practices dictated by the DNR	Plan for installing best management practices in place	Kapur, DNR, DPW	Ongoing
Create Storm Water Utility, MS4	Revenue for Utility received from users	Kapur and Associates, Council. Mayor, City Admin, Treasurer and Staff	Ongoing
Create storm water division out of DPW that will maintain the storm water system to the new MS4 permit	Maintenance crew funded by MS4 Utility	DPW	Ongoing

Strategic Priority: Infrastructure Maintenance & Expansion **Strategic Initiative: Limit water & wastewater treatment limits**
Desired Outcome: Meet the mandated requirements for water/wastewater systems
Target: 100% compliance

Initiative	Measure of Success	Who's Responsible	Target Date
List all required treatment limits and concentrations for wastewater and water as stated in each user permit as directed by the DNR	Completed list of water and wastewater discharge and use concentration requirements	DPW Director, Supervisor. Departments heads Water/Sewer	August 2016
Determine our efficiency in meeting all state requirements and identify any possible problem areas in water use	A list of our strengths and weaknesses against current water use requirements	DPW Director Supervisor, Departments heads Water/Sewer	August 2016
Compile list of future mandates and possible mandates for all water and wastewater processes	Future vision of possible changes in water use	DPW Director Supervisor, Departments heads Water/Sewer	Dec 2016
Seek out groups who challenge the State/Federal mandates/changes through data and analysis of facts	Becoming an active member and contribute to the success of the chosen group	DPW Director Supervisor, Departments heads Water/Sewer	ongoing
Meet current mandate limits for water and wastewater regulations	No violations against existing water use	DPW Director Supervisor, Departments heads Water/Sewer	current

Strategic Priority: Infrastructure Maintenance & Expansion **Strategic Initiative: Complete Schedules & Strategy for Major Facilities**
Desired Outcome: Clear direction on facility needs/wants for City Hall, Library, Police Department
Target: Council Direction on City Hall, Library Police Department

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Meeting with School District, Racine County, Library for possible joint use facility	One or all stakeholders agree to explore the feasibility of study	Administration	2016
Conduct Feasibility to identify individual stake holder needs & possible Location	Stakeholders Agree and Adopt Recommendation of Feasibility Study	Administration	2016
Catalog all City facilities and build date	Completed list of all buildings/building	Department Heads	2016
Identify current condition of each building	List of deficiencies with financial costs	Department Heads	2016
Develop facilities replacement schedule and funding strategy	Priority list of which facilities need replacement first and funding needed for 2017 budget cycle	Administration	2016
Possible Design and Build	One or all stakeholders move forward with joint use facility	Administration	2017/2018

Strategic Priority: Infrastructure Maintenance & Expansion **Strategic Initiative: Complete Schedules & Strategy for Major Facilities**
Desired Outcome: Clear direction on facility needs/wants for Community Pool
Target: Council Direction on Community Pool

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Release Pool RFP	Receive qualified RFP proposals	Administration & Public Works	February 2016
Identify and interview vendor (s) meeting RFP guidelines with 4 service groups and Common Council	Identify vendor for City to negotiate contract with Common Council approval to begin phases of feasibility study	Common Council & 4 Service Groups (Pool Board, Kiwanis, JayCees and Rotary)	March 2016
Consultant to complete Phase 1 Site Assessment	Site Assessment that identifies suitability of the current and/or adjacent sites to support the construction of an aquatic facility. Recommendations to be brought forth to 4 Service Groups and Common Council for approval	Administration & Public Works	April 2016
Consultant to complete Phase 2 Preliminary Design	Consultant to develop a preliminary plan for a new aquatics facility, including an opinion of probable cost for demolition and removal of the existing pool (if necessary) and construction/rehabilitation of the facility. The City may determine whether or not to proceed with the project.	Administration & Public Works	
Consultant to complete Phase 3 Pool Management Plan	The consultant will provide a pool management plan that will provide a guide for the sustainable operations of the pool. The plan will provide recommendations on a staffing model, fees, revenue-generating programming opportunities, concessions operations and other required information that will demonstrate the feasibility of the pool. At the conclusion of this Phase, the City will determine whether or not to proceed with the project.	Consultant, Administration & Public Works	

Consultant to complete Phase 4 Referendum Education and Assistance	The consultant will provide necessary educational tools to the City in order to educate the public about the proposed pool design. The City intends to educate the public regarding the cost estimates and proposed pool design in anticipation of a referendum on the proposed pool construction. The referendum results will determine if Phases IV through VI are completed. At the conclusion of this Phase, the City will determine whether or not to proceed with the project.	Consultant	November 2016 Referendum
Consultant to complete Phase 5 Design and Bid	TBD The consultant will provide all necessary services to complete the design plans and specifications required to secure competitive construction bids. This Phase shall include, but not be limited to, completion of all sketches, drawings, documents, publications, meetings, and notifications necessary for the City to secure competitive bids. This Phase shall also include the consultant's review and tabulation of bids received, as well as a recommendation for contract award.	Consultant & Administration	2017
Consultant to complete Phase 6 Construction Management and Inspection	TBD The consultant shall provide construction management services to ensure that the contractor implements and performs all project construction related activities as planned and designed. The consultant is expected to assist the City to resolve any disputes that may arise during construction.	Consultant & Administration	2017

Strategic Priority: A Competitive Workforce **Strategic Initiative: Total Employee Compensation Study**
Desired Outcome: Retention of high quality employees
Target: Reduced rate of turnover

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Determine variables for study	Collect job descriptions and current compensation package	Department Heads	February 1, 2016
Create and issue RFP to conduct study	Distribute to various consultants able to conduct study	Department Heads	Mid-February 2016
RFP due from consultants	Select consultant to recommend to the Council	Department Heads	Mid-March 2016
Present contract with consultant to Council	Council to consider contract	Department Heads	April 2016
Consultant to conduct Employee Compensation Study	City Administrator to be updated throughout study	Administration	July-August 2016
Present results of study to the Council	Council to be updated and consider recommended changes to current policy	Administration	August 2016
Implement policy and plan changes if desired by Council	Implement changes and notify affected employees	Administration	September-December 2016

Strategic Priority: A Competitive Workforce **Strategic Initiative: Create a Succession Plan for Entire Organization**

Desired Outcome: Trained workforce to assume leadership positions

Target: Increase in internal candidates hired

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Define and develop components of succession plan for the organization	Plan is established and presented to the City Administrator	Department Heads	January 2017
Compile a list of current job descriptions, qualifications, and required certifications	Job description packet is established	Department Heads	March 2016
Discuss training expectations with employees during performance review process	Meeting with employees during performance review process	Department Heads	Ongoing
Establish general career development and training needed for all employees. Separate mandatory and non-mandatory training	Create training manual for all positions	Department Heads	March 2017
Implement training program and succession plan	Budget for training opportunities and discuss with City Administrator on an ongoing basis	Department Heads	August 2017
Evaluate and monitor progress as defined in the plan to ensure no lapse in required training	Evaluation is part of annual performance review for employees.	Department Heads	Ongoing

Strategic Priority: A Competitive Workforce **Strategic Initiative: Conduct an Employee Satisfaction Survey**

Desired Outcome: Retention of high quality employees

Target: Reduction of turnover rate and increase of internal candidates hired

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Develop a set of questions determining satisfaction criteria	Questions gathered and collated into a survey	Department Heads	March 2016
Distributing survey to employees	Survey is distributed to all employees both written and electronically	Department Heads	April/May 2016
Receive feedback	Projected goal of 75% return of surveys	Department Heads	July/August 2016
Compile results and review with City Administrator	City Administrator receives data compiled into easy to read reports	Department Heads	Sept/Oct 2016
Review results and reports with Council.	Council is updated on employee satisfaction	Department Heads	November 2016
Publish results with employees	Provide information to employees in various forms of media (written, electronic, other)	Department Heads	December 2016
Implement action plans based on feedback from survey	Provide updates to employees and Council about action plans in place	Department Heads	Ongoing
Redistribute survey to employees after action plans have taken place every year	Survey is distributed to all employees both written and electronically	Department Heads	Ongoing
Compile results of survey and implement action plans if necessary	Provide updates to employees and Council about action plans in place	Department Heads	Ongoing

Strategic Priority: A Competitive Workforce **Strategic Initiative: Conduct exit interviews for all positions**

Desired Outcome: Consistently attaining higher number of qualified applicants for openings

Target: 50% increase in qualified applicants

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Determine perimeters to formulate exit questionnaire.	Perimeters determined	Administration	January 2016
Prepare standard exit questionnaire to conduct exit interviews	Questionnaire prepared	Administration	January 2016
Conduct exit interview with each employee that terminates employment with the City	Interview conducted	City Administrator	Ongoing
Review results annually and create action plans as necessary to better improve policies and procedures		Department Heads	Ongoing

Strategic Priority: Citizen Engagement **Strategic Initiative: Develop a Community Engagement and Education Program**
Desired Outcome: Improved two-way communication
Target: Increase feedback 10% annually

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Review existing public information tools the City currently uses	Public information tools are identified	Administration	November 2016
Research what tools other communities are utilizing	Information gathered	Administration	Nov 2016 - Jan 2017
Review findings and recommendations with the City Administrator	City Administrator is provided a report outlining options for implementing a program	Administration	Feb 2017
Create Community Engagement and Education Program based around findings	Program is created	Administration	July 2017
Review program and projected outcome with Council.	Council is updated prior to program implementation	Administration	August 2017
Implement program and market to residents	Provide information to residents in various forms of media (written, electronic, other)	Administration	Ongoing
Communicate and update residents on current city events, programs and legislature	Provide information to residents in various forms of media (written, electronic, other)	Administration	Ongoing

Strategic Priority: Citizen Engagement **Strategic Initiative: Conduct a Citizen Survey**
Desired Outcome: More citizen involvement
Target: Increase 10% annually

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Develop an RFP for conducting a community-wide survey	RFP created	Administration	2017
Marketing and communicating with residents of the importance of the survey	Marketing provided to residents about survey	Administration	2017
Hire consultant to assist with the survey	Council to approve contract with consultant	Administration	2017
Have residents complete the survey	Ensure there is a mechanism for all residents to complete the survey (electronic, written, other)	Administration	2017
Review the results with the Council	Discuss results with the Council	Administration	2017
Make recommendations for improvements based on the results of the survey	Council to review and approve the actions steps	Administration	Ongoing
Communicate with residents regarding results and actions that were taken	Provide updates to the residents through various media platforms	Administration	Ongoing

Strategic Priority: Citizen Engagement **Strategic Initiative:** Establish a citizen recruitment and application process
Desired Outcome: Increased volunteerism at city functions and services
Target: Full pool of volunteers – all functions

Initiative:	**Measure of Success**	**Who's Responsible**	**Target Date**
Research what methods other communities are utilizing	Information is identified	Administration	June 2016
Create citizen recruitment application for boards, committees and City volunteering opportunities	Application is created	Administration	July/Aug 2016
Review application process, projected outcome and methodology with Council.	Council is updated prior to program implementation	Administration	Sept/Oct 2016
Market application and opportunities on various forms of media	Provide information to residents in various forms of media (written, electronic, other)	Administration	Nov/Dec 2016
Communicate and update residents on current city opportunities and openings	Provide information to residents in various forms of media (written, electronic, other)	Administration	Ongoing
Update Council annual with citizen engagement data	Council to be updated annual with reports and/or statistically findings	Administration	Ongoing