



Strategic Plan 2017-2021

Village of Waterford: Adopted 08/14/2017

What is “strategic planning”?

Strategic planning is the process whereby elected officials step back, examine the current situation of their jurisdiction and then develop a vision of what they would like that jurisdiction to be like in 3, 5, 10, 15, or 20 years, based on forecasted needs and conditions. It is the ability to engage the citizenry and key stakeholders in a visioning process whereby the elected officials are able to determine what those parties would like their jurisdiction to be like in the future. It is the ability to define goals for the Village and objectives to achieve those goals. It is also the ability to periodically redirect and modify the “plan” as conditions warrant. Most important to achievement of the strategic plan is how on an ongoing basis the jurisdiction's resources can be deployed to achieve the plan's goals.

Village Boards make public policy. They adopt annual or biennial budgets; they approve land-use variances; they set utility rates, approve conditional use ordinances, and adopt annual property tax rates. These are among the many ongoing and recurring responsibilities of legislative bodies. They address the current needs of the jurisdiction, and those are subject to review and change on an ongoing basis. They are not cast in concrete and few, if any of these policies have long-term implications for the Village.

Strategic planning, on the other hand, is an array of actions that can have significant long-term impacts. Adoption of a comprehensive land-use or capital improvement plan; extension of utility lines into formerly undeveloped areas; or even the decision to partner with the school districts, are all elements of a strategic plan to in one way or another shape the jurisdiction's future. As distinct from general short-term policy making, many of the aforementioned actions are the result of a longer, more deliberative process.

It should be noted that in a democracy, government is a composite of the priorities of its citizenry. The citizenry tends to support the efforts of its elected officials when they have a sense that their governments are proactive; identifying current and future needs, and adopting a process that engages the citizenry in identification needs and development of solutions. The adoption of the strategic plan is the culmination of that process.

Why did the Village decide to plan?

Strategic planning is designed to help public organizations respond effectively to their new situations. In the next five years the Village anticipates going through many new projects that require a substantial investment. Having an agreed upon vision for the future of our community is essential to ensure that the decisions made support the vision.

Ironically, our key decision makers and department heads have not had a process to get together and discuss what is truly important. Over the last year the Village has made positive strides in the Joint Finance Committee and Village Board meetings reviewing our financing; however, key decision makers typically need a more structured process to identify and resolve the most important issues their organizations face. In February 2016 the Village Board agreed to proceed with development of the Village's first strategic plan.

What do we hope to accomplish?

The strategic plan is a vision that has been decided upon which requires action. In the case of the Village, we choose to start not with the vision development, but a mission first. Creating a strategic plan from scratch can be challenging, as it is a new process for the board, staff and community. Beginning with the mission first allowed the Village to move through this process for the first time and help clarify our overall vision before putting pen to paper. The vision will be finalized by the Village Board prior to approval of the strategic plan.

The goal of the strategic plan is to develop a mission, strategies and goals that drive our results and actions moving forward. Just as important as creation of the plan, is how the plan will be reported upon to the community and utilized by those identified with roles and responsibilities. And while the plan will accommodate for all known elements at this time, our goal is to also provide a process to modify the plan if necessary.

We would not need a strategic plan if everyone already had the same common goals and were like minded. The plan will create laser focus for where the Village is headed and what needs to be accomplished to meet the goals.



**Village
Strategic**

Planning Process

1. Village Board agrees to move forward with strategic planning – 2/22/16
2. Village Board agrees to a timeline of action steps for the planning process – 3/14/16
3. Village Board & Key staff member identified internal and external stakeholders - 3/22/16
4. 1st Strategic Planning Workshop– 5/20/16
 - Over 40 people participated in the planning workshop, representing local government; schools, religious, civic and other organizations; business; and tourism. They were requested to participate in a SWOT analysis, creation of mission statement and strategies for the strategic plan.
5. Community Voice Survey – June/July 2016
 - The strategies identified by the Workshop participants were put into a Community Voice survey and sent to all utilities customers in the Village. We asked respondents to identify whether they agreed or disagreed with the workshop responses and identify the top strategies.
6. 2nd Strategic Planning Workshop – 9/20/16
 - The same workshop participants gathered to review the results of the mission and top strategies identified by the community.

- The participants evaluated the citizen’s feedback, made modifications to their prior strategies and provided a final recommendation of strategies to the Village Board.
7. 3rd Strategic Planning Session – 11/2/16
- Village Board and key staff members will review the mission, narrow down the strategies for the plan and develop goals for strategy implementation.
 - Village Board and staff confirmed the mission:

“The Village of Waterford promotes a friendly, safe environment where people come to live, work and play. Village government will provide essential, efficient services for sustainability and growth.”
 - The following strategic goals were identified in priority order: 1) Business plan for industry, 2) Jurisdictional efficiencies, 3) Waterford as a destination, and 4) Business plan for retail.
8. 4th Strategic Planning Session – 12/5/16
- Working on development action plans.
 - Determining the scope and timeline for accomplishing the goal.
 - Village Board and key staff members will agree upon a tool to monitor/report on action plans to the Village.
 - Village Board and staff will agree upon a process for reviewing and updating the strategic plan after approval.
9. 5th Strategic Planning Session - Action Plan Development – 6/13/17
- Board/staff finalize actions plans with assigned roles for the tasks associated.
10. 6th Strategic Planning Session – 6/27/17
- Village Board and key staff member to create the vision statement.
11. Strategic Plan Approval – 8/14/17
- Implementation of Strategic Plan begins – August 2017

Amendment Procedure

The Village Board agreed that the following procedure be utilized should amendments of the strategic plan be required.

- To change a goal would be consensus by Administrator and Board
- To tweak an action plan item would need consensus by the Administrator and Department Head
- To eliminate a goal would be consensus by the Administrator and Board
- To add a goal would be consensus by the Administrator and Board
- If you flop the pyramid over, the more you get to the top of the pyramid the less fluid things should be

Visibility of the Strategic Plan

The approved Strategic Plan will be made available on the Village website. Village Board members leading a strategic goal shall provide quarterly and dashboard updates via email to the Administrator every third Monday of the month. The updates will be included within the Village Board packets for the meeting every fourth Monday of the month. Trustees will verbally review the updates monthly at this meeting. If no update has been provided, the record will reflect that no update was submitted. Due dates for these items are as follows:

<u>Dashboard/Strategic Goal Quarterly Updates Submitted</u>	<u>Trustee Report at Meeting</u>
August 21 – Dashboard	August 28
September 18 – Dashboard	September 25
October 16 – Strategic Goal Quarterly	October 23
November 20 – Dashboard	November 27

The same cycle would continue for future years.