

FY 2018-2021 Strategic Plan



July 2018



NORTHERN ILLINOIS UNIVERSITY

**Center for
Governmental Studies**

Outreach, Engagement, and Regional Development

July 18, 2018

RE: FY 2018-2021 Strategic Plan- Village of Roselle

Dear Mayor Maglio:

I am pleased to present this FY 2018-2021 Strategic Plan and Summary Report to the Village of Roselle. The plan reflects your organization's commitment to strategic thinking, measurable results and the delivery of quality services.

Thank you for the opportunity to assist the Village with this project. The Board of Trustees and staff are to be commended for your interest, dedication and collective effort.

I specifically want to thank Village Administrator Jeff O'Dell, and Assistant Village Administrator Jason Bielawski for their help and support during the process.

Yours truly,

A handwritten signature in black ink, appearing to read 'Craig Rapp'.

Craig R. Rapp
Senior Advisor
President, Craig Rapp, LLC

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Executive Summary

From March--June 2018 the Roselle Board of Trustees and senior staff engaged in a strategic planning process. The process resulted in a strategic plan covering FY 2018-2021.

The plan consists of four **strategic priorities**—the issues of greatest importance to the Village over the next three years. Associated with each priority is a set of **desired outcomes, key outcome indicators**, and **performance targets**, describing expected results and how the results will be measured. The plan also includes **strategic initiatives** that will be undertaken to achieve the targeted outcomes.

The planning effort began with an examination of the previous strategic plan and the progress made to achieve the objectives of that plan. This was followed by an evaluation of the current operating environment, which was supported by a questionnaire. The group considered the progress that had been made, changes in the environment and established a set of priorities for the FY 2018-2021 performance period.

Based upon those priorities, the Village's senior staff met on May 24, 2018 and developed a set of strategic initiatives. The strategic priorities, key outcome indicators, and strategic initiatives are summarized on the following page.

Strategic Priorities

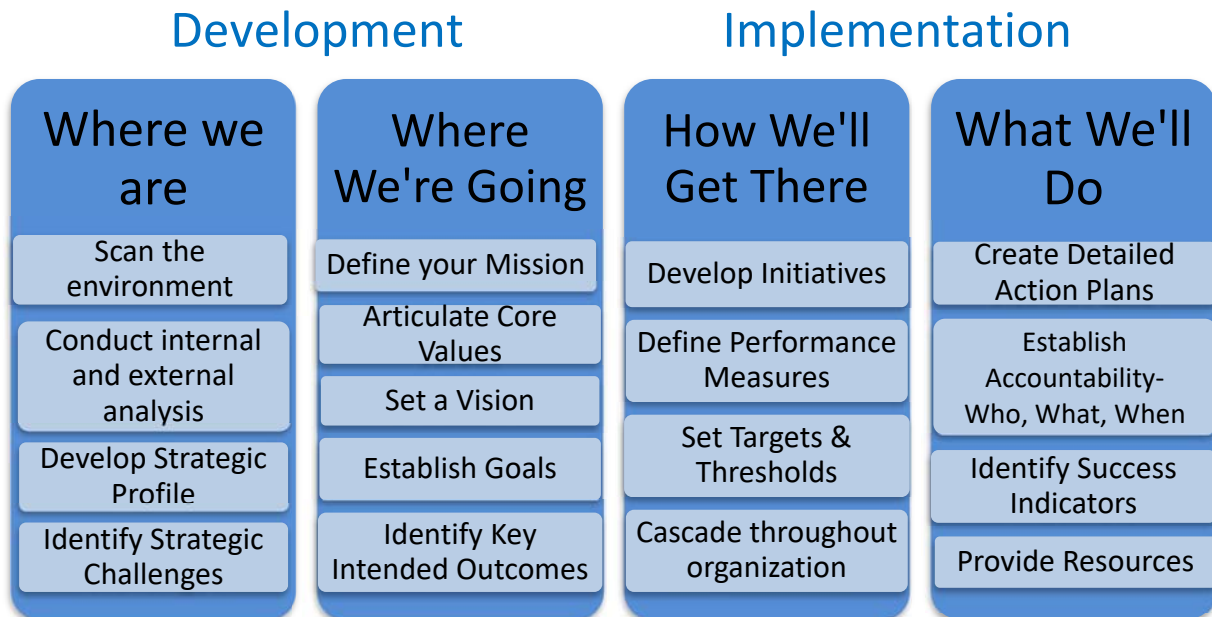
Fiscal Sustainability	Economic Development
Community Engagement	Operational Readiness

Village of Roselle-Strategic Plan Summary 2018-2021

STRATEGIC PRIORITY	DESIRED OUTCOME	KEY OUTCOME INDICATOR (KOI)	TARGET	STRATEGIC INITIATIVES
FISCAL SUSTAINABILITY	Adequate General Fund reserves	- FYE fund balance	- Maintain at least 35% reserves	a) Develop revenue alternatives b) Evaluate public safety pension funding alternatives c) Complete operations funds sustainability projects d) Analyze capital project funding options
	Sufficient capital project funding	-Capital project revenues/expenses	- Fully fund 5-year Capital Improvement Program	
	Sustainable municipal operations	- Operations funds expenditures	- Balanced budget while maintaining operations funds reserve targets	
ECONOMIC DEVELOPMENT	Strong diverse tax base	- Sales tax, EAV, and fees	- $\$/\%$ General Fund revenue - $\$/\%$ Sales tax increase - $\$/\%$ EAV increase	a) Expand business retention program b) Expand business recruitment program c) Develop a sales tax improvement plan d) Implement an East Irving Park Road redevelopment strategy
	Positive working relationship with business community	- Feedback from business owners	- $\%$ report positive relationship	
	East Irving Park Road corridor redeveloped	- Project approval - Square feet added - Sales tax and EAV	$\%$ \square Square foot increase by 2021 $\$/\%$ Sales tax and EAV increase by 2021	
COMMUNITY ENGAGEMENT	Robust community participation	- Special event attendance - Other group involvement	- $\%$ Increased attendance - $\%$ increase in volunteers	a) Initiate a collaborative visioning effort b) Coordinate a community partnership program c) Develop a community engagement process
	Shared vision for Roselle	- Progress toward developing a community wide shared vision	-Adoption of a community wide shared vision	
	Vibrant civic engagement	- New ideas learned - Groups engaged -Social media metrics	- New relationships increase $\%$ via civic engagement - $\%$ increase of in-person and social media comments, feedback from collaborators	
OPERATIONAL READINESS	Well-trained and engaged work force	- Employee satisfaction score - Job performance evaluation ratings - Employee tenure and turnover rate	- All employees “meet or exceed job performance expectations” - Improve employee satisfaction rate by $\%$ - Maintain $\%$ or less turnover	a) Establish an employee engagement process b) Implement an organization succession plan c) Develop a service level pilot program for Inspectional Services.
	An operation that meets service demands	- Budgets - Service levels -Authorized staffing levels	- Pipeline process for identifying good candidates in place by $\%$ - Service levels and staffing aligned in three areas by 2021	
	A Village adaptive to changing needs of community			

Village of Roselle Strategic Planning Process

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 Village of Roselle 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? The process is divided into a development phase and an implementation phase. The full process is depicted below:



Initiating the Process--Reviewing Progress, Culture and Value Proposition

On April 27-28, 2018, the Village Board and key senior staff held a retreat to develop a strategic plan, covering FY 2018-2021. To begin the process and address the question of “Where are we now?” the group spent time reviewing the progress made on the previous strategic plan. The Village Administrator provided a detailed report, which revealed significant progress in each priority area. It was noted that although a high percentage of the projects and tasks identified in the plan had been completed, a number of important initiatives remained, and the priorities were, in many ways, still applicable to the current operating environment.

As the group continued to consider the question of “Where are we now?” they were challenged to define the current organizational culture and its value proposition—understanding that an organization’s culture, and the value proposition 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:

Three Value Propositions

Operational Excellence (example- Wal-Mart, Southwest Airlines)

- ❑ They adjust to us (command and control)

Product/Service Leadership (example- Apple, Google)

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

Customer Intimacy (example- Nordstrom, Ritz-Carlton)

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

Four Core Cultures

Control Culture (example: Military - command and control)

Strengths: Systematic, clear, conservative

Weaknesses: Inflexible, compliance more important than innovation

Competence Culture (example: Research Lab – best and brightest)

Strengths: Results oriented, efficient, systematic

Weaknesses: Values can be ignored, human element missing, over planning

Collaboration Culture (example: Family-teams)

Strengths: Manages diversity well, versatile, talented

Weaknesses: Decisions take longer, group think, short-term oriented

Cultivation Culture (example: Non-profit/religious group-mission/values)

Strengths: Creative, socially responsible, consensus oriented

Weaknesses: Lacks focus, judgmental, lack of control

The group engaged in a discussion regarding the value proposition and its relationship to the culture. While there were a variety of different perceptions regarding the value proposition, it was generally believed that customer intimacy reflects much of the current approach, and operational excellence has been 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.

Examining the Operating Environment

Following plan update, culture and value proposition discussions, the group reviewed the results of a questionnaire completed by the Board, which covered the current operating environment in the following categories: greatest concerns, things the Village does well, areas for improvement, what the Village should do more of, and what one thing could they personally do to improve the Village. They considered the data, and summarized the results into most frequently mentioned categories: (See all responses in Appendix I):

GREATEST CONCERNS

- Succession planning
- Strong Alternative tax base
- Lack of diversity downtown (account for infrastructure improvement):
Entertainment, shops and shopping

DO WELL

- Communication
- Public Safety
- Customer Service
- Civic Engagement-Involvement

DO MORE

- Communicate w/residents: General events, deeper on some issues
- Collaboration: Intergovernmental cooperation
- Economic Development: Business recruitment, proactive strategies
- New ways of thinking: Challenge status quo, open to new ideas and events

IMPROVE ON

- Think outside the box on issues.
- Communicating with residents on why decisions are made and why.
- Listening to residents and building/maintaining relationships.
- Slow w/issues, let pre-annex agreements expire.
- Review code ordinances and then enforce them.
- Working with other forms of governments.

The group then compared the things they did well with the things they should do more of to determine which opportunities maximize strengths, and then compared areas needing improvement with general concerns to determine how weaknesses could be exacerbated by problem issues. The results of this analysis:

DO WELL--DO MORE

- Communicate
- Collaborate
- Economic Development

IMPROVE-CONCERNS

- Engage residents

- Proactively review existing codes, ordinances, procedures for updates
- Improve and strengthen governmental relationships
- Continue/maintain current focus on succession planning

Following consideration of these issues, the Mayor facilitated a discussion of the responses received to the question: “What one thing can you do personally to improve the Village? The group’s responses:

ONE THING

- Continue to support our aligned goal of increasing citizen engagement
- Develop a teen helping senior citizens program
- A place in Roselle for teens to occupy time and get them off electronics
- Help the Village achieve home rule status
- Improve Village pride
- Give the Village Home Rule authority
- Represent the Village of Roselle in different functions
- Find a way to communicate with all residents

This led to a discussion and determination of the issues and challenges facing the Village. The group carefully considered all of the data that had been presented: the progress made on the previous plan, the information from the questionnaire, and the collaborative analysis performed at the retreat. As a result, they identified the following:

ISSUES and CHALLENGES

- Communication
- Collaboration – Intergovernmental
- Economic development (business recruitment and retention)
- Engagement (community)
- Succession planning
- Updating codes and procedures
- Fiscal sustainability
- Pension funding
- Changing community
- Infrastructure funding maintenance/stability
- Capital funding
- State funding/mandates

Based upon the issues and challenges identified, the group debated where the Village’s focus should be over the next three years. They considered the priorities in the last strategic plan and compared those priorities with the issues identified. After significant discussion, they determined that two were still valid: Economic Development and Fiscal Sustainability. They replaced two for a total of four priorities:

STRATEGIC PRIORITIES

- Fiscal Sustainability
- Economic Development
- Operational Readiness
- Community Engagement

Defining the Priorities

To clarify the meaning of each priority, the group identified key concepts which were used to create guidance, and ultimately, definitions.

1. Fiscal Sustainability

Budget, surplus, adequate reserves, autonomy, diverse tax base, revenue, short-term and long-term

2. Economic Development

Retain and grow, marketing, assisting existing businesses to thrive, diversity, leader engagement, partnering, redevelop and green space

3. Operational Readiness

Succession planning, code and ordinance review, meet resource service demands, training/education, meet needs of changing community, innovation, business planning

4. Community Engagement

Internal and external, leading the charge, new mediums, partnering, adding value

Key Outcomes, Indicators, and Targets by priority:

With definitions in place, the group determined the most important outcomes to be achieved for each priority, defined Key Outcome Indicators (KOI's), and developed Performance Targets. KOI's define progress toward desired outcomes. Performance Targets define successful outcomes, expressed in measureable terms.

The alignment created between priorities, outcomes and targets is important, not only for clarity, but also for maintaining a disciplined focus on the desired results.

1. Fiscal Sustainability

- Outcome:** Adequate General Fund reserves; **KOI:** FYE fund balance; **Target:** Maintain at least 35% reserves
- Outcome:** Sufficient capital project funding; **KOI:** Capital project revenues/expenses; **Target:** Fully fund 5-year CIP
- Outcome:** Sustainable General Fund operations; **KOI:** Operating funds expenditures; **Target:** Balanced budget while maintaining General Fund reserve targets

2. Economic Development

- Outcome:** Strong diverse tax base; **KOI:** Sales tax, EAV, fees; **Target:** \$__% ↑ General Fund revenue, \$__% Sales tax increase, \$__% EAV increase

- b. **Outcome:** Positive working relationship with business community; **KOI:** Feedback from business owners; **Target:** ____% report positive relationship
- c. **Outcome:** East Irving Park Road corridor redeveloped; **KOI:** Project approval, square feet added, sales tax, EAV; **Target:** \$__% sales tax and EAV increase, ____ square foot increase by 2021

3. Community Engagement

- a. **Outcome:** Robust resident participation; **KOI:** Special event attendance, other group involvement; **Target:** ____ Increased attendance, __% increase in volunteers,
- b. **Outcome:** Shared vision for Roselle; **KOI:** Progress toward a community wide shared vision; **Target:** Adoption of a community wide shared vision
- c. **Outcome:** Vibrant civic engagement; **KOI:** New ideas learned, groups engaged, social media metrics; **Target:** New relationships increase __% via civic engagement, __% increase of in-person and social media comments, feedback from collaborators

4. Operational Readiness

- a. **Outcome:** Well-trained and engaged work force; **KOI:** Employee satisfaction score, job performance evaluation scores, employee tenure/turnover rate; **Target:** All employees “meet job performance expectations,” improve employee satisfaction rate by ____, Maintain ____% or less turnover
- b. **Outcome:** Operation that meets service demands; **KOI:** Budgets, service levels, authorized staffing levels; **Target:** Pipeline process for identifying good candidates in place by____, service and staffing levels aligned in three areas by 2021
- c. **Outcome:** A Village adaptive to changing needs of community; **KOI;** **Target:**

Implementation: Developing Strategic Initiatives and Action Plans

To successfully address the strategic priorities and achieve the intended outcomes and performance targets, it is necessary to have a focused set of actions, including detailed implementation steps to guide organizational effort.

The Village of Roselle will accomplish this through a set of strategic initiatives. 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 Targets.

The following are strategic initiatives developed by staff, refined and approved by the Board of Trustees:

1. Fiscal Sustainability:

- a) Develop revenue alternatives
- b) Evaluate public safety pension funding alternatives
- c) Complete operations funds sustainability project
- d) Analyze capital project funding options

2. **Economic Development:**
 - a) Expand business retention program
 - b) Expand business recruitment program
 - c) Develop a sales tax improvement plan
 - d) Implement an East Irving Park Road redevelopment strategy

3. **Community Engagement:**
 - a) Initiate a collaborative visioning effort
 - b) Coordinate a community partnership program
 - c) Develop a community engagement process

4. **Operational Readiness:**
 - a) Establish an employee engagement process
 - b) Implement an organization succession plan
 - c) Develop a service level pilot program for inspectional services

In the near future, the staff, with Board of Trustees input, will finalize detailed action steps for each strategic initiative. The collective actions will become the on-going work plan for the staff over the FY 2018-2021 performance period.

Strategic Planning Participants

The strategic plan was developed with the hard work and dedication of many individuals. The Board of Trustees led the way, taking time out their schedules to commit to long-term thinking. They defined a direction and a set of outcomes that are important to the citizens, stakeholders and community at large.

Board of Trustees

Andy Maglio, Mayor
Bruce Berkshire, Trustee
Patrick Devitt, Trustee
Wayne Domke, Trustee
David Pileski, Trustee
Heather Pransky, Trustee
Lee Trejo, Trustee

Village Clerk

Patty Burns, Village Clerk

Senior Staff

Jeff O'Dell, Village Administrator
Jason Bielawski, Assistant Village Administrator
Patrick Watkins, Community Development Director
Tom Dahl, Finance Director
Steve Herron, Police Chief
Dan Anderson, Fire Chief
Victor Ramirez, Public Works Director
Roman Tarchala, Deputy Police Chief
Mark Bozik, Deputy Fire Chief

APPENDIX I

Questionnaire Results

1. What are your greatest concerns for the future of the Village?

- Responsibly developing remaining open land
- Existing stock that can be repurposed
- Pension
- Healthcare costs
- Quality of life given the climate in Springfield
- Declining revenue from some sources (i.e. Telecom tax)
- Population migration out of the State
- Our housing market is not turning over like it was previous years
- Lack of new home construction
- Lack of entertainment for families in Roselle which leads to lack of interest in new families moving to Roselle
- We lack a variety of restaurants
- Renovating playgrounds
- Social Media schools being misrepresented
- Social media releasing wrong info on school info
- Succession retirement
- Ability to be technologically relevant
- Our ability to establish and maintain an identity within the suburbs
- Succession planning across all departments and levels
- Maintain financial independence from the State
- Lack of alternative tax base
- Lack of engagement by community in supporting the Village Safety concerns due to the width of Main Street - the perception this is not a road/street but an alley way
- Succession plan for key positions within the Village staff
- Spending - "life is good" right now so we approve all requests for funds
- We should be evaluating each expenditure
- Stronger tax base for the future
- Public Works
- Department continues to be run by consultants who have no investment in our community - embarrassing and costly
- Disparity in how we treat employees - definitely not all equal
- High taxes
- High water bills
- Lack of diverse restaurants
- Non income producing businesses
- Land locked
- No buildable open space
- Succession of staff, employees and board members to fill experience and history of the Village
- Being able to keep-up with the cost to maintain

2. What does the Village do well?

- Balancing budgets
- Special events
- Informing the community
- Newsletters, emails, Facebook,
- Coffee with the board, and the recently successful town hall
- Fire Dept. Stroke unit big initiative
- Police teamwork with schools
- 911 service times excellent
- Customer service
- Citizens police academy
- Police Dept. advertises well for events
- Get citizens involved in their town
- Great Fests
- Low crime
- Fire Dept. on a call goes beyond to keep us safe
- Snow removal promptly
- Responding to resident's inquiries
- Community-wide events
- Partnering with community organizations
- Elected official and senior staff accessibility
- Financial planning Day-to-day administration
- Protecting the community (police and fire)
- Provide effective services to the community (public works)
- Our core employees are our biggest and best asset. They respond to residents with respect and address their needs with concern - this includes everyone from the front counter to PD/FD and PW
- We are lucky that the Village runs so well
- Our response to resident concerns and needs customer service
- Police, fire and public service to the community provide a safe and pleasant neighborhood
- Now communicating better with residents
- Public services from all departments
- Providing transparency through many forms of social media
- Training and education for employees to make them more efficient

3. What should the Village be doing more of?

- Collaboration with other governments to squeeze out every bit of every tax dollar we can.
- Continue engaging the community.
- Perhaps the town hall could be twice a year or quarterly.
- Thinking outside the box.
- Challenge the status quo.
- Understand financial impact of moving new employees to 401k plans and increasing health care premiums to help shore up current pension obligations.
- Advertising of Our vacancies
- Inform citizens of ongoing water improvements
- Advertise New Programs on social media
- Tell people to subscribe to Roselle News
- Collaborate with other town events
- Have more events for Mothers and Baby's
- New events
- Closing the deal when recruiting new businesses/development
- Annexing outstanding properties
- Cooperating and partnering with other governmental agencies/bodies
- Business recruitment especially around the new TIF districts
- Collaboration with neighboring Villages to build solid business corridors (e.g. Lake Street with Bloomingdale or Roselle Rd with Schaumburg)
- Proactively develop and strengthen relationships
- Collaboration with other governments on everything from summer road projects to tree trimming.
- Social media posts.
- Communicate with the public continue to do what we are doing continue to work with residents to annex into the village
- Exploring more redevelopment

4. What things does the Village need to improve on?

- Being frank with some residents with regard to their issues
- Sometimes slow with issues (i.e. Action on the gas station on Roselle Road probably could have happened a lot earlier than it did)
- We let all these pre-annexation agreements expire
- We need to be accountable not only to our residents but ourselves.
- Listening to residents
- Reputation of Hanover Park
- Keep tabs on Springwood
- Reduce practice of excessive budget buffering
- Community wide special events - but on a small to medium scale
- Events smaller than the Taste or Rose Festival
- Bring the residents together.
- Communication with residents.
- Think outside the box when solving problems
- communicating with the citizens on why and the benefits
- Communication between departments to become more proficient
- Review code ordinances
- Enforce ordinances
- Building relationships
- Working with other forms of government

5. What are the most important priorities for the Village over the next three years?

- Infrastructure
- Continue to navigate Springfield financial pressures and the impact it has on us
- Attracting businesses to continue to broaden the tax base
- Continue lobbying against ComEd 390 poles
- COMED
- Trusting State Laws (uncertainties)
- Ensure quality Infrastructure
- Addressing social and environmental impacts
- Continued water improvements
- Parking for smart cars?
- finding big sales tax
- generating businesses
- Growing a diverse tax base
- Improving infrastructure offering
- Establishing home rule
- Maintain the financial sustainability
- Addressing the on- boarding of police officers by improving the recruiting process
- developing an early engagement to activate officers
- Forecasting the future direction of the Village in terms of business trends and then attracting those types of businesses
- Developing a relationship with 'key' businesses
- Village provide the needed support so business remains
- Evaluate and address the infrastructure (e.g. waste water treatment, commuter parking, etc.)
- Develop and administer a succession plan
- initiate specific training, engagement, and 'role shadowing'
- Attracting strong sales tax generating businesses financial strength and stability
- Employee succession
- Outreach with community
- Social media, town hall meetings
- Continue to be financially stable
- continue to stay ahead of infrastructure repairs and maintenance
- continue to provide community service
- Organizational readiness
- Maintaining growth and enthusiasm of this Village
- Planning for future infrastructure for new development
- Cleanup hanging loose ends on old pre- annexation

6. If you could personally do one thing for the Village, what would it be?

- Continue to support our aligned goal of increasing citizen engagement
- Develop a teen helping senior citizens program
- A place in Roselle for teens to occupy time and get them off electronics
- Help the Village achieve home rule status
- Improve Village pride
- Give the Village Home Rule authority
- represent the village of Roselle in different functions
- Find a way to communicate with all residents