

Attachment B – Workshop Materials





To: Mr. Matt Schuenke, Village Administrator, Village of McFarland

From: Jacquelyn McCray, Senior Manager
Mike Casey, Partner

Subject: McFarland Strategic Plan Workshop Briefing Document

Date: September 17, 2019

Introduction

McFarland Village Board members will gather for a two-day strategic planning workshop to create a plan that will reflect Village priorities through the year 2025. The workshop is scheduled for Monday, September 30 from 5:00 p.m. to 8:00 p.m. and will continue on Tuesday, October 1 from 9:00 a.m. to 12:00 p.m. The workshops will be held at the McFarland Municipal Center.

During the workshops, the Village President, Board of Trustees, Village Administrator and department heads will determine priority goals and strategies for the future based on an understanding of the strengths, weaknesses, opportunities and challenges identified by resident, stakeholders and employees. Staff will present an environmental scan of current data and key local and regional trends that may impact the future of the Village.

Management Partners will facilitate the generation of ideas for the future that will result in vision and mission statements and core values to guide McFarland Village leaders and employees in decision making for the future based on defined goals and strategies. Together, the elements of the strategic plan will serve to direct the allocation of Village resources over the next five years. Management Partners will facilitate both workshops with Board members and the Village leadership team and prepare a draft strategic plan based on results from the two sessions.

Management Partners has prepared this packet to provide background and context for your discussions and to maximize our time together. In advance of the workshops, we ask that you review the following briefing materials and complete the enclosed worksheets. To ensure that the group discussion is as efficient as possible, please *bring the completed worksheets with you* so you can refer to them during the discussion.

The briefing document includes several worksheets that should be completed prior to the first workshop and additional background information, including:

1. Workshop agendas
2. Worksheets for reviewing the Village of McFarland's vision and mission statement and making suggestions for change and improvement to each, if desired, a worksheet for your suggestions about core values to guide service delivery and decision-making, and a worksheet to provide suggested goals and strategies. Please *review and complete these worksheets in advance of the September 30 and October 1* workshop and bring this packet with you to the workshop so you can reference your worksheets.
3. **Summary of community and employee survey responses (Attachment A).** The surveys were used to solicit input and gather opinions about McFarland's strengths, weaknesses, opportunities, and challenges, and what should be reflected in the vision, mission, and values for McFarland. Management Partners compiled the survey results and identified common themes from the two groups of respondents. This information will be presented and discussed during the workshop.
4. **Environmental scan (Attachment B).** The environmental scan provides important data, trends and useful information about the Village of McFarland's population, education, housing, income, and budget. It provides a snapshot of key indicators that will help inform discussions and the decision-making process. This information will be presented and discussed during the workshop.

Conclusion

We look forward to joining the Village President, Board of Trustees, Administrator and department directors for two productive strategic planning sessions. If you have questions, please feel free to contact Jacquelyn McCray (jmccray@managementpartners.com) (513.861.5400) or Mike Casey (mcasey@managementpartners.com) (703.732.1542).

Thank you in advance for your participation in the strategic planning workshops.





Village Board Strategic Plan

Workshop 1

McFarland Municipal Center – Community Room

September 30, 2019, 5:00 p.m. to 8:00 p.m.

Agenda

(Please bring your worksheets for use during the session)

Purpose and Outcomes

Identify the elements of a desired future for the Village of McFarland for the next five to seven years. The results of two strategic planning sessions will guide the future allocation of resources and department work planning to achieve the priorities established by the Village Trustees. The Board President will convene a second strategic planning workshop on October 1.

The focus of the first workshop is to create a vision statement and mission statement and identify core values for the organization. The focus of the second workshop will be on identifying priority goals and strategies to accomplish the vision.

5:00 p.m.	Arrive Welcome and Agenda Review Present and Discuss Environmental Scan (presented by the Village Administrator) Present and Discuss Summary of Community and Employee Survey themes (presented by Management Partners)
6:00 to 6:30	Break for Dinner
6:30	Discuss McFarland Vision, Mission and Values
7:00	Identify and Prioritize Goals for the Future
7:55 p.m.	Wrap Up and Next Steps





Village Board Strategic Plan Workshop 2

McFarland Village Hall - Training Center
October 1, 2019, 9:00 a.m. to Noon

Agenda

(Please bring your worksheets for use during the session)

Purpose and Outcomes

Review and confirm the strategic plan elements (vision, mission and values) developed during the first workshop. During this workshop Village Board members will identify goals and strategies to achieve the vision and identify success measures based on the priorities. The goals, strategies and success factors identified during this session will guide the allocation of resources and departmental work planning for the future.

9:00 a.m.	Welcome and Agenda Review
	Confirm Vision, Mission and Values
9:15	Identify and Prioritize Goals (continued)
10:00	Develop Strategies for Priority Goals
11:15	Identify Success Measures for Each Goal
11:50 a.m.	Wrap Up and Next Steps



McFarland Strategic Planning Worksheet

Please Bring Your Completed Worksheet to the Workshops

Instructions

The worksheet is divided into four sections: A) vision, B) mission, C) values, and D) goals and strategies. Each section of the worksheet is supplemented by information obtained from responses to the community and employee surveys. Survey responses were received from 433 community stakeholders and 65 Village of McFarland employees.

A. Vision

A **vision** is an aspirational statement of where Village leaders want the Village to be in the future. Setting a vision is a fundamental element of the strategic planning process.

Survey respondents were asked if the current Village vision should be changed and had the option to provide suggested revisions. The current vision is:

The vision of McFarland is to create an inviting, dynamic, diverse community that offers a high quality of life and a supportive environment in which all citizens may practice their individual value choices. The community actively seeks to preserve its proud heritage, protect its abundant natural resources, plan for responsible and balanced residential and commercial growth, promote a viable economic base, support educational excellence, provide diverse leisure options, and foster a healthy social fabric.

Table 1 indicates that a majority of community and employee survey respondents believe the current vision statement does not need to be changed.

Table 1. Do you think the vision statement should be changed?

	Community Response	Employee Response
Yes	65 (19%)	17 (26%)
No	284 (81%)	48 (74%)
Answered Question	349	65

Some community survey respondents included suggestions to improve the current vision statement, these are provided in Table 2. Of the respondents that thought it should be changed, both community and employee respondents suggested simplifying the vision statement.

Table 2. Suggestions for Changes to the Current Vision

Response Theme	Examples From Community Responses	Examples From Employee Responses
Remove words or phrases	Choice value Commercial growth Diverse leisure options Viable economic base	None provided



Response Theme	Examples From Community Responses	Examples From Employee Responses
Refine/Reword	Change “citizens may practice” to “citizens participate” Define choice value and natural resources Simplify vision statement Statement is too vague Vision statement does not reflect village	Proud heritage Simplify vision statement
Add	Be an inviting and dynamic community Be mindful of environment Create a diverse population through housing Create a community that is diverse socially, culturally, economically, and in its land use that fulfills value choices of the populace to enhance community Fiscal responsibility Keep Lake Waubesa clean and safe for our community Providing housing opportunities and atmosphere for all facets of economic class Reducing economic barriers	All done at a reasonable cost to residents Be inviting to businesses Forward thinking Provide a safe community
Words or Phrases to Keep	All citizens Recreational options current and future growth Support educational excellence Responsible and balanced growth	Commercial growth

VISION STATEMENT EXAMPLES

Roswell, Georgia: *To be a vibrant riverside community connecting strong neighborhoods, preserving our rich history, celebrating the arts and culture and cultivating entrepreneurial spirit.*

Reno, Nevada: *We are a vibrant university town known for our outdoor activities, special events, arts and culture, and innovative industries.*

Please provide any suggestions you have for changing or modifying the vision statement below.



B. Mission

A **mission statement** provides the purpose of the organization and guides the prioritization of opportunities. The mission defines what the Village stands for and what it will do.

The current mission statement for the Village reads:

With direction encouraged from an engaged citizenry, Village elected officials and employees will maintain and enhance the quality of life of the community by delivering quality services in an efficient and accountable manner and by providing an orderly, unbiased system of government that is transparent and accessible. To create and sustain a high level of confidence in Village government, we pledge to function with: professional integrity; fiscal responsibility; open communications; environmental sustainability; sensitivity to the values of each individual; and full cooperation in achieving the priority goals determined by the community.

As shown in Table 3, a majority of survey respondents believe the current mission statement should not be changed.

Table 3. Do you think the mission statement should be changed?

Answer	Community Response	Employee Response
Yes	38 (11%)	14 (22%)
No	308 (89%)	50 (78%)
Answered Question	346	64

Suggested themes for modifying the current mission statement submitted by the survey respondents is included in Table 4. Similar to the vision statement, some community and employee survey respondents indicated the Village mission should be simplified.

Table 4. Suggestions for Changes to the Current Mission

Response Theme	Examples From Community Responses	Examples From Employee Responses
Refine/Reword	Clarify how quality of life is improved Community instead of citizenry Define quality services Simplify mission statement	Full cooperation in achieving priority goals Simplify mission statement
Add	The vision of McFarland is to facilitate a safe, environmentally conscious community where individuals can live, thrive, and pursue their best lives Lake community Modernize Prioritize affordable housing Sustainability Seek economic growth, including commercial development	Control tax burden Fiscal accountability



Response Theme	Examples From Community Responses	Examples From Employee Responses
Words or Phrases to Keep	Professional integrity Quality of life	Accountable Engaged citizenry Responsible

MISSION STATEMENT EXAMPLES

West Palm Beach, Florida: *In partnership with our communities, West Palm Beach delivers exceptional customer service that enhances quality of life.*

Boulder City, Nevada: *Deliver outstanding services to enhance the quality of life within our community, our economic vitality, and the safety of those who reside, work in, visit, or travel through our community.*

Please provide any suggestions you have for changing or modifying the mission statement below.

C. Core Values

Values are the core operating principles of an organization. They govern the actions and behaviors of policy makers and employees to effectuate the Village’s mission and vision.

The current mission statement for McFarland includes the following core values:

- *Professional integrity*
- *Fiscal responsibility*
- *Open communications*
- *Environmental sustainability*
- *Sensitivity to the values of each individual*
- *Full cooperation in achieving the priority goals determined by the community*

Table 5 indicates that a majority of survey respondents believe that the current core values should not be changed.



Table 5. Should any of the values be changed?

Response	Community Response	Employee Response
Yes	51 (15%)	11 (17%)
No	290 (85%)	54 (83%)
Answered Question	341	0

Table 6 provides a summary of suggested values submitted by community and employee survey respondents. Survey respondents could submit up to three values.

Table 6. Suggestions for Changes to the Current Values

Response	Community Response	Employee Response
Add or Keep	Commitment to the safety and well-being of residents Decrease barriers (economic, social) Diversity Education Environment Responsibility Equity Financial/Fiscal Responsibility Inclusion Learning Openness Preparation Professional Integrity Responsiveness Sensitivity Transparency	Accountability Kindness Opportunity Progressiveness Quality of life Respect Trust
Remove	Full cooperation Values of each individual	None provided

Use the space below to record your preferred list of values for discussion during the workshop.

1. _____
2. _____
3. _____
4. _____
5. _____



D. Goals and Strategies

Goal: A statement of specific direction and the desired outcome(s) to be achieved.

Sample Goal Statement: Create local, regional and state partnerships to promote economic development and tourism and strategically leverage city assets.

Strategy: An action to be taken to achieve a goal.

Sample Strategy: Expand the use of technology and media to promote economic growth and tourism.

Priorities to Consider as You Identify Goals and Strategies for the Strategic Plan

Survey respondents were provided a list of potential priorities for the future and were asked to indicate their top three priorities. Respondents could also add up to three priorities.

There were 353 (81%) community responses and 64 (98%) employee responses to this question. Both community and employee respondents agreed that *increasing retail offerings in the Village* and *improving the mix of commercial and industrial development along Highway 51* should be future priorities.

Top priorities identified by community respondents

- *Develop an outdoor swimming pool*
- *Increase retail offerings in the Village*
- *Promote greater public use of frontage along Lake Waubesa*
- *Improve the mix of commercial and industrial development along Highway 51*
- *Expand recreation offerings*

Top priorities identified by employee respondents

- *Address facility needs of Village departments*
- *Pursue commercial and industrial development opportunities east of the Village*
- *Develop a multi-purpose community center*
- *Improve the mix of commercial and industrial development along Highway 51*
- *Increase retail offerings in the Village*

On the following two pages identify up to four goal areas you think should be considered for inclusion in the strategic plan and indicate why they are important. We will discuss your proposed goal areas during the workshops.



Goal Area 1:

Strategies to Support the Goal – What strategies (actions or projects) should be considered?

- 1. _____
- 2. _____
- 3. _____

Goal Area 2:

Strategies to Support the Goal – What strategies (actions or projects) should be considered?

- 1. _____
- 2. _____
- 3. _____

Goal Area 3:

Strategies to Support the Goal – What strategies (actions or projects) should be considered?

- 1. _____
- 2. _____
- 3. _____



Goal Area 4:

Strategies to Support the Goal – What strategies (actions or projects) should be considered?

1. _____

2. _____

3. _____

