This Strategic Plan Update summarizes progress toward Strategic Plan implementation to date, Strategic Plan related budget requests for Stub Year 2020 and updated timeframes for the various initiatives and action under each of the four strategic goals.

STRATEGIC PLAN IMPLEMENTATION PROGRESS UPDATE

In April 2018, the Village Board adopted the Village’s Strategic Plan for Fiscal Years 2019-2021. The plan included four new strategic goals (Governance, Services and Infrastructure, Economic Development and Staffing), each of which were bolstered by specific initiatives and action items. Immediately following the adoption of the Strategic Plan, the Village Manager’s Office worked with the internal Leadership Team to create a process for implementation, which resulted in over 40% of full-time Village staff members (both in administrative and operational roles) being assigned to one or more Strategic Plan teams.

As detailed in the Strategic Plan Annual Report presented to the Village Board in April 2019, while major progress has been made by these teams, actual implementation timeframes have varied slightly from the Strategic Plan as adopted. Recognizing the high-level nature of many of the Strategic Plan projects and a number of competing operational priorities, the Village Board approved extending the Strategic Plan timeframe from three years to four years following the Annual Report presentation (now concluding at the end of Calendar Year 2021). As part of the review of the draft Stub Year 2020 Budget, the Board reviewed a second set of updates to the implementation timeframes, which are reflected in the GANTT charts following the specific project updates below.
GOVERNANCE

Initiative: Evaluate and implement community engagement initiatives to determine satisfaction with Village services and future community priorities

- **Action Items:** (1) Determine the desired scope of and develop a process for fielding the Village’s next community survey; and (2) Conduct survey and analyze feedback noting ways to improve service delivery
- **Status:** (1) Complete; and (2) On track
- **Update:** Staff worked with survey administration firm ETC Institute to field the 2019 Community Survey, the results of which will be discussed in late 2019. The analysis and takeaways will be incorporated into services and program improvements, as well into Strategic Plan initiatives in the near future.

- **Action Item:** Collect community feedback through non-survey tools such as expanded Coffee with the Board events, presence at French Markets and community forums
- **Status:** Complete/On-Going
- **Update:** Staff continue to collaborate with the Glencoe Park District, Glencoe Public Library and District 35 to host the on-going Coffee with the Boards series, originally launched in April 2018. The drop-in style events are hosted quarterly at various community locations. Additionally, staff coordinated an effort to have a Village presence at the French Market events, hosted on Saturdays throughout the summer. Volunteers from various departments, committees and commissions took turns representing the Village.

- **Action Item:** Evaluate applicability of emerging online engagement and transparency tools
- **Status:** Scheduled for Stub Year 2020
- **Update:** As part of this initiative and in line with data tracking action items in other goal areas, staff plan to evaluate potential project management, data tracking and online community engagement software platforms in Stub Year 2020. $9,000 has been budgeted for preliminary costs associated with such platforms.

- **Action Item:** Collaborate with the Community Relations Forum
- **Status:** Paused
- **Update:** The Community Relations Forum’s involvement in this initiative is paused as the Forum has not met recently due to the volunteer commission being without a chair. Once the Forum reconvenes it will establish goals for finding new ways to engage the community.

Initiative: Determine whether being a non-home rule government provides the Village with the optimal regulatory and financial authority

- **Action Items:** (1) Complete analysis of the Village’s current financial and regulatory authority, creating a comprehensive list of regulations, procedures and revenue sources that are within and outside the Village’s current authority; and (2) Present Initial analysis to the Village Board and develop future action items based on direction *(Note: This is also an Economic Development action item)*
- **Status:** (1) Complete; and (2) Complete
- **Update:** The preliminary analysis of financial, regulatory and economic development impacts of being a non-home rule government is complete. The Village Board discussed summary information at the May, July and September 2019 Committee of the Whole meetings. Additional discussion is planned for early 2020 to determine next steps, if any.
### Initiative: Review and update all Village regulations and ordinances to ensure compliance with State and Federal regulations and to bring them in line with organization and community priorities

- **Action Items:** (1) Establish staff review committee and develop a project plan; (2) Compile list of desired regulations and ordinances that are affected by being a non-home rule community as part of the analysis of the Village’s regulatory and financial authority; (3) Identify regulations that are in need of update but are not affected by being a non-home rule community; (4) Clean obsolete regulations and ordinances from the Village’s Code of Ordinances; and (5) Establish plan for ongoing review of all Village regulations
- **Status:** (1) Complete; (2) Complete; (3) Complete; (4) On track; and (5) On track
- **Update:** A master list of all Village regulations and ordinances was developed to assist in prioritizing regulations that are in need of update. Following a presentation to the Village Board, staff will focus efforts in Stub Year 2020 on evaluating the Village’s business license regulations. Corporation counsel Holland & Knight is engaged on this project, with a corresponding allocation in the Village Manager’s Office department budget for legal services related to this analysis.

### Initiative: Evaluate options for the Village’s water treatment and distribution services

- **Action Items:** (1) Engage with potential local partners to discuss their future plans for water production; (2) Expand on the 2015 Water Supply Planning Report to include additional alternatives; (3) Engage community members and evaluate their feedback surrounding the provision of water and report findings back to the Village Board
- **Status:** (1) On track; and (2) On track
- **Update:** Soon after the Strategic Plan was adopted, staff launched a bi-monthly key performance indicator report. The staff team, however, determined a need to take a step back from producing the report to instead focus on auditing what data the Village currently collects and where data is stored.

### SERVICES AND INFRASTRUCTURE

### Initiative: Develop and Implement a standard method for evaluating and measuring service levels and delivery methods

- **Action Items:** (1) Identify data sources and methods for a set of services; (2) Benchmark the Village’s service level and cost data against established industry standards and or/best practices and modify practices where improvements are needed; and (3) Establish and present to the Village Board a set of services to be continually evaluated in the next three years
- **Status:** (1) Behind; (2) Behind; and (3) Behind
- **Update:** As part of the 2019 Community Survey, the community was asked to provide feedback on their priorities for the future of the Water Treatment Plant. Results will be presented to the Village Board in December 2019. Further discussion will take place with the completion of the system analysis currently in progress with the Village of Winnetka.
throughout the organization. The team is also in the process of identifying a viable software platform to assist in the storage and dashboarding of the data.

**Initiative: Improve service delivery and/or reduce service-related costs through process improvements, consideration of alternative service delivery models and use of emerging technology**

- **Action Items:** (1) Identify alternative service delivery methods (i.e. shared services/inter-governmental cooperation, in-sourcing, outsourcing, public/private partnerships); and (2) Develop a standard tool to calculate/analyze cost of individual services
- **Status:** (1) On track; and (2) Behind
- **Update:** Staff reevaluated a list of core and enhanced Village services and selected a subset for evaluation as services to consider for alternative service delivery. Following a presentation to senior staff, snow and ice control operations were selected for further review. Analysis will resume in Stub Year 2020.

- **Action Item:** Conduct process improvement exercises for all major business processes
- **Status:** On track/On-Going
- **Update:** This project has been aligned with implementation of the Village’s new enterprise resource planning (ERP) software. Staff started with mapping business processes within the Finance Department where ERP implementation is well underway. Focus will transition to mapping business processes in the Public Works Department during Stub Year 2020.

**Initiative: Identify mission-critical facility replacement/rehabilitation projects for Village-owned facilities and develop recommended courses of action**

- **Action Items:** (1) Determine what mission-critical facilities are in need of replacement/rehabilitation in the next five to 10 years; and (2) Expand facility and capital rating matrix to incorporate priority levels for all categories and subcategories of Village assets; and (3) Develop options for addressing each major facility project including potential timelines for replacement/rehabilitation and engage other community organizations in considering options
- **Status:** (1) Complete; and (2) Behind; and (3) Scheduled for Stub Year 2020
- **Update:** Staff developed a rating matrix to help quantify the condition of the Village’s mission-critical facilities which was discussed with senior staff in early fall. The staff team is further refining the weighting system used in the matrix before it is implemented to help identify timelines for replacement or rehabilitation. It is expected to be a part of the Community Investment Program development during Stub Year 2020.

- **Action Item:** Develop financing plans for facility rehabilitation/replacement projects
- **Status:** Complete
- **Update:** Staff developed a financing plan for major facility rehabilitation and replacement projects which was incorporated into the Fiscal Year 2020 and Stub Year 2020 Community Investment Program (CIP). The plan also evaluated program fees and corresponding costs. This financing plan will be updated as needed to determine when bonds may be issued to finance any of the capital projects identified as part of the facility evaluation matrix, explained above.

- **Action Item:** Facilitate fundraising and construction planning for a new Glencoe Golf Club Clubhouse
- **Status:** On track
- **Update:** Staff worked with the Village Attorney to establish a separate 501(c)(3) organization capable of accepting donations for the project. Staff has conducted further research on fundraising efforts undertaken for similar projects in other communities and has since contracted with a project fundraiser. Additionally, cost estimates for the clubhouse have been developed and the architect that was chosen from the previously completed feasibility study is working on finalizing site plans for use in public portion
of the fundraising process. Next, staff will work with the fundraising consultant and the Village President to establish a board the 501c3, and to further develop a public relations campaign.

**Initiative: In concert with the Sustainability Task Force, create operational and community-wide Sustainability Plans**

- **Action Items:** (1) Establish a project plan for implementing aspects of the EcoDistricts Certification framework in Glencoe; (2) Engage community partners and residents in the development of a plan for implementing the EcoDistricts Certification framework; (3) Present recommendations for incorporating new sustainable activities into the Village’s purchasing policy, service delivery methods and infrastructure maintenance to the Village Board for consideration; and (4) Implement certification framework components and recommendations
- **Status:** (1) Behind; (2) On track; (3) Scheduled for Stub Year 2020; and (4) Scheduled for Stub Year 2020
- **Update:** Following further discussion with the Sustainability Task Force and a presentation to the Village Board at the June Committee of the Whole meeting, staff is now working toward establishing a plan for implementing components of the EcoDistricts Certification framework in Glencoe. As noted in the Village Manager’s Office department budget narrative, $12,000 has been budgeted for sustainability-related projects.

**ECONOMIC DEVELOPMENT**

**Initiative: Retain and attract viable businesses that maintain or enhance the tax base in Glencoe**

- **Action Items:** (1) Design and implement a new business retention process; (2) Develop a proactive marketing plan, inclusive of community branding in line with the findings of the Downtown Plan, to attract and grow new businesses in the Village; (3) Design and implement a survey for businesses who are exiting Glencoe to identify future business service improvements; and (4) Partner with the Chamber of Commerce to strategically assess current services and identify business community members’ priorities into the future
- **Status:** (1) Behind; (2) Behind; (3) Behind; and (4) Behind
- **Update:** While research into best practices in business retention was conducted in Fiscal Year 2019, due to staff turnover, this business-centric set of action items was put on hold. With a new Development Services Manager, the Business Services Team will partner with other staff members to move these projects forward in Stub Year 2020.

- **Action Item: Enhance relationships with existing business and building owners through ongoing Business Before Hours initiatives and one-on-one meetings**
  - **Status:** On track/On-going
  - **Update:** The Business Services Team continues to host quarterly Business Before Hours events to grow relationships with local business owners and managers.

- **Action Item: Identify opportunities to enhance our relationship with Writers Theatre, the Chicago Botanic Garden and other cultural assets; Meet with representatives on a biennial basis**
  - **Status:** On track/On-going
  - **Update:** The Village Manager and other executive staff members continue to meet with representatives from Writers Theatre and the Chicago Botanic Garden on a regular basis. Specifically, Writers Theatre continues to be engaged as the Tudor Court street and streetscape improvements are being planned for next spring.
- **Action Item:** As part of the planning for the new Glencoe Golf Club Clubhouse, develop alternative fundraising options to reduce reliance on public funding for the project
  - **Status:** On track/On-going
  - **Update:** Reference update in Services and Infrastructure goal.

- **Action Item:** Research economic development incentives and resources within the Village’s current regulatory authority and bring recommendations to the Village Board
  - **Status:** Complete
  - **Update:** Reference update in Governance goal.

**Initiative:** Evaluate opportunities to support further economic growth through improvements to the Village’s built environment and regulations impacting commercial uses

- **Action Item:** Prepare to implement recommendations of the Active Transportation Plan
  - **Status:** On track/On-going
  - **Update:** Staff has worked alongside the Sustainability Task Force, Glencoe Park District, District 35 and the Active Transportation Alliance to draft the community’s first Active Transportation Plan which proposes various infrastructure enhancements and public education campaigns to encourage safe and active travel (walking and biking) to and from popular community locations and schools. The draft plan was presented to all relevant boards in October 2018 and was formally adopted by the Village Board in November 2018. Now adopted, recommendations for implementation will continue to be incorporated into CIP planning. $100,000 has been included in the Stub Year 2020 budget for purposes of implementing recommended improvements in the community.

- **Action Item:** Complete design and initiate installation of wayfinding signage, information kiosks and gateway features in and surrounding business districts
  - **Status:** On track
  - **Update:** Staff worked with planning and design firm Teska Associates to identify desired wayfinding enhancements (highlighting key points of interest, parking, connections to active transportation options, etc.) and to develop design and schematics. An RFP for Phase I of the improvements was issued in December and a contract is pending Village Board consideration.

- **Action Item:** Work with the Plan Commission to produce new design guidelines for the Village’s business districts
  - **Status:** Complete
  - **Update:** The Plan Commission worked with staff to prepare an update to the business district design guidelines which were approved by the Plan Commission in February 2019 and presented to the Board at the March Committee of the Whole meeting. A resolution adopting the guidelines was adopted in April 2019.

**STAFFING**

**Initiative:** Incorporate the Village’s vision, priorities and goals into daily staff life to create opportunities for engagement

- **Action Items:** (1) Develop and institute a staff training program to educate on the Village’s vision, priorities and goals (consider a formal program, such as “Glencoe University” for current employees and for use during the onboarding process); (2) Reinforce Village’s customer-centric culture through internal branding in the workplace; and (3) Conduct staff customer service training
  - **Status:** (1) Behind; (2) Behind; and (3) Behind
Update: This set of action items have moved forward in part though the development of “Glencoe Way” promotional items, highlighting exceptional customer service standards, which have been distributed to staff at various events. However, staff plan to refocus on developing a core costumer service training, both for new and tenured employees.

- **Action Item:** Institute regular meetings between union leadership, operational staff and administration to encourage engagement through regular, rotating meetings with the Village Manager
- **Status:** Behind
- **Update:** Shortly after the Strategic Plan was adopted, the Village Manager hosted a series of meetings with each department to distribute printed copies of the plan while also explaining the plan’s development and implementation next steps. The establishment of a regular meeting schedule is planned for Stub Year 2020.

- **Action Item:** Routinize work plan development across the Village to better define the ways in which individual employees contribute to overall department and Village goals
- **Status:** On track
- **Update:** A work plan document, to be employed by supervisors has been created by staff and refined by the department head team. Additional training materials need to be developed before the tool is adopted organization-wide.

**Initiative:** Develop a more flexible workforce through job enhancement, and cross-functional training and teams.

- **Action Item:** Create and implement on-boarding training for each department to establish baseline knowledge of both Village functions and roles within two weeks of hire date
- **Status:** Behind
- **Update:** This action item has been integrated into the development of a “Glencoe Way” set of training tools, as described in the previous initiative.

- **Action Item:** Create, update and review standard operating procedures for all Village business and operating procedures
- **Status:** Behind
- **Update:** A template for documenting standard operating procedures has been developed and staff plan to refine the template by testing it on various projects in different functional areas. Staff plan finalize the template and establish timeframes for completing documentation in Stub Year 2020.

- **Action Item:** Evaluate and update all staff job descriptions
- **Status:** Behind
- **Update:** An updated job description template has been developed and job description updates are in progress, beginning with positions that have recently been filled through recruitments. A schedule to update all other job descriptions is being created, with the goal to update all job descriptions by the end of Stub Year 2020.

- **Action Item:** Develop employees by promoting cross-training and rotating assignments where possible
- **Status:** On track/On-going
- **Update:** While structured cross-training and assignment rotation programs have not been established for all departments, cross-training is actively being implemented throughout the organization to provide operational redundancy for key business processes and professional development. Development of structured cross-training and assignment rotation programs are behind schedule.
<table>
<thead>
<tr>
<th>Initiative: Prepare for long-term staffing needs through continual workforce planning analysis and adapting best recruitment and on-boarding practices</th>
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<tbody>
<tr>
<td><strong>Action Item:</strong> Research, evaluate and implement best recruitment practices and develop hiring strategies to develop a qualified applicant pipeline to increase workplace diversity</td>
</tr>
<tr>
<td><strong>Status:</strong> On track/On-going</td>
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<tr>
<td><strong>Update:</strong> Staff have surveyed comparable communities and is planning to evaluate results and discuss next steps for Glencoe’s overall recruitment strategy in the near future.</td>
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<tr>
<td><strong>Action Item:</strong> Routinize analysis of long-term staffing needs based on potential legislative changes, retirements, attrition, etc.</td>
</tr>
<tr>
<td><strong>Status:</strong> On track/On-going</td>
</tr>
<tr>
<td><strong>Update:</strong> As part of the Stub Year 2020 Budget development process, staff applied relevant employee data (such as tenure, anticipated retirement and pension data) into department personnel requests. This process will be repeated with each budget cycle moving forward.</td>
</tr>
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<table>
<thead>
<tr>
<th>Initiative: Evaluate and implement changes to the Village’s work environment to make the Village an employer of choice</th>
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<tbody>
<tr>
<td><strong>Action Item:</strong> Research alternative compensation policies of other municipalities and best practices</td>
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<tr>
<td><strong>Status:</strong> On track</td>
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<tr>
<td><strong>Update:</strong> Staff have developed a list of alternative compensation possibilities and is gathering more feedback from other communities to get a sense of what is realistic and achievable.</td>
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<tr>
<td><strong>Action Item:</strong> Establish an interdepartmental Employee Relations Committee</td>
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<tr>
<td><strong>Status:</strong> Behind</td>
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<tr>
<td><strong>Update:</strong> Staff has generated ideas for the framework of the Employee Relations Committee, including meeting structure and feedback mechanisms. Next, the project team will work with department heads to select committee participants with an eye toward making sure all levels of staff are represented.</td>
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<tr>
<td><strong>Action Item(s):</strong> (1) Determine and evaluate staff satisfaction levels through employee satisfaction surveys and stay interviews; and (2) Evaluate any low staff satisfaction trends and investigate potential methods of improvement</td>
</tr>
<tr>
<td><strong>Status:</strong> (1) On track; and (2) On track/On-going</td>
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<tr>
<td><strong>Update:</strong> Staff developed and fielded an employee satisfaction survey and an analysis has been prepared for the department head team. Next steps involve developing takeaways from the survey into discussion topics for the Employee Relations Committee. Note that staff have not yet adopted the practice of conducting stay interviews.</td>
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<tr>
<td><strong>Action Item:</strong> Conduct staff interviews at end of Village employment</td>
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<tr>
<td><strong>Status:</strong> On track/On-going</td>
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<td><strong>Update:</strong> An exit interview questionnaire has been developed and is in use.</td>
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<tr>
<td><strong>Action Item:</strong> Develop interdepartmental teambuilding opportunities, both in terms of work-related tasks and employee social activities</td>
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<tr>
<td><strong>Status:</strong> Behind</td>
</tr>
<tr>
<td><strong>Update:</strong> Due to staff turnover in the team lead role, this project is expected to resume when a new team lead is selected.</td>
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</tbody>
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Other Major Projects

In addition to moving these and multiple other high-level items forward since the Strategic Plan was adopted, staff have also dedicated significant time and resources in Fiscal Year 2020 to a number of other major projects which are not part of the Strategic Plan work plan, but that are inherently related to the Village’s strategic goals and priorities. Some of those projects include:

- Commencement of implementation of the new enterprise resource planning (ERP) system
- Administration of the plat of subdivision review process for 1801 Green Bay Road (known commonly as the Hoover Estate)
- Collaboration with the Historic Preservation Commission, Glencoe Historical Society and the Frank Lloyd Wright Building Conservancy on potential alternatives to demolition for 239 Franklin Road (known commonly as the Sherman Booth Cottage)
- Consolidation and presentation of information and community input related to zoning and other local regulation considerations for the potential sale of recreational cannabis in Glencoe following a change in State statute
- Completion of the design, community engagement, design and bidding phases of the Tudor Court Street/Streetscape Improvement Project, in addition to implementation of multiple other capital and infrastructure projects as detailed in the 10-Year Community Investment Program (CIP)
- Recruitment of multiple new administrative staff including a new Civil Engineer, Water Distribution Supervisor, Planner, Development Services Manager and two Management Analysts
- Planning and coordination of the Village’s Sesquicentennial celebration events and activities

STRATEGIC PLAN RELATED BUDGET REQUESTS

While all Strategic Plan initiatives and action items have a budget impact when considering allocation of staff time and resources, the following items are highlighted in the Department Budgets and have specific line item requests for Stub Year 2020:

<table>
<thead>
<tr>
<th>STRATEGIC PLAN ITEM</th>
<th>REQUEST</th>
<th>DEPARTMENT</th>
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<tbody>
<tr>
<td>Glencoe Way and On-Boarding Training</td>
<td>$10,000</td>
<td>VMO</td>
</tr>
<tr>
<td>Project Management and Data Tracking Software</td>
<td>$9,000</td>
<td>VMO</td>
</tr>
<tr>
<td>Legal Counsel for Non-Home Rule Analysis and Ordinance/Regulation Review</td>
<td>$58,500</td>
<td>VMO</td>
</tr>
<tr>
<td>Golf Clubhouse Professional Fundraiser*</td>
<td>$15,300</td>
<td>Golf</td>
</tr>
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**UPDATES TO PLAN IMPLEMENTATION TIMEFRAMES**

The attached set of GANTT charts provide an action item level detail of the progress made toward each initiative. Status for each action item is stated as *On Track, Behind, Complete or Not Yet Started*, with some statuses showing that the project is *On-Going* meaning that it will continue beyond the conclusion of this strategic plan, beyond Calendar Year 2021. Note that these timeframes reflect those as recommended by staff during the draft Stub Year 2020 Budget discussion, with some modifications. The full key for the GANTT charts is as follows:

<table>
<thead>
<tr>
<th>STATUS INDICATORS</th>
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<tr>
<td>Complete</td>
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<td></td>
<td>On Track or On Track/On-Going</td>
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<td></td>
<td>Behind</td>
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<td>Scheduled for a Future Fiscal Year</td>
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<table>
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<tr>
<th>TIMEFRAME INDICATORS</th>
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<tbody>
<tr>
<td>Project Timeframe</td>
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<tr>
<td>On-Going Project</td>
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