



---

---

## **MEMORANDUM**

**DATE:** April 9, 2015  
**TO:** Philip A. Kiraly, Village Manager  
**FROM:** David Kraus, Management Analyst  
**SUBJECT: Report on Strategic Plan Implementation**

---

### **Background**

In an effort to track the status of the initiatives outlined in the Village's Strategic Work Plan, the Strategic Plan Implementation Schedule (attached) was constructed. The schedule is broken down by quarter and illustrates when each project was expected to be completed. Further, a color coded system is utilized to indicate project status: **green**-complete; **gold**-in progress; and **red**-not yet underway. This allows for the continued tracking of projects by Staff and the Village Board.

### **Status**

Significant efforts are underway in each of the Village's six strategic priorities as outlined in the Strategic Work Plan. Staff have focused on the initiatives and associated action items established under these strategic priorities over the course of the First Quarter 2015. This has resulted in several action items that have been completed or are in progress/ongoing. Listed below are the six priorities with a brief update on their current status.

#### *Financial Sustainability*

Efforts are underway on two initiatives and the action items listed for each. First, for the 'Create a Financial Decision Making Framework,' initiative, staff has completed the action item of increasing Board awareness of financial policies and procedures through regular communication and reviewing financial policies with the Finance Committee and Village Board. For the second initiative, 'Analyze Options for Increasing Local Revenue,' the action item of developing a fee review schedule has also been completed. Work is also currently underway on the review of the Village's Special Charter rights under this same initiative and discussion is expected to occur in June.

#### *Commercial Vitality*

There have been efforts on all three of the initiatives under this priority. As such, there are three action items that are currently in progress or ongoing with only one that has yet to commence. This action item is the implementation of business retention visits with existing businesses which also relates to the creation of a business attraction and retention program initiative. Staff expects these visits to commence in April.

### *Infrastructure Replacement*

Under this strategic priority, work has been completed or is in progress on all of the action items listed in First Quarter 2015. One completed and one ongoing action item fall under the 'Complete Water System Master Plan' initiative. The other two action items that are in progress or ongoing fall under the 'Refine Storm Water Management Plan' and 'Implement Golf Clubhouse Redevelopment Plan' initiatives. Further, efforts are currently underway on three of the five initiatives with work on the other two expected to begin later in 2015.

### *Operational Effectiveness*

There were three action items required for First Quarter 2015 that are currently ongoing or in progress. First, staff is working to complete the implementation of a plan to reduce the hand entry of billing and payment data, which is an action item for the 'Undertake Process Improvement Initiatives in Two Service Areas (Finance/Technology)' initiative. Second, staff is continuing to explore future partnerships with the Park District for fulfillment of the 'Examine Additional Shared Service Opportunities' initiative. Finally, efforts are underway to redefine the role of the IT Committee to focus on identifying best practices and innovative methods of service delivery as required under the 'Evaluate Technology Needs of the Organization; Redefine Organizational Philosophy Toward the Use of Technology' initiative.

### *Organizational Development*

Work is in progress and ongoing on two initiatives under this priority. Under the 'Establish a Leadership Development Program' initiative, leadership/management opportunities are being provided to supervisors and will continue as appropriate. Second, staff has developed a training curriculum for 2015 that will ensure a work and training environment that allows for competitive internal promotions. For the 'Create an Enterprise-Wide Training and Development Program,' initiative, staff is currently establishing a list of certifications/specialized skills for all current positions and developing a plan to maintain all requirements for each.

### *Community Engagement*

There were three initiatives with associated action items due for First Quarter 2015. Work has been completed and is underway on all three of these initiatives. Additionally, there are two action items that are due in Second Quarter 2015 but are already in progress. In total, three action items have been completed with six others in progress or ongoing.

**Attachment:** Strategic Plan Implementation Schedule

# 2015

	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
<b>Financial Sustainability</b>												
<b>Increase Effectiveness of Budget Document in Presenting Priorities</b>												
Develop a template to be used to define operating costs of all departmental functions for FY17 budget process									DUE			
<b>Create Financial Decision Making Framework</b>												
Develop budgetary protocols and criteria for staff recommendations and Board decision making									DUE			
Increase Board awareness of financial policies and procedures through regular communication; review financial policies with Finance Committee and Village Board	Complete: Budget Approved, Creation of upcoming FY budget calendar in progress.			ONGOING			ONGOING			ONGOING		
<b>Analyze Options for Increasing Local Revenue</b>												
Develop fee review schedule		Complete: FY 16 Fee Resolution approved. Staff will work with the Village's Attorney to update the Code accordingly										
Complete review of Special Charter Rights		Discussion with Village Board expected at the June Committee of the Whole Meeting										
Determine how to achieve other revenue growth (new or enhanced, rate increases, grant funding)							DUE					
Appoint an ad hoc committee to complete analysis of Special Charter rights vs. Home Rule									DUE			
Coordinate a review of new revenue opportunities with review of opportunities to improve process efficiency									DUE			
<b>Commercial Vitality</b>												
<b>Complete the Downtown Plan</b>												
Continue with public process to engage the community in discussing the future of Downtown Glencoe	ONGOING			ONGOING			ONGOING			ONGOING		
Host open house inviting public comment on draft Downtown Plan							DUE					
Finalize Downtown Plan based on feedback from open house									DUE			
Present Downtown Plan to Village Board									DUE			
<b>Develop a Downtown Promotion Strategy</b>												
Establish a public/private partnership to reinvigorate the Farmer's Market							Chamber of Commerce working to secure new vendor					
Maintain/expand quality and appeal of current downtown special events (Grand Prix, 4th of July, Festival of the Arts)	ONGOING; Staff continues to analyze upcoming special events and suggest enhancements to event organizers.			ONGOING			ONGOING			ONGOING		
<b>Create a Business Attraction and Retention Program</b>												
Promote parking options in and around downtown							Outgrowth of Downtown Plan					
Implement business retention visits with existing businesses	Visits expected to commence in April with the Village Manager and Planning and Development Administrator			ONGOING			ONGOING			ONGOING		
Reevaluate Village banner policy for downtown streetlights							DUE					
Develop a business recruitment strategy to attract businesses identified in the Downtown Plan									DUE			

	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
Monitor permitted uses within the Village's business districts and recommend Code changes as necessary	ONGOING			ONGOING; Staff will analyze code modifications with Downtown Plan			ONGOING			ONGOING		
Review business license process, building codes and Village regulations to identify impediments and to identify options for streamlining process										DUE		
Evaluate the effectiveness of the small business improvement program							DUE					
<b>Infrastructure Replacement</b>												
<b>Complete Water System Master Plan</b>												
Complete Water System Master Plan report including an assessment of alternatives for the replacement of the water treatment plant	Initial Water System Planning Study report completed and presented. Review of options to continue throughout the year.			ONGOING			ONGOING			ONGOING		
Develop and implement communication plan to outline water treatment plant replacement alternatives	ONGOING; Public engagement process in development											
Continue to evaluate possible partnership with the Northwest Water Commission							DUE					
Utilize information from the Water System Master Plan to develop long term water system improvement plan										DUE		
<b>Enhance Capital Improvement Plan Review Process</b>												
Reassess capital equipment replacement procedures/policies				DUE; Part of FY 17 budget preparation								
Develop a qualitative decision making approach for the review of the Village's 10 year capital project inventory				DUE; Part of FY 17 budget preparation								
<b>Assess Needs of Sanitary Sewer System</b>												
Evaluate existing grant programs (overhead sewer conversion program, etc.) for continued value and possible modification							DUE					
<b>Refine Storm Water Management Plan</b>												
Continue to evaluate problem areas throughout the Village and program future storm water needs as a component of the CIP process	ONGOING; Staff continues to monitor problem areas and address as appropriate through capital improvement projects			ONGOING; Based on the outcome of the referendum, project design for approved storm water projects will commence			ONGOING			ONGOING		
Review the Village's sewer maintenance/repair program				DUE								
Review maintenance programs for ravine and storm sewer outfalls							DUE					
<b>Implement Golf Clubhouse Redevelopment Plan</b>												
Negotiate a working agreement with the Forest Preserve District	ONGOING			ONGOING								
Research funding opportunities and budget for new clubhouse							DUE					
Present architectural services budget to Village Board for approval; recommend contract										DUE		
<b>Operational Effectiveness</b>												
<b>Establish Service Level Baselines</b>												
Identify all major services by department; Determine which Village services are core (absolute) or enhanced (optional)				DUE								
Present findings to the Board										DUE		
<b>Undertake Process Improvement Initiatives in Two Service Areas (PW/Tech)</b>												
Review process for work order management in Public Works Department; investigate work order management technology solutions				DUE								

	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
Review process for preparing payroll and time entry, including review of outsourcing opportunities						In Progress						
Recommend solution to Village Board for approval						DUE						
Modify operations and integrate new technology into work process									DUE			
<b>Undertake Process Improvement Initiatives in Two Service Areas (Finance/Tech)</b>												
Develop plan to reduce hand entry of billing and payment data			In Progress; Staff is working to complete implementation of this plan.									
Review process for preparing payroll and time entry, including review of outsourcing opportunities						DUE						
<b>Examine Additional Shared Service Opportunities</b>												
Compile report for the Board on existing shared services; where possible, articulate costs and cost savings												DUE
Conduct analysis of partnering opportunities with other regional municipal organizations; identify similar operational needs and estimate costs												DUE
Explore further partnerships between the Village and Park District including the possibility of a shared facility for Public Works and Park District Maintenance and/or shared disaster recovery site			ONGOING			ONGOING		ONGOING				ONGOING
<b>Evaluate Technology Needs of the Organization; Redefine Organizational Philosophy Toward the Use of Technology</b>												
Redefine the role of the IT Committee to focus on identifying "best practices" and innovative methods of service delivery and operational effectiveness through the use of technology			ONGOING			ONGOING		ONGOING				ONGOING
Evaluate existing Enterprise Resource Planning (ERP) software; Research alternative ERP software provider. Determine which is best to implement "best practice" and technology-driven improvements to service delivery and operational effectiveness									DUE			
Present a report to the Village Board on technology improvements and recommendations for implementation												DUE
Determine appropriate staffing levels for IT support									DUE			
<b>Organizational Development</b>												
<b>Establish a Centralized Human Resources Function in the Organization</b>												
Centralize the human resources function within the Village Manager's Office						DUE						
<b>Establish a Leadership Development Program</b>												
Provide leadership/management training for first-line supervisors									DUE			
Provide leadership/management opportunities for supervisors, including those outside of traditional job responsibilities			ONGOING			ONGOING		ONGOING				ONGOING
Ensure a work and training environment that allows for competitive internal promotions			ONGOING; A training curriculum has been developed for 2015 that outlines numerous opportunities for employees to further their professional development.			ONGOING		ONGOING				ONGOING
<b>Create an Enterprise-Wide Training and Development Program</b>												
Establish a list of certifications and/or specialized skills of all current positions; develop a plan to maintain all requirements for each			In Progress									
Develop compensation/classification plan tied to outcomes and performance evaluations									DUE			
<b>Community Engagement</b>												
<b>Enhance Public Understanding of Glencoe Village Government (Issues, Organization, Services)</b>												
Develop comprehensive communications policy, including web, social media and print communications from the Village						In Progress; Completion expected at end of 2nd Quarter						

	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sept	Oct	Nov	Dec
Utilizing Glencoe Connect, design and disseminate regular email newsletter/blast to residents, businesses				In Progress; Developing more systematic approach to system. Expected completion by end of April 2015; plan and strategy for increased use being developed.								
Conduct media outreach/interviews with newly hired and promoted employees			ONGOING	ONGOING					ONGOING		ONGOING	
Publish employee spotlight columns/articles in Glencoe Quarterly			ONGOING; First article completed, second article to appear in next Glencoe Quarterly	ONGOING					ONGOING		ONGOING	
Develop A-Z guide to Village services and FAQs												DUE
<b>Conduct a Comprehensive Review of Boards and Commissions</b>												
Review opportunities to coordinate/consolidate Boards and Commissions			Analysis complete. Human Relations Forum re-named to Glencoe Community Relations Forum									
Recruit/attract qualified members			ONGOING	ONGOING					ONGOING		ONGOING	
<b>Improve Organization's Understanding of Resident Needs, Expectations</b>												
Conduct formal and scientific citizen survey and analyze results; identify and implement opportunities for improvement												DUE
Implementation of service request system to expedite registering, processing and tracking of residential service requests												DUE
<b>Expand Public Participation in Village Affairs</b>												
Develop recruitment strategy for Village Board and Commissions			Complete	Complete					Complete		Complete	
Establish working file with resumes of interested applicants categorized by area of interest			ONGOING; File currently stored in VMO.	ONGOING					ONGOING		ONGOING	
Utilize file to fill identified and anticipated vacancies as needed			ONGOING	ONGOING					ONGOING		ONGOING	