



**CITY OF WAUWATOSA**  
**COMMITTEE OF THE WHOLE**  
**MINUTES • NOVEMBER 7, 2013**

**Regular Meeting****Upper Civic Center****6:30 PM**

7725 W. North Avenue, Wauwatosa, WI 53213

<b>Attendee Name</b>	<b>Title</b>	<b>Status</b>	<b>Arrived</b>
Peter Donegan	Alderman	Excused	
James Moldenhauer	Alderman	Present	
Kathleen Causier	Alderman	Present	
Craig Wilson	Alderman	Excused	
Jeffrey Roznowski	Alderman	Present	
John Dubinski	Alderman	Present	
Tim Hanson	Alderman	Absent	
Gregory Walz-Chojnacki	Alderman	Present	
Jill Organ	Alderman	Absent	
Dennis McBride	Alderman	Present	
Bobby Pantuso	Alderman	Excused	
Joel Tilleson	Alderman	Excused	
Brian Ewerdt	Alderman	Excused	
Donald Birschel	Alderman	Absent	
Cheryl Berdan	Alderman	Present	
Jason Wilke	Alderman	Absent	
Kathleen Ehley	Mayor	Present	
James Archambo	City Administrator	Present	
Anthony Brown	Asst. to Administrator	Present	

**COMMITTEE OF THE WHOLE ITEMS**

1. Strategic planning work session facilitated by Dave Unmacht, Springsted, Inc.

Mr. Unmacht, Springsted, Inc., presented the Council members with the updated draft document created since the initial strategic planning session. The document contains a brief overview of the planning process undertaken. Five vision statements or goals have been identified; each statement has a one-paragraph strategic element that expands on the statement, followed by qualities and characteristics of the goal. The implementation aspect will be discussed in order to create a base document that will guide future decisions.

Addressing the value of this planning document, Mr. Archambo stated it will assist staff in having policy-related discussions that reflect the Council's vision of the City, so it doesn't waste time and resources pursuing activities in which the Council has no interest.

Ald. McBride observed that the City has a high amount of tax-exempt land (about 38%), to which services must be supplied. While the churches, parks, and colleges contribute to the quality of life, they require services as well. The Council is very concerned with preserving core services while still funding significant infrastructure needs. Encouraging appropriate development will contribute to the tax base and support services.

Ald. Berdan concurred and noted that this document should not be about sustainability; it should be about progressive planning.

Ald. Walz-Chojnacki opined that citizen engagement is critical to this document. Citizens need to become more aware of the significant obstacles the City faces in terms of infrastructure needs and maintaining even status quo

services.

Ald. Roznowski expressed concern with the constraints facing the City, noting that there is also tremendous potential. The challenge is working together with other entities to share services and seek collaborative solutions, and not just settle. He also noted that it is vital that the City be pro-active and not reactive in terms of development; developers ought not to be determining how the City will look in the future.

Ald. Moldenhauer suggested that the City needs to think outside the box and to refrain from the tendency sometimes to overlook best practices in favor of 'this is how we've always done things.' There may be a need for less emphasis on fitting things into historical constraints.

Ald. McBride observed that in 2008, the City wondered whether there would be any development to deal with during the recession. Yet even during the biggest challenges, the City continued to move forward.

The Mayor expressed her excitement for the proactive spirit evident and noted that elected officials must hold themselves to this standard while encouraging staff to do the same. If staff is expected to be proactive, Council members should be, too.

The difficulty of doing full-time work on part-time schedules was discussed, as well as the issue of citizen engagement. Ald. Walz-Chojnacki pondered the challenge of having the City change and offering new opportunities, while still honoring 'old Tosa.' Will that resonate? Is it possible?

The Mayor suggested that since change is inevitable, it falls to the elected officials to help residents understand why it is occurring.

Mr. Unmacht asked those present what they want to spend their time on. What do they want to produce? How do they want to be remembered?

Ald. Dubinski commented that goals can be of varying length. When he began working for the City in 1979, he could not have envisioned some of what has occurred since then. Maybe the development on the County grounds could have occurred sooner, but he is happy to be associated with the Council that started that process rolling. The tenor of State Street has changed tremendously in recent years. Some areas of the City still need a 'tune-up.' It can be difficult to project 35 years into the future. Do other Council members have personal projects they'd like to see get attention?

Mr. Unmacht then led the group in a brief exercise where they identified the City's primary strengths and challenges.

Strengths mentioned most frequently: Historic reputation, geographic location (proximity to major amenities), community sense of place (small town feel, also diversity and urban feel), neighborhoods and associations, economic diversity (a city with momentum), strong institutions (includes schools), city staff.

Challenges mentioned most frequently: Expand citizen engagement and involvement; manage growth and economic development (cost of redevelopment), maintain the City's infrastructure, preserve core services with levy limits, traffic congestion, geographically landlocked.

#### Goal #1, Wauwatosa is a City with Great Services

Ald. McBride began by saying that Wauwatosa changes and it remains the same. It is a leader in economic development and new technology and it strives to preserve its neighborhoods. Demographics are changing and the City may well become one of the most integrated cities in the state. He urged 'more poetry than prose' in a vision.

Responding to a question about the timetable for this document, Mr. Unmacht stated that strategic plans are generally updated yearly. There are short-term and long-term goals included, but the base document should sustain the City for many years.

The Mayor noted that some specific plans (Village Plan, East North Avenue Plan, for example) are just like that, incorporating both immediate and future issues. Sometimes a plan might just plant the seed of an idea.

Ald. Moldenhauer referenced “BAG,” the concept of ‘big, audacious goals’ often used in the private sector. They can be statements of where an organization wants to go; something similar ought to be included in this strategic plan.

Ald. Causer commented that while Wauwatosa is really popular right now, she does not want the City to become the ‘flavor of the day’ and fall out of favor. She voiced support for BAG, noting that when tastes change, the City will be able to maintain its place and location. Short, long, and medium-term goals should be included.

Mayor Ehley noted that meeting the infrastructure challenge is an example of a BAG. Some positive BAG’s are needed, too. Exciting and engaging projects will involve people and create momentum.

Ald. Roznowski questioned whether attaching dates to goals in a plan is limiting or frustrating for users.

Ald. Walz-Chojnacki observed that a new generation is being drawn back to the City. Where will they want to go? Perhaps defining future innovations is preferable to assigning specific timetables in a strategic plan. A ‘pay-it-forward’ attitude should be fostered; someone supported current Council members’ children when they were in school, for example. That investment in the future needs to continue going forward.

Ald. McBride suggested members think in terms of profit vs. long-term strategy with respect to development. What is the best use for that vacant lot?

Mr. Unmacht urged the group to identify the ‘how’ in these issues, to tie concrete actions to the key points. For example, *how* do you increase the economic base?

Ald. McBride responded that development must be managed to maximize the value of the land being developed. That will help pay for continue core services. This is hard for some people to hear and may result in higher density, or in precious land being developed instead of laying vacant. Creating another park doesn’t pay for services, though.

Ald. Berdan concurred, noting this connection has to be made very clear. Ald. Roznowski also agreed, adding that absent sufficient development, police services or fire-fighting services or other vital employee services will be lost.

Ald. Moldenhauer pointed out that the City is out of compliance with MMSD every time there is a significant rain event; the City becomes part of the problem. What if MMSD performs the necessary corrective sewer work and sends the City the bill? The notion of re-development in certain areas must be introduced, along with the fact that something taller, or with a larger footprint, or of a different character might replace the original use.

Ald. Roznowski stressed the communication component of this piece of the plan. Residents and businesses need to understand how vital re-development is.

Mr. Unmacht indicated he will add the ‘develop communication plan’ into the goal.

Discussion turned to best practices and book-marking core services. How can the City learn from those who do this well? Mr. Archambo suggested that over the next 18 months, a dashboard be created on the website whereby specific items can be bookmarked and viewers can gauge how the key performance metrics are being met.

Ald. Walz-Chojnacki reminded the group that if a budgetary gap results, the community must be reminded that taxes may need to go up if a certain level of service is desired, but value will be derived.

Ald. Moldenhauer concurred with the creation of efficient and effective service delivery models. Service may cost

money, but there may be different and cost-effective ways of providing it.

Goal #2, Wauwatosa is a Community of Choice

The group pondered how to make this happen.

Ald. McBride suggested reminding people of the unique qualities of their city. This state is so special; he added that he's lived elsewhere and traveled and there are not that many Tosas around. Sometimes we don't see how we can market the city to others. We need to have internal and external marketing and citizen engagement.

Ald. Roznowski suggested that diversity be emphasized; it fits here. The City is heading in that new direction and for some, it is still a negative stigma.

Mr. Unmacht asked whether 'attract' is a key word. Ald. Roznowski opined that the City is trying to attract a diverse population. Ald. Walz-Chojnacki added that it is happening and should be viewed positively, not negatively.

Discussion ensued about the word 'integrate' and the fact that it can have negative connotations. Words such as 'facilitate' or 'welcome' convey more positive images. Ald. Berdan added that she is not comfortable with emphasizing the east-west divide within the City. The parts of the City are equal, but different and diverse. Ald. Causier and the Mayor echoed those remarks, stating that distinctness and variety should be celebrated as positives.

Mr. Unmacht confirmed that less desirable wording will be replaced.

Discussion ensued about the fact that land values in the city have increased while some home values have decreased. Might this lead to a trend like the North Shore communities have experienced where existing homes are torn down and new ones - which may or may not fit the neighborhood - are being constructed? The Historic Preservation Commission is concerned that the character of a neighborhood can totally change if this becomes pervasive in an area. How much authority does the City have to control such a situation?

Comments were also made about property maintenance issues. Sometimes maintenance is not performed either because the people lack the financial means to do so, or because of mental health issues. In either instances, neighbors are affected by the neglected appearance of a property. Years ago, the City discussed whether to require code compliance upon a property's sale. Instead the decision was made to keep the maintenance system complaint-driven; should that topic be revisited now? It was agreed to keep this issue in the working document at present.

Discussion turned to citizen engagement and it was agreed that utilizing a citizen academy format may be one mechanism to increase involvement and cultivate future leaders. All Council members have received calls from outraged residents expressing concern about an issue that has been under discussion for many months; the problem is that the residents are generally unaware of most issues. Getting more people aware of what is going on is an ongoing situation.

Goal #3, Wauwatosa is the Preferred Location for Business.

Comments were made about specifically mentioning just one plan, i.e., the North Avenue Plan, but not others on the worksheet. There is the Village Plan, and the Burleigh Triangle Plan, for example, and there may be others yet to be developed. Mr. Unmacht suggested that if these Plans are each on their own tracks, the broad phrase, 'implement neighborhood development plans' will cover them. But if there are some that are not specifically advancing, they should be mentioned.

The Mayor pointed out that there is tremendous development potential in the area bounded by Hwy. 100, Hwy. 45, Burleigh Street and Hampton Avenue.

The issue of density and apartments was discussed under this goal; a suggestion was made that perhaps high-density

development areas ought to be identified along, say, Mayfair Road. Ald. Causier observed that density can be a very touchy subject when discussing new developments.

Ald. Moldenhauer suggested that the development of a TIF policy may be appropriate under this topic. Other communities have specific guidelines; this would be helpful for all parties and will eliminate the need for staff to continually lay the groundwork prior to new requests being considered.

Ald. Walz-Chojnacki noted that the City has unaddressed transportation issues; he urged that the City begin leading via the creation of an excellent transportation plan. The issue of efficient movement within and through the City includes a bike/pedestrian plan.

The suggestion was made to combine 'transit planning' and 'traffic management' into one characteristic under this goal.

Ald. McBride noted that a Mayfair corridor study doesn't exist yet, but property along this road is such valuable land that the City needs to be proactive in how future development occurs. Developers will make this determination otherwise. This study need specific mention.

In response to a follow-up question by Mr. Unmacht, the Mayor suggested that a planning effort for the Hwy.100/Hwy. 45/Burleigh Street/Hampton Avenue area also needs specific mention; the City needs to have an idea of what development it wants to see. Ald. Dubinski concurred, noting this area includes the Harley Davidson property, the JC Penney facility, and the K-Mart location. Some of these are very large sites and may be targets for redevelopment

Mr. Archambo added that the portion of the County grounds currently housing the behavioral health and children's court operations may be coming online.

Ald. Roznowski opined that the northwest quadrant of County land may deserve mention.

Ald. Roznowski added that Wauwatosa is a preferred location, but its current review processes, ordinances and standards seem limiting and cumbersome. The review and possible modification of the current Council Committee structure needs to be included under this goal, as streamlined operations will help to attract businesses.

Ald. McBride pondered how to make the City irresistible. Why go to Menomonee Falls? Make Wauwatosa irresistible so no one will want to go anywhere else. Evidently we had the pieces in place to attract Nordstrom and Mayfair Collection.

Ald. Moldenhauer agreed with Ald. Roznowski's comments about regulation and process; the process must be attractive. He noted Ald. McBride's remarks are more about the decisions businesses make when they determine where to locate. Does it make sense when they run numbers, is it the place to be?

Ald. Walz-Chojnacki pointed out that we don't just want to be about shopping centers. We need other kinds of businesses as well.

Ald. McBride agreed that with many kinds of development, there are different rates of return for each type. He referenced a recent article in *Government Finance Review* about "The Missing Metric," the failure of municipalities to evaluate fiscal performance along with the other factors that they consider when determining the suitability of a proposed development for approval. Sarasota, Florida has applied these principles and has found mixed use development is a very good value. High density residential development provides the best return; the return on suburban-type single family use, by contrast, is low.

Ald. Roznowski concurred with previous comments that a diverse array of businesses (that are not just restaurants, for example) is desirable.

The Mayor referenced a proposed characteristic within the goal that focuses on families and asked for clarification. Mr. Unmacht explained that this characteristic is an attempt to capture the importance of the housing/residential piece of growth management; what kinds of families are moving here and does the City have the space and housing options for all stages of life. The Mayor suggested that the term 'families' sounds too much like mom/dad/2 kids.

#### #4, Wauwatosa is an Organization Defined by Excellence

Mr. Unmacht noted that this proposed goal had the least amount of input but there seems to be support for the concept.

Ald. Moldenhauer suggested this goal means that in the course of conducting its businesses, is the City doing things the best way it can? This is a significant piece. In comparing the City to the way business organizations function and look at things, the City has a way to go. LEAN (a production practice that considers the expenditure of resources for any goal other than the creation value for the end customer to be wasteful, and thus a target for elimination) methodology lends itself to an assortment of business practices in the sense it can be done throughout an organization. It means always looking for best practices.

Ald. Moldenhauer gave an example, saying office placement within City Hall is ripe for improvement. The current CIP (capital improvement program) has two initiatives for remodeling this building. There needs to be additional outside consulting on how/where offices ought to be situated. This building's current siting is unproductive in terms of meeting citizen needs presently. This building can be much more customer friendly.

The Mayor added that this goal must also celebrate the improvements we have made. Staff has done much without notice. The community must be made to understand that there *isn't* waste in local government - to the extent it once may have existed, it has been eliminated

Ald. Moldenhauer agreed, noting that the City has a highly-utilized library; the Library Board and staff are looking at spending \$250,000 to automate book returns to allow sorting to occur so staff isn't hurt lifting books, etc. It is part of the CIP and is an example of how the City is getting ahead of that issue. The City is a service organization. The question is to how best to effectively deliver those services. This approach can improve employee morale as well when arduous tasks are eliminated.

Ald. Roznowski suggested that another characteristic to foster is a customer service mindset. As a service organization, the city must train and encourage staff to approach their jobs with a customer service focus. People have the choice to move or work in another community where that culture is promoted. There are 46,000 bosses.

Mr. Archambo noted that staff needs Council support on initiatives to improve organizational culture.

The Mayor added that this goes back to getting constituents comfortable with the notion of spending money on this kind of staff development.

Ald. McBride cautioned that there is dissimilarity between government and private business. While many operations can be analyzed on a business-like basis and a customer training culture can be cultivated, the City cannot be exactly like a corporation because government is messy by design. It does what private industry cannot do in a way that satisfies community needs. We build roads because it is efficient. We decide what to build when. We are a party of 16 bosses vs. a corporation that has just one boss. Government isn't designed that way.

Mr. Unmacht indicated he will add a customer service component to this goal, and perhaps a statement about the use of best practices. The strategic statement will be reworded and emphasis will be placed to stress that these principles apply to both staff and elected officials.

Ald. Berdan suggested that the Council's job is to empower employees to take ownership of their jobs. This is something that government doesn't typically do. Empowered employees can help create efficiencies.

#### #5 Wauwatosa is a Recognized Leader in the State:

General comments were made about the use of 'region' versus 'state' versus 'nation.' Is one word choice too limiting?

The point was made that other organizations, i.e., SEWRPC, ICC, M7, etc., need to accommodate the City's need to be represented in regional discussions.

Responding to Mr. Unmacht's question about including issues such as legislation and lobbying, Ald. Moldenhauer suggested including them. The City needs to advocate for itself.

Ald. McBride noted that many people come to Wauwatosa each day to work or transact business. We have economic muscle that others envy and must insist on a say in what happens in the regional economy because we are important. We must support Milwaukee, but Wauwatosa must also be recognized as more than just a bedroom community. The region must acknowledge that Children's Hospital, Froedtert Hospital, and the Medical College are here. We're a power house and our needs must be taken into account.

Ald. Walz-Chojnacki returned to the issue of regional transit, noting that we have people in the region who just want to drive their cars. We need to make them part of solution somehow.

The Mayor added that some this is already happening. With the Council's common agreement we should do this, it will continue to build. Milwaukee's Ald. Mike Murphy is aware of the need to deal with traffic congestion; there are bus issues. Ninety-five percent of the people who work at the Medical Complex live within five miles and drive. There are six million visitors per year to the area.

Ald. Roznowski suggested that the word 'insist' be used regarding Wauwatosa's inclusion in regional discussions.

Ald. McBride concurred, noting that the region needs to be aware of the consequences Wauwatosa deals with as a result of its economic viability.

Ald. Roznowski added that former Mayor Benz observes that too many Wauwatosa businesses identify themselves as being in Milwaukee and not in Wauwatosa.

Mr. Unmacht summarized the next steps, stating that the final draft of the logo document will be developed; it will read with substance. At least one more meeting (after Thanksgiving) will be needed to review it.

The meeting adjourned at 9:22 p.m.

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Carla A. Ledesma, CMC, City Clerk

# City of Wauwatosa – Work Session

- 6:30 Opening: Review Handouts
- 6:40 Prioritize Strengths and Challenges
- 7:00 Introduce Working Template
- 7:45 Break
- 8:00 Identify Goals
- 9:15 Next Steps
- 9:30 Adjourn

# Roles of Common Council

- Take ownership
- Be the champion
- Adopt a Plan
- Allocate resources and time
- Commit to implementation
- Determine levels of accountability
- Periodically review
- Update the Plan

## Roles of the Staff

- Understand the value
- Simplify the process
- Support the Council
- Recognize conditions change
- Accept responsibilities
- Integrate in operations
- Immerse in the culture
- Provide timely updates

# Implementation Ideas

- Assign and delegate responsibility
- Integrate information into workflow and processes
- Communication with staff and public
- Incorporate into communication tools
- Use in budget discussions
- Provide regular informal updates
- Conduct a formal review

GOAL WORKSHEETS  
COMMON COUNCIL WORK SESSION  
NOVEMBER 7, 2013

VISION: WAUWATOSA IS A CITY WITH GREAT SERVICES

Strategy: Preserve and maintain our core services and essential infrastructure

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The City’s primary obligation is to ensure the “bedrock of core services” is reliable and well-funded. Citizens and taxpayers determine their opinion about their city based on how well the core services are provided – often times reflecting that the “other work is not as important.” Through citizen surveys and informal feedback, by all measures, the City is doing a very good job. Testimony from many individuals suggests that the City’s core services are strong and well regarded in the community. Yet financial pressures, levy limits and rising costs for infrastructure repair and replacement are placing a greater burden on the core services that the community has come to expect. Now more than ever, for the vision to become a reality, city leaders must work to balance limited resources with short term and long term priorities. *The City’s vision is to be a city with great services.* For Wauwatosa this is about defining the core services, determining priorities and then allocating sufficient resources to get the job done.

Sample Goals

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- Identify our core services
- Fully fund and develop a GIS strategy
- Seek grant funding
- Develop a ten year infrastructure funding plan
- Benchmark core services with peers
- Shared services (School District)
- Build community consensus (possible levy referendum)
- Understand how health care changes impact overall services
- Develop a position on levy limits
- Prepare performance measurement analysis (ICMA benchmarks)
- Others...

*VISION: WAUWATOSA IS A COMMUNITY OF CHOICE*

**Strategic Element – Grow and expand on the *qualities* that make our community distinct and attractive**

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Since 1897 when the city first became chartered, through the great land expansion in the early 1950's, the city has carved a unique niche in the region. Wauwatosa is unique in that it started as a free-standing community and did not begin and grow as a “traditional” suburb. Known as the “city of homes” the community pride is strong and evident. Citizens are engaged through active volunteerism whether through neighborhood associations or in the many city-sponsored committees and commissions. The diversity and character of our community is manifested in the preservation of neighborhoods and in the east-west divide that is present in our City. The differences resulting from the “east and west” divide represent both an opportunity and a challenge for our future. *The City’s vision is to be a community of choice* that continues the historic charm while introducing creative ideas and trends to capture the imagination and excite the opportunities for existing, new and future residents and businesses. .

**Sample Goals**

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- Focus on our image and reputation
- Develop a branding and marketing strategy
- Develop a communications plan
- Create an innovative citizen engagement initiative
- Prepare a *Tosa* Report Card
- Implement a code enforcement program
- Conduct a citizens academy
- Conduct a benchmark study with peer cities
- Identify a plan to focus on “tear down homes”
- Minimize east-west divide
- Others...

VISION: WAUWATOSA IS THE PREFERRED LOCATION FOR CONDUCTING BUSINESS

Strategy: Focus on business development and effective growth management practices and policies

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The lifeline of any successful municipal government is the expansion of the tax base through planned and organized growth and development. The City benefits by its location and geographic connection to the greater Milwaukee metropolitan area. The City is recognized as the “second downtown” to the greater Milwaukee region. But geography alone does not sustain long term viability. The City has an opportunity to shape and influence the development by its land use policies and development rules and regulations. Growth and development decisions are often some of the hardest for local officials to make. However, development pressures will force the City into making choices – the challenge is for the City to identify our vision and then work within the marketplace to make it happen. The actions of the City to manage and support development truly do impact and influence decisions in the private sector. *The City’s vision is to be the preferred location for conducting business.* In this instance, the term business is broadly defined to include: retail, commercial, office, industrial and manufacturing.

Sample Goals

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- Develop a tax increment financing policy
- Implement North Avenue Plans
- Conduct a housing needs analysis
- Review the existing processes used to review developments
- Review the existing development ordinances and standards
- Create and adopt a Mayfair Corridor Study
- Create opportunity for bike-pedestrian uses
- Create a customized marketing strategy (leakage report)
- Focus on families
- New urbanization
- Understand housing market
- Transit planning
- Traffic management
- Others...

*VISION: WAUWATOSA IS AN ORGANIZATION DEFINED BY EXCELLENCE*

**Strategy: Implement efficient and effective service delivery models and business practices**

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City governments across the country, but especially in Wisconsin, are addressing a multitude of complex simultaneous challenges including identifying efficient and effective delivery systems, meeting citizen and policy maker expectations, and sustaining and maintaining both mandated and non-mandated programs and services. Conventional wisdom, local practice and hard realities reflect that the City cannot continue to perform operations and business practices in the traditional methods. The City will evaluate our business models and practices to ensure peak performance at all levels of the organization. *The City's vision is to be an organization defined by excellence.* In order to achieve this vision, the City will evaluate how well we are performing, be willing to take strategic risks and make changes – when needed – to current and present practices. Those entities that are willing to invest in themselves and make needed changes will be much more successful than those that stay static and traditional. Wauwatosa will be innovative.

**Sample Goals**

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- Analyze the present City Council committee structure
- Conduct LEAN evaluation on two business processes
- Conduct a staffing study of identified departments
- Complete a compensation and classification plan
- Prepare a Common Council orientation and training strategy
- Develop a listing of unresolved *policy* issues
- Create a focused staff training and development plan
- Complete a succession plan
- Others...

VISION: WAUWAOSA IS A RECOGNIZED LEADER IN THE STATE

Strategy: Identify opportunities to pursue greater influence in the region and state

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Whether by choice or by fate, the City of Wauwatosa resides in a location that presents regional and state-wide opportunities. The City is an economic engine with a multitude of businesses and industries that are influenced by many internal and external variables. The strategic planning process presents a timely opportunity for City leaders to reflect on what they want their City and community to be in the region and state. Presently, City leaders are involved and engaged in regional and state issues and initiatives. The reputation of the City, coupled with the experience of the elected officials and the strength of the staff provide a unique opportunity for the City to pursue a greater and more influential role in the region and state. *The City's vision is to be a recognized leader in the state.* In order to be successful, the City will identify those areas of top priority and determine a course of action that will provide for direct participation and involvement.

Sample Goals

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- Develop an annual legislative platform
- Develop a lobbying strategy
- Volunteer to speak at professional meetings and events
- Create a policy for responding to timely and emergency legislative issues
- Host regular inter-governmental meetings
- Volunteer to participate in regional advisory roles commissions and committees
- Inventory possible collaborative areas to strengthen involvement in the region and state
- Prepare a list of current partnership arrangements
- Participate in regional, state and national policy work
- Others...



## CITY OF WAUWATOSA, WISCONSIN

### STRATEGIC PLAN

#### OVERVIEW

#### City of Wauwatosa

The City of Wauwatosa is an inner ring suburban community located in Milwaukee County. The population of the City is slightly over 47,000 which places it among the top 15 cities in the state. Wauwatosa is strategically located at the center of the Milwaukee metropolitan area with excellent transportation access. It is the home of a number of regionally significant assets, institutions and companies – including the Milwaukee County Grounds, the County Medical Center, Research Park, Harley Davidson, GE Health Care and Briggs and Stratton and is second only to downtown Milwaukee as a regional employment center. The City of Wauwatosa features diverse neighborhoods, an excellent variety of housing stock, a thriving Village business district, and a key regional shopping center; the City is noted for its level of municipal services, excellent schools, the civic engagement of its citizens and high quality of life.

#### Background

The Common Council included a strategic plan in the City Administrator’s 2013 work plan. The City Administrator outlined the original objective of the strategic planning process in his statement from March 15, 2013, “Create an in-depth issue-based strategic plan with integrated actions designed to create a performance-driven and competitive organization.” Four key points were identified by the City Administrator to increase the likelihood of having an effective strategic plan:

- Identify from interviews with executive level staff and Council a list of key issues or opportunities and constraints that will be discussed and prioritized. A desired outcome is to build internal consensus on these issues.
- Develop a strategic planning process that is based on fiscal and political realities.
- Develop a strategic plan that is specific, measurable, achievable and realistic.
- Develop a system of input and output metrics to measure and monitor strategic targets.

The City is invested in a strategic planning process that is designed to create a new five-year strategic plan. As is well documented, over the past several years the City has adopted successful planning tools that can help create the foundation for the next five years. The City has undertaken a variety of analyzes, studies and planning documents including, but not limited to: a five-year general fund forecast; five-year capital plan; Village Plan; North Avenue Plan; Burleigh Triangle Plan; and a City Hall Master Plan. In addition *we* have embraced a series of organizational reviews including: citizen survey; compensation study; LEAN team; and Council issues survey. Finally, *we* have conducted efficiency studies of our operations, including the Fire, Engineering and Administration departments. The intent of the strategic planning process is to mold and shape all of these important documents into a single inter-dependent plan.

The information is intended to be assimilated into a series of draft strategies that will be presented to the Common Council. The discussion will combine fiscal realities with our community priorities. Ultimately we anticipate that the City Council will adopt an overall plan that will include high level goals and strategies with specific and achievable action steps. The final plan will set the City's strategic direction for the next five years.

## Planning Process

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The strategic planning process was designed to be inclusive and participatory. The process remains open and is flexible to adapt to changes and ideas that arise. The process used the following \_\_ steps. (This section will be updated as the process moves forward and will be finalized when it is completed.)

- Coordination and communication with Anthony Brown, Project Manager
- Review of extensive set of City documents (plans, budgets, studies, etc.)
- Tour of the City featuring projects, activities and community highlights
- Common Council and city staff interviews June 26<sup>th</sup> and June 27<sup>th</sup>
- Telephone interviews with city officials unavailable during June dates
- Prepare interview information and data into a Working Document for Department Director meeting
- Department Director meeting on August 26
- Update Working Document and prepare draft set of goal statements and strategies
- Presentation of revised Working Document and first draft of goals and strategies to Department Directors on September 30
- Identify financial and demographic trends for presentation to Common Council
- Briefing with the Common Council and handout information on October 15
- Common Council work session held on October 22
- Common Council work session on November 7

## Strategic Planning

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Strategic planning is an effective tool to provide a means for the Common Council to ensure that their resources are applied and used in an optimal manner. The process of strategic planning is a means to the end; it provides for a method of identifying the most important priorities and goals of the City and community. There are many benefits to strategic planning; the top six most consistent with the City's objectives are:

- Create an organizational vision and coalesce the elected officials around a common direction
- Provide a *written road map* to get to where you want to go
- Improve ability to focus on most important priorities and issues
- Provide direction on where to allocate limited resources
- Improve accountability and capacity to measure performance and outcomes
- Create partners and advocates within the community

## Strengths and Challenges

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A listing of the top strengths and challenges of the City was prepared from the interviews. On September 30, the Management Team prioritized the strengths and challenges into an organized subset. This section is on hold pending a similar Common Council action.

## Vision Statements

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The following five vision statements are introduced for discussion with the Common Council.

- Wauwatosa is *A City with Great Services*
- Wauwatosa is *A Community of Choice*
- Wauwatosa is *The Preferred Location for Conducting Business*
- Wauwatosa is *An Organization Defined by Excellence*
- Wauwatosa is *A Recognized Leader in the State*

## Strategic Elements

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The following five strategic elements make the vision possible. These were determined based on the input from all city officials, most notably the input from the Common Council and the outcome of the October 22 Common Council work session.

- Grow and expand on the qualities that make our community distinct and uniquely attractive
- Preserve and maintain our core services and essential infrastructure
- Focus on business development and effective growth management practices and policies
- Implement efficient and effective service delivery models and business practices
- Identify opportunities to pursue greater influence in the region and state

## Implementation

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The final strategic planning document will have a section on implementation ideas. This is just a sample list of ideas; we will discuss these during the November 7 work session.

- Assign and delegate responsibility
- Integrate information into workflow
- Communication with staff and public
- Incorporate into future budgets
- Provide regular informal updates
- Conduct a formal review



## CITY OF WAUWATOSA, WISCONSIN STRATEGIC PLAN

*VISION: WAUWATOSA IS A CITY WITH GREAT SERVICES*

### Strategy: Preserve and maintain our core services and essential infrastructure

The City’s primary obligation is to ensure the “bedrock of core services” is reliable and well-funded. Citizens and taxpayers determine their opinion about their city based on how well the core services are provided – often times reflecting that the “other work is not as important.” Through citizen surveys and informal feedback, by all measures, the City is doing a very good job. Testimony from many individuals suggests that the City’s core services are strong and well regarded in the community. Yet financial pressures, levy limits and rising costs for infrastructure repair and replacement are placing a greater burden on the core services that the community has come to expect. Now more than ever, for the vision to become a reality, city leaders must work to balance limited resources with short term and long term priorities. *The City’s vision is to be a city with great services.* For Wauwatosa this is about defining the core services, determining priorities and then allocating sufficient resources to get the job done.

### Qualities and Characteristics

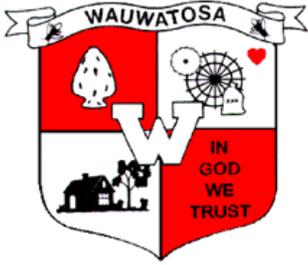
The following list represents qualities and characteristics within this goal.

- o Levy limits
- o Financial capacity
- o Workforce capacity
- o Cross-department collaboration
- o Outcome focused accountability
- o Shared services
- o Multi-model transportation systems
- o Leveraging information technology
- o Prioritize infrastructure needs
- o Data-driven decision-making
- o Technology
- o Community consensus
- o Police and law enforcement
- o Fire and emergency services
- o Infrastructure funding
- o Prioritize city services
- o Committed to making tough decisions
- o School District relationship

### Goals...

#### 1.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		



**CITY OF WAUWATOSA, WISCONSIN**  
**STRATEGIC PLAN**

*VISION: WAUWATOSA IS A CITY WITH GREAT SERVICES*

2.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

3.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

4.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

5.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

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# CITY OF WAUWATOSA, WISCONSIN STRATEGIC PLAN

*VISION: WAUWATOSA IS A COMMUNITY OF CHOICE*

## Strategic Element – Grow and expand on the *qualities* that make our community distinct and uniquely attractive

Since 1897 when the city first became chartered, through the great land expansion in the early 1950’s, the city has carved a unique niche in the region. Wauwatosa is unique in that it started as a free-standing community and did not begin and grow as a “traditional” suburb. Known as the “city of homes” the community pride is strong and evident. Citizens are engaged through active volunteerism whether through neighborhood associations or in the many city-sponsored committees and commissions. The diversity and character of our community is manifested in the preservation of neighborhoods and in the east-west divide that is present in our City. The differences resulting from the “east and west” divide represent both an opportunity and a challenge for our future. *The City’s vision is to be a community of choice* that continues the historic charm while introducing creative ideas and trends to capture the imagination and excite the opportunities for existing, new and future residents and businesses.

### Qualities and Characteristics

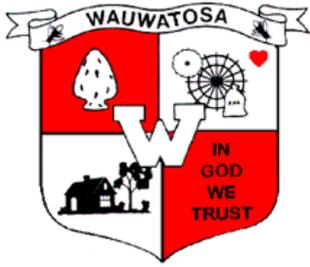
The following list represents qualities and characteristics within this goal.

- o Community of trees
- o Neighborhoods and associations
- o Citizen engagement
- o Committees and commissions
- o Distinct business districts
- o East – West divide
- o Creating an identity
- o Walking and biking
- o Public and private schools
- o Historic homes
- o Hart Park
- o Multi-family development trend
- o Safe community
- o Welcoming community
- o Sense of place
- o Public spaces
- o Diverse housing stock
- o Favorable *pull factor*

### Goals

1.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		



**CITY OF WAUWATOSA, WISCONSIN**  
**STRATEGIC PLAN**

*VISION: WAUWATOSA IS A COMMUNITY OF CHOICE*

2.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

3.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

4.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

5.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

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# CITY OF WAUWATOSA, WISCONSIN

## STRATEGIC PLAN

*VISION: WAUWATOSA IS THE PREFERRED LOCATION FOR CONDUCTING BUSINESS*

### Strategy: Focus on business development and effective growth management practices and policies

The lifeline of any successful municipal government is the expansion of the tax base through planned and organized growth and development. The City benefits by its location and geographic connection to the greater Milwaukee metropolitan area. The City is recognized as the “second downtown” to the greater Milwaukee region. But geography alone does not sustain long term viability. The City has an opportunity to shape and influence the development by its land use policies and development rules and regulations. Growth and development decisions are often some of the hardest for local officials to make. However, development pressures will force the City into making choices – the challenge is for the City to identify our vision and then work within the marketplace to make it happen. The actions of the City to manage and support development truly do impact and influence decisions in the private sector. *The City’s vision is to be the preferred location for conducting business.* The term business is broadly defined to include: housing, retail, commercial, office, industrial and manufacturing uses.

### Qualities and Characteristics

The following list represents qualities and characteristics within this goal.

- Land use and zoning
- Economic development policies
- Tax Increment Financing
- Transit planning
- Family needs
- Traffic management
- Comprehensive plan
- County grounds
- State regulations and laws
- Progressive growth philosophy
- Housing development
- Managed growth
- Parking needs
- Development studies
- Urban life/services
- Determine next big impact project
- Evolutionary (long term) focus
- Density

### Goals

1.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		



**CITY OF WAUWATOSA, WISCONSIN**  
**STRATEGIC PLAN**

*VISION: WAUWATOSA IS THE PREFERRED LOCATION FOR BUSINESS*

2.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

3.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

4.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

5.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		

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# CITY OF WAUWATOSA, WISCONSIN

## STRATEGIC PLAN

VISION: WAUWATOSA IS AN ORGANIZATION DEFINED BY EXCELLENCE

### Strategy: Implement efficient and effective service delivery models and business practices

City governments across the country, but especially in Wisconsin, are addressing a multitude of complex simultaneous challenges including identifying efficient and effective delivery systems, meeting citizen and policy maker expectations, and sustaining and maintaining both mandated and non-mandated programs and services. Conventional wisdom, local practice and hard realities reflect that the City cannot continue to perform operations and business practices in the traditional methods. The City will evaluate our business models and practices to ensure peak performance at all levels of the organization. *The City's vision is to be an organization defined by excellence.* In order to achieve this vision, the City will evaluate how well we are performing, be willing to take strategic risks and make changes – when needed – to current and present practices. Those entities that are willing to invest in themselves and make needed changes will be much more successful than those that stay static and traditional. Wauwatosa will be innovative.

### Qualities and Characteristics

The following list represents qualities and characteristics within this goal.

- o Council and staff roles
- o Council Committee system
- o Volume of Council work load
- o Lean
- o Delegation of duties
- o Service delivery models
- o Organizational structure
- o Workforce development
- o Cross department collaboration
- o Prioritize services
- o Organizational culture
- o City's reputation in the community
- o Citizen expectations
- o Benchmark practices with peers
- o Open-ended policy issues

### Goals

1.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		



**CITY OF WAUWATOSA, WISCONSIN**  
**STRATEGIC PLAN**

*VISION: WAUWATOSA IS AN ORGANIZATION DEFINED BY EXCELLENCE*

2.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

3.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

4.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

5.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

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## CITY OF WAUWATOSA, WISCONSIN STRATEGIC PLAN

VISION: WAUWAOSA IS A RECOGNIZED LEADER IN THE STATE

### Strategy: Identify opportunities to pursue greater influence in the region and state

Whether by choice or by fate, the City of Wauwatosa resides in a location that presents regional and state-wide opportunities. The City is an economic engine with a multitude of businesses and industries that are influenced by many internal and external variables. The strategic planning process presents a timely opportunity for City leaders to reflect on what they want their City and community to be in the region and state. Presently, City leaders are involved and engaged in regional and state issues and initiatives. The reputation of the City, coupled with the experience of the elected officials and the strength of the staff provide a unique opportunity for the City to pursue a greater and more influential role in the region and state. *The City's vision is to be a recognized leader in the state.* In order to be successful, the City will identify those areas of top priority and determine a course of action that will provide for direct participation and involvement.

### Qualities and Characteristics

The following list represents qualities and characteristics within this goal.

- o Policy statements
- o Opportunities
- o Council and staff strengths
- o Shared services
- o Regional asset
- o Role in M7 and other organizations
- o Existing partnerships
- o Milwaukee County
- o State legislation delegation
- o Waukesha County
- o 24-7-365 community
- o Recognition for full services
- o Public-private partnerships
- o Adjacent (border) cities
- o Advisory roles
- o Reputation
- o Distinctive economically
- o Intergovernmental relations

### Goals

1.) Goal...

Action Steps	Assigned	Deadline
a.		
b.		
c.		



**CITY OF WAUWATOSA, WISCONSIN**  
**STRATEGIC PLAN**

*VISION: WAUWATOSA IS A RECOGNIZED LEADER IN THE STATE*

2.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

3.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

4.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

5.) *Goal...*

Action Steps	Assigned	Deadline
a.		
b.		
c.		

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