CITY OF WAUWATOSA

COMMITTEE OF THE WHOLE

MINUTES ● DECEMBER 16, 2014

Regular Meeting | **Common Council Chambers** | **6:30 PM**

7725 West North Avenue, Wauwatosa, WI 53213

PRESENT: Alds. Byrne, Causier, Dubinski, Hanson (6:38 p.m.) Kofroth, McBride, Moldenhauer, Pantuso, Roznowski, Stippich Tilleson, Walsh, Walz-Chojnacki, Wilke, Wilson, Berdan -16

ALSO PRESENT: Mr. Archambo, City Administrator; Ms. Aldana, HR Director/Asst. City Attorney; Ms. Ledesma, City Clerk

Ald. McBride in the Chair

COMMITTEE OF THE WHOLE ITEMS

1. Annual review of the City Administrator, Part 1

Ms. Aldana explained that this meeting was the first part of the two-step City Administrator annual evaluation process. The evaluation will be both a look back at the previous year, and a look ahead towards 2015 goals. At this meeting, Mr. Archambo will give an overview of the City's Strategic Plan and efforts made in 2014 towards its implementation. The second evaluation meeting in January will be in closed session and will include a review of the 360-degree review that Department Directors performed.

Mr. Archambo stated that his focus the past couple of years has been on the strategic planning process and the implementation of the Strategic Plan itself. Like the capital improvement program, which has changed over time from a one-year plan to a five-year planning process, the implementation of the Strategic Plan is a multi-year effort that builds upon the groundwork laid in the previous year. The approach elongates the perspective of everyone involves and imbeds the Plan's contents throughout the organization.

(Ald. Hanson present 6:38 p.m.)

Mr. Archambo reviewed the performance evaluation system whose implementation began across the organization in 2014 following completion of a compensation study. Changes in public sector employment the past few years necessitated the creation of new rules, a new evaluation method, and a new compensation plan. The new evaluation plan has two sets of five goals (technical goals and 'SMART' goals) for each employee. This comprehensive effort ties in with the stated goals of the Strategic Plan.

Within the Strategic Plan there are specific employee groups charged with performing certain activities, the intent being a cohesive effort to begin implementing the Plan.

Another element of Plan implementation has been the overall budget process. The City had to undertake a larger capital process to deal with issues exacerbated by deferred maintenance, and begin to address these situations in terms of 3-, 4-, and 5-year capital plans. Projects initiated in one year may be completed the next. The report this evening is a summary of these ongoing efforts and is the first of what will be annual reports on the Plan's implementation.

Inasmuch as the Strategic Plan is a living document, its implementation will become much more likely if it is referred to regularly. To date, efforts have focused on creating timetables to implement action steps that will support the eventual achievement of goals. This annual report is another method by which the Plan will become imbedded throughout the organization in every-day activities. While still a small number, approximately 20-30 employees are actively engaged in the action-step processes and the various strategic planning committees have

all met several times. Each of the committees has five vision statements, strategic elements, and goals listed in the Strategic Plan Annual Report.

Mr. Archambo stated that this conversation will continue during the January 20th Committee of the Whole work session. He asked the Committee members to review both the Strategic Plan and its Annual Report before that session, to consider what has not been included, but should be. Is there more immediacy to certain action steps? Since there are 82 action steps, a realistic implementation timetable must be adopted, with the knowledge that certain steps may be more critical to the organization at a certain point than are others. Should a goal or action step be modified? If they were important six months ago, are they still?

Ald. Wilson inquired whether the City's employees in general have begun to adopt to the principles defined in the Plan, especially considering that their performance will be evaluated upon key Plan elements.

Mr. Archambo explained that 2014 was a pilot year. Some employees have a clearer understanding of the Plan than do others. Implementation is not uniform across the organization yet. There has been a fair amount of turnover this past year and the challenge is to include orientation to the Strategic Plan in the overall orientation process. New employees need to be 'on-boarded' more effectively. Between February and April 2015, Mr. Archambo stated, he will be devoting considerable time and energy to more vigorously imbedding the Plan to insure that individual competencies relating to the Plan, are achieved. He added that cultural change is slow, in part, because employees already have 'a lot on their plates' in terms of their regular responsibilities. Implementation of the Plan tends to get fit in around the usual activities; it is anticipated that including Plan elements in performance evaluations will help to keep it top-of-mind and facilitate implementation.

Ms. Aldana advised the Committee that they will be receiving an email from HR in the near future where they will have the opportunity to evaluate the Administrator's performance. The review criteria were modified such that Mr. Archambo will be evaluated under the same elements as are the Department Directors.

The meeting adjourned at 7:03 p.m.

RESULT:	**INFORMATION ONLY**	**Next: 1/20/2015 6:30 PM**
TO:	Committee of the Whole	

Carla A. Ledesma, CMC, City Clerk

2014

City of Wauwatosa Strategic Plan Annual Report

Strategic Planning Team

City of Wauwatosa

1/1/2014

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

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OVERVIEW

The strategic planning concept went from idea to initiation on June 4, 2013 when Springsted, Inc. was selected to assist the City through facilitation, research, and discussions to define the City of Wauwatosa's future path. As our partner and consultant, David Unmacht, Springsted, Inc., interviewed over 30 key City officials. This, along with other documents, plans, budgets and studies were aggregated into an environmental scan report.

Working with the Common Council and Department Directors over the course of several work sessions, priorities emerged in the following areas: Preserve and maintain our essential services and infrastructure, Grow and expand on the qualities that make our community distinct and uniquely attractive, Focus on business recruitment and effective growth management practices and policies, Implement efficient and effective service delivery models and customer service best practices, and Identify opportunities to pursue greater influence in the region, state and nation.

A Strategic Plan Workgroup, led by Department Directors and other staff leaders, met regularly to develop appropriate goals and action steps. Then, on July 22nd of 2014 the proposed goals and action steps were brought to the Common Council at a Committee of the Whole meeting. The general consensus among the Council was to move ahead with what staff had developed and for staff to continue working toward an implementation plan and process.

From there the Strategic Plan Workgroup decided that to implement the goals and action steps the effort would demand additional capacity. Through a series of discussions a Quality Management Plan has been developed, whereby Strategic Planning Committees (SPC) were established based on the strategic elements listed at the end of the first paragraph. The SPCs are responsible and accountable for following through on the goals and action steps. All of the workgroups have now met multiple times.

You will see in the balance of this document that a structure and process has been developed in such a way that it can grow and adjust over time with the organization. In other words, the goals and action steps necessary to achieve the visions may change over the course of the three to five years that this strategic plan is meant to cover. So, you may notice an 'unevenness' among various goals in terms of the status, or phase they are at right now. Given that the 2015 budgeting process is complete this process is now one of the most pressing matters. The other point to emphasize is that the workgroups will continue to meet and incrementally address each of these goals and action steps.

Treat this as a draft in that this process is intentionally iterative such that it becomes a 'living' document over time. The presentation to the Committee of the Whole on Tuesday, December

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16, is intended for initial feedback (are we on the right track) and will be followed by what is intended to be a Council work session presumably on January 20. As the elected representatives of our citizens this strategic plan is, after all, yours.

Ultimately, full integration of the strategic plan with the budgeting and performance evaluation systems begins with expanding the scope of activities contained herein after having in place the structure and process described. This stage can, and will, be transformational by helping the organization evolve, integrating all priorities into one cohesive 'plan.' We need all levels of the organization not just informed, but actively participating in this collaborative strategic planning effort.

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City of Wauwatosa

QUALITY MANAGEMENT PLAN

Implemented: November 7, 2014
Last Revision: November 14, 2014
Reviewed: December 12, 2014

I. PURPOSE AND SCOPE

The Wauwatosa Strategic Plan ("SP") is a means to organize the priorities of the City into one document. A strategic plan is complementary piece to the Comprehensive Plan, Capital and Operating Budgets, Employee Performance Evaluation system, and other planning documents and tools used by City leaders. The strategic plan in is informed by and incorporates these other documents and activities but IMPORTANTLY going forward guides or 'steers' them. A strategic plan organizes the priorities, programs and services into common themes and then presents strategies and goals to ensure there is a clear strategy to and for the future. Strategic planning is an effective tool to provide a means for the Common Council to ensure that resources are applied and used in an optimal manner. The methods used in strategic planning are a means to an end; the City's process was designed to identify the most important priorities and goals of the City and community. There are many benefits to strategic planning; the top five primary outcomes for include:

- *Create an organizational vision and coalesce the elected officials around a common direction*
- *Provide a written road map to record and document the direction*
- *Improve the Council and staff's ability to focus on the most important priorities and issues*
- *Provide a means to ensure that limited resources are allocated wisely*
- *Improve accountability and capacity to measure performance and outcomes*

To achieve the outcomes identified in the SP, a comprehensive Quality Management Plan is necessary. The Quality Management Plan encompasses a defined quality improvement process, benchmarked with a performance management system. The Strategic Planning Workgroup's ("SPW") quality improvement initiatives will be coordinated in a strategic manner. The Strategic Planning Committees ("SPC") initiatives' progress and results will be communicated to the SPW, the Common Council, stakeholders and the community.

II. DEFINITIONS

Vision Statements. The vision of the City is described in the following five vision statements.

- *Wauwatosa: A City with Great Services*
- *Wauwatosa: A Community of Choice*
- *Wauwatosa: The Preferred Location for Conducting Business*
- *Wauwatosa: An Organization Defined by Excellence*
- *Wauwatosa: Recognized as a Regional, State and National Leader*

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Strategic Elements. The following five strategic elements translate the vision into specific objectives and goals. Simply, they are action-oriented and ensure the vision becomes a reality. These elements were determined based on the input from all City officials, most notably the input from the outcome of the several Common Council work sessions in 2013 and 2014.

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

Goals. The five vision statements and strategic elements will be implemented through goals. Initial goals were identified early in the strategic planning process. The Common Council has directed the City staff to implement the goals. The goals represent short, medium and long-term investments of time and resources in pursuit of the City of Wauwatosa's vision. Goals will change as time goes on, i.e., some will be completed, others will cease to be an existing issue, etc. Others will and should continue to be added over time.

Quality Improvement ("QI"). This is the use of a deliberate and defined process, such as Plan-Do-Check-Act. It refers to a continuous and ongoing effort to achieve measurable improvements in the efficiency, effectiveness, performance, accountability, outcomes, and other indicators of quality services or processes, which achieve the vision statements.

Performance Management. This is the practice of actively using metrics data to improve the outcomes for goals. This involves the strategic use of performance standards, measures, progress reports, and ongoing quality improvement efforts to ensure the Strategic Planning Implementation Committees achieve the desired results. Ideally, these practices should be integrated into core operations, and can occur at multiple levels, including the program, organization or system level.

III. STRUCTURES, ROLES AND RESPONSIBILITIES

Overview: The central structure of the Quality Management Plan includes the Strategic Planning Workgroup (SPW) and the following sub-workgroups: City with Great Services (CGS), Community of Choice (2C), and Preferred Location for Conducting Business (PLCB), Organization Defined by Excellence (ODE), and Recognized as a Regional, State and National Leader (2RSNL). See Appendix A *for current QI structure. The SPCs are defined based on the goals and action step for each vision statement. QICs report their progress and activities to the SPW. The SPW provide oversight to the Quality Improvement Committees, and reports to the City Administration and the Common Council. The SPW provides the leadership and strategic vision for the quality improvement initiatives.*

A. *Strategic Planning Workgroup: The Strategic Planning Workgroup (SPW) provides the leadership and vision to the quality improvement initiatives. The SPW's responsibilities include:*

   1. *Assign professional staff to CGS, 2C, PLCB, ODE and 2RSNL; staff assignments will rotate as deemed necessary.*
   2. *Assign clerical staff to selected initiatives.*
   3. *Assist in identifying resources for initiatives.*
   4. *Provide orientation to staff on the Quality Management Plan. Training includes:*

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   a. *Initial orientation to the Quality Management Plan, definitions, and job expectations upon selection.*
5. *Ensure communication on the QI initiatives' progress and activities to the Common Council, stakeholders, and community. Communication venues include:*
   a. *Monthly department director staff meetings*
   b. *Common Council meetings, conducted at least annually*
   c. *Community partner and stakeholder meetings, conducted as opportunities arise*
   d. *Wauwatosa Strategic Plan Annual Report*
   e. *Other identified options, as needed, e.g., city website, city newsletter, media outreach, etc.*

B. *City with Great Services Committee: The City with Great Services Committee (CGS) provides oversight to the Quality Improvement Committees. The CGS's responsibilities include:*
1. *Meet as often as necessary, but must meet at least quarterly.*
2. *Draft and distributed an agenda at least 24 hours prior to meetings*
3. *Take minutes at every meeting and post minutes on the Strategic Planning S: drive,* S:\Public Folders\Public Share (Content Managed by Administration)\2014 Strategic Plan*.*
   a. *Minutes should list all attendees present, those excused, and a recorder*
   b. *Minutes should reflect agenda items discussed (decisions made, who's responsible, and deadlines)*
   c. *Use a template similar to the Clerk's Office.*
   d. *Minutes should be completed and distributed prior to the next meeting*
4. *Continuously evaluate current programming needs and goals (Plan-Do-Check-Act)*
5. *Update and/or create policies and procedures for workflow within the committees*
   a. *Identify resources needed for programming (departmental input, supplies, community partners, etc.)*
   b. *Identify, collect and analyze data sources to trace work*
6. *Provide oversight to QI subcommittees, if one is created by a SPC, including:*
   a. *Assign initiatives to QI subcommittees*
   b. *Approve QI subcommittee policies and procedures*
7. *Meet deadlines as established by the Strategic Planning Workgroup*
8. *Coordinate the development and completion of the following goals:*
   a. *Develop a performance management system*
   b. *Expand the tax base significantly ($125-$250 million through the end of 2019) through proper land use in a defined and thoughtful manner*
   c. *Transition from existing budgeting practices*
   d. *Develop a private inflow and infiltration policy for sewer overflows during weather events*
   e. *Pursue multi-jurisdictional collaborations and partnerships*

C. *Community of Choice Committee: The Community of Choice Committee (2C) provides oversight to the Quality Improvement Committees. The 2C's responsibilities include:*
1. *Meet as often as necessary, but must meet at least quarterly.*
2. *Draft and distributed an agenda at least 24 hours prior meeting*
3. *Take minutes at every meeting and post minutes on the Strategic Planning S: drive,* S:\Public Folders\Public Share (Content Managed by Administration)\2014 Strategic Plan*.*
   a. *Minutes should list all attendees present, those excused, and a recorder*

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   b. *Minutes should reflect agenda items discussed (decisions made, who's responsible, and possible deadlines)*
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   a. *Assign initiatives to QI subcommittees*
   b. *Approve QI subcommittee policies and procedures*
7. *Meet deadlines as established by the Strategic Planning Workgroup*
8. *Coordinate the development and completion of the following goals:*
   a. *Optimize and identify public investment opportunities for recreation and open space facilities*
   b. *Provide additional opportunities for public participation in civic matters*
   c. *Ensure optimal opportunities for housing in all stages of life*
   d. *Create a communications plan and strategy for internal and external communications during routine operations and emergency situations*
   e. *Maintain high aesthetics and standards for residential, commercial and industrial properties and green space to attract and retain residents and businesses in the City*
   f. *Strengthen our City image and reputation*
   g. *Preserve and improve the health and safety of the community through a Healthy Wauwatosa Initiative by 2017*

D. *Preferred Location for Conducting Business Committee (PLCB): The Preferred Location for Conducting Business Committee (PLCB) provides oversight to the Quality Improvement Committees. The PLCB must have a supervisor and non-supervisor. The PLCB's responsibilities include:*
   1. *Meet as often as necessary, but must meet at least quarterly.*
   2. *Draft and distributed an agenda at least 24 hours prior meeting*
   3. *Take minutes at every meeting and post minutes on the Strategic Planning S: drive,* S:\Public Folders\Public Share (Content Managed by Administration)\2014 Strategic Plan.
      a. *Minutes should list all attendees present, those excused, and a recorder*
      b. *Minutes should reflect agenda items discussed (decisions made, who's responsible, and possible deadlines)*
      c. *Use a template similar to the Clerk's Office.*
      d. *Minutes should be completed and distributed prior to the next meeting*
   4. *Continuously evaluate current programming needs and goals (Plan-Do-Check-Act)*
   5. *Update and/or create policies and procedures for workflow within the committees*
      a. *Identify resources needed for programming (departmental input, supplies, community partners, etc.)*
      b. *Identify, collect and analyze data sources to trace work*
   6. *Provide oversight to QI subcommittees, if one is created by a SPC, including:*
      a. *Assign initiatives to QI subcommittees*
      b. *Approve QI subcommittee policies and procedures*

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7. *Meet deadlines as established by the Strategic Planning Workgroup*
8. *Coordinate the development and completion of the following goals:*
   a. *Explore efficient modes of transportation to move people*
   b. *Foster business development through proactive strategies*
   c. *Review the state of major plans and studies*

E. *Organization Defined by Excellence (ODE) Committee: The Organization Defined by Excellence Committee (ODE) provides oversight to the Quality Improvement Committees. The ODE's responsibilities include:*
1. *Meet as often as necessary, but must meet at least quarterly.*
2. *Draft and distributed an agenda at least 24 hours prior meeting*
3. *Take minutes at every meeting and post minutes on the Strategic Planning S: drive,* S:\Public Folders\Public Share (Content Managed by Administration)\2014 Strategic Plan.
   a. *Minutes should list all attendees present, those excused, and a recorder*
   b. *Minutes should reflect agenda items discussed (decisions made, who's responsible, and possible deadlines)*
   c. *Use a template similar to the Clerk's Office.*
   d. *Minutes should be completed and distributed prior to the next meeting*
4. *Continuously evaluate current programming needs and goals (Plan-Do-Check-Act)*
5. *Update and/or create policies and procedures for workflow within the committees*
   a. *Identify resources needed for programming (departmental input, supplies, community partners, etc.)*
   b. *Identify, collect and analyze data sources to trace work*
6. *Provide oversight to QI subcommittees, if one is created by a SPIC, including:*
   a. *Assign initiatives to QI subcommittees*
   b. *Approve QI subcommittee policies and procedures*
7. *Meet deadlines as established by the Strategic Planning Workgroup*
8. *Coordinate the development and completion of the following goals:*
   a. *Foster a culture of continuous improvement using performance management systems*
   b. *Review City Hall Study conducted in 2010*
   c. *Develop a high-performing organization through strategic employee development and compensation programs*
   d. *Develop policies that foster and support high-performing workforce*

F. *Recognized as a Regional, State and National Leader Committee: The Recognized as a Regional, State and National Leader Committee (2RSNL) provides oversight to the Quality Improvement Committees. The 2RSNL's responsibilities include:*
1. *Meet as often as necessary, but must meet at least quarterly.*
2. *Draft and distributed an agenda at least 24 hours prior meeting*
3. *Take minutes at every meeting and post minutes on the Strategic Planning S: drive,* S:\Public Folders\Public Share (Content Managed by Administration)\2014 Strategic Plan.
   a. *Minutes should list all attendees present, those excused, and a recorder*
   b. *Minutes should reflect agenda items discussed (decisions made, who's responsible, and possible deadlines)*
   c. *Use a template similar to the Clerk's Office.*
   d. *Minutes should be completed and distributed prior to the next meeting*
4. *Continuously evaluate current programming needs and goals (Plan-Do-Check-Act)*

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5. *Update and/or create policies and procedures for workflow within the committees*
   a. *Identify resources needed for programming (departmental input, supplies, community partners, etc.)*
   b. *Identify, collect and analyze data sources to trace work*
6. *Provide oversight to QI subcommittees, if one is created by a SPC, including:*
   a. *Assign initiatives to QI subcommittees*
   b. *Approve QI subcommittee policies and procedures*
7. *Meet deadlines as established by the Strategic Planning Workgroup*
8. *Coordinate the development and completion of the following goals:*
   a. *Develop an annual legislative and policy/platform/strategy*
   b. *Enhance our relationship with Milwaukee County and other regional partners*
   c. *Initiate and lead innovative collaborations and partnerships*
   d. *Identify associations, groups and organizations to participate in*

IV. PERFROMANCE MANAGEMENT

The SPW and SPCs will track their respective initiatives utilizing Excel spreadsheets. Processes and activities will be monitored on a quarterly basis and documented in meeting minutes and on a spreadsheet. The tracking spreadsheets will be coded in the following manner; revisions to the plan must be dated and documented in the committee's meeting minutes:

A. *Blue – accomplished goal/completed task*
B. *Purple – partially accomplished goal/completed task; add comment by right clicking on cell, choose "Insert Comment", type in comments)*
C. *Yellow – target date was revised (type in the date when the revision was decided; date must correlate to meeting minutes/notes)*
D. *Green – target date; if it was a revised target date, type in the date when it was revised (date must correlate to meeting minutes/notes)*
E. *Red – stopped initiative when goal/task not completed; add comment by right clicking on cell, choose "Insert Comment", type in comments)*
F. *Pink – newly added goals*

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City of Wauwatosa

CITY WITH GREAT SERVICES

REVISED: 12/12/2014

1.1 PRESERVE AND MAINTAIN OUR ESSENTIAL SERVICES AND INFRASTRUCTURE

1.1.1 Develop a performance management system

Deadline: June 2016

December 2014: As part of an ongoing effort to improve performance and make performance data available to the public, City staff will develop a performance dashboard that provides meaningful data that describe the City's goals and priorities, and how those objectives are being met. The performance dashboard will be available to Wauwatosa citizens, and others interested, in an effort to learn more about the City and its governance. The dashboards allow access to summarized snapshots of City services by providing a clear and up-to-date view of the City's performance in specific areas of interest. For that reason, initiatives to identify performance measures have been assigned to content experts for ongoing tracking and accountability.

Develop a performance dashboard for the City website and internal usage

Deadline: September 2015

November 2014: Efforts have started to build a "proof -of –concept" portal that will identify a limited number of measures based on existing publications.

December 2014:

- Build a web-based portal to highlight measures by grouping them into broad categories
- Offer details about each measure in a separate page, along with the appropriate editorial:
  - Explain the measure and its value to the community
  - Offer an educational platform to improve the measure and how that improvement impacts the City
  - Offer opportunities for involvement and participation for residents
  - Clarify how the measure and its performance fits within the City's strategic plan and what changes, if any, need to be made to meet stated objectives

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Future Direction

June 2015:

- Look for opportunities to automate some of the measures collection
- Research existing vendors and databases for usable data, including GEMS dashboard
- Look for opportunities to combine data from independent sources to yield needed information, e.g., combining Human Resource (HR) records with waste collection records to look for optimization opportunities.

September 2015:

- Identify additional data points based on Departments' SMART Goals
- For each data point, determine what is the optimal graphic presentation for the data chart
- Identify a process for how the data will be updated on the dashboard, by whom, and how often
- Identify accompanying editorial and graphics for each measure to meet the criteria expressed above.

Identify existing outcome measures for City Services with the assistance of department directors

Deadline: June 2015

December 2014: Department Directors were tasked to identify and track at least two performance measures for their departments that relate directly to meeting City's visions.

The identified the measures and data sets will be integrated with the existing performance dashboard

Create and implement new outcome measures for City Service, if necessary

Deadline: December 2015

December 2014:

- Educate Department Directors on how to determine core elements of data that exist or need that to be collected and how to translate data into meaningful information. There needs to be a clear purpose for data collection. These efforts may include:
  - Examine existing publications and reports that include statistics, and input, output and outcome measures. These may include annual or quarterly reports; newsletters; federal, state, or locally mandated reports; special studies; and/or project documents.
  - Data used to prepare for budgetary purposes
  - Data used for employee, vendor or project evaluations
  - Comparative data at a local, regional, state, or national level (if available)
- Integrate new measures into performance dashboard
- Look for opportunities to have the performance dashboard replace or complement existing print or digital publications in order to better facilitate employees' time, offer a single source of data for readers, and clarify communications with constituents

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Develop an annual performance report based in identifiable and measurable criteria

Deadline: December 2015

December 2014: While the performance dashboard will provide a look at various measures and serve as an engagement tool with residents and others who have business with or within Wauwatosa, an annual report will provide a comprehensive look at those measures and how they align with the City of Wauwatosa Strategic Plan. An annual report would look for relationships between data points and offer an encompassing, 'State of the City' summary.

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

1.1.2 Expand the tax base significantly ($125-$250 million through the end of 2019) through proper land use in a defined and thoughtful manner

Deadline: December 2019

Develop value density zoning districts within the zoning code and comprehensive plan to encourage these types of developments

December 2014: This SPC is presently working on the draft action steps for this goal.

Deadline: TBD

Align City economic development investment programs with the identified opportunity areas

December 2014: The SPC continues to work on drafting a timeline and further actions steps. Recently, the Economic Development Investment Policy was recommended for approval by the Budget and Finance Committee. This was after an extensive process including several reviews by related policy partners. If approved, other elements of our various incentive programs will be folded into this policy.

Deadline: December 2015 (tentative)

Conduct a Mayfair Corridor Study (including the Northwest Quadrant of Milwaukee County Grounds)

December 2014: This project has been undertaken through the 2014 budget and calendar year. The hired consultant working with staff has presented a first draft to the Plan Commission. This specific first step related to the north end of the study area is anticipated to conclude over the first quarter of 2015. There will be a second (middle) and third (southern) segment to this project that will continue from the first. The SPC continues to work on the draft of timelines and additional action steps.

Deadline: TBD

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1.1.3 Transition from existing budgeting practices

Deadline: November 2017

December 2014: Currently, the City develops a line-item budget that is largely incremental from the previous year. This is done in the context of an on-going structural deficit that requires annual expenditure reductions and revenue enhancements. The responsibility for making these levy reductions is dispersed proportionately among City Hall, Fire, Police and Public Works. Each group is expected to develop sustainable initiatives that reduce their utilization of property tax levy. This strategy was used for the past four budgets. Each group eliminated vacant positions, changed operations and increased fees. There is a general consensus that any future significant levy reductions will impact service levels. There is direction from the Common Council that any service level reductions should be prioritized and not proportionately distributed.

Future Direction

There is a growing body of literature and practice on alternative budgeting strategies that rely on prioritization, outcomes and performance. Also, the City is fortunate to have staff with deep operational knowledge. To successfully achieve this transition, the Finance Director will work with a committee representing different departments and levels of the organization who are committed to the change. They will review literature on this topic, meet with organizations that implemented similar systems, and develop a budgeting framework. Templates will be developed, a process defined and trainings scheduled. The goal will be that this new system will be in place for the 2017 budgeting cycle.

Assemble books, articles and case studies for review

Update Five-Year Forecast with model that eliminates the structural deficit. Present to Budget Committee and receive feedback on tolerance level to undertake changes necessary to eliminate the structural deficit.

Develop charter and action plan for Advisory Committee. Focus will be on action-orientated meetings that have clear decision points.

Recruit Advisory Committee

Review and discuss literature with Committee

Deadline: March 2015

Meet with three other jurisdictions that have successfully implemented alternate budget strategies

Identify high-level framework for new budget system

Present framework to Department Directors for feedback

Present framework to Budget Committee for feedback

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

Deadline: June 2015

Finalize framework

Develop departmental template for framework

Develop process for implementing framework including detailed budget calendar

Determine how GEMS will support framework

Deadline: August 2015

Train Organization

Deadline: December 2015

Departments work on budget request utilizing new framework

Deadline: June 2016

Produce initial 2017 Budget using new framework

Evaluate process; document and make adjustments for 2018

Deadline: December 2016

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

1.1.4 Develop a private property inflow and infiltration policy for sewer overflows during adverse weather events

Deadline: TBD

Develop policy options, including financing strategies, for Council consideration

Deadline: April 2015

December 2014: Staff started the task of outlining the policy options for Council consideration. A great deal of research has already been done, however, it needs to be synthesized into an orderly policy document. A financing component needs to be added. Internal review with the Finance Department is a major part that needs to occur. The goal is to have a policy document to the Budget and Finance Committee by March 2015. This action will start the dialog and hopefully lead to a policy that can be implemented by the start of the 2016 budget cycle.

Seek and apply for grant opportunities

Deadline: Ongoing

December 2014: Milwaukee Metropolitan Sewerage District (MMSD) set aside private property inflow and infiltration grant funding through the year 2020, however, the actual funding is subject to an annual appropriation of the MMSD Board. Currently, they have set aside approximately $500, 000 per year. The City will monitor MMSD and any other available funds to augment or cover the cost of needed infrastructure.

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1.1.5 Pursue multi-jurisdictional collaborations and partnerships

Deadline: Ongoing

Update the City's shared services inventory

Deadline: March 2015

December 2014: Each year, the City of Wauwatosa Administration Department updates the Shared Services Inventory for each City Department. The Inventory serves to determine the nature of shared services and whether it is an informal or formal agreement. The sharing of services leads to collaboration. Depending on the nature of the arrangement, it can also save resources. Some services lend themselves to greater savings than others.

In past years, the Intergovernmental Cooperation Council group met extensively around shared services to explore what partnerships existed in Milwaukee County and where logical sharing could occur with the biggest impact.

In addition to examining City of Wauwatosa partnership areas, the capacity of departments to offer services to other communities will be studied. For example, garbage/recycling for nearby Butler.

Identify services and programs by department (inventory of what the City does and why)

Deadline: August 2015

December 2014: Existing arrangements revolve around fire/emergency medical service (EMS) sharing of vehicles and equipment bids; public health communicable disease prevention and control, health inspections, medical waste disposal, language interpretation lines, mentoring of public health students, school ; police resource officers; Mayfair Mall Officer, Sporting Event Safety, and Mutual Aid agreements (health, fire, police). Other potential areas for shared services include dispatch, compost, garbage and recycling, WIFI for the Wauwatosa School District (WSD). The future plan is to engage an administrative intern to develop survey questions to be distributed in advance to Department Directors followed by a face-to-face interview to address the current status and future possibilities of shared services.

Develop a means to rank each functional activity for greatest shared services opportunities

Deadline: January 2016

December 2014: Dispatch partnerships may result in the greatest savings, however, in order to make such a transition, a detailed plan would need to be in place well in advance of the transition. In addition, a look to the future to determine what opportunities exist for revenue options will be discussed to determine the capacity of departments, which may lead to them reaching out to others for selected operations.

Define a shared services strategy, or priorities

Deadline: December 2017

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Reach out and market opportunities to other communities and businesses

Deadline: TBD

Expand partnerships with WSD (open space study)

Deadline: December 2015

December 2014: This SPC continues to work on the draft of this action step. Presently, funding has been included in the 2015 budget for participation with the WSD to conduct the open space plan. The Park and Forestry Board will guide the project, culminating in a long term plan for consideration by the Common Council. See also item 2.1.1

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

City with Great Services: Goal and Action Step Tracking Sheet

City with Great Services

1.1 Preserve and maintain our essential services and infrastructure

Activity	Champion	Dec-14	Mar-15	Apr-15	Jun-15	Jul-15	Aug-15	Sep-15	Nov-15	Dec-15	Jan-16	Jun-16	Dec-16	Nov-17	Dec-17	Dec-1
1.1.1 Develop a performance management system	IT Director											■				
Identify existing outcome measures for City services with the assistance of department directors	IT Director				■											
Create and implement new outcome measures for City services, if necessary	IT Director									■						
Develop a performance dashboard for the City website and internal usage	IT Director	■						■								
Develop an annual performance report based on identifiable and measurable criteria	IT Director								■	■						
1.1.2 Expand the tax base significantly ($125-$250 million though the end of 2019) through proper land use in a defined and thoughtful manner	Finance Director															■
Develop value density zoning districts within the zoning code and comprehensive plan to encourage these types of developments	Finance Director															
Align City economic development investment programs with the identified opportunity areas	Finance Director															
Conduct a Mayfair Corridor Study (including the Northwest Quadrant of the Milwaukee County Grounds)	Finance Director															
1.1.3 Transition from existing budgeting practices	Finance Director													■		
Assemble books, articles and case studies for review	Finance Director		■													
Update Five-Year Forecast with model that eliminates structral deficit. Present to Budget Committee and receive feedback on tolerance level to undertake changes necessary to eliminate the structural deficit.	Finance Director		■													
Develop charter and action plan for Advisory Committee.	Finance Director		■													
Recruit Advisory Committee	Finance Director		■													
Review and discuss literature with Committee	Finance Director		■													
Meet with three other jurisdictions who have successfully implememnted alternate budget strategies	Finance Director				■											
Identify high-level framework for new budget system	Finance Director				■											
Present framework to Department Directors for feedback	Finance Director				■											
Present framework to Budget Committee for feedback	Finance Director				■											
Finalize framework	Finance Director						■									
Develop department template for framework	Finance Director						■									
Develop process for implementing framework including detailed budget calendar	Finance Director						■									
Determin how GEMS will support framework	Finance Director						■									
Train Organization	Finance Director									■						
Departments work on budget request utilizing new framework	Finance Director											■				
Produce initial 2017 Budget using new framework	Finance Director											■				
Evaluate process; document and make adjustments for 2018	Finance Director												■			
1.1.4 Develop a private property inflow and infiltration policy for sewer overflows during adverse weather events	Public Works Director															
Develop policy options including financing strategies for Council consideration	Public Works Director			■												
Seek and apply for grant opportunities	Public Works Director															
1.1.5 Pursue multi-jurisdictional collaborations and partnerships	Health Officer															
Update the City's shared services inventory	Health Officer		■													
Identify services and programs by department (inventory of what the City does and why)	Health Officer						■									
Develop a means to rank each functional activity for greatest shared services opportunities	Health Officer										■					
Define a shared services strategy, or priorities	Health Officer														■	
Reach out and market opportunities to other communities and businesses	Health Officer															
Expand partnership with Wauwatosa School District (open space study)	Health Officer									■						

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City of Wauwatosa

COMMUNITY OF CHOICE

REVISED: 12/12/2014

2.1 GROW AND EXPAND ON THE QUALITIES THAT MAKE OUR COMMUNITY DISTINCT AND UNIQUELY ATTRACTIVE

2.1.1 Optimize and identify public investment opportunities for recreation and open space facilities

Deadline: December 2017

December 2014: The Open Space plan was discussed in 2014 through administrative meetings between the City of Wauwatosa and the Wauwatosa School District (WSD). A committee was created that included the Mayor, the Department of Public Works, and WSD administration. $25,000 was set aside in the 2015 Parks and Forestry budget for partial expenses to conduct an Open Space Study. The City envisioned a partnership with the WSD and matched funds, as the City's portion may not be adequate to cover the cost of the study. The purpose of this partnership was to pay for a current study and coordinate plans and resources for recreational and open space throughout the City. Due to unforeseen WSD personnel changes, progress slowed.

The existing Recreational and Open Space Study was conducted in the 1990's by the Southeastern Wisconsin Regional Planning Commission (SEWRPC). The importance of having a current Recreational and Open Space Study is tied to future grant possibilities and the conservation of resources for thoughtful planning. This initiative is expected to move forward in 2015.

Determine what partners would like to participate in an open space facilities study

Deadline: March 2015

January 2015: Determine what partners would like to participate in an open space facilities study

- Wauwatosa School District administration and facilities personnel
- City of Wauwatosa administration and Parks and Forestry
- Milwaukee County Parks System
- Milwaukee Metropolitan Sewerage District
- Southeastern Wisconsin Regional Planning Commission

February 2015: The plan for next year is to reconvene the committee partners including the new WSD facilities personnel and other appropriate parties to secure a commitment from WSD to match the City of Wauwatosa funds.

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March 2015: In 2014, a request for proposal (RFP) was completed by the previous planning committee but not circulated. The RFP will be issued to conduct a current, collaborative Recreational and Space Study after which the recommendations will be reviewed and considered.

Create and release a request for proposal to engage a consultant

Deadline: March 2015

December 2014: In March, the committee will create and release a request for proposal to engage a consultant through the following steps: meet to review the RFP, issue the RFP, and consider the contractors through RFP review and interview; and select a contractor to conduct the study.

Review recommendations and build an implementation plan

Deadline: March 2016

December 2014: Will be completed once contractor is selected through RFP process.

Identify available funding options for projects

Deadline: March 2016

November 2014: $25,000 is set aside in the City's 2015 budget which is estimated to cover half of the study. A matching amount of $25,000 is being explored through future meetings with the WSD.

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2.1.2 Provide additional opportunities for public participation in civic matters

Deadline: September 2015

Develop a plan for expanding citizen participation in the budgeting process

Deadline: July 2015

November 2014: The Common Council asked the City Administration to look for ways to increase citizen participation in the 2015 Budget Process. Following are new steps taken for the fall 2015 budget process:

- For the first time in its current format, a preview of the upcoming budget was given to the Budget & Finance Committee in July, 2014;
- The City Administrator presented an overview of the budget to all the Alderpersons in a Committee of the Whole Meeting (COW) on September 11, 2014;
- The overview presentation was posted on the City website for the public;
- Press releases, articles in Wauwatosa Now and an e-blast to all neighborhood associations invited the public to attend the October committee meetings and the budget hearing on November 18, 2014;
- The City Administrator presented "Tosa 101," an overview of the budget at the Wauwatosa Recreation's Department's "Learning Never Ends" program for adults on October 28, 2014; and
- The City Treasurer created a budget game for November 2014 school tours.

Assessments will be conducted of these efforts and more opportunities will be explored to engage the public in the 2016 Budget Process.

Develop and implement a Citizen Academy – 'Civics 101'

Deadline: June 2015

November 2014: The pilot program "Citizen Academy: Get to Know Wauwatosa" was created to offer the public opportunities to learn more about and participate in the City of Wauwatosa initiatives. In collaboration with the Recreation Department (affiliated with the WSD), a program of 8 classes designed to highlight City programs and services and provide an overview of the City's history, culture, and new growth and development. The Citizen Academy is advertised in the Recreation Department Winter Catalog. City personnel, in collaboration with community partners, will teach the courses. The Citizen Academy will begin February 4, 2015 and conclude March 25, 2015 at which time graduation will be celebrated and certificates awarded. The cost of the program is $41. The program offering will be evaluated and revised as needed. The final agenda was finalized 12/2/2014. Speakers, schedules and locations of classes are in the process of being confirmed.

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2.1.3 Ensure optimal opportunities for housing in all stages of life

Deadline: Ongoing

Complete a housing inventory and market study

Deadline: December 2015

December 2014: The housing study is funded in the 2015 budget. The Request for Proposal will be reviewed and move to the Budget and Finance Committee in the first quarter of 2015. The housing study will be conducted by a selected partner consultant. Selection of the consultant we be done through a competitive RFP. The committee will track the progress.

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2.1.4 Create a communications plan and strategy for internal and external communications during routine operations and emergency situations

Deadline: TBD

November 2014: The City recognized the need to develop a comprehensive Communications Plan that supports the Common Council's vision and Strategic Plan; facilitates two-way communications with residents and businesses, and enhances internal communications with employees. An emergency operations communication plan currently exists and is in the process of being updated. An updated City of Wauwatosa Organizational Chart with lines of communication is needed. Communications procedures and guidelines should be established and reviewed and revised at least every three years. A Communications Committee will be established consisting of City Administration, the Mayor and some department directors to provide input into the plan. A comprehensive audit will be completed of the City communications tools, such as the website, social media, newsletter, and brochure. This new Communications Committee will also have access to the work performed throughout this year by the Ad-Hoc Marketing and Communications Committee created by the Common Council, and have their assistance as an advisory group.

December 2014: A meeting of the Communications Committee will be scheduled to create a comprehensive Communications Plan. Sample communication plans from other communities were compiled and will be reviewed by committee members in advance of the meeting. The police department has a social media and media policy; the health department has a routine communications plan and an emergency communications plan, which will be shared with the committee.

The draft social media policy is under review. In addition to the current legal and privacy language, additional content will include who can use social media, the process of getting an account (approval by department head and city administrator), and guidelines for use and allowed content.

Develop policies for internal and external communications

Deadline: 2015/2016

December 2014: Communication policies and procedures will be developed after the communications plan is completed since one drives the other.

Develop a process for communicating progress on capital projects

Deadline: December 2015

December 2014: The new communication plan and redesigned website and other venues will assist in communicating progress on capital projects and progressive initiatives that are going on in the City of Wauwatosa.

Increase utilization of the City website by external users

Deadline: December 2015

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November 2014: An e-communications team lead by Information Systems Director is working on the redesign of the City website. The City website usage increased 32% from October 2013 through October 2014, according to a report given at the November 21st meeting. The Police Department will be asked to join the group based on their communications needs. Potential vendors and platforms are under review with funding approved in the 2014 and 2015 budget. A small subset of this committee met to discuss updating prioritizing content make navigational improvements. Next meeting is scheduled for December 18, 2014.

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2.1.5 Maintain high aesthetics and standards for residential, commercial and industrial properties and green space to attract and retain residents and businesses in the City

Deadline: Ongoing

Review and expand the code enforcement programs in order to prioritize and proactively seek resolutions

Deadline: COMPLETE

December 2014: A full-time Code Enforcement Officer is in place. A review and revisions of the City Codes was just completed. The Code Enforcement Program has expanded from a complaint-based system to that of proactive. Inspections are seasonal. Studies will be conducted during the slower times of the year. Though this phase is 'complete' we will create a process under which this SPC continues to foster continuous improvement.

Educate the public on available housing rehabilitation program sources

Deadline: March 2015

December 2014: An internal meeting with Development staff will be scheduled during the first quarter of 2015 on how best to disseminate information to the public on resources, CDBG, and Milwaukee County housing rehabilitation program information. A decision was made to coordinate this with the communications plan and website revisions.

Re-evaluate the sign code for possible revision

Deadline: COMPLETE

December 2014: A review and revisions of the Sign Codes was just completed. It now also includes banners, sandwich boards and more.

Pursue opportunities on WisDOT projects to implement Community Sensitive Solutions (CSS), i.e., State acts as a partner during State construction project to identify the characteristics of a community by helping to maintain them

Deadline: August 2015

December 2014: The City will be proactive regarding the 1% WisDot funding earmarked in each specific project for Community Sensitive Solutions. This funding is set aside to pursue opportunities for improvements in the City such as crosswalks, pedestrian bridges, bike lanes, graphics, etc. Planning has already begun for the next largest WisDot project to impact Wauwatosa, WIS 100 Corridor Study, encompassing the expansion of South 108th Street and North Mayfair Road slated to begin in 2023. Discussions have already begun. The Mayor met with WISDOT Secretary Gottlieb on December 3, 2014 and the Governor's staff on December 8, 2014. A meeting with City planners and public works personnel, the Mayor and City Administrator is scheduled with the WIsDot Planning Group for December 22, 2014. WisDot will hold Public Involvement meetings to provide information to the public on January 20, 2015 for Wis 100 North – Watertown Plank Road to Silver Spring Drive and January 27,

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2015 for Wis 100 South – Layton Avenue to I-94. Further discussion will take place on what we have already done, how we stay involved, how to pursue opportunities, and guarantee the improvements.

Set aside 1% of the capital budget for CSS

Deadline: August 2015

According to the Department of Public Works Director, the State legislature may be pushing to eliminate the funds earmarked in the WisDot budget for Community Sensitive Solutions (CSS) and will be tracking it. The City will also set aside funds for CSS, the dollar amount to yet be determined. This may include monies already earmarked in the Bike and Pedestrian Facilities Plan.

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2.1.6 Strengthen our City image and reputation

Deadline: December 2015

Develop an implementation plan from the Ad-Hoc Marketing Committee recommendations for Council adoption

Deadline: January 2015

December 2014: The Ad-Hoc Marketing Committee has met for the past 1.5 years to review existing City communications and marketing materials and City's image. They made initial recommendations to the Community Development Committee during fall 2014. They are currently making modifications to their recommendations and the next step will be presenting them to Budget and Finance Committee in early 2015. Their progress will be monitored and they will offer assistance to the new Communications Committee.

Consolidate and expand existing communications resources

Deadline: December 2015

December 2014: Communications resources consolidation of existing resources will be made part of the overall communications plan to use existing resources as efficiently as possible. See above.

Re-evaluate participation in Visit Milwaukee

Deadline: June 2015

December 2014: Questions about continued participation in Visit Milwaukee (VM) were raised by the Common Council during the 2015 budget review process. A group within the City was established to discuss local needs consisting of City Attorney, Police Chief, Health Officer, Aldermanic liaison, Mayor and Development Director This group met on December 11, 2014. An overview of how the funding works for VM, what the City contributes and possible legislative changes coming in 2015 were discussed. Also discussed were possible alternative solutions if VM contract with Wauwatosa was not extended. The next steps will be for VM Board members, Development Director, Alderman, and Mayor to continue to stress to the VM Board at the January 2015 how serious our Common Council is in revaluating our relationship and contract. The Mayor will also convey this message to the VM Executive Board meeting in February. VM will be asked to prepare a report for the Common Council at the end of the first quarter of 2015 documenting all promotion efforts for Wauwatosa and costs associated with them.

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2.1.7 Preserve and improve the health and safety of the community through a Healthy Wauwatosa

Deadline: December 2016

Adopt the 2011 City of Wauwatosa Community Health Assessment and the 2014-2017 City of Wauwatosa Community Health Improvement Plan as an addendum to the larger City of Wauwatosa Plan

Deadline: June 2015

November 2014: The City of Wauwatosa Community Health Assessment and Health Improvement Plan are official survey documents on the health of the community and health priorities. They will be adopted as a supplement the City's Comprehensive Plan.

Implement the Community Health Improvement Plan and link it to larger City initiatives, i.e., bike/pedestrian facilities plan, Safe Routes to School, Invest in Wellness, etc.

Deadline: December 2017

November 2014: The City of Wauwatosa Community Health Assessment was completed in 2011 to examine primary and secondary data about the health and wellbeing of our community compared to the state and the nation. The document provides insight as to how to move forward to support the strengths and address health needs of the community. The City of Wauwatosa Community Health Improvement Plan was completed in 2013 and serves as a follow up document to identify priorities and set out a plan to address the priorities in partnership with the community. These documents, special surveys, the WHD Strategic Plan, and WHD Annual Reports can be found online at www.wauwatosa.net/healthdata

Community Health Assessment: http://www.wauwatosa.net/DocumentCenter/Home/View/2140

Community Health Improvement Plan: http://www.wauwatosa.net/DocumentCenter/View/2697/

The planning and implementation process is outlined in the health improvement plan. Health Department staff created logic models for all priorities. A Mayor's Forum is being planned for February 17, 2015 to meet with community partners and report progress. Wauwatosa Health Department personnel participate in, monitor, and report off on progress which is included in the Health Department Annual Report. http://www.wauwatosa.net/DocumentCenter/View/3030

Participate in collaborative initiatives for health and safety with health, fire, police, human resources, library, development and other yet to be determined departments

Deadline: December 2017

November 2014: Police, Fire, and Health Departments have a long-standing history of collaborating on health and public safety. A health department grant funds police wages to conduct retail compliance checks with students twice a year for tobacco and alcohol sales. The purpose is to discourage illegal sales to minors in our community. In addition, the police conduct random drug searches in the schools.

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The Health Department will conduct the Youth Risk Behavior Survey in collaboration with the Wauwatosa School District (WSD) during the first quarter of 2015. The survey asks high school students about health practices, risk behaviors, and helps to identify concerns that need to be addressed by the community. The health department analyzes the data and prepares a summary report for the School District. Fire, Police, and Health are members of the WSD's Tosa United which addresses youth alcohol, drugs, and tobacco and safety issues.

The Police and Health department work together to address unintentional injuries and death for infants and minors. Police, Fire, and Health work together to address human health hazards, including hoarding situations. Animal bites, which create potential rabies exposures, and dangerous/vicious dog declarations are reported and enforced jointly by health and police. In 2014, the Police and Health department teamed up to purchase and advertise the permanent prescription drug drop box, located at the Police Department. The Fire Chief and Health Officer meet monthly to discuss potential collaborative health and safety efforts. The Fire Department conducts CPR/AED recertification courses for health department personnel.

The Health Department and Library partner to offer health programming to children of all ages through a number of coordinated initiatives. The Health Department partners with Human Resources and the Invest in Wellness Program by providing selected vaccines for city workers in addition to multiple flu clinics. The Health Department clinic area is used for the annual health risk assessments and biometric screening.

Most recently, health, fire/EMS, and police conducted joint planning to address the Ebola response effort. The Health Department worked with Froedtert Hospital and Children's Hospital of Wisconsin, our regional Ebola treatment centers, to prepare for an event if it should happen.

Engage citizens in a culture of health and safety

Deadline: December 2015/2016

December 2014: Community-based initiatives are taking place and will be reported out at the February 17, 2015 forum. Larger initiatives will be planned in the coming months to engage the community around health and safety.

City Administration conducted the National Citizen Survey in 2012 and has a desire to conduct a new survey in 2016. This survey provides results on the community quality of life, service delivery, civic participation and perceptions about public safety. Administration will determine if funding is available for 2016.

The Health Department and Fire Department are in the process of preparing for national accreditation which provides benchmarks for service excellence and quality improvement. The health department accreditation is through the Public Health Accreditation Board. All evidence will be electronically loaded by the end of February 2015 after which a site visit will be scheduled.

PHAB Accreditation http://www.phaboard.org/wp-content/uploads/PHAB-Standards-and-Measures-Version-1.01.pdf.

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Develop a communication/marketing plan for promotion of Healthy Wauwatosa initiatives including social media/marketing

Deadline: December 2015

December 2014: The Police Department has a social media and media policy. The Health Department created a Routine Communication Plan and has a marketing plan for health events. The Health Department, Police Department and Fire Department are collaborating on an internal grant to establish a social media policy and procedure for City business. The departments will pilot a social media site, followed by the police and fire departments. Although the police department currently has a Facebook page, it will be reviewed to assure conformity to the City policy which is in the process of being finalized by City administration.

Report the results of a comprehensive Healthy Wauwatosa Initiative and outcomes in the City of Wauwatosa Health Department Annual Report

Deadline: Annual

November 2014: The WHD issues an annual report which is posted on the health web page. The report is a culmination of data, trends, and accomplishments throughout the year. In the 2013 report, we added performance management indicators to be tracked through 2017.

http://www.wauwatosa.net/DocumentCenter/View/3030

Currently, in addition to the Health Department, the Police Department, Fire Department, and the Board of Public Works create and post annual reports on the City's website. In October, 2014, the City Administrator began a monthly report which is also posted on the website.

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Community of Choice: Goal and Action Step Tracking Sheet

Community of Choice

2.1 Grow and expand on the qualities that make our community distinct and uniquely attractive

Activity	Champion	Jan-15	Mar-15	Jun-15	Jul-15	Aug-15	Sep-15	Dec-15	Mar-16	Dec-16	Dec-17
2.1.1 Optimize and identify public investment opportunities for recreation and open space facilities	Health Officer										
Determine what partners would like to participate in an open space facilities study	Health Officer										
Create and release a request for proposal to engage a consultant	Health Officer										
Review recommendations and build an implementation plan	Health Officer										
Identify available funding options for projects	Health Officer										
2.1.2 Provide additional opportunities for public participation in civic matters	Mayoral Assistant										
Develop a plan for expanding citizen participation in the budgeting process	Mayoral Assistant										
Develop and implement a Citizen's Academy – 'Civics 101'	Mayoral Assistant										
2.1.3 Ensure optimal opportunities for housing in all stages of life	Development Director										
Complete a housing inventory and market study	Development Director										
2.1.4 Create a communications plan and strategy for internal and external communications during routine operations and emergency situations	Mayoral Assistant										
Develop policies for internal and external communications	Mayoral Assistant										
Develop a process for communicating progress on capital projects	Mayoral Assistant										
Increase utilization of the City website by external users	Mayoral Assistant										
2.1.5 Maintain high aesthetics and standards for residential, commercial and industrial properties and green space to attract and retain residents and businesses in the City	Development Director										
~~Review and expand the code enforcement programs in order to prioritize and proactively seek resolutions~~ COMPLETE	Development Director										
Educate the public on available housing rehabilitation program sources	Development Director										
~~Re-evaluate the sign code for possible revision~~ COMPLETE	Development Director										
Pursue opportunities on WisDOT projects to implement community sensitive solutions (CSS), i.e., State acts as a partner during State construction projects to identify the characteristics of a community by helping maintain them	Development Director										
Set aside 1% of the capital budget for CSS	Development Director										
2.1.6 Strengthen our City image and reputation	Mayoral Assistant										
Develop an implementation plan from the Ad-Hoc Marketing Committee recommendations for Council adoption	Mayoral Assistant										
Consolidate and expand existing communications resources	Mayoral Assistant										
Re-evaluate participation in Visit Milwaukee	Mayoral Assistant										
2.1.7 Preserve and improve the health and safety of the community through a Healthy Wauwatosa Initiative by 2017	Health Officer/Fire Chief										
Adopt the 2011 City of Wauwatosa Community Health Assessment and the 2014-2017 City of Wauwatosa Community Health Improvement Plan as an addendum to the larger City of Wauwatosa plan	Health Officer/Fire Chief										
Implement the Community Health Improvement Plan and link it to larger City initiatives, i.e., bike/ped plan, Safe Routes to School, wellness program, etc.	Health Officer/Fire Chief										
Participate in collaborative initiatives for health and safety with health, fire police, human resources, library, development and other yet to be determined departments	Health Officer/Fire Chief										
Engage citizens in a culture of health and safety	Health Officer/Fire Chief										
Develop a communication/marketing plan for promotion of Healthy Wauwatosa initiatives including social media/marketing	Health Officer/Fire Chief										
Report the results of a comprehensive Healthy Wauwatosa Initiative and outcomes in the City of Wauwatosa Health Department Annual Report	Health Officer/Fire Chief										

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

City of Wauwatosa

PREFERED LOCATION FOR CONDUCTING BUSINESS

REVISED: 12/12/2014

3.1 FOCUS ON BUSINESS RECRUITMENT AND EFFECTIVE GROWTH MANAGEMENT PRACTICES AND POLICIES

3.1.1 Explore efficient modes of transportation to move people

Deadline: Ongoing

Form a bike/pedestrian workgroup with the intent to develop an implementation plan

Deadline: April 2015

December 2014: The implementation of the City of Wauwatosa Bike/Pedestrian plan was referred to the Traffic and Safety Committee for discussion on January 13th 2014.

The Development Director will prepare a document outlining the make-up of the Implementation Bike/Pedestrian Plan Task Force.

Create a transit survey and survey community groups

Deadline: December 2016

December 2014: The Public Works Director contacted Milwaukee County Transit System to determine if they have any information that may be useful in developing a relevant survey for Wauwatosa.

Develop a TOSA streets policy for Council consideration

Deadline: December 2015

December 2014: A primary function of the Bike/Pedestrian workgroup will be to move forward a Complete Streets Ordinance through the Traffic and Safety Committee.

Continue to partner with WisDOT, SEWRPC, and other groups to understand traffic patterns and appropriate routing

Deadline: Ongoing

December 2014: The Public Works Director will invite other City staff members and coordinate with other agencies such as MMSD, Milwaukee County, SEWRPC, etc. to better understand traffic routing and patterns from other perspectives.

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

3.1.2 Foster business development through proactive strategies

Deadline: TBD

December 2014: The plans for these goals and action steps are still being finalized. The work will be complete by the end of January.

Identify and plan for areas with low-value density development

Deadline: TBD

Implement economic development investment program guidelines

Deadline: January 2015

Create and implement marketing and business recruitment program

Deadline: TBD

Create and implement a business retention program

Deadline: TBD

Initiate a development survey instrument to gather business feedback

Deadline: April 2015

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

3.1.3 Review the state of major plans and studies

Deadline: Ongoing

Create an inventory of active plans that have remaining action items

Deadline: June 2015

December 2014: Department heads will be contacted and asked to provide electronic copies of any plans produced by respective departments, a status report related to plan action items, and the primary staff liaison for these plans. The plans will be located in an accessible shared folder.

Complete an annual report showing progress of major plans, including the North Avenue Plan and Village Plan

Deadline: December 2015

December 2014: Working with the applicable department liaisons, develop a notification system to coordinate annual plans reports and determine the audience, best method, and timing for status updates of each plan (including, but not limited to, the Comprehensive Plan, Community Health Improvement Plan, Village Plan, East North Avenue Plan, TIF project plans, Open Space Plan, and Capital Improvements Plan).

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Preferred Location for Conducting Business: Goal and Action Step Tracking Sheet

Preferred Location for Conducting Business

3.1 Focus on business recruitment and effective growth management practices and policies

Activity	Champion	Jan-15	Mar-15	Apr-15	Jun-15	Dec-15	Dec-16
3.1.1 Explore efficient modes of transportation to move people							
Form a bike/ped workgroup with the intent to develop an implementation plan							
Create a transit survey and survey community groups							
Develop a TOSA streets policy for Council consideration							
Continue to partner with WISDOT, SEWRPC, and other groups to understand traffic patterns and appropriate routing							
3.1.2 Foster business development through proactive strategies							
Identify and plan for areas with low-value density development							
Implement economic development investment program guidelines							
Create and implement a marketing and business recruitment program							
Create and implement a business retention program							
Initiate a development survey instrument to gather business feedback							
3.1.3 Review the state of major plans and studies							
Create an inventory of active plans that have remaining action items							
Complete an annual report showing progress of major plans including the North Avenue and Village Plan							

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

City of Wauwatosa

ORGANIZATION DEFINED BY EXCELLENCE

REVISED: 12/12/2014

4.1 IMPLEMENT EFFICIENT AND EFFECTIVE SERVICE DELIVERY MODELS AND CUSTOMER SERVICE BEST PRACTICES

4.1.1 Foster a culture of continuous improvement using performance management systems

Deadline: December 2018

December 2015: Collaborate with the City of Great Services Committee to launch this effort. Tasks include:

- Gather information on performance measures proposed by Department Directors (aligned with--SMART goals)
- Request additional performance measures (where needed & applicable) to monitor internal customer service & performance
- Budget for any funds needed during 2016
- Ensure proper indicators by having the City Administrator work with Department Directors on performance indicators are effective & aligned with the City's vision & mission.
- Request that Department Directors continue to gather and provide information to benchmark proposed performance measures and compare it to peer government entities. Evaluate usefulness of the benchmarks against the City's proposed performance measures.
- Gather additional benchmarking & performance data by Department Directors where needed.

Future Direction

December 2016:

- Refine department director performance measures to more closely align with their departmental benchmarks.
- Evaluate how departments are doing against their internal customer service & performance benchmarks to determine a baseline.
- Make a plan for performance improvement with Department Directors where needed.

December 2017

- Conduct a follow up evaluation of how departments are doing against their internal customer service & performance benchmarks.

Analyze the Common Council committee structure

Deadline: TBD

Attachment: 2014 Strategic Planning REPORT (7) (2) (2675 : Admin. Annual Review, Part 1)

Establish a Quality Improvement Committee to champion, oversee and evaluate projects that result in more efficient and effective business practices

Deadline: December 2016

December 2015:

- Form a committee to oversee this effort
- Determine the best way to utilize the $25,000 from the 2015 budget for a consultant and assure the work is completed
- Explore potential grant funding from the State and other sources
- Review completed City Lean projects to evaluate the effectiveness of the changes
- Determine if additional training is needed to broaden the number of City personnel involved in Lean projects.

Develop a document management process for more efficient keeping of records and process flow

Deadline: December 2019

December 2015:

- Form a committee to oversee this effort
- Determine the best way to utilize the $25,000 budget for a consultant to assess the City's document management needs and assure the work is completed
- Submit a budget request for any funds needed to continue pursuing this project in 2016

Future Direction

2016:

- Select a document management system after a thorough review of options
- Design the system organization structure
- Plan, implement, and train the organization
- Submit a 2017 budget request for the purchase and first phase implementation of the system

2017:

- Oversee the implementation of the system for piloted City departments
- Evaluate the pilot to determine effectiveness
- Submit a 2018 budget request for any costs associated with the second phase of system implementation
- Coordinate training and refine system as needed

2018 & 2019:

- Continue implementation in planned phases

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4.1.2 Review City Hall and Civic Center Master Plan Study

Deadline: January 2015

October 23, 2014: The Public Works Director submitted a memo to the Budget and Finance Committee to assist Committee members in understanding the 2010 City Hall and Civic Center Master Plan Study, what had been done to date and next steps to complete the study recommendations.

At that time, the Committee asked for a final estimate for refurbishing the Administrative wing of City Hall and to assist in the decision to continue the project. The committee requested that staff ask the developer, HSI, Inc., of the East Branch of the Milwaukee Public Library/The Standard @ East Library to provide an outlook on the resources and effort to complete this type of mixed-use project.

Identify completed work and what remains to be finished

Deadline: January 2015

October 23, 2014: The Public Works Director-, submitted a memo to the Budget and Finance Committee to educate them on past plans to improve City Hall. The status of completion included Development, Engineering, Public Health, and Planning. The renovated spaces have new lighting, flooring, floor plans and control systems.

A number of other projects have been undertaken, or are in the process of being done. These facility-wide projects include: mechanical upgrades to dampers, control valves, an emergency generator and boilers.

Future Direction:

Approximately $350,000 in the 2015 Capital Budget was set aside to remodel the Administrative wing of City Hall. Additional mechanical upgrades in the amount of approximately $130,000 were included in the Capital Budget over the five- year period of 2015-2019.

The remaining departments of Finance, Water, Assessors, and City Clerk's will be completed as one project due to the integrated nature of future uses. The estimated cost of this project is approximately $835,000. It is anticipated through the Capital Budget that the design work for this project would be completed in 2017, with the demolition and construction scheduled for 2018-2019.

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4.1.3 Develop a high- performing organization through strategic employee development and compensation programs

Deadline: Ongoing

Develop and support leadership qualities of employees throughout the organization

Deadline: Ongoing

December 2014: The initial framework for this strategy was developed and implemented during 2013 and 2014 and will be an ongoing initiative to maintain a culture that expects and supports leadership through organized workforce development training and performance evaluation.

- As a part of a new City initiative called "Project Leadership", employee groups developed leadership competencies for all levels of the organization in 2013 and 2014.
    - Front-line employees
    - Professional non-supervisors
    - Supervisors
    - Directors/Administrator
  - Competencies are incorporated into the performance management process. The first application of the competencies as a part of the evaluation process is scheduled for March/April 2015.
  - Leadership competencies comprise 50% of the performance evaluation criteria with an emphasis on "how" you do your job separate from "what" you do.
  - Input resources included professional consulting services, employee time for meetings and HR support. Output is the leadership competence.
  - The desired outcome is a visible transformation of the organization – higher levels of customer service, productivity and professionalism.
- Leadership training.
  - In 2014, the City established leadership training for all employees and supervisors.
    - On-site training by HR/Consultant on approximately a quarterly basis

Develop and implement a compensation plan that motivates and retains high performing employees

Deadline: December 2015

December 2014

- A wage compensation study was conducted in 2013 and implemented in 2014 for the purpose of assuring wages were competitive with the market.
  - Performance pay was added as a new strategy to what had been a step and grade system, which awarded pay increases based on longevity.
  - A PILOT program conducted in spring of 2014 in which performance criteria were developed and discussed with employees, but no pay was attached to the process.
  - In 2015, the performance evaluation process will include performance pay.
  - Pay policies were modified to be more flexible to support recruitment and retention efforts related to high performing employees.

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- Pay adjustments were made to several positions that were not in line with the market.
- Analyses of the first year of performance pay under new plan to be conducted by the end of 2015.
- Inputs included professional consulting services, HR staff time, employee time to learn and implement system.

Evaluate, and modify as appropriate, employee benefit programs to enhance retention and recruitment

Deadline: December 2016

December 2014

- Conduct an employee survey to determine what benefits most influence employee satisfaction
- Evaluate the same issue in applicants, i.e., why do they want to work here and what role does the benefit package play?
- Evaluate retirement benefits as they contribute to attracting and retaining (High Priority).
- Evaluate what other successful organizations include in benefit packages (public and private)
- Attempt to positively distinguish the City's benefit package from others
- Inputs included professional consulting services, HR staff time. Outputs: results from analysis. Outcome: modern benefit package that enhances retention and recruitment.

Develop a robust employee development program for the entire organization that provides professional development opportunities designed to foster a high-performing workforce

Deadline: December 2015

December 2014

- Created "Invest in People" employee development program
  - Re-directed funds to create budget-neutral program
  - Created Employee Development Steering Committee that included city personnel represent all operational areas.
    - Committee met during 2013 to discuss departmental and city needs and determine the content and type of development program would be successful at the City
    - Created program concept and evaluated how to roll-out program
  - Inputs included the Committee member time, professional consulting services, and HR staff time, and evaluation time Output is the "Invest in People" employee development programs.

The Invest in People program was implemented in 2014 and the first year of program will be evaluated by the end of December 2015.

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4.1.4 Develop policies that foster and support high-performing workforce

Deadline: December 2016

December 2014

- Articulate overall strategic objectives of what policies are to achieve before focusing on individual policies.
- Focus on desired workforce outcomes
- Conduct a gap analysis of existing policies prior to updating policies and procedures
- Identify and incorporate legal compliance issues
- Explore templates used by other communities and City of Wauwatosa departments
- Create a common policy and procedure format for the Establish a system of police review and revision and track dates of activity on the policy documents
- Create policies and procedures where gaps exist.
- Conduct training on City policies and procedures for all new employees upon hire and for all employees upon the creation or revision of any policy to assure internal communication.
- Create a 3-year policy review cycle to assure that policies and procedures are continually reviewed and revised
- Inputs: Create committee to champion this project. Staff time to research. May need staffing resources if current staff cannot make this commitment- possible intern. Output: strategic and operational policies and procedures with review and training cycles. Outcome: policies that support and foster a high-performing workforce.

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Organization Defined by Excellence: Goal and Action Step Tracking Sheet

Organization defined by Excellence

4.1 Implement efficient and effective service delivery models and customer service best practices

Activity	Champion	Jan-15	Mar-15	Jun-15	Dec-15	Dec-16	Dec-17	Dec-18	Dec-19
4.1.1 Foster a culture of continuous improvement using performance management systems	Senior Accountant								
Analyze the Common Council committee structure	Senior Accountant								
Establish a Quality Improvement Committee to champion, oversee and evaluate projects that result in more efficient and effective business practices	Senior Accountant								
Develop a document management process for more efficient keeping of records and process flow	Senior Accountant								
4.1.2 Review City Hall and Civic Center Master Plan Study conducted in 2010	Senior Management Analyst								
Identify completed work and what remains to be finished	Senior Management Analyst								
4.1.3 Develop high performing organization through strategic employee development and compensation program	Human Resource Director								
Develop and support leadership qualities of employees throughout the organization	Human Resource Director								
Develop and implement a compensation plan that motivates and retains high performing employees	Human Resource Director								
Evaluate, and modify, as appropriate, employee benefit programs to enhance retention and recruitment	Human Resource Director								
Develop robust employee development program for entire organization that provides professional development opportunities designed to foster high performing workforce	Human Resource Director								
4.1.4 Develop policies that foster and support high performing workforce	Police Lieutenant								

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City of Wauwatosa

RECOGNIZED AS REGIONAL, STATE AND NATIONAL LEADER

REVISED: 12/12/2014

5.1 IDENTIFY OPPORTUNITIES TO PURSUE GREATER INFLUENCE IN THE REGION, STATE AND NATION

5.1.1 Develop an annual legislative and policy/platform/strategy

Deadline: Ongoing

December 2014: The City Attorney will identify resources for keeping up with and maintaining the relevance of legislative information. The primary focus will be on State legislation, but also tracking Federal issues affecting the City, including Milwaukee County and other legislative bodies.

A legislative workgroup of City staff and elected officials, will track, monitor and direct action on legislative programs.

Identify annual Council priorities

Deadline: January 2015

December 2014: Present a recommended plan of legislative action to the Council in January 2015, or as soon as a place for legislative policy development is identified in a Council Reorganization Plan.

Efforts will be made to develop a dynamic list of legislative priorities for management by the Council, which will be adapted from League of Wisconsin Municipalities and other sources. Council will help to assign priorities and direct timeliness of actions.

Assign specific staff to monitor the priorities during the year

Deadline: February/March 2015

December 2014: Following identification of resources, the legislative workgroup will help to assign staff to ongoing monitoring of and response to legislative activities. They will include Council members to address specific issues of interest and help guide priorities between formal Council actions.

Create a policy to respond to timely and emergency legislative business

Deadline: January 2015

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December 2014: Create a process whereby staff or others are encouraged to bring potential legislative issues of interest to a central point of contact. Encourage the use of existing resources for purposes of identifying legislative issues in a timely fashion. Legislative issues should be described with a standardized format and set of information bill numbers, legislative champions, and other interested parties identified. The legislative workgroup will outline a process for special meetings or executive action in lieu of specific Council direction, based on timeliness concerns and other policy direction given in advance.

Identify Legislative Partners

Deadline: Ongoing

December 2014: The legislative workgroup will assemble contacts at key governmental and related agencies or organizations in preparation for specific contact needs related to legislative issues. The workgroup will formulate areas of common interest and synergies between organizations. They will track legislative information sources such as Wheeler Report to find others with common interests on issues of concern.

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5.1.2 Enhance our relationship with Milwaukee County and other regional partners

Deadline: Ongoing

December 2014: A list of shared services and arrangements is prepared annually during the budget process and will be examined and updated for efficiencies and gaps. There are multiple relationships at the administrative and department level which need to be captured so that the organization is aware of overlapping relationships and opportunities. This will be monitored at the administrative level with input from department directors.

Develop strategies to work with Milwaukee County on common issues (e.g., radios, water, disaster preparedness, etc.)

Deadline: Ongoing

December 2014: The City of Wauwatosa has many partnerships with Milwaukee County around emergency preparedness. A number of departments have 800 MHz radios (fire, police, DPW, water, health, others) and are connected into the Milwaukee County Emergency Management System. City Emergency Operations Plan and individual departmental emergency preparedness plans (i.e. health, fire, and police) have additional agreements that include memorandums of understanding and mutual aid agreements with not only Milwaukee County but other jurisdictions. The water and health department work with Milwaukee County on failed water samples related to County water infrastructure.

Hold regular meetings with elected officials and staff at different levels of government

Deadline: Ongoing

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5.1.3 Initiate and lead innovative collaborations and partnerships

Deadline: Ongoing

Develop a list of existing partnerships and collaborations

Deadline: June 2015

December 2014: Administration prepared a list of partnerships and active and past collaborations. The list is updated annually. Partnerships once made need to be nurtured and maintained.

Develop method to enhance and expand working relationships

Deadline: August 2015

December 2014:

- Research what other government agencies are doing to enhance their external and internal working relationships. Understand what projects partners are working on and how their investments can be mutually beneficial. Similarly, share information about City projects and how others may get involved. In this way, duplication is avoided and resources conserved when working toward mutual goals.
- Empower and educate staff on improving existing relationships and cultivating new ones.
- Efforts used in private enterprise may be identified as appropriate in the City environment
- Recognize that relationships require staff time and financial commitments and are not easily captured quantitatively through return on investment formulas.
- Use the concept of Entrepreneurial Government to supplement the cost of doing business, thus reducing the burden on taxpayers.
    - Explore opportunities to offer services we conduct efficiently to neighboring municipalities or related agencies.
    - Research tasks that don't yield themselves to normal efficiencies and seek other entities that may be able to manage them more efficiently due to specialization or volume.
    - Investigate resource sharing opportunities; including but not limited to, enterprise software and hardware. Identify other agencies that are working on upgrading their system and find sharing opportunities.
    - Look for process normalization and standardization, where appropriate, that could lead to less expensive solutions. Do not assume that an existing specialized process must remain unchanged thus requiring specialized software.

Coordinate communications among boards, committees and commissions

Deadline: August 2015

December 2014:

- Review current email distribution memberships to ensure appropriate dissemination of information
- Create a "Welcome Kit" for new memberships that:

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  - Highlight duties and responsibilities through job descriptions
  - Offer report, minutes, email, and project templates
- Investigate the need to create a digital "forum" to supplement physical meetings, offer an internet working space for memberships, and facilitate a single reference point for communications.

Collaborate with Milwaukee Regional Center

Deadline: Ongoing

December 2014: The recently announced, October 2014, hiring of Bob Simi as the Executive Director of Milwaukee Regional Medical Center (MMRC), will facilitate discussions with City staff on a variety of issues and services. The City Administrator is set to continue discussions in January of 2015. Those discussions may include:

- Fire Protection Services: Currently provided by the City of Wauwatosa under a 1980 agreement that will expire in 2040
- Police Services: Currently provided by Milwaukee County Sheriff
- Road and Transportation Infrastructure Services: Currently provided by Milwaukee County
- Snow Removal and Waste Management
- Water Utility Services
- Health Services: Food Inspection; collaboration with Infectious Disease Program Departments; member of with health care community improvement advisory board

Create a task force to, potentially, consolidate Milwaukee County Grounds Water Utility Providers, per Public Policy Forum Report

Deadline: Ongoing

December 2014: According to the Public Policy Forum, a regional organization with membership encompassing a wide range of individuals, nonprofit organizations, educational institutions, corporations, and state, county and municipal government agencies, the Milwaukee County Water Utility is the only utility managed by the County.

There are many factors complicating a transfer of the utilities ownership from the County to the City. Those issues are detailed in the report commissioned by the City of Wauwatosa and The Milwaukee Country Department of Administrative Services and completed in April of 2014. A task force comprised of representatives the three primary constituents: Utility users, City of Wauwatosa, and Milwaukee County, is to consider the report's finding and continue with the additional work needed to find an optimal solution can address issues for the constituencies. Until recently, the major missing piece was representation for the (MMRC-). This issue was resolved by naming an MMRC Executive Director in October of 2014.

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5.1.4 Identify associations, groups and organizations to participate in

Deadline: March 2015

Identify in what groups and organizations the City presently is a member

Deadline: June 2015

December 2014: Identify and create a list of all associations, groups and organizations of which staff, and the City as an entity' are currently members. On November 20, an email sent to all Department Directors, Department Heads and Common Council Members requesting them to submit a list and identify if memberships were included in 2015 budget.

Identify leadership roles and opportunities

Deadline: December 2015

December 2014: As part of the data collection effort, employees and Alderpersons are also asked to provide information on their status of each association, group or organizations; such as a Board Member or Chair of Committee.

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Recognized as Regional, State and National Leader: Goal and Action Step Tracking Sheet

Recognized as a Regional, State and National Leader

5.1 Identify opportunities to pursue greater influence in the region, state and nation

Activity	Champion	Jan-15	Mar-15	Jun-15	Aug-15	Dec-15
5.1.1 Develop an annual legislative and policy/platform/strategy	City Attorney					
Identify annual Council priorities	City Attorney					
Assign specific staff to monitor the priorities during the year	City Attorney					
Create a policy to respond to timely and emergency legislative business	City Attorney					
Identify legislative partners	City Attorney					
5.1.2 Enhance our relationship with Milwaukee County and other regional partners	Library Director					
Develop strategies to work with Milwaukee County on common issues (e.g., radios, water, disaster preparedness, etc.)	Library Director					
Hold regular meetings with elected officials and staff at different levels of government	Library Director					
5.1.3 Initiate and lead innovative collaborations and partnerships	IT Director					
Develop a list of existing partnerships and collaborations	IT Director					
Develop method to enhance and expand working relationships	IT Director					
Coordinate communications among boards, committees and commissions	IT Director					
Collaborate with Milwaukee Medical Regional Center	IT Director					
Create a task force to, potentially, consolidate Milwaukee County Grounds Water Utility Providers, per Public Policy Forum Report	IT Director					
5.1.4 Identify associations, groups and organizations to participate in	Mayoral Assistant					
Identify what groups and organizations the City presently is a member	Mayoral Assistant					
Identify leadership roles and opportunities	Mayoral Assistant					

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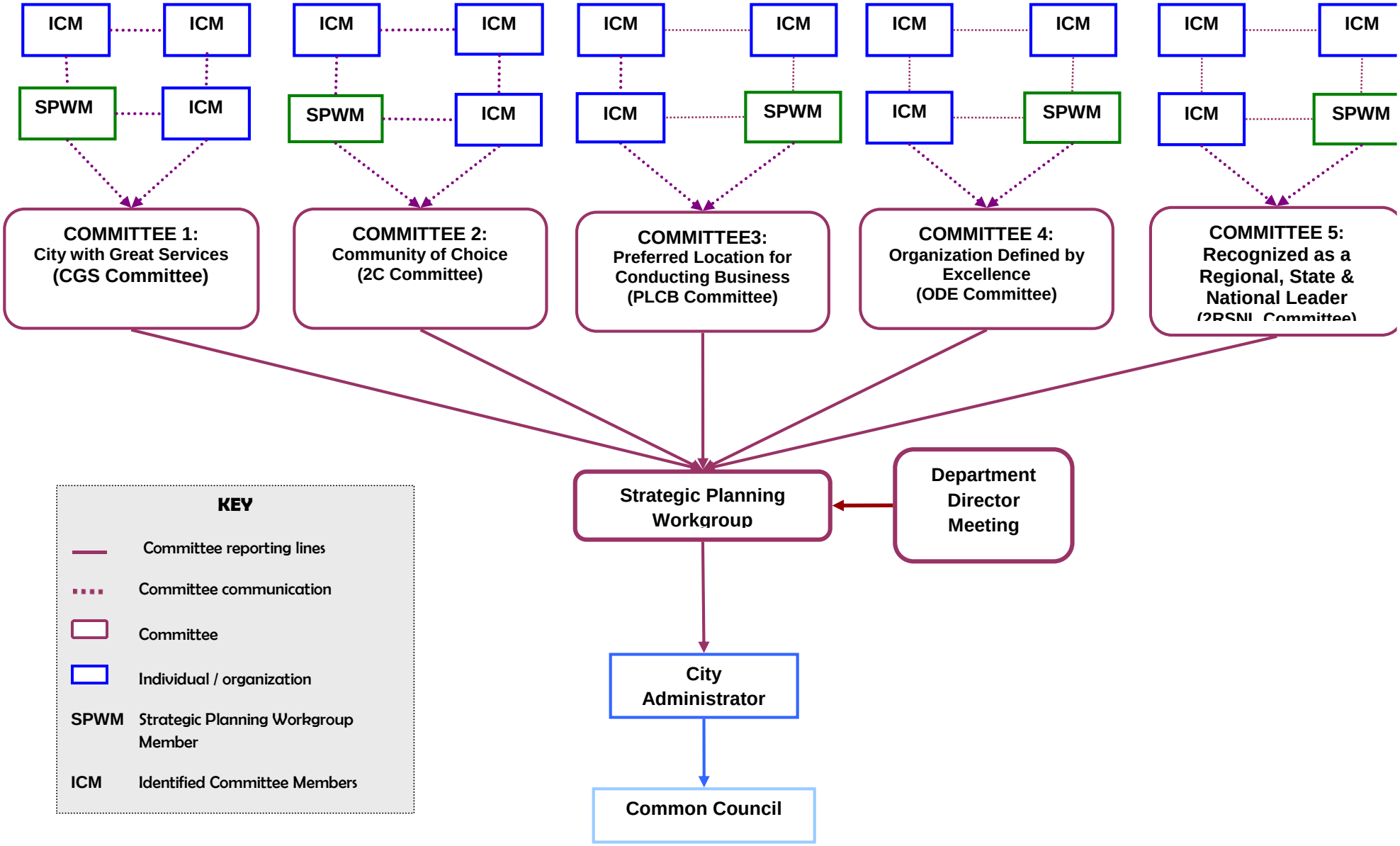
APPENDIX A: STRATEGIC PLANNING IMPLEMENTATION PROCESS – STRUCTURE



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City of Wauwatosa, Wisconsin
Strategic Plan
December 2014

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City of Wauwatosa, Wisconsin

Strategic Plan

Wauwatosa Vision

Excellence – Energy – Employment – Education. These words define the present and future citizen experience in the City of Wauwatosa.

We are strategically located in the middle of metropolitan Milwaukee, Wisconsin's economic center, and straddle Wisconsin's busiest freeway interchange, with unparalleled opportunities in economic development, retail, housing, and transportation. We are a national leader in research, engineering, manufacturing, medicine, and education. Our full-service city is recognized for efficiency, continuous improvement, and the ability to think globally and act locally. Our citizens represent all generations and all ethnic and racial groups, well-educated and committed to maintaining an unrivaled sense of community through active neighborhood groups, service organizations, and other volunteer initiatives.

Our die was cast in the 1850's, when Milwaukee County leaders created the County Grounds in what was then considered a remote hamlet; in the 1950's when the interstate highway system was planned; and in the 1980's [?] when the Medical College of Wisconsin moved to the County Grounds. Today, we again have a once-in-a-generation opportunity to re-shape, refine, and design our community for the 2050's. Looking to the future, we envision opportunities in business, recreation, the arts, parks, culture, tourism, and higher education. Balancing financial resources with public investment is our first priority, and we believe that expanding our tax and employment bases is the right way to ensure our long-term viability.

We foster strong relationships with neighboring communities and with our public and private schools, colleges, and businesses, recognizing that partnership and collaboration will be the key to our success. We will accomplish our vision through wise financial planning, progressive thinking, innovative solutions, deliberate risk-taking, and adherence to best practices. Our challenges are many and clear, but we are committed to effective planning to ensure that we will build a consensus for our future direction.

As stewards of our future, we have high expectations for ourselves, our citizens, and this special place we call Wauwatosa.

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 place it among the top 15 most populous cities in the state. Wauwatosa is strategically located in the center of the Milwaukee metropolitan area with excellent transportation access. The City takes great pride in being 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. Wauwatosa is home to Mayfair Mall – the largest and busiest mall in Wisconsin. The City of Wauwatosa features diverse neighborhoods, an excellent variety of housing stock, and thriving business districts. The City is recognized for its skilled professional staff and municipal services, excellent schools, the civic engagement of its citizens and a quality of life second to none.

Attachment: 2014-12-12 Wauwatosa Strategic Plan FINAL (2675 : Admin. Annual Review, Part 1)

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 a statement from March 15, 2013. He stated the purpose of the plan is to, "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, timely, 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 will shape its foundation for the future. 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; Hart Park Plan; Innovation Campus Plan; Economic Development Plan and a City Hall Master Plan. In addition, "W*e* 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 (completed). The discussion will combine fiscal realities with our community priorities (completed). 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 (by March 31, 2014). The final plan will set the City's strategic direction for the next five years.

What is a Strategic Plan?

A strategic plan is a means to organize all of priorities of the city into one document. A strategic plan is complementary to the Comprehensive Plan and the other planning tools used by city leaders. A strategic plan organizes the priorities, programs and services into common themes and then presents strategies and goals to ensure there is a clear road map for the future. 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 methods used in strategic planning are a means to an end; the City's process was designed to identify the most important priorities and goals of the City and community. There are many benefits to strategic planning; the top five primary outcomes for the City are:

- Create an organizational vision and coalesce the elected officials around a common direction
- Provide a *written road map* to record and document the direction
- Improve the Council and staff's ability to focus on the most important priorities and issues

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- Provide a means to ensure that limited resources are allocated wisely
- Improve accountability and capacity to measure performance and outcomes

Planning Process

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 20 steps. (This section will be updated as the process moves forward and will be finalized when it is completed.)

- Ongoing 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 26th and June 27th
- 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 at regular meeting on October 15
- Common Council work session on October 22
- Common Council work session on November 7
- Create the Second Draft of the Strategic Plan
- Common Council work session on December 4
- Create the Third Draft of the Strategic Plan
- Presentations by the Mayor and City Administrator to community groups
- Common Council work session on March 18
- Create the Fourth Draft of the Strategic Plan
- Department Director briefing on March 19

Strengths and Challenges

The Common Council reviewed the list of 21 *Strengths and 23 Challenges* that resulted from the Mayor, Council and staff interviews (June 2013). Testimony ensured that there are many features of Wauwatosa that are noteworthy and important. For the task of strategic planning, the Common Council was charged with identifying, as a group, what are the *top five* factors in the two categories. (The original list of 21 *Strengths* and 23 *Challenges* is retained in the project file.) In an open conversation, the members organized and identified the following top items as the City of Wauwatosa's greatest strengths and most important challenges within this strategic planning process. The list is not in any order or preference.

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Wauwatosa Strengths

- **Sense of community** – history, distinguished place; neighborhoods, urban and small town feel
- **Geographic location** – location; proximity to regional and major amenities
- **City with momentum and action** – economic diversity, reputation and pro-active thinking; younger families moving in
- **Facilities and institutions** – county grounds, college and medical campuses
- **Community assets** – city staff; public safety; neighborhood associations; public and private schools

Wauwatosa Challenges

- **Manage growth and economic development –** general economy**;** tools and policies; ordinances and standards
- **Preserve essential services with fiscal constraints –** levy limits; fiscal deficit; impact of state policies; staff bench strength
- **Maintain infrastructure –** cost to replace lines; redevelopment pressures; underground needs
- **Expand citizen engagement and involvement –** be creative; explore best practices; reach out to all generations
- **Geographically land-locked –** high number of state highways; traffic congestion; relationship with Milwaukee County

Vision Statements

The vision of the City is described in the following five vision statements.

- Wauwatosa: *A City with Great Services*
- Wauwatosa: *A Community of Choice*
- Wauwatosa: *The Preferred Location for Conducting Business*
- Wauwatosa: A*n Organization Defined by Excellence*
- Wauwatosa: *Recognized as a Regional, State and National Leader*

Strategic Elements

The following five strategic elements translate the vision into specific objectives and goals. Simply, they are action-oriented and ensure the vision becomes a reality. These elements were determined based on the input from all city officials, most notably the input from the outcome of the October 22 Common Council work session.

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

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Goals

The five vision statements and strategic elements will be implemented through goals. Initial goals were identified early in the process. The Common Council has directed the city staff to develop the goals in greater detail. The goals represent short, medium and long term investments of time and resources in pursuit of the City of Wauwatosa's vision. Goals will return to the Council for review and approval in the coming weeks.

Implementation

The role of the Common Council in implementation of the strategic plan includes the following key principles:

- Champion and take ownership in the plan
- Formally take action to adopt the Plan
- Communicate with the staff and public
- Include plan in new Council orientation
- Ensure resources are allocated for action steps
- Identify accountability measures
- Periodically review the Plan

The role of the staff in the implementation of the strategic plan includes the following key principles:

- Understand the value
- Support the Common Council
- Accept responsibilities
- Integrate in operations
- Immerse in the culture
- Provide regular updates

The role of Administration in the implementation of the strategic plan includes the following key principles:

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

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Implementation Process

This section is meant to give a brief timeline of the implementation process as it moves forward.

- Strategic Planning Workgroup Meeting to brainstorm goals and action steps on May 22
- Strategic Planning Workgroup Meeting to continue to develop goals and action steps on June 27
- Committee of the Whole to discuss goals and action steps on July 22
- Strategic Planning Workgroup Meeting Goals and Action Steps Work Plan meeting on August 1
- Strategic Planning Workgroup Meeting to determine how the goals and action steps should be assigned on August 24
- Strategic Planning Workgroup Meeting to make final decision about plan for goals and action steps on November 7
- Strategic Planning Committee Orientation on November 18
- First Strategic Planning Report to Common Council

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

VISION: WAUWATOSA – A CITY WITH GREAT SERVICES

Strategy: Preserve and *MAINTAIN* our essential 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 form their opinion about their city based on how well the core services are provided – often times reflecting that the "other work is just 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 City 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. City leaders know that maintaining excellent services will require an expansion and growth in the tax base. Now more than ever, for the vision to become a reality, the question of "How to pay for our services must be answered?" To that end the Common Council is committed to finding the right balance given limited resources and a broad array of essential priorities. *The City's vision is to be a city with great services.* For Wauwatosa, this is defining the core services, determining priorities and allocating sufficient resources to get the job done.

Qualities and Characteristics

The following list represents qualities and characteristics within this strategy and goal.

- Levy limits
- Financial capacity
- Workforce capacity
- Cross-department collaboration
- Outcome focused accountability
- Shared services
- Multi-model transportation systems
- Leverage information technology
- Prioritize infrastructure needs
- Data-driven decision-making
- Technology
- Community consensus
- Police and law enforcement
- Fire and emergency services
- Infrastructure funding
- Prioritize city services
- High tax exempt land value 38%
- School District relationship

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City of Wauwatosa, Wisconsin

Strategic Plan

Goals

1. ***Develop a performance management system***

Action Steps	Assigned	Deadline
Identify existing outcome measures for City services with the assistance of department directors		June 2015
Create and implement new outcome measures for City services, if necessary		December 2015
Develop a performance dashboard for the City website and internal usage		September 2015
Develop an annual performance report based on identifiable and measurable criteria		December 2015

2. ***Transition from existing budgeting practices***

Action Steps	Assigned	Deadline
Assemble books, articles and case studies for review		March 2015
Update Five-Year Forecast with model that eliminates the structural deficit. Present to Budget Committee and receive feedback on tolerance level to undertake changes necessary to eliminate the structural deficit.		March 2015
Develop charter and action plan for Advisory Committee. Focus will be on action-orientated meetings that have clear decision points.		March 2015
Recruit Advisory Committee		March 2015
Assemble books, articles and case studies for review		March 2015
Review and discuss literature with Committee		March 2015
Meet with three other jurisdictions that have successfully implemented alternate budget strategies		June 2015
Identify high-level framework for new budget system		June 2015
Present framework to Department Directors for feedback		June 2015
Present framework to Budget Committee for feedback		June 2015
Finalize framework		August 2015
Develop departmental template for framework		August 2015
Develop process for implementing framework including detailed budget calendar		August 2015

Determine how GEMS will support framework		August 2015
Train Organization		December 2015
Departments work on budget request utilizing new framework		June 2016
Produce initial 2017 Budget using new framework		December 2016
Evaluate process; document and make adjustments for 2018		December 2016

3. ***Develop a private property inflow and infiltration policy for sewer overflows during weather events***

Action Steps	Assigned	Deadline
Develop policy options including financing strategies for Council consideration		April 2015
Seek and apply for grant opportunities		Ongoing

4. ***Pursue multi-jurisdictional collaborations and partnerships***

Action Steps	Assigned	Deadline
Update the City's shared services inventory		March 2015
Identify services and programs by department (inventory of what the City does and why)		August 2015
Develop a means to rank each functional activity for greatest shared services opportunities		January 2016
Define a shared services strategy, or priorities		December 2017
Reach out and markey opportunities to other communities and businesses		TBD
Expand partnership with Wauwatosa School District (open space study)		December 2015

5. ***Expand the tax base significantly ($125-$250 million though the end of 2019) through proper land use in a defined and thoughful manner***

Action Steps	Assigned	Deadline

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Develop value density zoning districts within the zoning code and comprehensive plan to encourage these types of developments		TBD
Align City economic development investment programs with the identified opportunity areas		TBD
Conduct a Mayfair Corridot Study (including the Northwest Quardrant of the Milwaukee County Grounds)		TBD

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

VISION: WAUWATOSA – 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 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" our 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 distinguished characteristics we offer in *east and west* Tosa. City leaders recognize the importance of celebrating the differences that exist in our community whether they are geographic, demographic or generational. We have an influx of younger families moving into our city and from this base we will seek and find the next generation of community leaders. *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 strategy and goal.

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

Goals

1. ***Ensure optimal opportunities for housing in all stages of life***

Action Steps	Assigned	Deadline
Complete a housing inventory and market study		December 2015

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City of Wauwatosa, Wisconsin

Strategic Plan

2. ***Optimize and identify public investment opportunities for recreation and open space facilities***

Action Steps	Assigned	Deadline
Determine what partners would like to participate in an open space facilities		March 2015
Create and release a request for proposal to engage a consultant		March 2015
Review recommendations and build an implemenation plan		March 2016
Identify available funding options for projects		March 2016

3. ***Provide additional opportunities for public participation in civic matters***

Action Steps	Assigned	Deadline
Develop a plan for expanding citizen participation in the budgeting process		July 2015
Develop and implement a Citizen's Academy – 'Civics 101'		June 2015

4. ***Strengthen our City image and reputation***

Action Steps	Assigned	Deadline
Develop an implementation plan from the Ad-Hoc Marketing Committee recommendations for Council adoption		January 2015
Consolidate and expand existing communications resources		December 2015
Re-evaluate participation in Visit Milwaukee		June 2015

5. ***Create a communications plan and strategy for internal and external communications during routine operations and emergency situations***

Action Steps	Assigned	Deadline
Develop policies for internal and external communications		December 2016

Develop a process for communicating progress on capital projects		December 2015
Increase utilization of the City website by external users		December 2015

6. ***Maintain high aesthetics and standards for residential, commercial and industrial properties and green space to attract and retain residents and businesses in the City***

Action Steps	Assigned	Deadline
Review and expand the code enforcement programs in order to prioritize and proactively seek resolutions		COMPLETE
Educate the public on available housing rehabilitation program sources		March 2015
Re-evaluate the sign code for possible revision		COMPLETE
Pursue opportunities on WisDOT projects to implement community sensitive solutions (CSS), i.e., State acts as a partner during State construction projects to identify the characteristics of a community by helping maintain them		August 2015
Set aside 1% of the capital budget for CSS		August 2015

7. ***Preserve and improve the health and safety of the community through a Healthy Wauwatosa Initiative by 2017***

Action Steps	Assigned	Deadline
Adopt the 2011 City of Wauwatosa Community Health Assessment and the 2014-2017 City of Wauwatosa Community Health Improvement Plan as an addendum to the larger City of Wauwatosa plan		June 2015
Implement the Community Health Improvement Plan and link it to larger City initiatives, i.e., bike/ped plan, Safe Routes to School, wellness program, etc.		December 2017
Participate in collaborative initiatives for health and safety with health, fire police, human resources, library, development and other yet to be determine departments		December 2017
Engage citizens in a culture of health and safety		December 2016

Develop a communication/marketing plan for promotion of Healthy Wauwatosa iniatives including social media/marketing		**December 2015**
Report the results of a comprehensive Health Wauwatosa Initiative and outcomes in the City of Wauwatosa Health Department Annual Report		**Annual**

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

VISION: WAUWATOSA – THE PREFERRED LOCATION FOR CONDUCTING BUSINESS

Strategy: Focus on business recruitment 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. Today, we have a strong and diverse business base; our plan is to grow and be a distinct and special place – an "irresistible" location for businesses of all types. However, our 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 for our City is to know the most effective means to work within the marketplace to make our vision reality. 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 all land uses: housing, retail, commercial, and office, industrial and manufacturing uses.

Qualities and Characteristics

The following list represents qualities and characteristics within this strategy and goal.

- Land use and zoning
- Economic development policies
- Tax Increment Financing
- Transit planning
- Development potential
- 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. ***Review the state of major plans and studies***

Action Steps	Assigned	Deadline
Create an inventory of active plans that have remaining action items		**June 2015**
Complete an annual report showing progress of major plans including the North Avneue and Village Plan		**December 2015**

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City of Wauwatosa, Wisconsin

Strategic Plan

2. Foster business development through proactive strategies

Action Steps	Assigned	Deadline
Identify and plan for areas with low-value density development		TBD
Implement economic development investment program guidelines		TBD
Create and implement a marketing and business recruitment program		TBD
Create and implement a business retention program		TBD
Initiate a development survey instrument to gather business feedback		TBD

3. Explore efficient modes of transportation to move people

Action Steps	Assigned	Deadline
Form a bike/ped workgroup with the intent to develop an implementation plan		April 2015
Create a transit survey and survey community groups		December 2016
Develop a TOSA streets policy for Council consideration		December 2015
Continue to partner with WISDOT, SEWRPC, and other groups to understand traffic patterns and appropriate routing		Ongoing

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

VISION: WAUWATOSA – AN ORGANIZATION DEFINED BY EXCELLENCE

Strategy: Implement efficient and effective service delivery models and customer service best 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. One Common Councilmember noted, "This is a gold mine of opportunity for us." The City will evaluate its business models and practices to ensure peak performance at all levels of the organization. This commitment includes all city systems, processes and models, including the work of the elected officials and staff. *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 present practices. Entities that are willing to invest in themselves and make needed changes will be much more successful than those that accept the status quo. We will empower our staff, take prudent risks and explore innovations and ideas in pursuit of our vision.

Qualities and Characteristics

The following list represents qualities and characteristics within this strategy and goal.

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

Goals

1. ***Develop a high-performing organization through strategic employee development and compensation programs***

Action Steps	Assigned	Deadline
Develop and support leadership qualities of employees throughout the organization		Ongoing

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STRATEGIC PLAN

Develop and implement a compensation plan that motivates and retains high performing employees		December 2015
Evaluate, and modify as appropriate, employee benefit programs to enhance retention and recruitment		December 2016
Develop a robust employee development program for the entire organization that provides professional development opportunities designed to foster a high-performing workforce		December 2015

2. Foster a culture of continuous improvement using performance management systems

Action Steps	Assigned	Deadline
Analyze the Common Council committee structure		TBD
Establish a Quality Improvement Committee with staff members to champion, oversee and evaluate projects that result in more efficient and effective business practices		December 2016
Develop a document management process for more efficient keeping of records and process flow		December 2019

3. Review City Hall Study conducted in 2010

Action Steps	Assigned	Deadline
Identify completed work and what remains to be finished		January 2015

4. Develop policies that foster and support high-performing workforce

Action Steps	Assigned	Deadline

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

VISION: WAUWATOSA – RECOGNIZED AS A REGIONAL, STATE AND NATIONAL LEADER

Strategy: Identify opportunities to purse greater influence in the region, state and nation

Whether by choice or by fate, the City of Wauwatosa is in a position that offers exciting state and national 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 offers a timely opportunity for City leaders to reflect on our strengths and challenges and work proactively to take advantage of our "economic muscle to enhance the quality of life in our City and community. Presently, City leaders are involved and engaged in regional and state issues and initiatives. But more involvement and participation – across all levels of the City – is needed. 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 effectively and successfully instill a greater and more influential role in local, state and national policy. *The City's vision is to be a recognized leader in the nation.* In order to be successful, the City will identify those areas of priority and determine a course of action that will provide for direct participation, involvement and input into outcomes.

Qualities and Characteristics

The following list represents qualities and characteristics within this strategy and goal.

- Policy statements
- Many opportunities exist
- Council and staff strengths
- Shared services
- Regional role and asset
- M7, ICC, SEWRPC
- Existing partnerships
- Milwaukee County
- State legislation delegation
- Waukesha County
- 24-7-365 community
- Recognition for full services
- Public-private partnerships
- Adjacent (border) cities
- Advisory roles
- Reputation
- Distinctive economically
- Intergovernmental relations

Goals

1. ***Identify associations, groups and organizations to participate in***

	Assigned	Deadline
Identify what groups and organizations the City presently is a member		June 2015
Identify leadership roles and opportunities		December 2015

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CITY OF WAUWATOSA, WISCONSIN

STRATEGIC PLAN

2. Develop an annual legislative and policy/platform/strategy

	Assigned	Deadline
Identify annual Council priorities		January 2015
Assign specific staff to monitor the priorities during the year		March 2015
Create a policy to respond to timely and emergency legislative business		January 2015
Identify legislative partners		Ongoing

3. Enhance our relationship with Milwaukee County and other regional partners

	Assigned	Deadline
Develop strategies to work with Milwaukee County on common issues (e.g., radios, water, disaster preparedness, etc.)		Ongoing
Hold regular meetings with elected officials and staff at different levels of government		Ongoing

4. Initiate and lead innovative collaborations and partnerships

	Assigned	Deadline
Develop a list of existing partnerships and collaborations		June 2015
Develop method to enhance and expand working relationships		August 2015
Coordinate communications among boards, committees and commissions		August 2015
Collaborate with Milwaukee Medical Regional Center		Ongoing
Create a task force to, potentially, consolidate Milwaukee County Grounds Water Utility Providers, per Public Policy Forum Report		Ongoing

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