



Get Your Strategic Plan OFF the Shelf and into Action



Better Dash Faster, LLC (www.betterdashfaster.com)

- Walter Jankowski; Reinvention Consultant

In this session, Walter will go through:

- Best practices in planning
- Their experience with developing and executing strategic plans
- Performance tracking and benchmarking with your peers
- Collaboration projects with other key partners in the community



October 27, 2017



Business Consulting Services

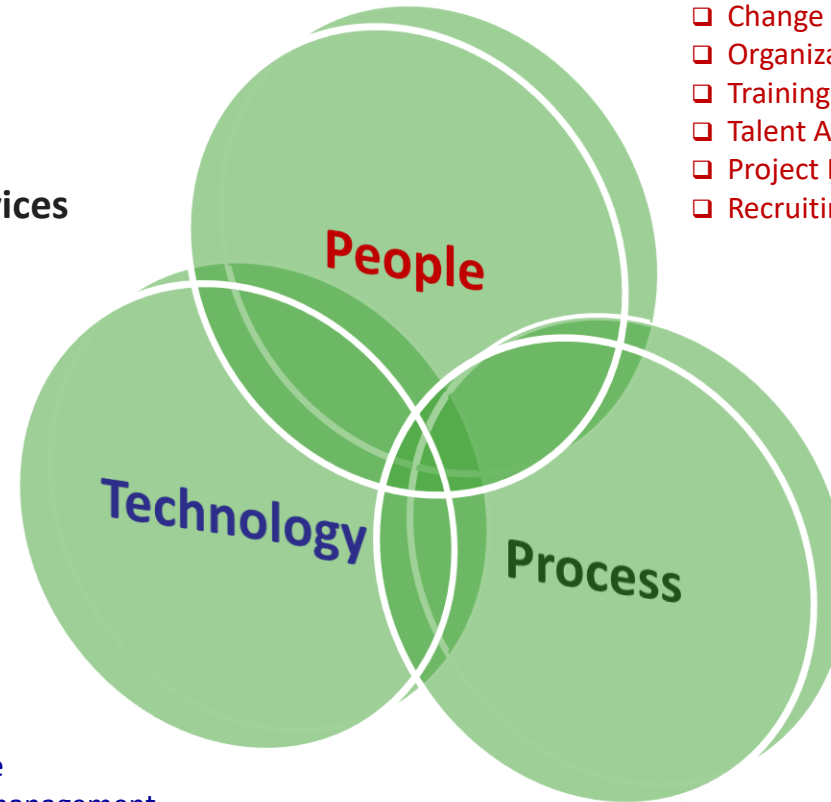
- ❑ Strategic Planning & Execution
- ❑ Building *Centers of Excellence*
- ❑ Program Management
- ❑ Project Management
- ❑ Vendor Partnerships

Technology

- ❑ Application Development
- ❑ Service Oriented Architecture
- ❑ Database development and management
- ❑ Web/ Internet development
- ❑ Systems development and management
- ❑ ERP / PDM / CRM Implementation, Migration
- ❑ Network administration and support
- ❑ E-commerce and e-business

People

- ❑ Change Management
- ❑ Organizational Design
- ❑ Training
- ❑ Talent Assessment
- ❑ Project Resourcing
- ❑ Recruiting / Staffing



Process

- ❑ Business Process Management
- ❑ Roles and Responsibilities
- ❑ Business and IT Requirements
- ❑ On-line SharePoint Documentation
- ❑ Staffing Models
- ❑ Metrics

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1. Planning Background - Overview of Planning Best Practices

- Process
- Deliverables
- Planning, That Was The Easy Part – Now How Do We Execute?

2. City of Oshkosh Experience with Developing and Executing Strategic Plans

3. Performance Tracking and Benchmarking with Your Peers

4. Collaboration Projects with Other Key Partners in the Community

Does Your Organization Have a Strategic Plan?



Strategic direction is clearly set with critical strategies and action plans developed and progress checked.

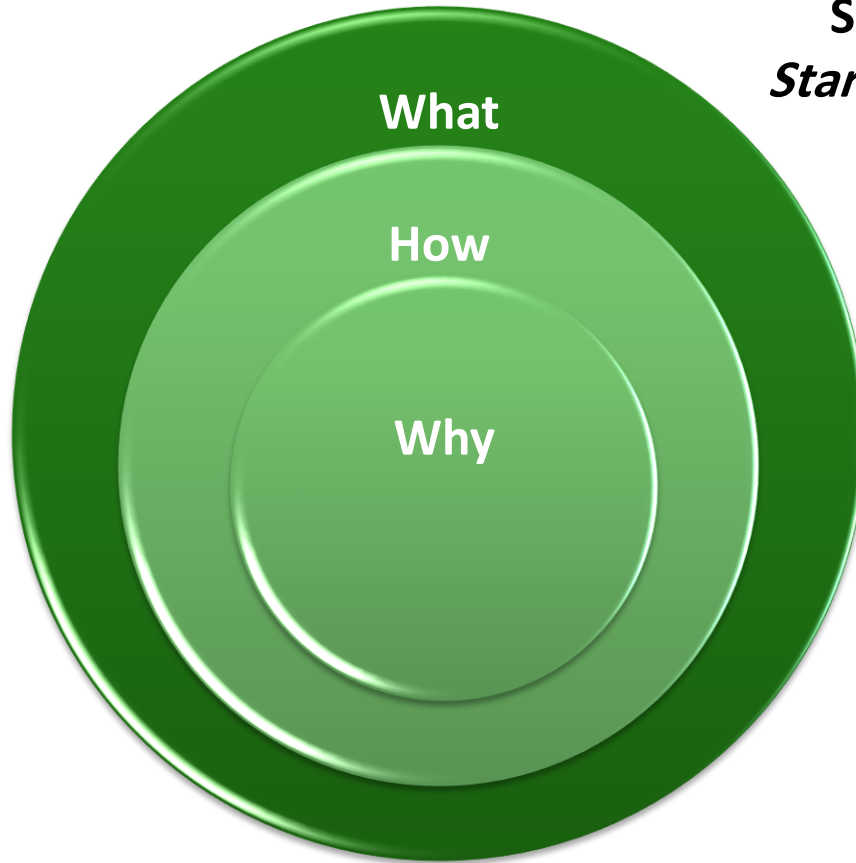
- 11% 1. = Need significant work in this area
- 22% 2. = A little better, but could be a lot better
- 44% 3. = Doing ok or pretty average, need some work
- 0% 4. = We are almost there, have a little bit to do
- 22% 5. = We are very strong in this





- **Process**
- **Deliverables**
- **Planning, That Was The Easy Part – Now How Do We Execute?**

TED Talk
Simon Sinek
Start with Why



Why Plan?

Why Plan?

"Plans are nothing; planning is everything."

Dwight D. Eisenhower



"By failing to plan, you are planning to fail."

Benjamin Franklin



"A good plan today is better than a perfect plan tomorrow."

George S. Patton



"Planning is bringing the future into the present so that you can do something about it now."

Alan Lakein



"Everyone has a plan – until they get punched in the mouth."

Mike Tyson



Why We Plan in Oshkosh

1. Shrinking Resources

- Ability to apply resources effectively

2. Consistency Across Election Cycles

- Continuity of organizational direction

3. Cross-Department Cooperation

- Resources that report to different departments

4. Return on Investment



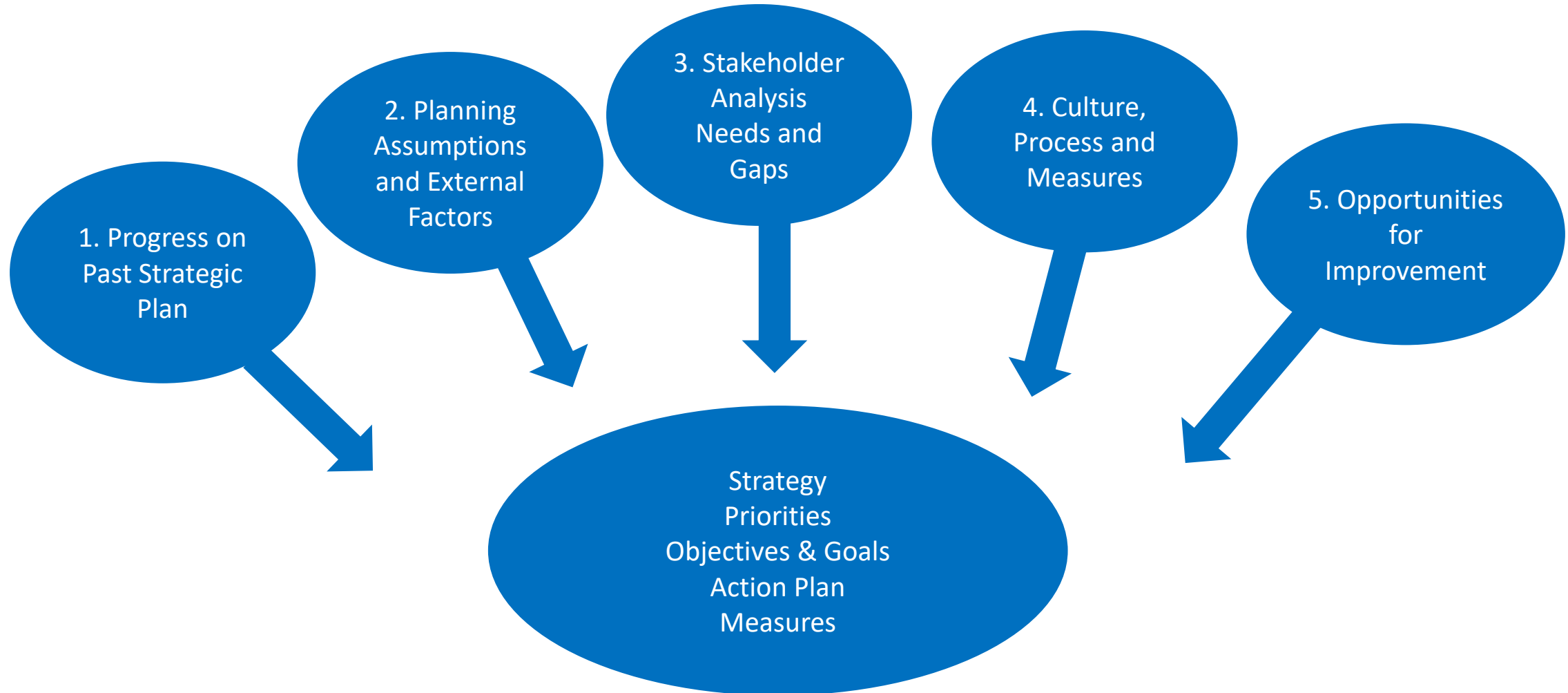
Vision and Long-Term Plan



The Strategic Planning Goals are the largest gaps between the most important future customer and key stakeholder needs and your current capability.

1. *Who are your customers and key stakeholders? (lead, target, etc.)*
2. *What do they need?*
3. *What is your current capability to meet the most important needs?*
4. *What are your biggest gaps and what do we need to do to fill them?*

High-level Overview of Typical Planning Process





City of Oshkosh Strategic Planning Survey Results

Supervisor

Survey Results

July 14, 2014

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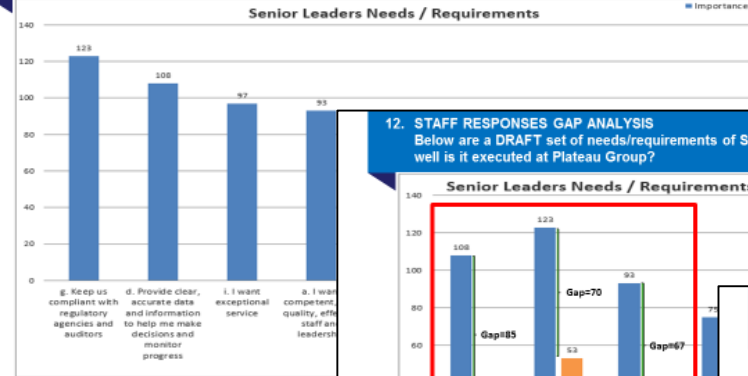
3. What are the top three planning assumptions we can make about the next two years? Write them as though it was a factual statement. We assume...



- CFPB and Regulation**
- ☐ That the CFPB and other agencies will continue to be a detriment to business
 - ☐ The CFPB will continue to mandate changes that will negatively impact banking and insurance
 - ☐ The CFPB will continue to add requirements that will burden our customers and which will require additional compliance work from us.
 - ☐ Regulation and consumer advocate pressure will continue to increase
 - ☐ The CFPB & other regulatory will continue to cause loan industry consolidation
 - ☐ The industry will have to fend off regulatory challenges.
 - ☐ CFPB will continue to be problematic
 - ☐ That the CFPB will not create a problem on credit insurance.
 - ☐ Lending requirements will remain favorable for lenders
- Market**
- ☐ The economy will continue to limp along at a growth rate of less than 3%
 - ☐ The economic atmosphere in the United States will be healthy
 - ☐ Uncertainty will make bank market difficult
- Mergers**
- ☐ Banks will continue to merge and be acquired (2)
 - ☐ The number of credit insurance and debt protection providers will continue to shrink, the additional marketing opportunities for Plateau.
- Product Growth**
- ☐ We can grow gross (direct + assumed) premium numbers by 10% per year
 - ☐ New gap and ancillary products are going to increase in the next 2 years
 - ☐ That the need for non-traditional income streams will continue to grow
 - ☐ Premiums will grow significantly from internal growth in existing product and new products
 - ☐ Plateau Insurance Company will have the ability to produce coverage of benefits and costs
 - ☐ Plateau's growth has continued with organic products.
 - ☐ The company will continue to seek new revenue for its current lines of business
 - ☐ New products are going to create significant growth within our company in the next 2 years
- Account Growth**
- ☐ Work on account efficiencies
 - ☐ Maintain & grow existing accounts and add new accounts profitably
 - ☐ Converting accounts from the companies we have taken over to our certificates will increase income.
 - ☐ We will be able to improve the quality of business in certain existing accounts through to

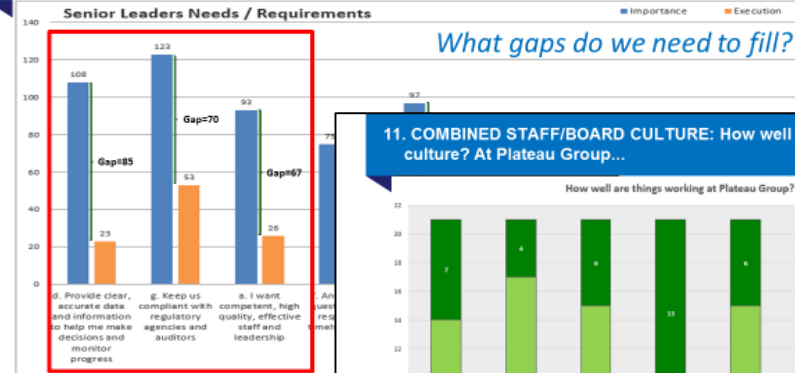
- cancelling poor producing accounts that will not or cannot work on increased production
- Staffing**
- ☐ Staff growth has occurred to keep up with the growing business.
 - ☐ Train & develop existing associates and hire highly skilled associates in needed areas
- Management**
- ☐ Management will remain healthy

12. STAFF RESPONSES: Below are a DRAFT set of needs/requirements of Senior Leaders. From your perspective, how important is this and how well is it executed at Plateau Group? n=18, Index = # "Critical" responses * 9 pts + # "Very" * 3 pts + # "Somewhat" * 1 pts + # "Not at All" * 0 pts



Reinvention

12. STAFF RESPONSES GAP ANALYSIS: Below are a DRAFT set of needs/requirements of Senior Leaders. From your perspective, how important is this and how well is it executed at Plateau Group?

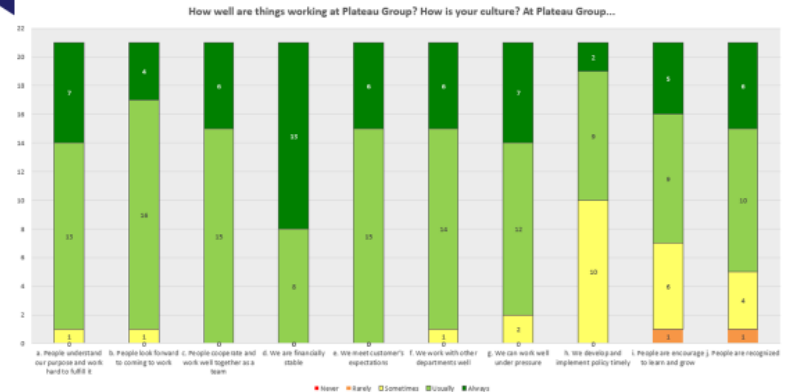


- ☐ None of the above are "Poorly Executed". No
- ☐ Growth rate has hampered downstream com
- ☐ Leadership needs to delegate more, and rely planning is a need.

Reinvention

What gaps do we need to fill?

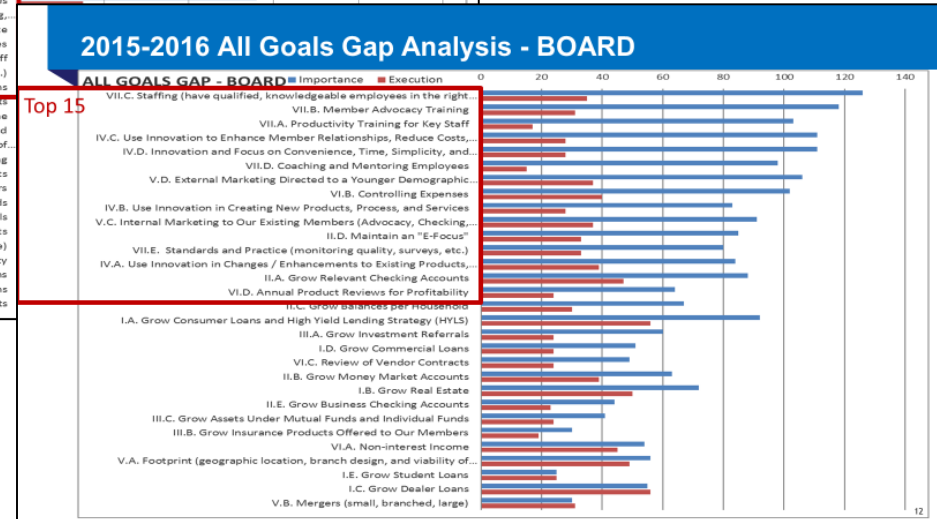
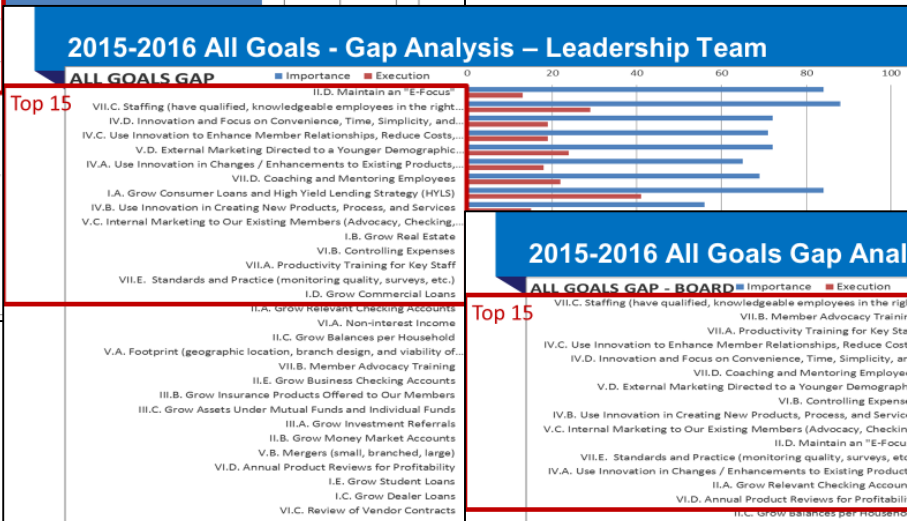
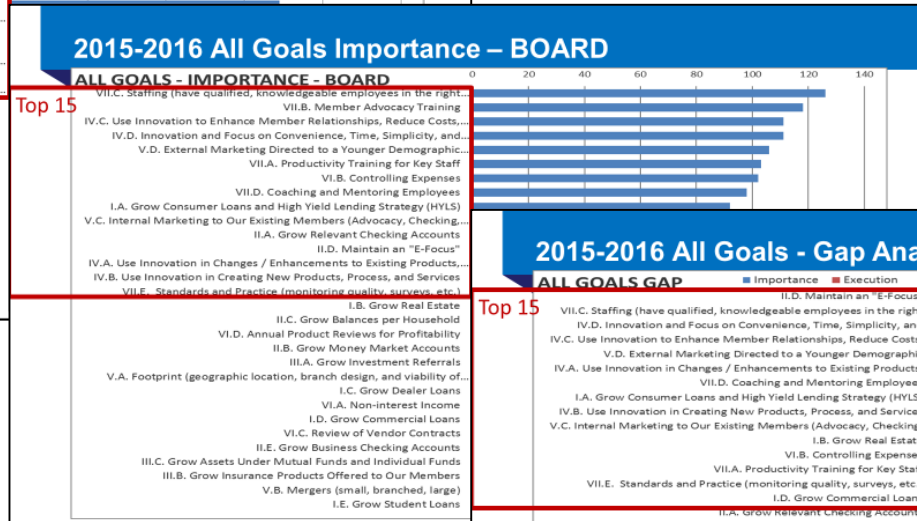
11. COMBINED STAFF/BOARD CULTURE: How well are things working at Plateau Group? How is your culture? At Plateau Group...



Reinvention

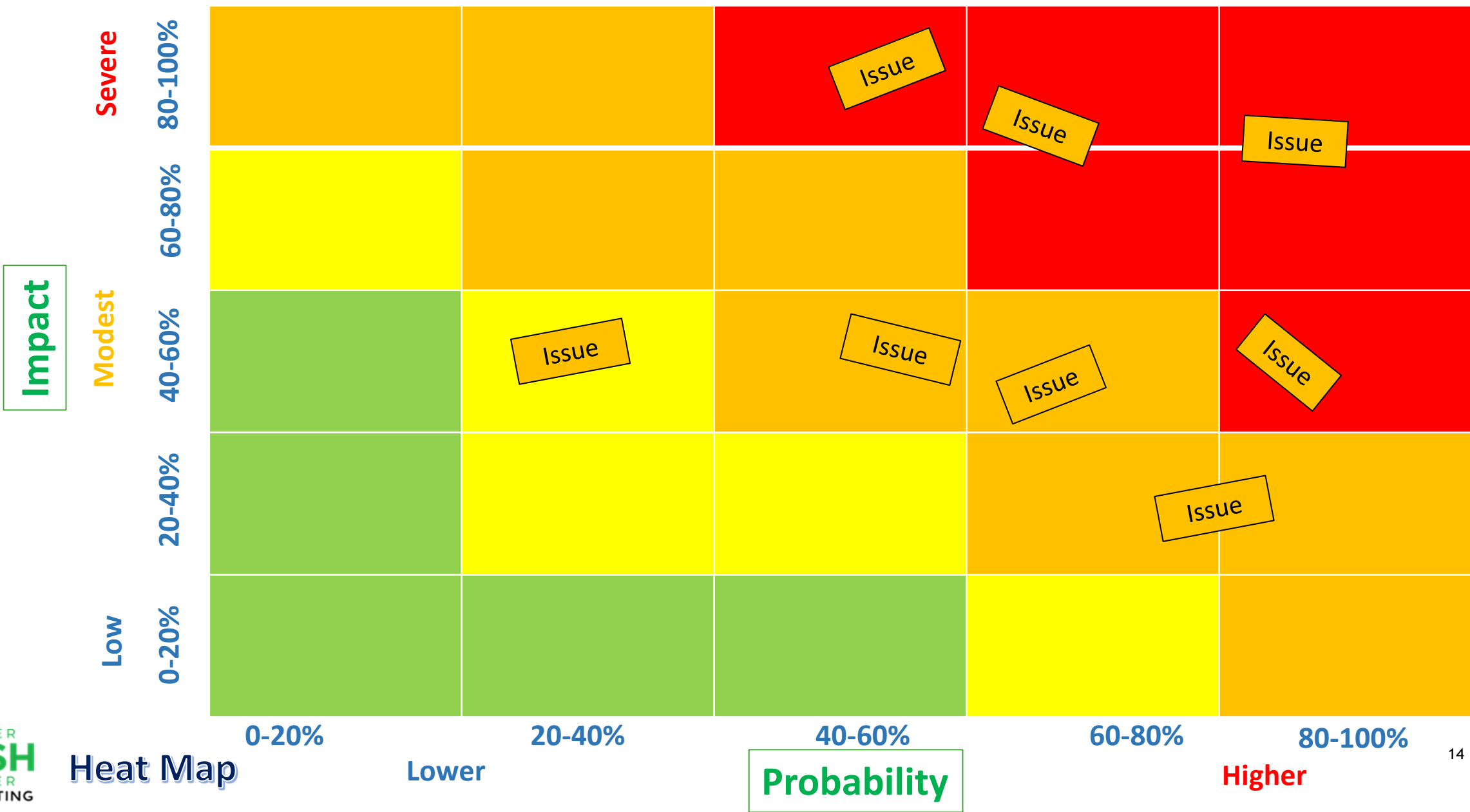
1. Progress on Current Plan

What are still the biggest gaps?



Importance
Execution

2. Planning Assumptions and External Factors



What are the biggest gaps?

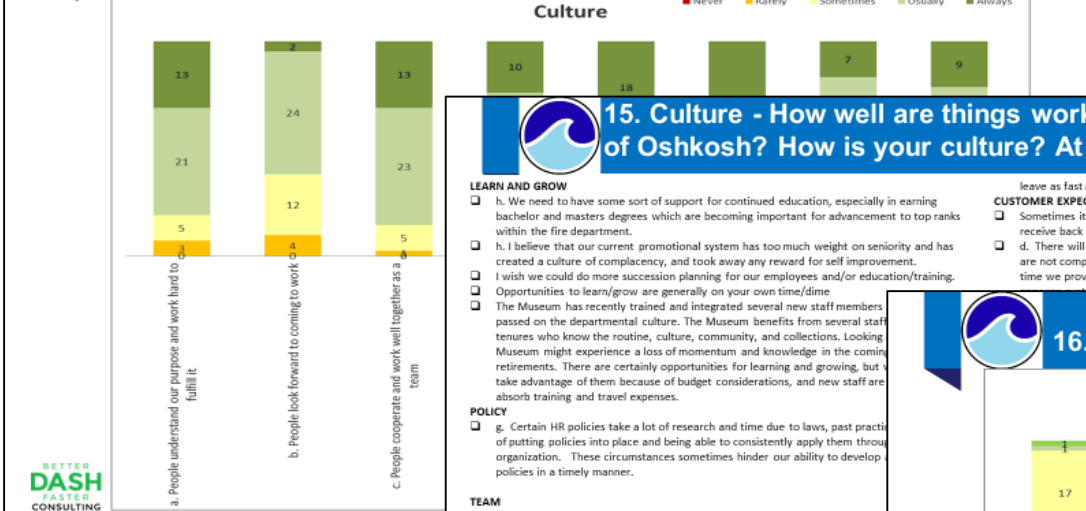
SENIOR LEADER NEEDS GAP

Category	Singaporeans (%)	Executives (%)
c. Provide convenient access to your services (IT2 web, phone, etc.)	75	55
a. I want competent, high quality, effective staff and leadership	70	50
i. I want exceptional service	65	45
h. Effectively tell our story	50	30
f. Answer my questions in a respectful, timely manner	50	30
g. Keep us compliant with regulatory agencies and auditors	45	35
d. Provide clear, accurate data and information to help me make decisions and monitor progress	40	35
b. Demonstrate value of services (ROI)	35	25
e. I want clear accountability for actions	30	20

4. Culture, Process and Measures

What are the biggest gaps?

15. Culture: How well are things working in our Department at the City of Oshkosh? How is your culture? At the City...

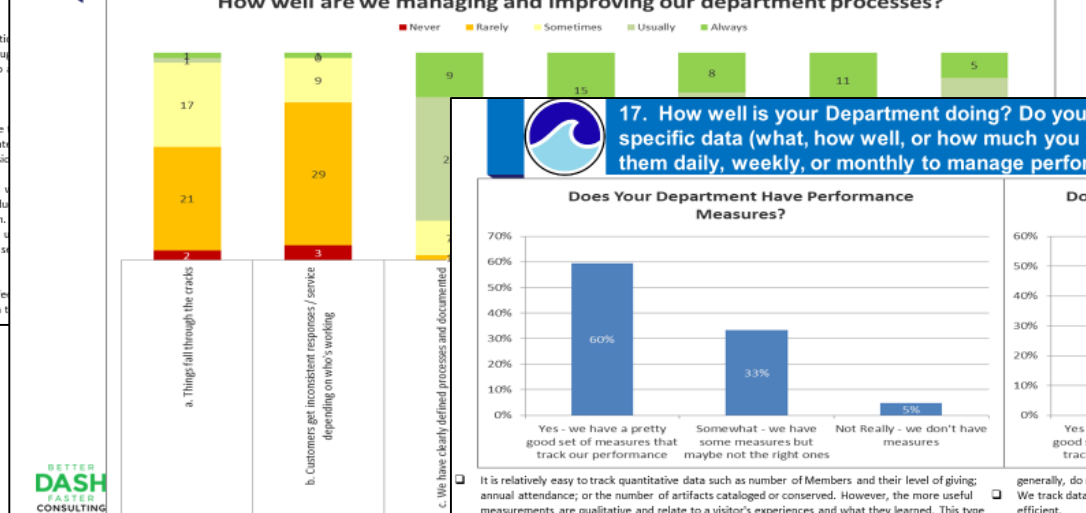


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15. Culture - How well are things working in our Department at the City of Oshkosh? How is your culture? At the City...Comments

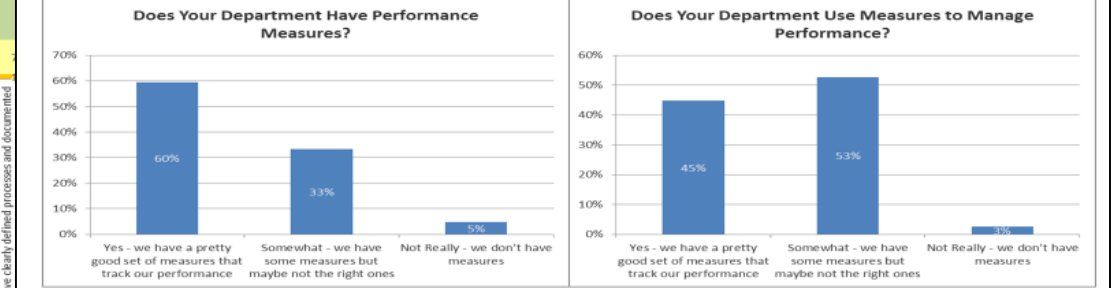
- LEARN AND GROW**
- ☐ h. We need to have some sort of support for continued education, especially in earning bachelor and masters degrees which are becoming important for advancement to top ranks within the fire department.
 - ☐ h. I believe that our current promotional system has too much weight on seniority and has created a culture of complacency, and took away any reward for self improvement.
 - ☐ I wish we could do more succession planning for our employees and/or education/training.
 - ☐ Opportunities to learn/grow are generally on your own time/dime
 - ☐ The Museum has recently trained and integrated several new staff members passed on the departmental culture. The Museum benefits from several staff tenures who know the routine, culture, community, and collections. Looking Museum might experience a loss of momentum and knowledge in the coming retirements. There are certainly opportunities for learning and growing, but take advantage of them because of budget considerations, and new staff are absorb training and travel expenses.
- POLICY**
- ☐ g. Certain HR policies take a lot of research and time due to laws, past practice of putting policies into place and being able to consistently apply them through organization. These circumstances sometimes hinder our ability to develop policies in a timely manner.
- TEAM**
- ☐ We have a great team that works very well together the vast majority of the
 - ☐ I am working hard to build a team atmosphere and make sure my subordinate that the quality of work each individual performs reflects on the whole division person understands their roll in our processes
 - ☐ In the past 5-8 years our employees have come to trust that we are teamed up perform our duties with very positive results. "Our" work habits and productivity improved. Employee "buy in" has peaked and we are working to maintain. treatment quality is as good as it has ever been. When "our" job requires us all step up and give what it takes to deliver to a high standard that we have set I am proud to work in the company of the workers in which I am a part of.
- PURPOSE**
- ☐ Most understand our purpose and work hard. There are always a few that feel more and won't do more than what they are told to do. They want to put in
- leave as fast as they can. These are the ones that are more work.
- CUSTOMER EXPECTATIONS**
- ☐ Sometimes it is felt that we have to provide better customer service to the public then we receive back from internal service within the city.
 - ☐ d. There will always be expectations we cannot meet. Things like pay structure and benefits are not completely in our control, so we explain the constraints. I do believe the service and time we provide meets the expectations, but our answers and solutions do not always

16. How well are we managing and improving our processes?



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17. How well is your Department doing? Do you have measures and/or track specific data (what, how well, or how much you are doing) and then do you use them daily, weekly, or monthly to manage performance?



- ☐ It is relatively easy to track quantitative data such as number of Members and their level of giving; annual attendance; or the number of artifacts cataloged or conserved. However, the more useful measurements are qualitative and relate to a visitor's experiences and what they learned. This type of measurement is best evaluated through specialized visitor surveys and interviews. Collecting and analyzing that input requires someone who understands the process, and has time to dedicate. Therefore, these measurements are challenging for the Museum given staffing and the number of priority projects we are engaged in.
- ☐ We are Permitted by the Wisconsin DNR and have to meet said permit on a daily, weekly, monthly and annual basis.
- ☐ We monitor constantly followed by monthly reports.
- ☐ in our line of work data to measure our daily work doesn't really help what is planned for the day.
- ☐ We do not have measures that we track at this time.
- ☐ Many of the measurements we use are highly dependent on the weather. Bad weather equates to a decline but good weather equates to improvement.
- ☐ We have an employee evaluation process, but with the seniority promotion, the employees, generally, do not put much stock in their evaluations.
- ☐ We track data on a weekly, monthly, and yearly basis and use it on a daily basis to make us more efficient.
- ☐ We have reports that measure many aspects of what we do in our division.
- ☐ It has been a struggle to find benchmark measures that specifically address our specific divisional resources, structure and responsibilities. As such the benchmarks tend to be against our annual performance, not towards a state/national benchmark. Frankly, a good portion of the time we are simply trying to do our regular work within the budget and resources we have to work with, more less trying to take measures along the way... Putting out brush fires is a big part of our jobs.
- ☐ Our goal/mission is to provide quality technology to support all divisions/departments and city services, both internal and external. The landscape for our support of other city areas changes so fluidly, that having static measurable goals is difficult.

5. Opportunities for Improvement

Frustrate You / Need to Be Fixed Top Projects King or Queen

QUESTION 22

What are the top three to five things that frustrate you or need to be fixed?

EMPLOYEE RELATED ISSUES

1. Employee satisfaction
2. Having employees in roles that they may not be best suited for
3. Occasionally those that need to be aware of change or decisions are not included. Not intentionally but something to always be mindful of.
4. Having employees in jobs that are not right for them.
5. Wrong people in leadership positions
6. Attracting and keeping good talent
7. As we grow, staff turnover is more
8. Losing good employees due to pay/incentives
9. Employees that are still stuck in the past
10. Getting back to working as a solid team. It's coming, but there is more work to be done
11. Supervisor training for those in leadership roles
12. *Keeping good employees*
13. *Attracting and keeping good talent*
14. *Employee Morale, Respect and knowledge*
15. *How do we make employees feel valued in the large corporate structure?*
16. *Attracting, developing and keeping great talent*
17. *Attracting and retaining quality employees.*

BUREAUCRACY

1. Statements
2. Managing in a reactionary manner
3. Bureaucracy is seeping in, and we need to keep the focus away from this
4. As we get bigger, bureaucracy is something that needs to be guarded against.
5. *As we get bigger, bureaucracy is something that needs to be guarded against.*

SPEED / EFFICIENCY

1. Speed of the transactions in-branch.
2. Length of time to open new account
3. Faster transactions at the front line...
4. slow loan approval and disbursement process
5. The back office lending departments (mortgage and consumer) have not evolved with our new credit union
6. Implementing new procedures/products/services takes time.
7. *Speed of execution - in be continuous*
8. *Speed of transactions*
9. *Reducing costs*

TECHNOLOGY

1. Challenges of keeping
2. The online experience
3. Members seem so fru
4. At times we are react
5. *Update the website*
6. *The online experience*
7. *Challenges of keeping*
8. *Keeping up with tech*
9. *technology improvem*
10. *technology*
11. *Online Banking*

PLANNING / PRIORITIES

1. Lack of a plan, every
2. Free flow of relevant
3. Inconsistency of expe
4. Too much managem
5. *Lack of clear, concise exercise will help)*
6. *Some board members*

MEMBER ISSUES

1. Member retention
2. *Keep members*
3. *Member issues*
4. *member satisfaction*
5. *Member Satisfaction and Quality Customer Satisfaction*
6. *Maintaining "small town" feel / personal service as the*

Comments in red italics are from Board members

QUESTION 23

For the Credit Union as a whole, what are the top three to five projects that need to be accomplished in 2016 / 2017?

TECHNOLOGY

1. More technology available for members and staff such as peer to peer transfers or tablets available for easy signing.
2. Plastic Card increased security (OnDot)
3. Website/online account opening improvements.
4. Improve our e-services, getting us back to leading edge
5. add functionality to online banking
6. Improve the technology for our members, from apps to website to innovation
7. Website and Intranet
8. *Improve technology for members (website, online experience)*
9. *Technology*
10. *Identify technology priorities and then implement them*
11. *online convenience*
12. *Technology improvements*
13. *Refresh online banking and online bill pay*
14. *Make core computer system more user friendly and faster for the front lines*

EMPLOYEE FOCUS

1. Employee retention.
2. Further expand on employee and leadership development
3. Keep communication open with employees, become a sought after employer in the area
4. Employee education
5. Investing in our staff for longevity.
6. Focusing on results, staff performance
7. Make employee salary adjustments where necessary to stay competitive and to retain good employees
8. Staffing for Mortgage Dept. and rebalance of duties/responsibilities
9. *Employee pride in Capital Credit Union*

10. *Investing in our staff for longevity.*
11. *Solid Employee coaching and development program*
12. *Employee focus*
13. *Getting all the employees knowledgeable and providing great customer service that are especially in need. Continue to have the employees have continuing education to to have in*

SPEED / EFFICIENCY / PROCESS IMPROVEME

1. Mortgage Department Revamp - in pro
2. Mortgage department improvements (a underway)
3. Improve loan approval/disbursement p both consumer and mortgage
4. Reworking the mortgage process from application to closing
5. Continuing to Streamline our Mortgage process
6. Improvements on speed of transactions branch.
7. Make core computer system more user and faster for the front lines
8. Evaluation of specific departments/cha the way things are done
9. Review/adapting our products/services serve our member
10. Transforming branches to help centers transactional centers
11. *Reduce expenses (increase efficiencies)*
12. *Mortgage Department Revamp*

MEMBER FOCUS

1. Transactional member surveys.
2. Identifying and defining our target market membership
3. Pay/Incentives

4. Improving member satisfaction through quicker responsiveness, whether it's a lobby transaction, phone call, mortgage application, etc.
5. Member surveys
6. *Member focus*
7. *Improve the customer experience (increase knowledge level of employees, speed of service.*

SUCCESSION PLAN

1. *succession planning for Tom's retirement*
2. *place the succession plan when Tom retires. End the negativity of the merger toward management.*

BDA

QUESTION 24

If you were king or queen for the day and time, money, and/or resources were unlimited, what are the one or two things you would change about Capital Credit Union?

TECHNOLOGY

1. Unlimited Technology Resources for our employees and members.
2. Provide top notch equipment to assist employees in doing their job efficiently
3. Put in place a computer system that is user friendly and adaptable for the future
4. Bleeding edge technology
5. get more bells and whistles/functionality for online services
6. Hire a technology staff to work with existing IT to develop and implement the technology our members would want and use.
7. *a tech staff to make all systems work together as efficiently as possible.*
8. *Improve all aspects of technology (IT staff, systems, vendors) to provide best in class website, online banking, self-serve and mobile options.*
9. *upgrade technology*
10. *Implement ITMs and offer co-browsing and chat on our re-designed home banking site*
11. *Technology*
12. *Technology improvements*

EMPLOYEE

1. Increase pay to help retain employees
2. Pay valued Employees top dollar to reflect value
3. I would expect more out of our employees, and then reward them for it.
4. Continue to come up with ways to provide our employees a good place to work, with exceptional benefits, that they find fulfilling, and balances work and family.
5. Weeding out the negative employees that hang onto the old way of doing things and act more like an anchor when we are trying to make improvements
6. *employee satisfaction*

Hire

8. *Upgrade pay and benefits*
9. *Invest in training those employees that are willing/able to provide an awesome member experience with every transaction, and/or hire employees with the skills capable of providing the level of service we want to deliver.*
10. *retaining and the recruiting of top tellers and MSR employees*
11. *Increase pay for dedicated loyal employees*

EXTREME MARKETING

1. Promote Capital through advertising and community efforts until the public is sick of hearing of us, ok that might be overkill!
2. *Increased marketing*
3. *Advertise for new member growth*
4. *Rebrand and rejuvenate*
5. *That Capital Credit Union is Top of Mind when choosing a financial institution.*
6. *Getting rid of the "old" credit unions and focusing forward on the new Capital*

REBRAND AND REJUVINATE

1. Getting rid of the "old" credit unions and focusing forward on the new Capital

DEVELOP A NEW LENDING PROCESS

1. I would develop a lending process that gives our members the convenience of online financial business with the personal touch of our branches.
2. Optimize our branch structure, whether by "right sizing", relocating, transforming to make them as effective and efficient as possible.

CREATE A MEMBER FOCUS ORGANIZATION

1. Enhance the member experience, not only with better rates but with education, guidance, budget help, technology assistance, everything.
2. Extend drive through and lobby hours, for members, especially for open new accounts and lending

MEMBERS

1. *Enhance the member experience, not only with better rates but with education, guidance, budget help, technology assistance, everything.*
2. *Increase member dividend*

COMMUNITY

1. *Developing and growing into a great and well respected Credit Union in all communities.*
2. *Extreme community involvement/presence in all areas we serve*

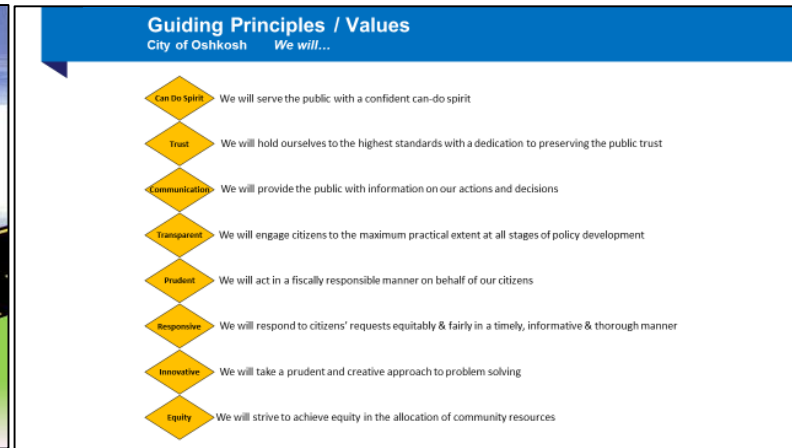
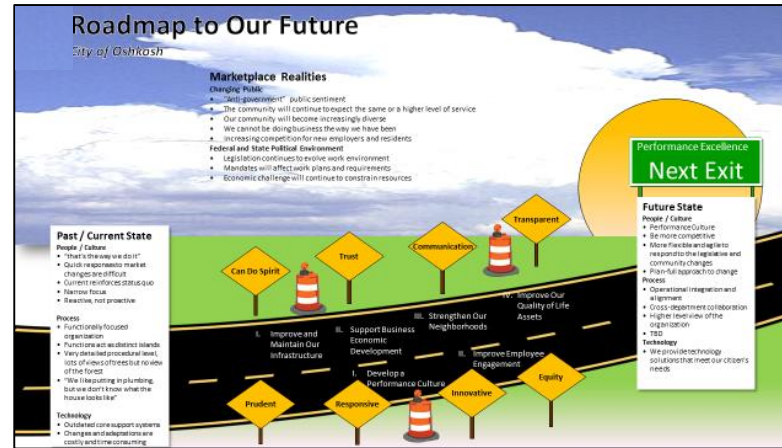
OTHER

1. Provide funds to organizations that we have had relationships with in the past and are not able to help all the time
2. Have all of corporate functions under one roof...

What are the "big rocks?"

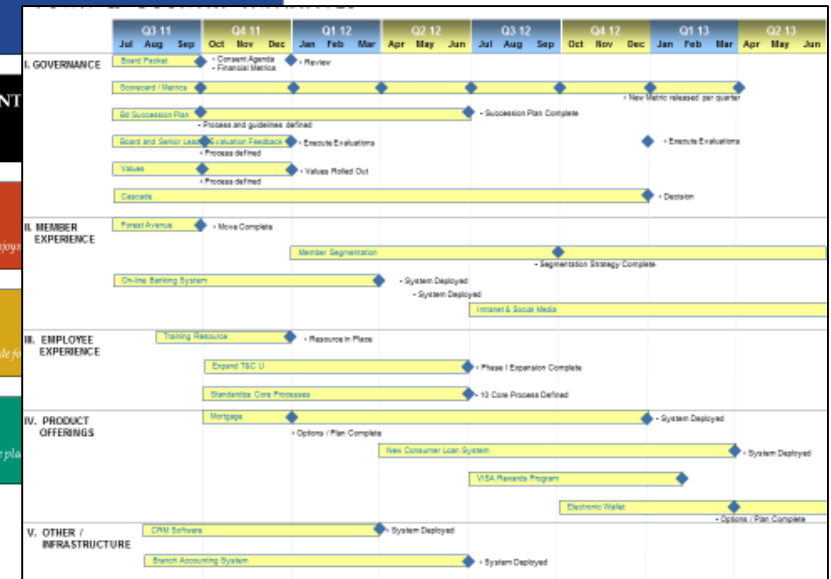
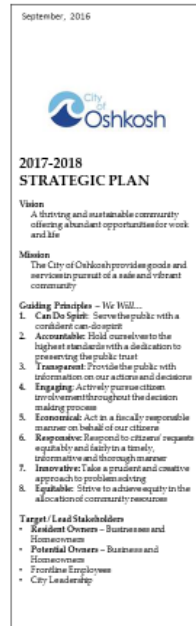
1. The Roadmap

- High-level One Page Summary
- Rotary Speech
- Laminated Card for Staff
- Posted on Internet

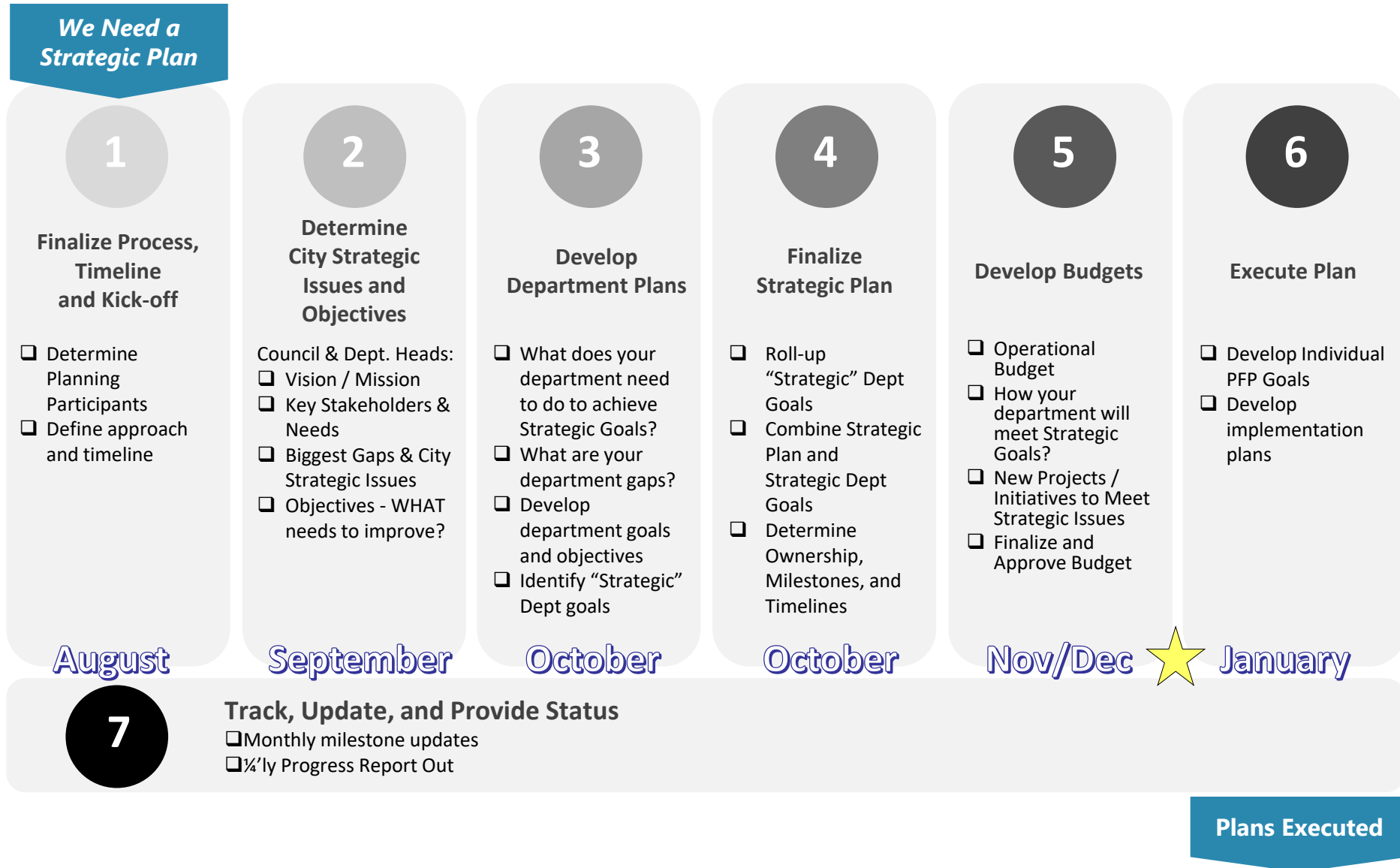


2. The Summary Plan & Timeline

- Summary High-level Plan
- Tree Diagram Format
- Gantt Chart of Major Activities and Milestones
- Updated 1/4ly
- Posted on Internet



Example Strategic Planning Process



City of Oshkosh Experience with Developing and Executing Strategic Plans



City of Oshkosh Strategic Plan





2017-2018
STRATEGIC PLAN

Vision
A thriving and sustainable community offering abundant opportunities for work and life

Mission
The City of Oshkosh provides goods and services in pursuit of a safe and vibrant community

- Guiding Principles – We Will...**
- 1. **Can Do Spirit:** Serve the public with a confident can-do spirit
 - 2. **Accountable:** Hold ourselves to the highest standards with a dedication to preserving the public trust
 - 3. **Transparent:** Provide the public with information on our actions and decisions
 - 4. **Engaging:** Actively pursue citizen involvement throughout the decision making process
 - 5. **Economical:** Act in a fiscally responsible manner on behalf of our citizens
 - 6. **Responsive:** Respond to citizens' requests equitably and fairly in a timely, informative and thorough manner
 - 7. **Innovative:** Take a prudent and creative approach to problem solving
 - 8. **Equitable:** Strive to achieve equity in the allocation of community resources

- Target / Lead Stakeholders**
- **Resident Owners** – Businesses and Homeowners
 - **Potential Owners** – Business and Homeowners
 - Frontline Employees
 - City Leadership

SUPPORT ECONOMIC DEVELOPMENT

Staff Owner: Allen Davis

Future State: Be recognized as a premier community in Wisconsin by fostering entrepreneurial activity, developing and retaining a diverse mix of employees & employment opportunities, and revitalizing the downtown/central city area and I-41 corridor.

PROVIDE A SAFE, SECURE, AND HEALTHY COMMUNITY

Staff Owner(s): Tim Franz & Dean Smith

Future State: Public Safety Officials are recognized as trusted, efficient and effective professionals

ENHANCE THE EFFECTIVENESS OF OUR CITY GOVERNMENT

Staff Owner: John Fitzpatrick

Future State: Organizational efficiency has been maximized by successfully achieving City initiatives

IMPROVE AND MAINTAIN OUR INFRASTRUCTURE

Staff Owner(s): James Rabe, Jim Collins, John Fitzpatrick

Future State: A safe and effective infrastructure that provides a framework for full scale community enjoyment

ENHANCE OUR QUALITY OF LIFE SERVICES AND ASSETS

Staff Owner(s): Jeff Gilderson-Duwe, Ray Maurer, Brad Larson

Future State: Natural, Cultural and Recreational Assets of the City are recognized as a sources of pride for the community

STRENGTHEN OUR NEIGHBORHOODS

Staff Owner(s): Allen Davis

Future State: Neighborhoods throughout the community are attractive, well maintained, and desirable places to live that inspire positive social interactions among residents



2017-2018 STRATEGIC PLAN

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1. **Can Do Spirit:** Serve the public with a confident can-do spirit
2. **Accountable:** Hold ourselves to the highest standards with a dedication to preserving the public trust
3. **Transparent:** Provide the public with information on our actions and decisions
4. **Engaging:** Actively pursue citizen involvement throughout the decision making process
5. **Economical:** Act in a fiscally responsible manner on behalf of our citizens
6. **Responsive:** Respond to citizens' requests equitably and fairly in a timely, informative and thorough manner
7. **Innovative:** Take a prudent and creative approach to problem solving
8. **Equitable:** Strive to achieve equity in the allocation of community resources

Target / Lead Stakeholders

- **Resident Owners** – Businesses and Homeowners
- **Potential Owners** – Business and Homeowners
- Frontline Employees
- City Leadership

SUPPORT ECONOMIC DEVELOPMENT – *Allen Davis*

Future State: Be recognized as a premier community in Wisconsin by fostering entrepreneurial activity, developing and retaining a diverse mix of employees & employment opportunities, and revitalizing the downtown/central city area and I-41 corridor.

- A. Attract, Expand and Retain Businesses
- B. Support Redevelopment Opportunities for Central city, Waterfront, and Underutilized Properties in the City
- C. Develop Infrastructure Needed to Support Business and Residential Development
- D. Establish Economic Development Metrics
- E. Promote the City of Oshkosh
- F. Develop an Effective Economic Development Incentive Program

PROVIDE A SAFE, SECURE, AND HEALTHY COMMUNITY- *Tim Franz & Dean Smith*

Future State: Public Safety Officials are recognized as trusted, efficient and effective professionals


- A. Enhance Community Trust in Public Safety
- B. Strengthen Relationships with Neighborhood Organizations and Diverse Community Groups
- C. Build Awareness of Personal Health and Safety
- D. Ensure High-Level of Response to Emergencies
- E. Prepare the Community's Ability to Recover from Disruptive Events
- F. Develop Strategies to Address Substance Abuse in the Community
- G. Improve Transportation Safety within Community
- H. Develop a Professional and Diverse Workforce within Public Safety
- I. Enhance Crime Prevention and Community Policing Strategies

ENHANCE THE EFFECTIVENESS OF OUR CITY GOVERNMENT – *John Fitzpatrick*

Future State: Organizational efficiency has been maximized by successfully achieving City initiatives

- A. Maximize Our Financial Position Based On Our Capabilities and Limitations
- B. Improve Our Internal and External Communication Systems
- C. Recruit, Retain, Engage, Recognize and Develop Employees and Future Leaders
- D. Improve Our Technology
- E. Align Internal Department Action Plans to Strategic Plan
- F. Align Employee Performance to Department Plans
- G. Develop / Improve Our Performance and Outcome Measures
- H. Reassess / Realign Our Boards and Commissions
- I. Increase Local Engagement with State Legislators to Increase Local Control
- J. Strengthen Partnerships in Community
- K. Encourage Collaboration with Diverse Community Groups

September, 2016



2017-2018
STRATEGIC PLAN

Vision
A thriving and sustainable community offering abundant opportunities for work and life

Mission
The City of Oshkosh provides goods and services in pursuit of a safe and vibrant community

Guiding Principles – We Will...

- Can Do Spirit:** Serve the public with a confident can-do spirit
- Accountable:** Hold ourselves to the highest standards with a dedication to preserving the public trust
- Transparent:** Provide the public with information on our actions and decisions
- Engaging:** Actively pursue citizen involvement throughout the decision making process
- Economical:** Act in a fiscally responsible manner on behalf of our citizens
- Responsive:** Respond to citizens' requests equitably and fairly in a timely, informative and thorough manner
- Innovative:** Take a prudent and creative approach to problem solving
- Equitable:** Strive to achieve equity in the allocation of community resources

Target / Lead Stakeholders

- Resident Owners** – Businesses and Homeowners
- Potential Owners** – Business and Homeowners
- Frontline Employees
- City Leadership

Strategic Goal

SUPPORT
ECONOMIC
DEVELOPMENT

*Future State:
Be recognized as a premier community in Wisconsin by fostering entrepreneurial activity, developing and retaining a diverse mix of employees & employment opportunities, and revitalizing the downtown/central city area and I-41 corridor.*

Staff Owner:
Allen Davis

<div><div>A. Attract, Expand, and Retain Businesses and Workforce</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Continue to invest and support the Greater Oshkosh Economic Development Corporation (GO-EDC)</div></div><div><div></div><div>Develop and implement action plans for prime real estate and redevelopment locations such as Buckstaff, the Riverwalk, the Pioneer area, Aviation Business Park, etc.</div></div><div><div></div><div>Partner with Greater Oshkosh EDC to offer educational opportunities for Elected Officials</div></div><div><div></div><div>Continue to streamline the approval and permitting process for developers while preserving health & safety</div></div><div><div></div><div>Create and continuously update a database of municipally-related data necessary for business expansion or attraction</div></div><div><div></div><div>Reduce Economic Disparities by Attracting Family Sustaining Jobs to Oshkosh</div></div></div></div>
<div><div>B. Support Redevelopment Opportunities for Central City, Waterfront, and Underutilized Properties in the City</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Implement the Central City Investment Strategy</div></div><div><div></div><div>Identify and support targeted redevelopment areas for reuse and development</div></div><div><div></div><div>Actively pursue acquiring key sites for redevelopment through the Redevelopment Authority or Common Council that have the potential to have a significant impact on the community if redeveloped</div></div><div><div></div><div>Continue to support the development of the Riverwalk along the Fox River and Lake Winnebago</div></div><div><div></div><div>Market redevelopment sites to private developers</div></div></div></div>
<div><div>C. Develop infrastructure needed to support business and residential development</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Implement the recommendations in the 2016 Parking Study when applicable and budgeted</div></div><div><div></div><div>Develop a city-owned rail transload facility in the Southwest Industrial Park</div></div><div><div></div><div>Develop and implement plans to improve the city’s main corridors and to plan for industrial and business park expansions</div></div><div><div></div><div>Market Interstate 41 as an economic development asset</div></div><div><div></div><div>Pursue site designation certification within our industrial parks through the Wisconsin Economic Development Corporation (WEDC)</div></div><div><div></div><div>Explore the feasibility of a city-owned wetland bank</div></div><div><div></div><div>Research potential of a residential subdivision development program</div></div></div></div>
<div><div>D. Establish Economic Development Metrics</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Develop a Set of Metrics / dashboard that can monitor the progress of the City’s Investment in Economic Development</div></div></div></div>
<div><div>E. Promote the City of Oshkosh</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Support involvement in the Interstate 41 Corridor initiative to jointly market the region</div></div><div><div></div><div>Market our transportation connections</div></div><div><div></div><div>Market the city-owned available lots in the industrial and business park, redevelopment areas, and scattered residential sites</div></div><div><div></div><div>Develop and Implement a Quality of Life campaign with community partners</div></div><div><div></div><div>Support joint efforts on a marketing campaign to attract and retain businesses and workers</div></div></div></div>
<div><div>F. Develop an Effective Economic Development Incentive Program</div><div>Staff Owner: Allen Davis</div></div>	<div><div><div><div></div><div>Update Tax Incremental Financing (TIF) Policy to include residential redevelopment</div></div><div><div></div><div>Develop an Economic Development Incentive policy</div></div><div><div></div><div>Continue to promote and enhance the city’s Revolving Loan Fund</div></div><div><div></div><div>Research all local, state, federal, and private grant opportunities regularly</div></div><div><div></div><div>Research Economic Development incentives used by other communities in Wisconsin and nationwide</div></div><div><div></div><div>Identify needs for loans and grants for niche businesses, entrepreneurs, or minority/women/disabled business owners</div></div></div></div>

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City of Oshkosh Strategic Plan Features

- **We Have Owners for Each Goal, Objective, and Action Item**
- **Each Department Has Created an Operational Plan Aligned to City Plan**
- **We Track Progress**
- **Budgets Are Aligned to Strategic Plan**



Strategy Ownership ASSESSMENT

We have clear ownership / accountability for Goals, Objectives and Action Items

- | | |
|-----|---|
| 11% | 1. = Need significant work in this area |
| 33% | 2. = A little better, but could be a lot better |
| 22% | 3. = Doing ok or pretty average, need some work |
| 22% | 4. = We are almost there, have a little bit to do |
| 11% | 5. = We are very strong in this |

Strategy Alignment ASSESSMENT

We have Department operational plans that are aligned to our City Strategic Plan

- | | |
|-----|--|
| 11% | 1. = Need significant work in this area |
| 11% | 2. = A little better, but could be a lot better |
| 56% | 3. = Doing ok or pretty average, need some work |
| 0% | 4. = We are almost there, have a little bit to do |
| 22% | 5. = We are very strong in this |

Strategy Tracking ASSESSMENT

We track our Strategic Plan progress

- | | |
|-----|--|
| 22% | 1. = Need significant work in this area |
| 11% | 2. = A little better, but could be a lot better |
| 11% | 3. = Doing ok or pretty average, need some work |
| 33% | 4. = We are almost there, have a little bit to do |
| 22% | 5. = We are very strong in this |

Budget Alignment ASSESSMENT

Our Budgets are aligned to what is important in our Strategic Plan. We put our money where our mouth is.

0%	1. = Need significant work in this area
11%	2. = A little better, but could be a lot better
44%	3. = Doing ok or pretty average, need some work
22%	4. = We are almost there, have a little bit to do
22%	5. = We are very strong in this

1. Adoption of Plan is Just the Beginning

- Planning is the “easy part”
- Executing is the hard part
- *“All good planning digresses to real work”*

2. Keep Participants Engaged

3. Involve Supervisors

- We Did it After Several Planning Cycles
- Timing is Everything
- Like Introduction of Yoga in Football





Manage what you measure
Are we making progress?
Provide performance feedback

Performance Measurement ASSESSMENT

Data is selected, collected, graphed, analyzed and used for performance tracking and improvement plans. Performance is tracked and reported in key areas including customer satisfaction, product and service process/quality, staff, and financial performance. It is shared with staff to drive results.

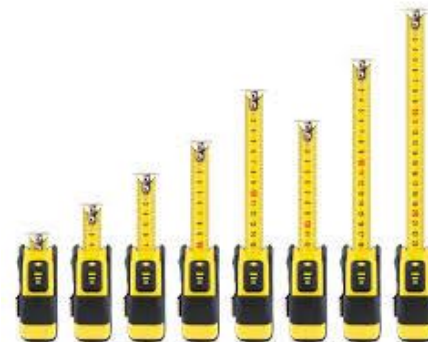
11% 1. = Need significant work in this area

22% 2. = A little better, but could be a lot better

11% 3. = Doing ok or pretty average, need some work

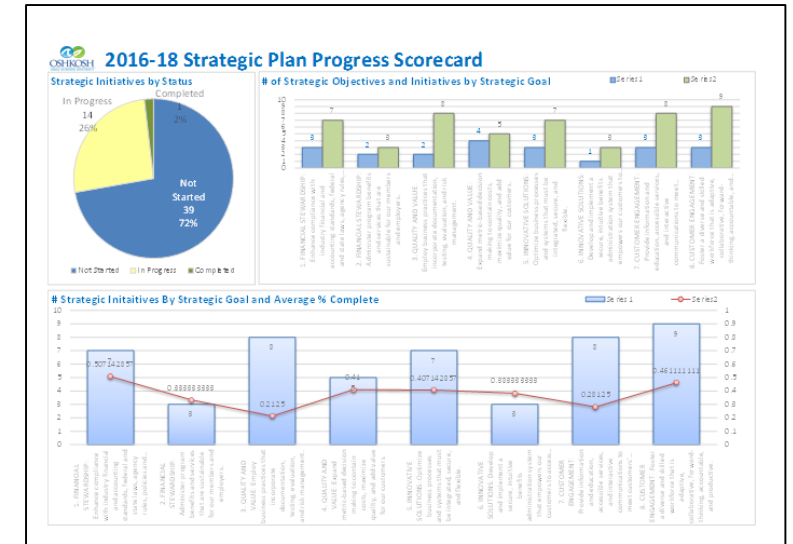
33% 4. = We are almost there, have a little bit to do

22% 5. = We are very strong in this



- Level 1 Progress Measures: Progress on the Strategic Plan**

- Dates, Dollars, Deliverables
- PRIORITY, Goal, Action Steps, Task, sub-task
- Status: Red, Yellow, Green
- % Complete




- Level 2 Key Performance Indicators: How we are doing in Strategic Plan RESULTS / OUTCOMES?**
- Level 3 Key Performance Indicators: How are we doing in all other key areas (not in plan)?**

Old Performance Tracking

City of Oshkosh
2017 Strategic Plan 1st Quarter Update

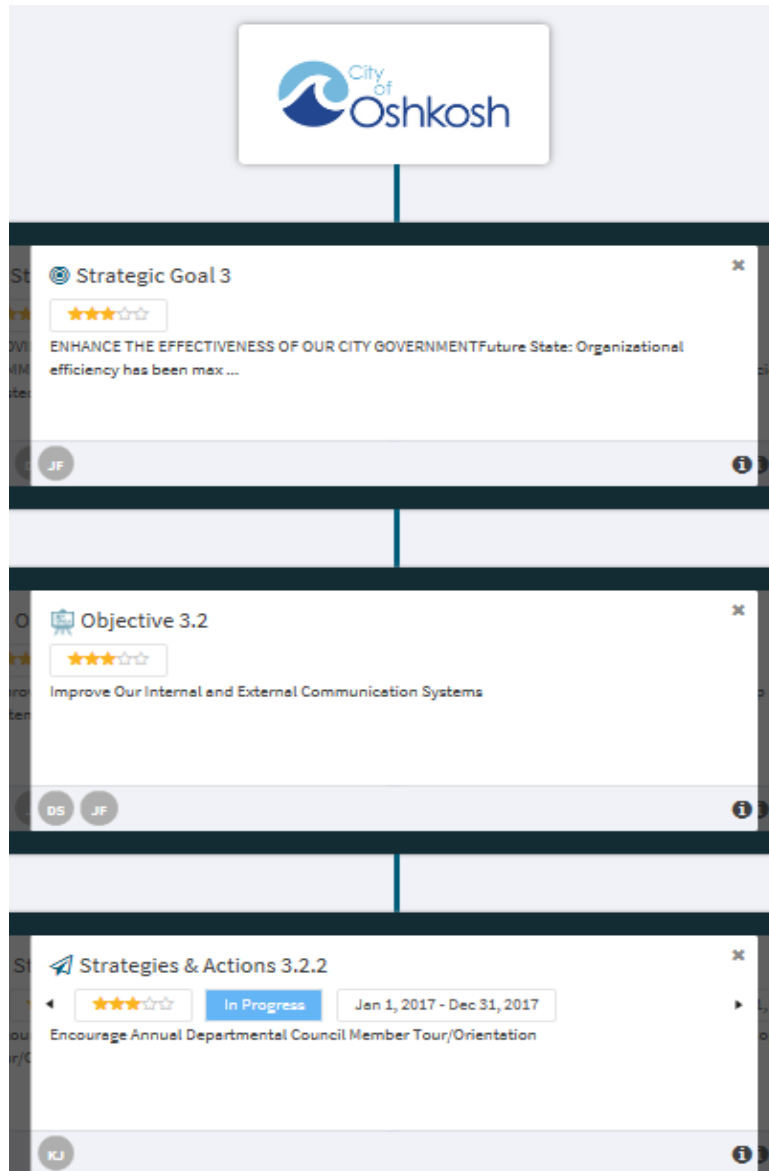


Key: ✓ Complete ↑ In Progress ⇌ Caution ↓ Below Plan

Mission, Vision & Values	Priority Goal	Strategic Objectives	Strategies and Tactics
<p>MISSION Living and thriving in a sustainable community with abundant opportunities for a better life.</p> <p>VISION City of Oshkosh is a place where goods and services are provided in a safe, vibrant community.</p> <p>PRINCIPLES Can Do Spirit Accountable Transparent Engaging</p>	 Support Economic Development	<p>A. Attract, Expand and Retain Businesses</p> <p>B. Support Redevelopment Opportunities for Central city, Waterfront, and Underutilized Properties in the City</p> <p>C. Develop Infrastructure Needed to Support Business and Residential Development</p> <p>D. Establish Economic Development Metrics</p> <p>E. Promote the City of Oshkosh</p> <p>F. Develop an Effective Economic Development Incentive Program</p>	<p>Continue to invest and support the Greater Oshkosh Economic Development Corporation (GO-EDC)</p> <p>Develop and implement action plans for prime real estate and redevelopment locations such as: Sawdust District, the Pioneer area and Aviation Business Park</p> <p>Partner with Greater Oshkosh EDC to offer educational opportunities for Elected Officials</p> <p>Continue to streamline the approval and permitting process for developers while preserving health & safety</p> <p>Create and continuously update a database of municipally-related data necessary for business expansion or attraction</p> <p>Reduce economic disparities by attracting family sustaining jobs to Oshkosh</p> <p>Implement the Central City Investment Strategy</p> <p>Identify and support targeted redevelopment areas for re-use and development</p> <p>Actively pursue acquiring key sites through the Redevelopment Authority or Common Council that could have a significant impact on the City if redeveloped</p> <p>Continue to support the development of the Riverwalk along the Fox River and Lake Winnebago</p> <p>Market redevelopment sites to private developers</p> <p>Implement the recommendations in the 2016 Parking Study when applicable and budgeted</p> <p>Develop a City-owned rail transload facility in the Southwest Industrial Park</p> <p>Develop and implement plans to improve the City's main corridors and to plan for industrial and business park expansions</p> <p>Market Interstate 41 as an economic development asset</p> <p>Pursue site designation certification within our industrial parks through the Wisconsin Economic Development Corporation (WEDC)</p> <p>Explore the feasibility of a City-owned wetland bank</p> <p>Research potential of a Residential Subdivision Development Program</p> <p>Develop a set of metrics/dashboard that can monitor the progress of the City's investment in economic development</p> <p>Support involvement in the Interstate 41 Corridor Initiative to jointly market the region</p> <p>Market our transportation connections</p> <p>Market the City-owned available lots in the industrial and business park, redevelopment areas, and scattered residential sites</p> <p>Develop and implement a Quality of Life campaign with community partners</p> <p>Support joint efforts on a marketing campaign to attract and retain businesses and workers</p> <p>Update Tax Incremental Financing (TIF) Policy to include residential redevelopment</p> <p>Develop an Economic Development Incentive Policy</p> <p>Continue to promote and enhance the City's Revolving Loan Fund</p> <p>Research all local, state, federal, and private grant opportunities regularly</p> <p>Research economic development incentives used by other communities in Wisconsin and nationwide</p> <p>Identify needs for loans and grants for niche businesses, entrepreneurs, or minority/women/disabled business owners</p>

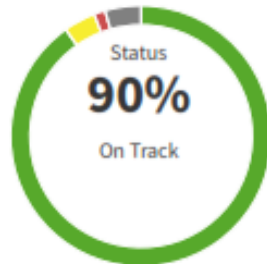
- Word Doc
- Very Manual
- A Lot of “Chasing”

New Performance Tracking

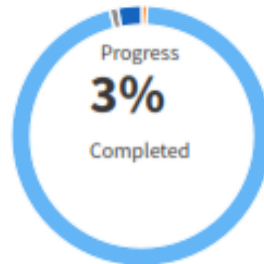


- **Envisio Strategic Planning On-line Software**
- **Strategic Goals**
- **Objectives**
- **Actions**

Strategic Plan Progress from Apr 01, 2017 to Jun 30, 2017



On Track 90.2%
 Caution 3.9%
 Below Plan 1.4%
 No Update 4.4%



Overdue 0.7%
 In Progress 95.4%
 Upcoming 1.0%
 Completed 2.9%

Total Assignment: 212

On Track: 193	Caution: 8
Below Plan: 1	No Update: 10

Total Strategies & Actions: 216

Overdue: 1	In Progress: 206
Upcoming: 2	Completed: 7

% Complete by Status of Plan

- On Track
- Caution
- Below Plan
- No Update

% Complete by Goal

- Overdue
- In Progress
- Upcoming
- Complete

Strategic Goal 1

SUPPORT ECONOMIC DEVELOPMENT Future State : Be recognized as a premier community in Wisconsin by fostering entrepreneurial activity, developing and...



On Track 97.6%
 Caution 2.4%



In Progress 100.0%

Total Assignment: 31

On Track: 30	Caution: 1
--------------	------------

Total Strategies & Actions: 31

In Progress: 31

Objective: 6

Strategies & Actions: 31

govBenchmark



Best Practices in Tracking Your Strategic Plan

Office 365


Walter Jankowski

?

⚙️

BROWSE

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Vision:
A modern connected and available multimodal transportation system meeting the needs of the traveling public.

Mission:
Provide a highly available, well-maintained, and safe transportation infrastructure that contributes to the economic competitiveness and quality of life throughout the region.

Core Values and Guiding Principles:
Customer Service
Efficiency
Integrity
Accountability
Safety
Valued Employees

October 2017



Department of Transportation

2017-20

STRATEGIC PLAN

Vision
A modern connected and available multimodal transportation system meeting the needs of the traveling public.

Mission
Provide a highly available, well-

Strategic Goal - Area that needs significant improvement in the next 3 years

Objectives - WHAT needs to happen

I. INVEST IN THE SAFETY, RELIABILITY, AND SUSTAINABILITY OF OUR TRANSPORTATION INFRASTRUCTURE

A. Develop and Invest in Our Co-workers

B. Streamline Our Processes

C. Measure and Make Data-Driven Decisions

new item

✓ Strategic Goal

Action Item Title

Start Date

Projected End Date

% Complete

Average= 18 %


Strategic Goal : I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure (33)

Strategic Goal : II.A. Develop Organizational Excellence: Develop and Invest in Our Co-Workers (13)

Strategic Goal : II.B. Develop Organizational Excellence: Streamline Our Processes (28)


Strategic Goal : II.C. Develop Organizational Excellence: Measure and Make Data Driven Decisions (31)

Strategic Goal : II.D. Develop Organizational Excellence: Increase Accountability (24)



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Best Practices in Tracking Your Strategic Plan



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Save Cancel Paste Copy Delete Item Attach File Spelling

Commit Clipboard Actions Spelling

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EDIT LINKS

Strategic Goal: I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure

Objective: I.A. Develop and implement a safety management program that improves safety and reduces risk

Division: Fleet

Action Item Title: Reduce \$ of Equipment Accident Damage

Description: Partner with Risk Management to provide accident reporting by Division; Work with Risk Management and Divisions to reduce equipment damage through training and equipment purchasing

Action Item Assigned To: Goeden, Daniel

Others Involved: Blonien, John; Kuehn, Kenneth; Schwegel, Paul

Start Date: 10/1/2016

Projected End Date: 12/31/2020

Actual End Date:

Status: Assigned / In Progress

Project Status: Green

Status Comments: No existing entries.

% Complete: 0%

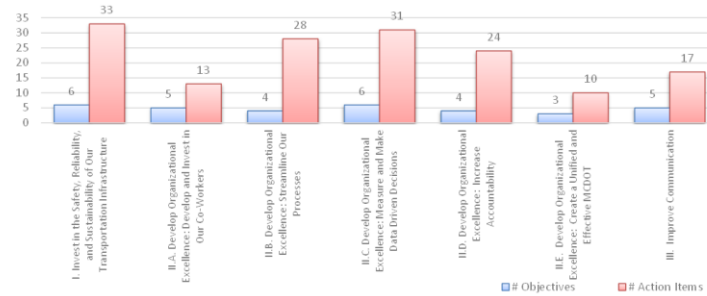
Strategic Goal	Objective	Division	Action Item Title	Description	Action Item Assigned To	Others Involved	Start Date	Projected End Date	Actual End Date	Status	Project Status	Status Comments	% Complete	Progress
I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure	I.A. Develop and implement a safety management program that improves safety and reduces risk	Fleet	Reduce \$ of Equipment Accident Damage	Partner with Risk Management to provide accident reporting by Division; Work with Risk Management and Divisions to reduce equipment damage through training and equipment purchasing	Goeden, Daniel	Blonien, John; Kuehn, Kenneth; Schwegel, Paul	10/1/2016	12/31/2020		Assigned / In Progress	Green	No existing entries.	0%	Kuehn, Kenneth; Schwegel, Paul
I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure	Develop and Implement a Safety management program and plan	Highway Maintenance					1/1/2016	12/31/2020		Assigned / In Progress	Green		0%	Kuehn, Kenneth; Heisel, Gregory; Kent, Kevin; Moore, Sean
I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure	Plan and Implement Highway Safety Improvement Program projects	Transportation Services					10/1/2017	12/31/2020		Assigned / In Progress	Green		0%	Weddle-Henning, Andrea; Murphy, Daniel; Masters, Andrea
I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure	Develop and Implement SMS to plan for and reduce risk and ensure quality	Transit					11/1/2016	12/31/2020		Assigned / In Progress	Green		0%	Julie Schneider; Sandra Kellner; Daniel Basile

BETTER
DASH
FASTER
CONSULTING

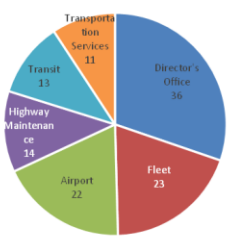
Best Practices in Tracking Your Strategic Plan

2017-2020 Strategic Action Item Progress Scorecard

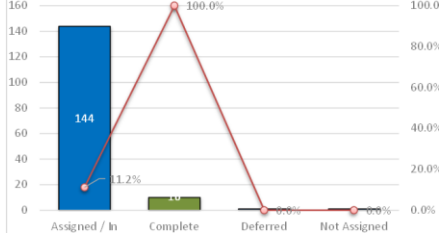
of Objectives and Action Items by Strategic Goal



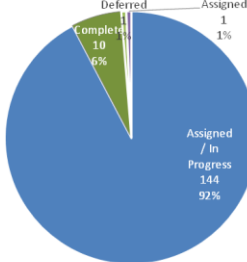
Action Items by Division



Action Items by Status and Average % Complete



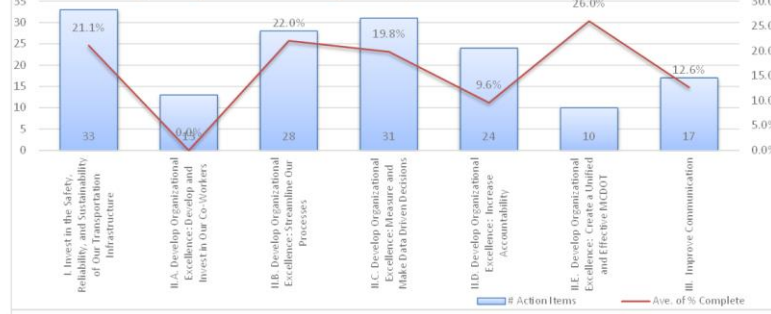
Action Items by Status



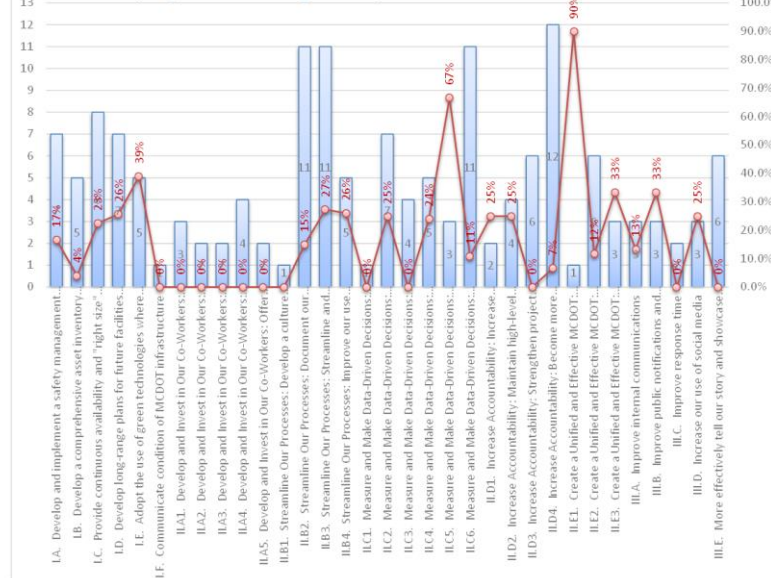
Report Ran 9:52 AM 10/26/2017

2017-2020 Strategic Action Item Progress Scorecard

Action Items By Strategic Goal and Average % Complete



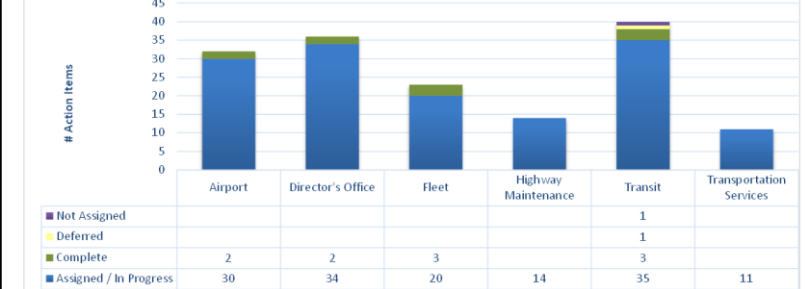
Action Items By Objective and Average % Complete



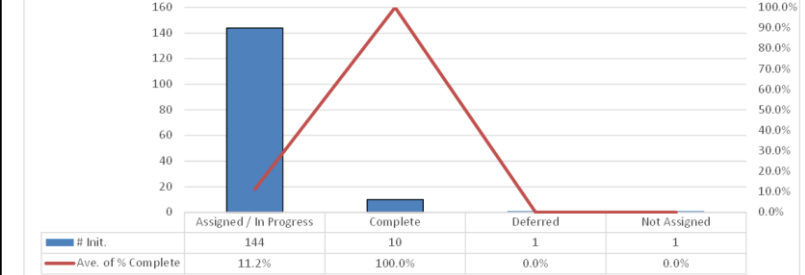
Report Ran 9:53 AM 10/26/2017

2017-2020 Strategic Action Item Progress Scorecard

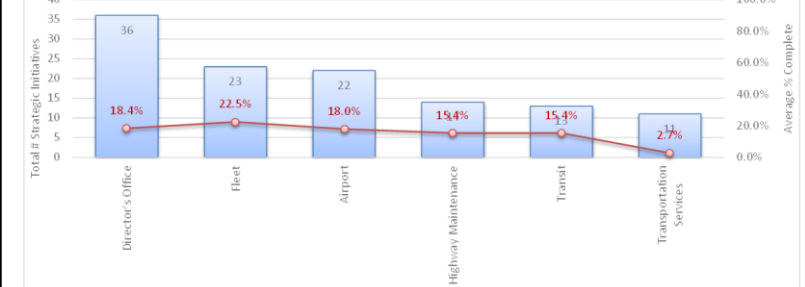
Action Items by Division by Status



Action Items by Project Status



Total # Action Items By Division and Average % Complete



Report Ran 9:53 AM 10/26/2017

Next Phase – Develop Level 2 and 3 Outcome Measures

1. Measurement of Results / Impact for Each City Department

- Example - Fire and Police Response Time
- Cycle time for Snow Plowing
- Customer Satisfaction
- Etc.



2. Next Phase of Our Measurement Project

- ✓ Form City Measurement Team
- ✓ Gather all existing measurement work
- ✓ Gather best practices (Coral Springs, Irving, WCMA, etc.)
- ☐ Measurement training for team and key leaders
- ☐ Develop Level 2 and 3 Key Performance Indicators (KPI's) for Each Department
- ☐ Create City-wide and Council Dashboards

3. We Will Be Benchmarking with Other Cohort Cities – WE NEED YOU!



- 1. Senior Management support is key to it being successful**
- 2. Some Departments are ahead of others**
- 3. Supervisor involvement helps communication of Plan to the lower levels of the organization more successful**
- 4. Getting other to update tracking has really made it easier**

Collaboration Projects with Other Key Partners in the Community



Collaboration with Other City Stakeholders

We work very closely with other key City stakeholders such as school district, business organizations, Foundations, etc.

11% 1. = Need significant work in this area

33% 2. = A little better, but could be a lot better

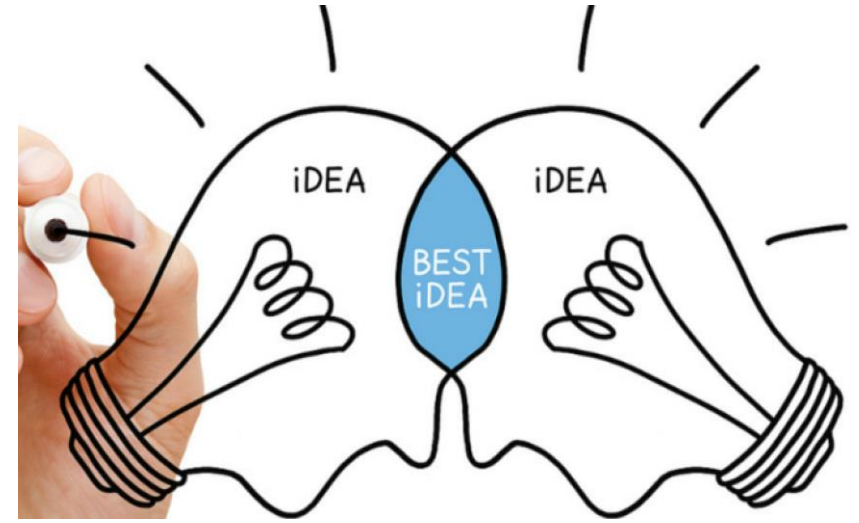
11% 3. = Doing ok or pretty average, need some work

11% 4. = We are almost there, have a little bit to do

33% 5. = We are very strong in this



Oshkosh Community Success Coalition



It's a common-sense collaboration.

Rather than work separately toward shared goals, why not tackle them in concert, together. The idea is “same goals... same page.”



Talent Attraction, Development, and Retention

Andy Leavitt, UW-Oshkosh

The Problem: Shrinking workforce population across the state, lack of diversity, and lower education levels locally.

Goals:

- ☐ Increase Oshkosh talent pool
- ☐ Retain workforce
- ☐ Develop talent internally
- ☐ Collaborate with other businesses



Strong Schools / Lifelong Learning / Student Success

David Gundlach, OASD

The Problem: Major factor in choosing a community or neighborhood when buying a home/renting are the quality of schools.

Goals:

- ☐ Build and support strong school communities
- ☐ All children ready to start school
- ☐ All students College, Career, and Community Ready
- ☐ Intentionally form and strengthen community partnerships



Accountability and Sustainable Funding

Mark Rohloff, City of Oshkosh

The Problem: Uncertain financial support from Federal, State and Local sources.

Goals:

- ☐ Strategic Planning
- ☐ Performance Management
- ☐ Maximize resources through collaboration & innovation
- ☐ Demonstrated ROI of taxpayer dollars
- ☐ Self-reliance



Quality of Life Image Campaign

Bill Wyman, OACF

The Opportunity: To create and promote a singular, powerful, and prideful city image and story.

Goals:

- ☐ Creative brief & messaging
- ☐ Implement long-term media in Oshkosh area
- ☐ Collaborate on unified shared marketing
- ☐ Develop effective evangelists



1. Before We Had No Overarching Plan

- Individual department plans

2. New Planning Process Gave a Sense of Team Focus

- Gave a sense of other department's mission
- We succeed and fail together

3. Consistency Gave Community a Sense of Direction

4. Strengthened Community Partnerships

- There are connecting points
 - Identify and Reduce duplication



What Questions Do You Have?

