



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

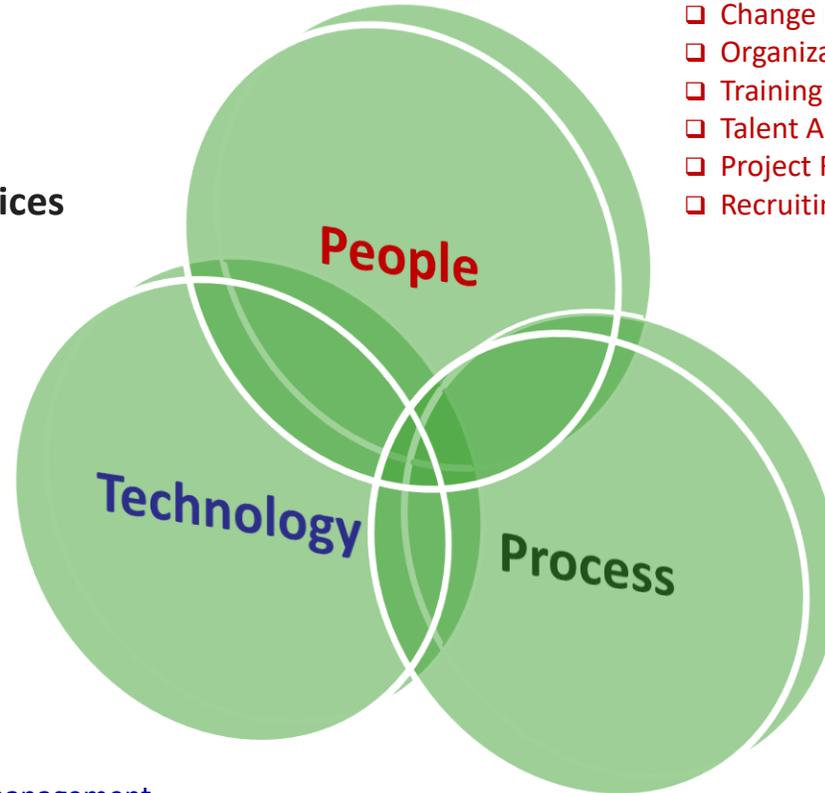
- ❑ Strategic Planning & Execution
- ❑ Building *Centers of Excellence*
- ❑ Program Management
- ❑ Project Management
- ❑ Vendor Partnerships

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?

78% **1. Yes**

22% **2. No**



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

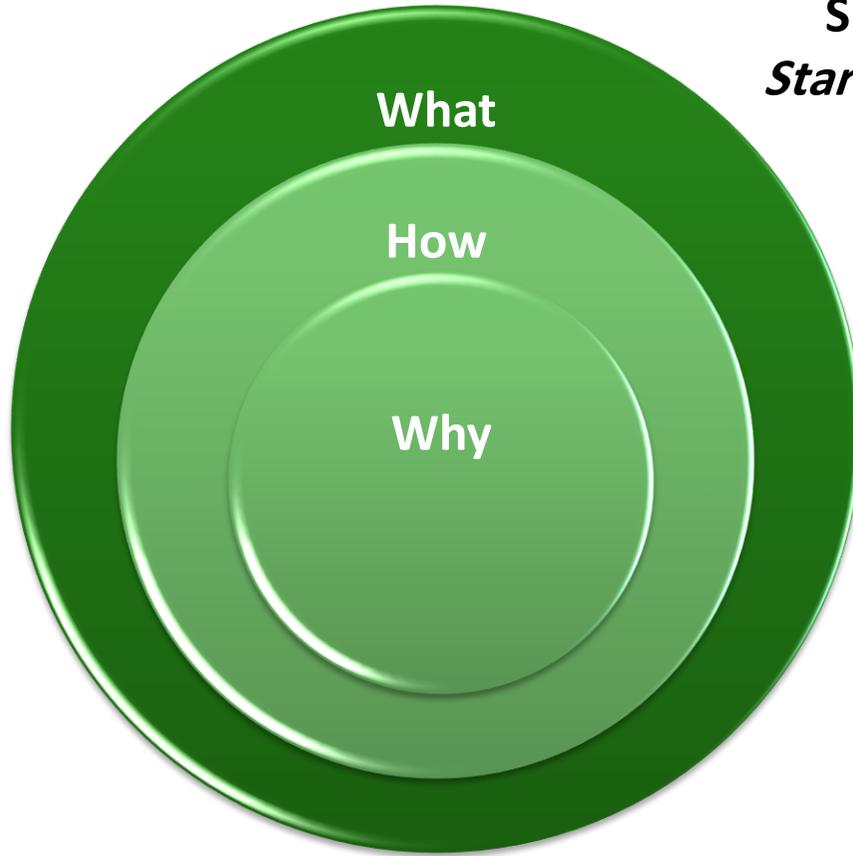
- 11% **1. = Need significant work in this area**
- 22% **2. = A little better, but could be a lot better**
- 44% **3. = Doing ok or pretty average, need some work**
- 0% **4. = We are almost there, have a little bit to do**
- 22% **5. = We are very strong in this**





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

TED Talk
Simon Sinek
Start with Why



Why Plan?

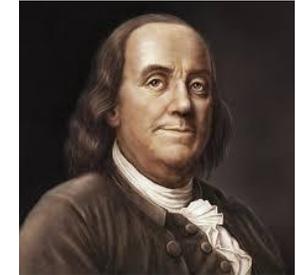
“Plans are nothing; planning is everything.”

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



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

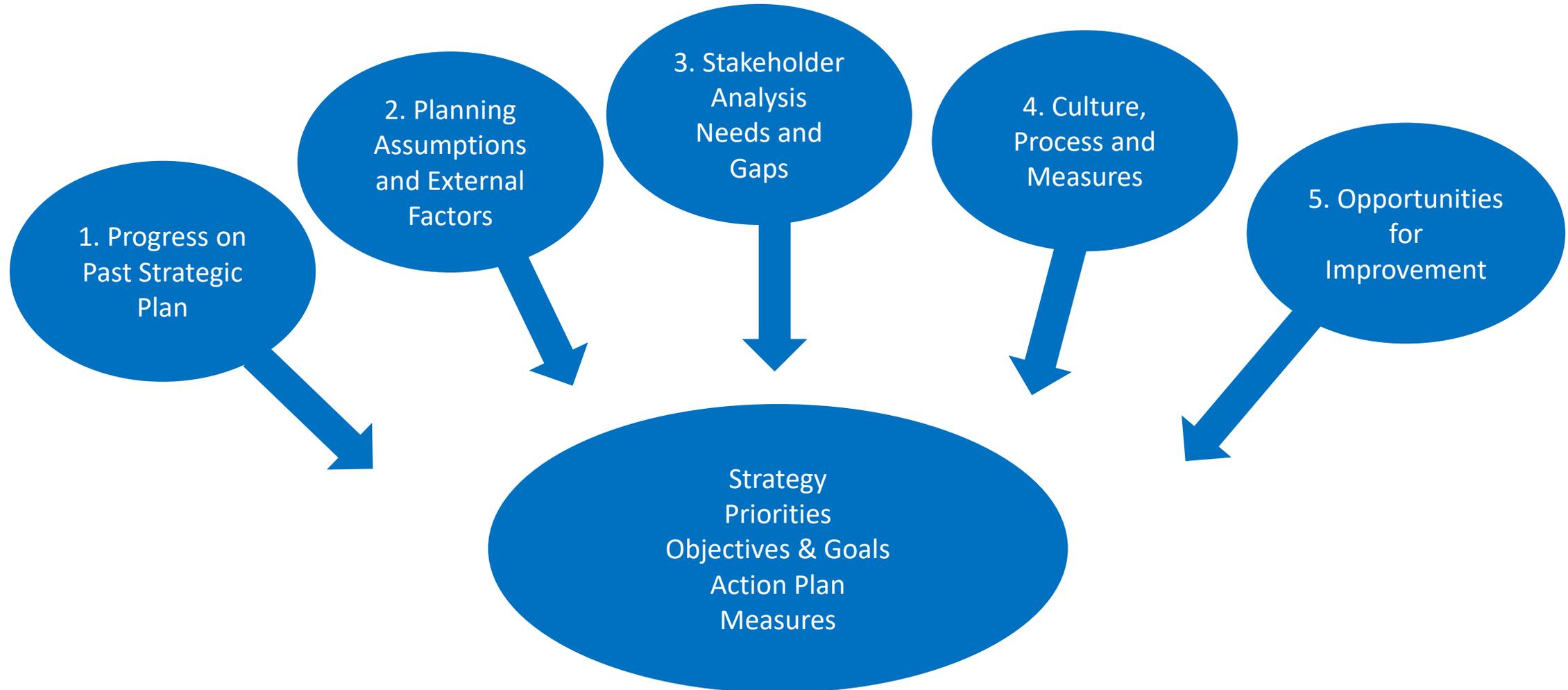




The Strategic Planning Goals are the largest gaps between the most important future customer and key stakeholder needs and your current capability.

- 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



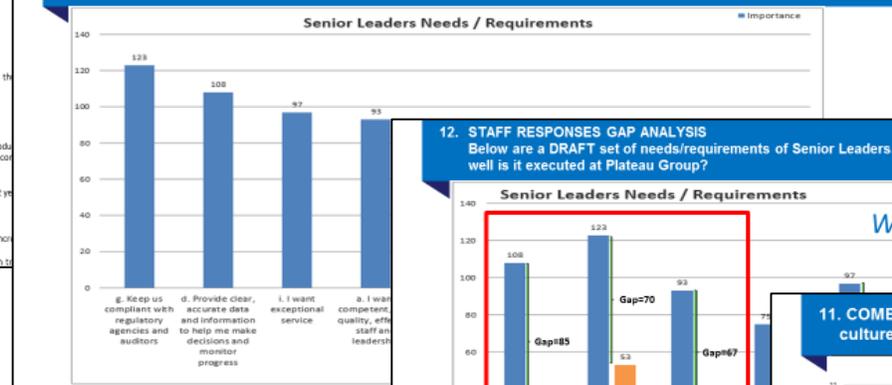
Supervisor
Survey Results
July 14, 2018

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BETTER DASH
FASTER CONSULTING

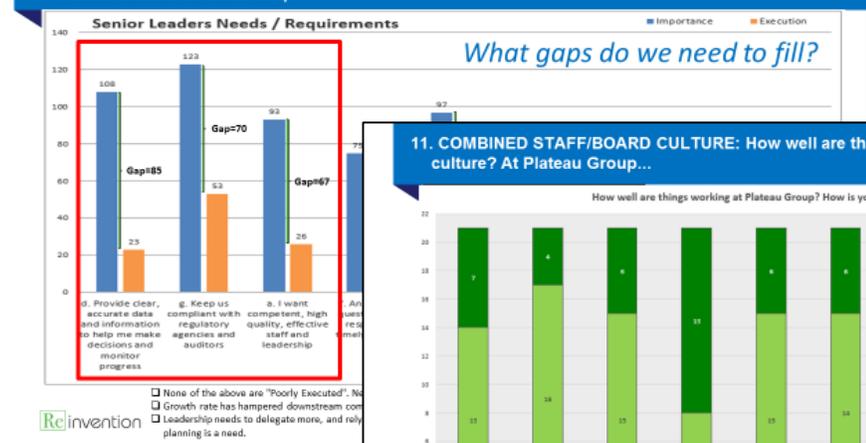
3. What are the top three planning assumptions we can make about the next two years? Write them as though it was a factual statement. We assume...

- 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 regulators 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, thus 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 cost
 - Plateau's growth has continued with organic products.
 - The company will continue to seek new revenue for its current lines of business
- Account Growth**
 - New products are going to create significant growth within our company in the next 2 yrs
 - 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 t

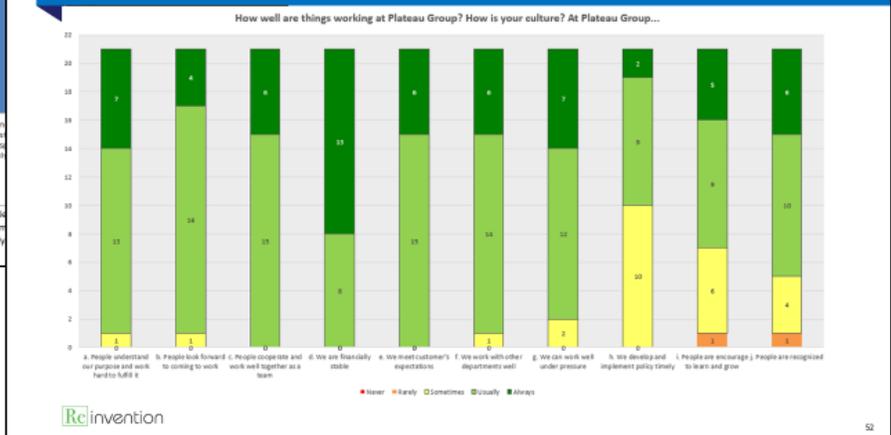
12. STAFF RESPONSES: Below are a DRAFT set of needs/requirements of Senior Leaders. From your perspective, how important is this and how well is it executed at Plateau Group? n=18, Index = # "Critical" responses * 9 pts + # "Very" * 3 pts + # "Somewhat" * 1 pts + # "Not at All" * 0 pts



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?



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



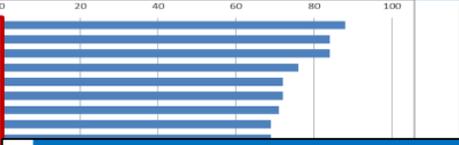
1. Progress on Current Plan

What are still the biggest gaps?

2015-2016 All Goals Importance – Leadership Team

ALL GOALS - IMPORTANCE

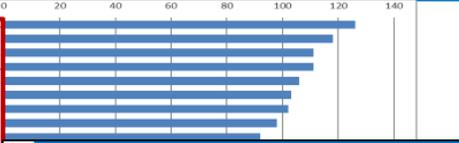
- Top 15
- VII.C. Staffing (have qualified, knowledgeable employees in the right...)
- I.A. Grow Consumer Loans and High Yield Lending Strategy (HYLS)
- I.D. Maintain an "E-Focus"
- VII.B. Member Advocacy Training
- IV.D. Innovation and Focus on Convenience, Time, Simplicity, and...
 - V.D. External Marketing Directed to a Younger Demographic...
- IV.C. Use Innovation to Enhance Member Relationships, Reduce Costs,...
 - II.A. Grow Relevant Checking Accounts
 - VII.D. Coaching and Mentoring Employees
- V.A. Footprint (geographic location, branch design, and viability of...
 - I.B. Grow Real Estate
- II.C. Grow Balances per Household
- IV.A. Use Innovation in Changes / Enhancements to Existing Products,...
 - VI.B. Controlling Expenses
- V.C. Internal Marketing to Our Existing Members (Advocacy, Checking...



2015-2016 All Goals Importance – BOARD

ALL GOALS - IMPORTANCE - BOARD

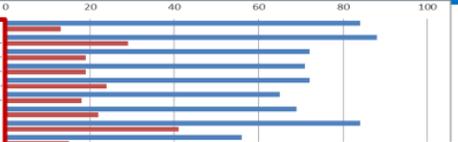
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 - II.D. Maintain an "E-Focus"
- IV.B. Use Innovation in Creating New Products, Process, and Services
 - VII.E. Standards and Practice (monitoring quality, surveys, etc.)
- I.B. Grow Real Estate
- II.C. Grow Balances per Household
- V.D. Annual Product Reviews for Profitability
- II.B. Grow Money Market Accounts
- III.A. Grow Investment Referrals
- I.C. Grow Dealer Loans
- II.E. Grow Business Checking Accounts
- III.C. Grow Assets Under Mutual Funds and Individual Funds
- III.B. Grow Insurance Products Offered to Our Members
 - VI.C. Review of Vendor Contracts
 - V.B. Mergers (small, branched, large)
 - I.E. Grow Student Loans



2015-2016 All Goals - Gap Analysis – Leadership Team

ALL GOALS GAP

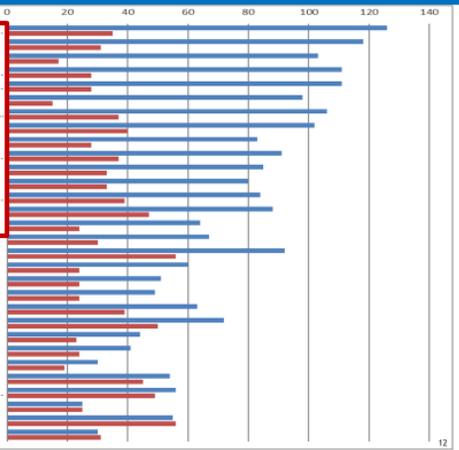
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 - V.B. Mergers (small, branched, large)
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 - I.E. Grow Student Loans
 - I.C. Grow Dealer Loans
 - VI.C. Review of Vendor Contracts



2015-2016 All Goals Gap Analysis - BOARD

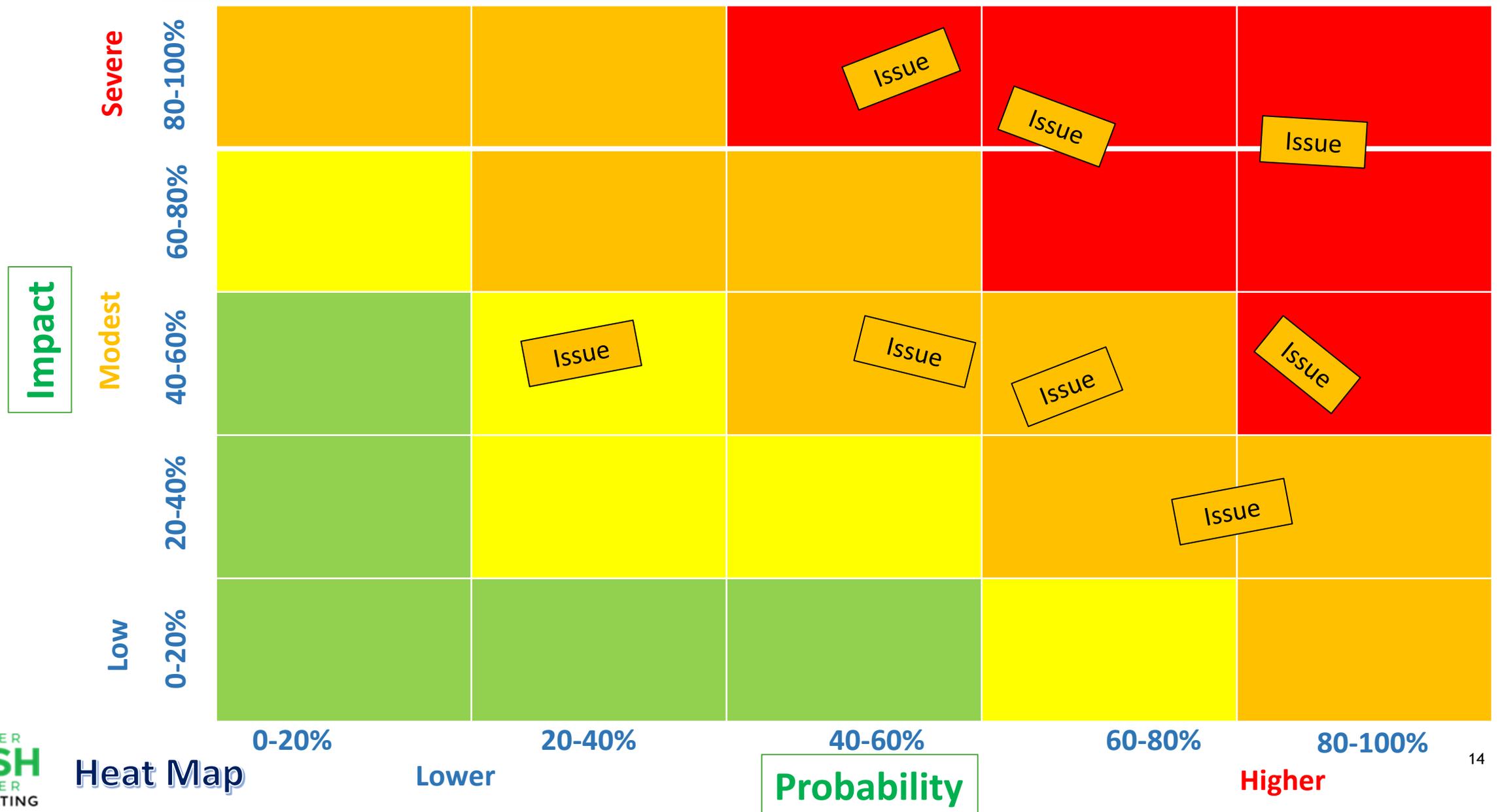
ALL GOALS GAP - BOARD

- Top 15
- VII.C. Staffing (have qualified, knowledgeable employees in the right...)
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- VI.C. Review of Vendor Contracts
- II.B. Grow Money Market Accounts
 - I.B. Grow Real Estate
- III.C. Grow Assets Under Mutual Funds and Individual Funds
 - II.E. Grow Business Checking Accounts
- III.B. Grow Insurance Products Offered to Our Members
 - VI.A. Non-interest Income
 - I.E. Grow Student Loans
 - I.C. Grow Dealer Loans
- V.A. Footprint (geographic location, branch design, and viability of...
 - V.B. Mergers (small, branched, large)



Importance
Execution

2. Planning Assumptions and External Factors



Heat Map

3. Stakeholder Analysis Needs and Gaps

Lead/ Target Customers
Like?
Dislike?
Improve?

QUESTION 12. Who are Capital Credit Union's top three "lead / target" members?

YOUNGER GENERATION	others/their community (relate to our mission)	FIRST TIME BORROWERS	Comments in red italics are from Board members
1. Younger generations - high school/college age	23. <i>younger generation</i>	1. First time borrowers (2)	
2. Younger demographic - those entering the borrowing years.		2. First mortgage members	
3. Young adults 20-40		3. <i>First time borrowers (3)</i>	
4. Millennials		4. <i>first time home owners</i>	
5. Young generation (16 to 40)			
6. New Millennials or age group of 18 to 45. Still want personal service but with the Tech. advances			
7. A younger demographic, 18 to 40, predominately female.			
8. 25-40 year old females			
9. 16 - 40			
10. Age demographic of 18 to 35			
11. Young members just starting their first job or career (millennials)			
12. Women			
13. <i>young married couples</i>			
14. <i>Millennials that are just starting a family /career</i>			
15. <i>Young generation (16 to 40)</i>			
16. <i>Younger members - millennials</i>			
17. <i>Young adults 20-40 (the future of the credit union)</i>			
18. <i>Millennials</i>			
19. <i>Young adults starting out in life</i>			
20. <i>young adults 20 - 30 age group</i>			
21. <i>Younger generation</i>			
22. <i>Millennials passionate about helping</i>			

QUESTION 13 What do your members like about your services / products? What are we good at?

MEMBER SERVICE	PRODUCT OFFERINGS	TECHNOLOGY / ONLINE	Comments in red italics are from Board members
1. Member service	1. Multiple products offered for each member	1. Our online offerings - remote deposit capture, home banking, ect.	
2. Love the member service	2. Members like the relevant checking products for the high interest rate, cash back, and/or ATM surcharge refunds/		
3. They like our customized, high-touch level of service.			
4. convenient branches			
5. Keeping a member focus			
6. Member advocacy			
7. <i>Member Service (4)</i>			
8. <i>Service (2)</i>			
9. <i>Good service</i>			
10. <i>Friendly staff and willingness to help members.</i>			
11. <i>Customer/member service</i>			
12. <i>They like our customized, high-touch level of service.</i>			
13. <i>Full financial service</i>			
14. <i>personal, we look at more than just a credit score making pro-active suggestions to help the member</i>			
15. <i>Keeping the</i>			

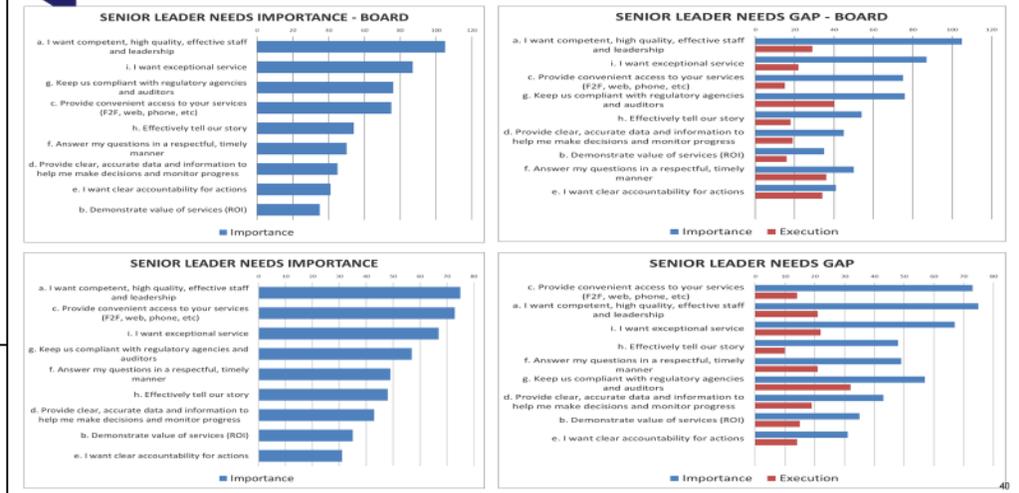
QUESTION 14 What are your top three member complaints? What do they dislike?

SLOW SERVICE	HOME BANKING / ONLINE ACCESS	MERGER ISSUES	Comments in red italics are from Board members
1. Our core system takes longer to process a transaction	1. The computer/home banking	1. Still stuck on the merger from over 2 years ago	
2. The speed of transactions.	2. Our on-line applications are outdated	2. Isn't the old credit union (either Capital or Pioneer)	
3. Lobby transactions take too long to process.	3. online banking needs more functionality	3. <i>Still stuck on the merger from over 2 years ago</i>	
4. Not fast enough (transactions, lending decisions, available technology)	4. <i>online banking</i>	4. <i>Isn't the old credit union</i>	
5. Wait time for transactions			
6. Time it takes to do a transaction or print receipts			
7. Too long to get a mortgage			
8. Because of changes in timing requirements on mortgage loan applications, it takes longer to close a loan. Member education is key in the process.			
9. Slow response times whether it's returning a phone call or getting a loan/mortgage approval.			
10. Slow front line transactions			
11. <i>The speed of transactions</i>			
12. <i>Slow system, it takes too long to do a transaction.</i>			
13. <i>Slow response times - call backs, mortgage applications, online</i>			
14. <i>Slow to return phone calls.</i>			
15. <i>Slow Service</i>			

QUESTION 15 What are one or two things your members say you need to improve?

ONLINE / TECHNOLOGY	EMPLOYEE KNOWLEDGE	Market
1. Online experience	1. Employee expertise/knowledge	2. <i>rates - pay higher dividends</i>
2. Technology	2. Developing a knowledgeable staff.	3. <i>Higher interest rate on Cha Ching or Money</i>
3. online banking experience	3. Staff that know what they are doing	Market
4. Online banking features		
5. <i>online banking downtime</i>		
6. <i>Technology/online experience</i>		
7. <i>online banking experience</i>		
8. <i>Technology (2)</i>		
9. <i>Technology as it relates to products and services</i>		
10. <i>online banking experience, phone service</i>		
11. <i>On line east of transactions</i>		
12. <i>On line business</i>		
13. <i>online banking features</i>		

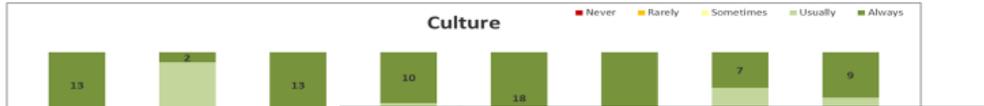
QUESTION 16. Below are a DRAFT set of needs/requirements of Senior Leaders. From your perspective, how important is this and how well is it executed at Capital Credit Union? Sorted by Importance and Biggest Gaps



What are the biggest gaps?

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...



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 I 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 subordinates 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 production 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

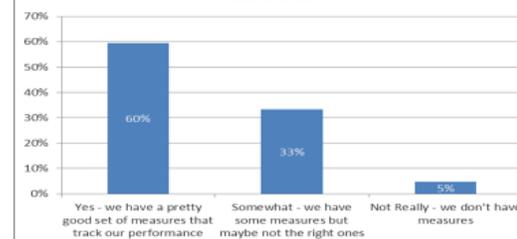
16. How well are we managing and improving our processes?

How well are we managing and improving our department processes?

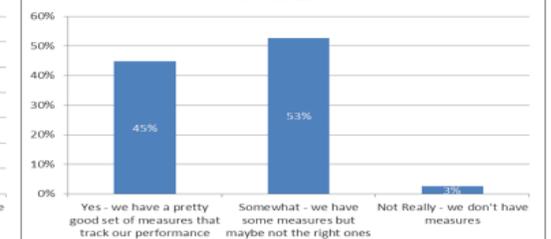


17. How well is your Department doing? Do you have measures and/or track specific data (what, how well, or how much you are doing) and then do you use them daily, weekly, or monthly to manage performance?

Does Your Department Have Performance Measures?



Does Your Department Use Measures 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

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

BUREAUCRACY

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

SPEED / EFFICIENCY

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

TECHNOLOGY

- Challenges of keeping
- The online experience
- Members seem so fru
- At times we are react technology, core t
- Update the website
- The online experience
- Challenges of keeping
- Keeping up with tech
- technology improvem
- Technology
- Online Banking

PLANNING / PRIORITIES

- Lack of a plan, every
- Free flow of relevant
- Inconsistency of exp
- Too much managem
- Lack of clear, concis
- Some 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

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

EMPLOYEE FOCUS

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

MEMBER ISSUES

- Member retention
- Keep members*
- Member issues*
- member satisfaction*
- Member Satisfaction and Quality Customer Satisfaction*
- Maintaining "small town" feel / personal service as the*

Comments in red italics are from Board members

TECHNOLOGY

- Investing in our staff for longevity.
- Solid Employee coaching and development program*
- Employee focus*
- 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

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

MEMBER FOCUS

- Transactional member surveys.
- Identifying and defining our target market membership
- Pay/Incentives

SUCCESSION PLAN

- succession planning for Tom's retirement*
- place the succession plan when Tom retires. End the negativity of the merger toward management.*
- Member surveys*
- Member focus*
- Improve the customer experience (increase knowledge level of employees, speed of service.*

SUCCESSION PLAN

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

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

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

EMPLOYEE

- Increase pay to help retain employees
- Pay valued Employees top dollar to reflect value
- I would expect more out of our employees, and then reward them for it.
- 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.
- 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
- employee satisfaction*

HIRE

- Hire*
- Upgrade pay and benefits*
- 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.*
- retaining and the recruiting of top tellers and MSR employees*
- Increase pay for dedicated loyal employees*

EXTREME MARKETING

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

REBRAND AND REJUVINATE

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

DEVELOP A NEW LENDING PROCESS

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

CREATE A MEMBER FOCUS ORGANIZATION

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

MEMBERS

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

COMMUNITY

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

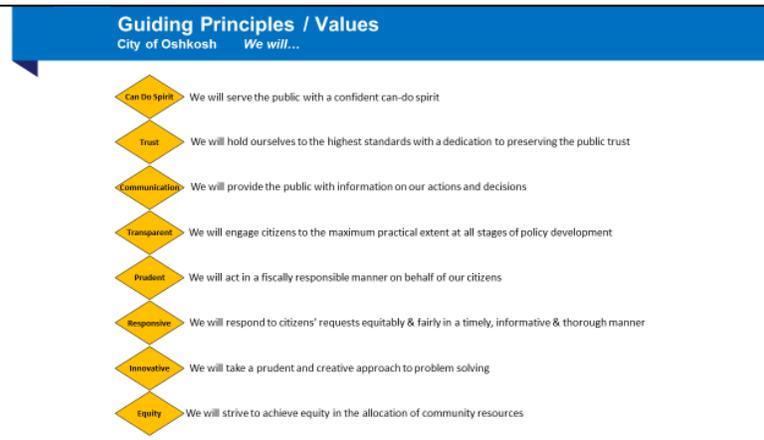
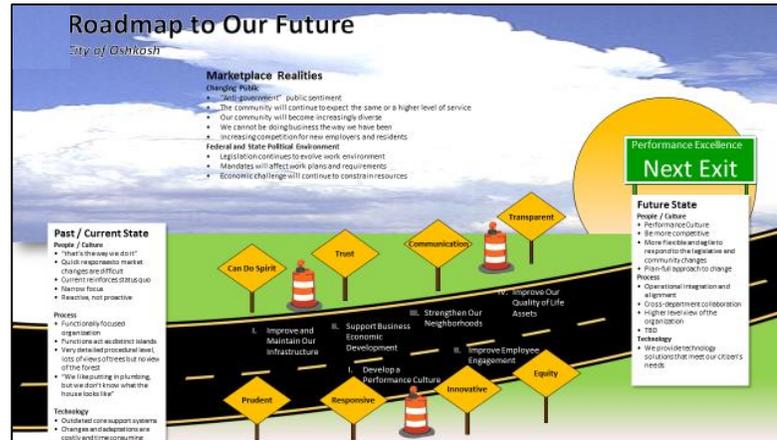
OTHER

- Provide funds to organizations that we have had relationships with in the past and are not able to help all the time
- 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

September, 2016

2017-2018 STRATEGIC PLAN

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

Mission: The City of Oshkosh providing goods and services in pursuit of a safe and vibrant community.

Guiding Principle - 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. **Essential:** 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 - Businesses 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.

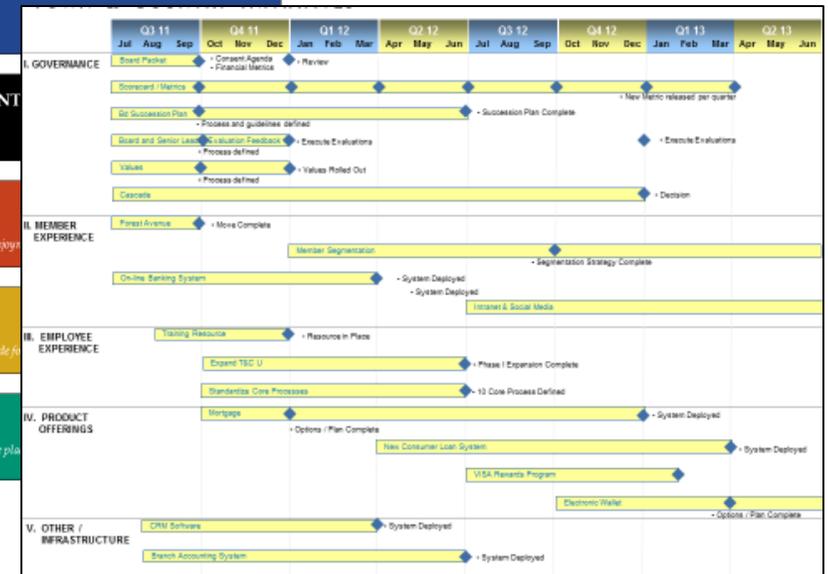
PROVIDE A SAFE, SECURE, AND HEALTHY COMMUNITY
Staff Owner(s): Tim Franz & Dean Smith
Future State: Public Safety Officials are recognized as trusted, efficient and effective professionals

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

STRENGTHEN OUR NEIGHBORHOODS
Staff Owner(s): Allen Davis
Future State: Neighborhoods throughout the community are attractive, well maintained, and desirable places among residents



3. Detailed Strategic Plan

- Detailed Plan and Status Results
- Detailed Status
 - Green/Yellow/Red
 - Status Comments
- Updated for 1/4'ly Status Reviews
- Includes Agenda 12 Month Plan
- Posted to Internet

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.

Strategic Objectives - WHAT

- A. Attract, Expand, and Retain Businesses and Workforce
- 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

Strategies/Tactics - HOW

- Continue to attract and support the Greater Oshkosh Economic Development Corporation (GO-EDC)
- Develop and implement action plans for prime real estate and redevelopment locations such as Buckstaff, the Riverwalk, the Pioneer area, Aviation Business Park, etc.
- Partner with Greater Oshkosh EDC to offer educational opportunities for Elected Officials
- Continue to streamline the approval and permitting process for developers while preserving health & safety
- Create and continuously update a database of municipally-related data necessary for business expansion or attraction
- Reduce Economic Disparities by Attracting Family-Sustaining Jobs to Oshkosh

City of Oshkosh 2012-14 Strategic Plan and Results

Key: ✓ Complete ◐ In Progress ⚠ Caution ⚡ Below Plan

Council Meeting Week	Council Review	Topic / Activity / Milestone Review	Who	Comments
7/16/2012	Strategic Planning Session			
7/30/2012				
8/13/2012	Plan Review			
8/27/2012				
9/10/2012		Approve 2012-13 Plan	Mark	
9/24/2012				
10/8/2012				
10/22/2012				
11/5/2012				
11/19/2012				
12/3/2012	Quarterly Review	TBD		
12/17/2012				
12/31/2012				
1/14/2013				
1/28/2013				
2/11/2013				
2/25/2013				
3/11/2013	Quarterly Review	TBD		
3/25/2013				
4/8/2013				
4/22/2013				
5/6/2013				
5/20/2013				
6/3/2013	Semi-Annual Review	TBD		
6/17/2013				
7/1/2013				
7/15/2013	Update Plan			
7/29/2013				
8/12/2013	Plan Review			
8/26/2013				
9/9/2013				
9/23/2013				

4. Draft Measures

- Set of Measures
- Draft Council Scorecard

Proposed City of Oshkosh Measures Balanced Scorecard

Financial

- ✓ Spend / Revenue
- ✓ \$ Spend vs Budget
- ✓ \$ in TIF
- ✓ \$ Property Value by Type
- ✓ \$ Cost Recovery for City Programs (Rec, Parks, etc.)
- ✓ \$ Property Tax Revenue as a % of General Fund Revenues
- ✓ \$ IT Spend / Resident
- ✓ % of KPI TARGETS ACHIEVED

Customer

- ✓ Overall Quality of Life
- ✓ Quality of Neighborhood
- ✓ Feel Safe Index
- ✓ Population
- ✓ Overall Quality of City Services (KPI) and By Service
- ✓ Overall Customer Service Rating (KPI)
- ✓ Residents' Value Rating (KPI)
- ✓ Quality of "Cool Stuff To Do"
- ✓ Quality of Communications
- ✓ Likelihood of Recommending City as a Place to Run a Business
- ✓ Business Rating of City Efforts
- ✓ Supporting Growth
- ✓ Attracting New Businesses
- ✓ Retaining Existing
- ✓ Easy to Do Business With

Learning and Growth

- ✓ Employee Satisfaction (KPI)
- ✓ Employee Satisfaction with HR
- ✓ Rewards and Recognition
- ✓ Employees per 1,000 Residents
- ✓ Employee Turnover
- ✓ Sick Leave per 1,000 Hrs Worked
- ✓ Workers' Compensation Claims per 100 Employees
- ✓ Training Hours per Employee vs. Total Dollars Spent for Training
- ✓ Recruitment Cycle Time
- ✓ Supervisor Satisfaction with Recruitment

Department Process/Quality

- ✓ Fire and Police
- ✓ Crime Rate Incidents per 100,000 (KPI)
- ✓ Crime Clearance Rate
- ✓ Fractal Response in 8 min. or Less by Fire or EMS
- ✓ Police Response Time
- ✓ Accidents at Major Intersections (KPI)
- ✓ Permit Status (New, Pending, Closed)
- ✓ % Code Violations Voluntary Compliance Prior to Judicial Process (KPI)
- ✓ Permit Cycle Time (Level 1, 2, & 3)
- ✓ # & sq. ft. of buildings/sites available
- ✓ Status - Open, Pending, Closed, Completed) by Arterial/Collect.
- ✓ # Employees v. Satisfaction with
- ✓ Job Loss / Local Employees
- ✓ Increase in Tax
- ✓ Cycle Time

Proposed Council Scorecard Balanced Scorecard

Financial

- ✓ Spend / Revenue
- ✓ \$ Spend vs Budget
- ✓ \$ in TIF
- ✓ \$ Property Value by Type
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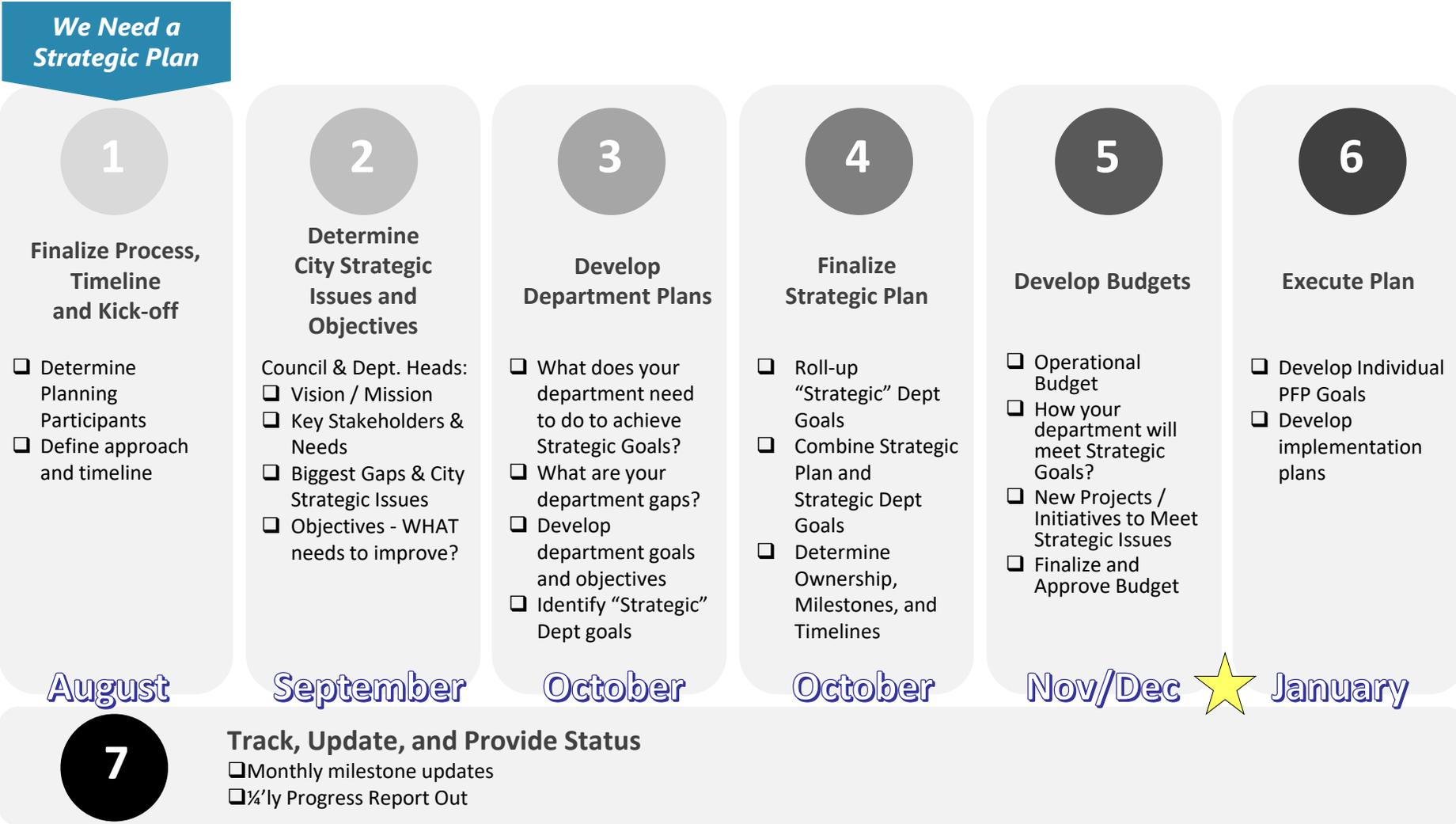
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Example Strategic Planning Process



Plans Executed



City of Oshkosh Strategic Plan





2017-2018 STRATEGIC PLAN

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Mission

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- 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

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SUPPORT ECONOMIC DEVELOPMENT – *Allen Davis*

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- A. Attract, Expand and Retain Businesses
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- 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

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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

Objectives - WHAT

A. Attract, Expand, and Retain Businesses and Workforce

Staff Owner: Allen Davis

B. Support Redevelopment Opportunities for Central City, Waterfront, and Underutilized Properties in the City

Staff Owner: Allen Davis

C. Develop infrastructure needed to support business and residential development

Staff Owner: Allen Davis

D. Establish Economic Development Metrics

Staff Owner: Allen Davis

E. Promote the City of Oshkosh

Staff Owner: Allen Davis

F. Develop an Effective Economic Development Incentive Program

Staff Owner: Allen Davis

Strategies / Tactics - HOW

- Continue to invest and support the Greater Oshkosh Economic Development Corporation (GO-EDC)
- Develop and implement action plans for prime real estate and redevelopment locations such as Buckstaff, the Riverwalk, the Pioneer area, Aviation Business Park, etc.
- Partner with Greater Oshkosh EDC to offer educational opportunities for Elected Officials
- Continue to streamline the approval and permitting process for developers while preserving health & safety
- Create and continuously update a database of municipally-related data necessary for business expansion or attraction
- Reduce Economic Disparities by Attracting Family Sustaining Jobs to Oshkosh

- Implement the Central City Investment Strategy
- Identify and support targeted redevelopment areas for reuse and development
- 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
- Continue to support the development of the Riverwalk along the Fox River and Lake Winnebago
- Market redevelopment sites to private developers

- Implement the recommendations in the 2016 Parking Study when applicable and budgeted
- Develop a city-owned rail transload facility in the Southwest Industrial Park
- Develop and implement plans to improve the city's main corridors and to plan for industrial and business park expansions
- Market Interstate 41 as an economic development asset
- Pursue site designation certification within our industrial parks through the Wisconsin Economic Development Corporation (WEDC)
- Explore the feasibility of a city-owned wetland bank
- Research potential of a residential subdivision development program

- Develop a Set of Metrics / dashboard that can monitor the progress of the City's Investment in Economic Development

- Support involvement in the Interstate 41 Corridor initiative to jointly market the region
- Market our transportation connections
- Market the city-owned available lots in the industrial and business park, redevelopment areas, and scattered residential sites
- Develop and Implement a Quality of Life campaign with community partners
- Support joint efforts on a marketing campaign to attract and retain businesses and workers

- Update Tax Incremental Financing (TIF) Policy to include residential redevelopment
- Develop an Economic Development Incentive policy
- Continue to promote and enhance the city's Revolving Loan Fund
- Research all local, state, federal, and private grant opportunities regularly
- Research Economic Development incentives used by other communities in Wisconsin and nationwide
- Identify needs for loans and grants for niche businesses, entrepreneurs, or minority/women/disabled business owners



- **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**

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**

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**

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**

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

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.

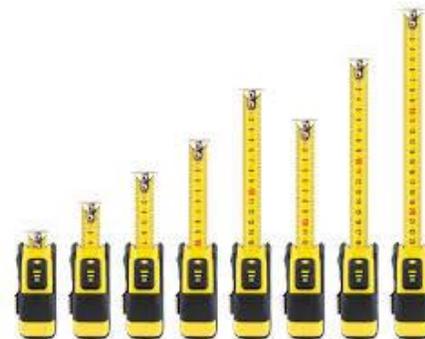
11% 1. = Need significant work in this area

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

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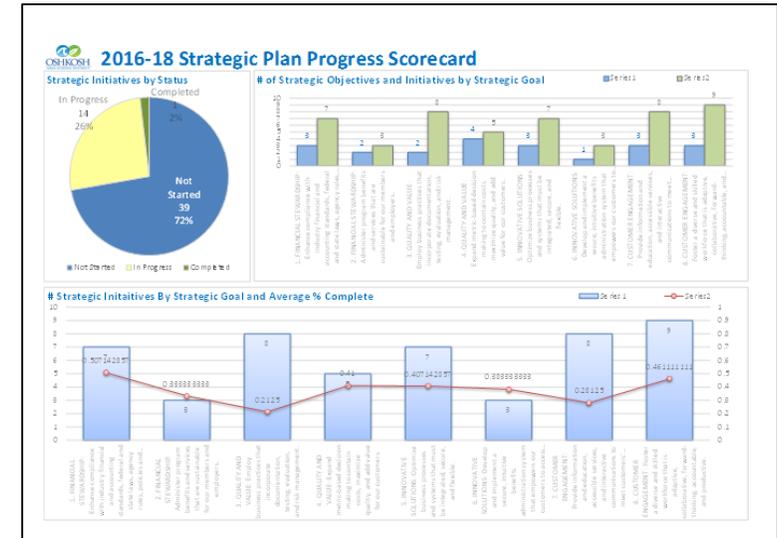
33% 4. = We are almost there, have a little bit to do

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)?**

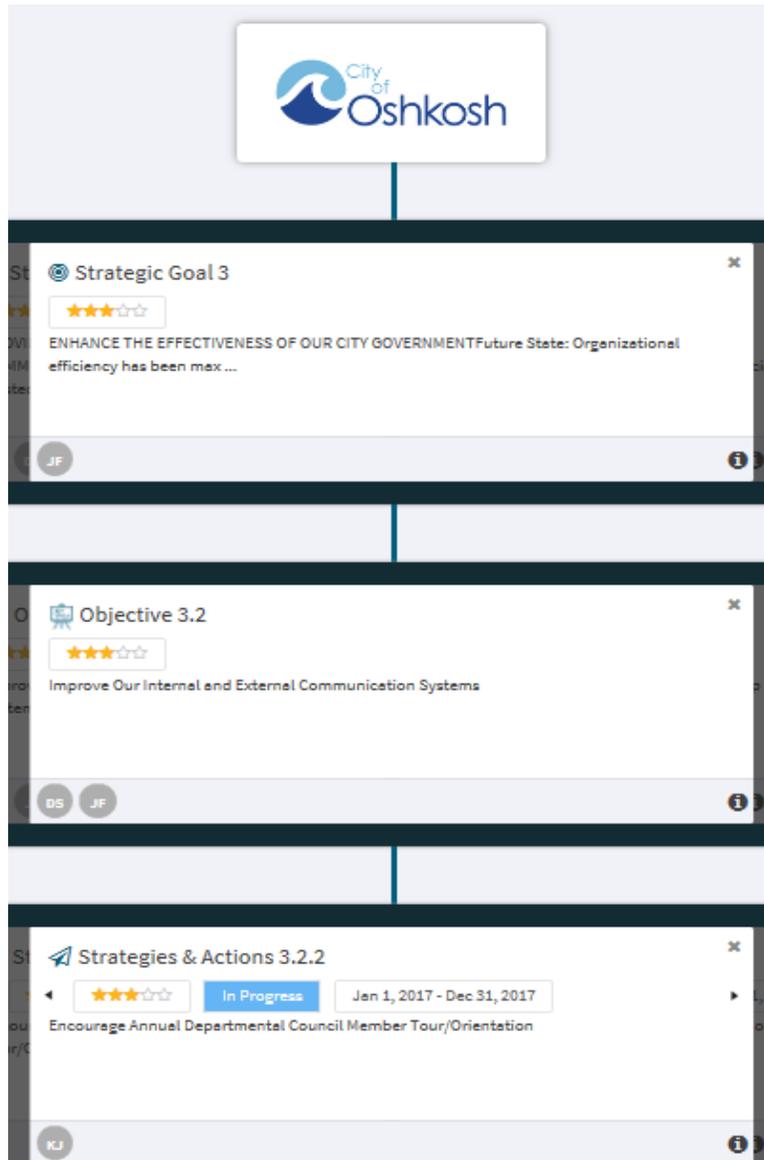
City of Oshkosh
2017 Strategic Plan 1st Quarter Update



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

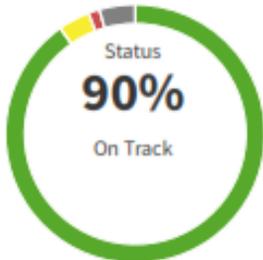
Priority Goal	Strategic Objectives	Strategies and Tactics
<p>Support Economic Development</p>	<p>A. Attract, Expand and Retain Businesses</p> <p>B. Support Redevelopment Opportunities for Central city, Waterfront, and Underutilized Properties in the City</p> <p>C. Develop Infrastructure Needed to Support 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>	<ul style="list-style-type: none"> ✓ Continue to invest and support the Greater Oshkosh Economic Development Corporation (GO-EDC) ✓ Develop and implement action plans for prime real estate and redevelopment locations such as: Sawdust District, the Pioneer area and Aviation Business Park ↔ Partner with Greater Oshkosh EDC to offer educational opportunities for Elected Officials ✓ Continue to streamline the approval and permitting process for developers while preserving health & safety ✓ Create and continuously update a database of municipally-related data necessary for business expansion or attraction ✓ Reduce economic disparities by attracting family sustaining jobs to Oshkosh ↔ Implement the Central City Investment Strategy ✓ Identify and support targeted redevelopment areas for re-use and development ✓ Actively pursue acquiring key sites through the Redevelopment Authority or Common Council that could have a significant impact on the City if redeveloped ✓ Continue to support the development of the Riverwalk along the Fox River and Lake Winnebago ✓ Market redevelopment sites to private developers ↔ Implement the recommendations in the 2016 Parking Study when applicable and budgeted ✓ Develop a City-owned rail transload facility in the Southwest Industrial Park ✓ Develop and implement plans to improve the City's main corridors and to plan for industrial and business park expansions ✓ Market Interstate 41 as an economic development asset ✓ Pursue site designation certification within our industrial parks through the Wisconsin Economic Development Corporation (WEDC) ✓ Explore the feasibility of a City-owned wetland bank ↔ Research potential of a Residential Subdivision Development Program ↔ Develop a set of metrics/dashboard that can monitor the progress of the City's investment in economic development ✓ Support involvement in the Interstate 41 Corridor Initiative to jointly market the region ✓ Market our transportation connections ✓ Market the City-owned available lots in the industrial and business park, redevelopment areas, and scattered residential sites ✓ Develop and implement a Quality of Life campaign with community partners ✓ Support joint efforts on a marketing campaign to attract and retain businesses and workers ✓ Update Tax Incremental Financing (TIF) Policy to include residential redevelopment ✓ Develop an Economic Development Incentive Policy ✓ Continue to promote and enhance the City's Revolving Loan Fund ✓ Research all local, state, federal, and private grant opportunities regularly ✓ Research economic development incentives used by other communities in Wisconsin and nationwide ✓ Identify needs for loans and grants for niche businesses, entrepreneurs, or minority/women/disabled business owners

- Word Doc
- Very Manual
- A Lot of "Chasing"

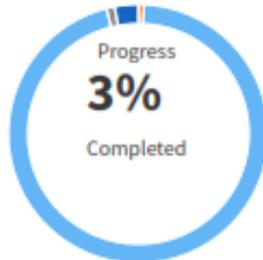


- **Envisio Strategic Planning On-line Software**
- **Strategic Goals**
- **Objectives**
- **Actions**

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



Total Strategies & Actions: 216



- **% 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



Total Strategies & Actions: 31



Objective: 6

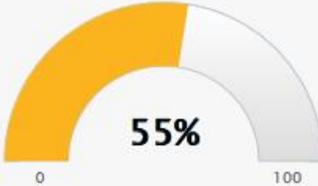
Strategies & Actions: 31

govBenchmark



Home Data Entry ▾ Reports ▾ Resources ▾

National City Performance Standard



55%

Data Entry Progress FY 2016

Service Area FY 2016		
1: General Government	90%	<div style="width: 90%;"></div>
2: Code Enforcement	0%	<div style="width: 0%;"></div>
3: Facilities	100%	<div style="width: 100%;"></div>
4: Finance	0%	<div style="width: 0%;"></div>
5: Fire/EMS	0%	<div style="width: 0%;"></div>

184 Cities

Newest Members

- Bowling Green
- Corona
- Bettendorf

[Show All \(+\)](#)

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MCDOT Strategic Plan

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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 implement a safety management program that improves safety and reduces risk
- B. Develop a comprehensive asset inventory including deferred maintenance
- C. Provide continuous availability and "right size" facilities and equipment
- D. Develop long-range plans for future facilities and services
- E. Adopt the use of green technologies where cost effective
- F. Communicate condition of MCDOT Infrastructure

A. Develop and Invest in Our Co-workers

A1 Harness more value from training & educational opportunities	A4 Increase employee "engagement"
A2 Develop our current leaders and identify potential leaders	A5 Offer competitive compensation
A3 Increase recognition, reward, and appreciation	

B. Streamline Our Processes

B1 Develop a culture of continuous improvement	☐ Increase on-line access
B2 Document our core and support processes	☐ Develop greater visual and GIS capabilities
B3 Streamline and standardize key processes to improve our efficiency	☐ Reduce paperwork-intensive processes
B4 Improve our use of technology	☐ Reduce duplicate data entries
☐ Be aware and apply new and emerging technologies	☐ Develop a central, department-wide collaboration site

C. Measure and Make Data-Driven Decisions

C1 Research and establish industry standards/ external benchmarks	measurement system
C2 Develop Department and Division KPIs	C5 Create regular division performance management updates
C3 Identify justifications for projects (ROI, RDA, etc.)	C6 Implement automation and tracking systems

Strategic Plan Action Plan

+ 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)				

MCDOT
Strategic Plan Action Items

Home Documents Calendar Notebook Recent Strategic Plan Action Items Site Contents EDIT LINKS

+ new item

Grouped by Goals Airport Action Items At Risk & Potential Risk Find an item

Strategic Goal Action Item Title Division Start Date Projected End Date Actual End Date

Count= 156

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

Strategic Goal : II.A. Develop and implement a safety management program that improves safety and reduces risk

Strategic Goal : II.B. Develop and implement a safety management program that improves safety and reduces risk

Strategic Goal : II.C. Develop and implement a safety management program that improves safety and reduces risk

Strategic Goal : II.D. Develop and implement a safety management program that improves safety and reduces risk

Strategic Goal : II.E. Develop and implement a safety management program that improves safety and reduces risk

Strategic Goal : III. Improve the efficiency of our transportation system

MCDOT
Strategic Plan Action Items

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+ new item

Grouped by Goals Airport Action Items At Risk & Potential Risk Find an item

Strategic Goal Action Item Title Division Start Date Projected End Date Actual End Date

Count= 33

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

MCDOT
Strategic Plan Action Items

Home Documents Calendar Notebook Recent Strategic Plan Action Items Site Contents EDIT LINKS

+ new item

Grouped by Goals Airport Action Items At Risk & Potential Risk Find an item

Strategic Goal Action Item Title Division Start Date Projected End Date Actual End Date

Count= 33

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

Strategic Goal	Action Item Title	Division	Start Date	Projected End Date	Actual End Date	% Complete	Assigned / In Progress	Progress	Assigned / In Progress
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		0%	Kuehn, Kenneth	Assigned / In Progress	Green
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		0%	Weddle-Henning, Andrea	Assigned / In Progress	Green
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		0%	Julie Schneider	Assigned / In Progress	Green

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Commit Clipboard Actions Spelling

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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%

Best Practices in Tracking Your Strategic Plan

ID	Strategic Goal	Objective	Division	Description	Action
5	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	Director's Office	Provide on-going training to Kuehn	
6	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	Airport	Complete SMS checklist for Thomas	
7	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	Partner with Risk Manager Goede	
8	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	Highway Maintenance	Develop safety bulletin Kuehn	
9	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	Transportation Services	Plan and Implement Highway Wedd	

Strategic Plan Calculations													
ID	Strategic Goal	Objective	New Strategic Goal	New Objective	Action Item Title	New Action Item	Division	Director's Office	Airport	Fleet	Highway Maintenance		
5	1	2	3	4	5	6	7	8	9	10	11	12	13
5	1	2	3	4	5	6	7	8	9	10	11	12	13

Strategic Plan Master Pivot Tables			
Instructions	Raw Data Download	STRATEGI	
1	Assigned / In Progress	144	92.3%
2	Complete	10	6.4%
3	Deferred	1	0.6%
4	Not Assigned	1	0.6%
5	Grand Total	156	100.0%
6	0	0	
7	Graph 1 - # Strategic Goals, Objectives, and Initiatives		Graph 2 - By Status
8	Row Labels	# Objectives	# Action Items
9	I. Invest in the Safety, Reliability, and Sustainability of Our Transportation Infrastructure	6	33
10	II.A. Develop Organizational Excellence: Develop and Invest in Our Co-Workers	5	13
11	II.B. Develop Organizational Excellence: Streamline Our Processes	4	28
12	II.C. Develop Organizational Excellence: Measure and Make Data Driven Decisions	6	31
13	II.D. Develop Organizational Excellence: Increase Accountability	4	24
14	II.E. Develop Organizational Excellence: Create a Unified and Effective MCDOT	3	10
15	III. Improve Communication	5	17
16	Grand Total	33	156
17			
18			
19			

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



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

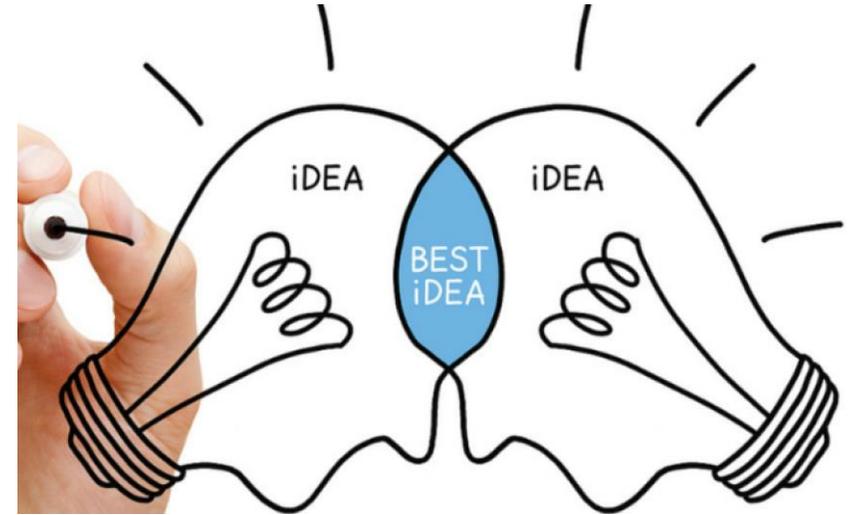
11% 3. = Doing ok or pretty average, need some work

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?

