



The City of Burlington, Wisconsin

STRATEGIC PLANNING WORKSHOP

July 28, 2012

Prepared by:



BURLINGTON, WISCONSIN

Strategic Planning Workshop

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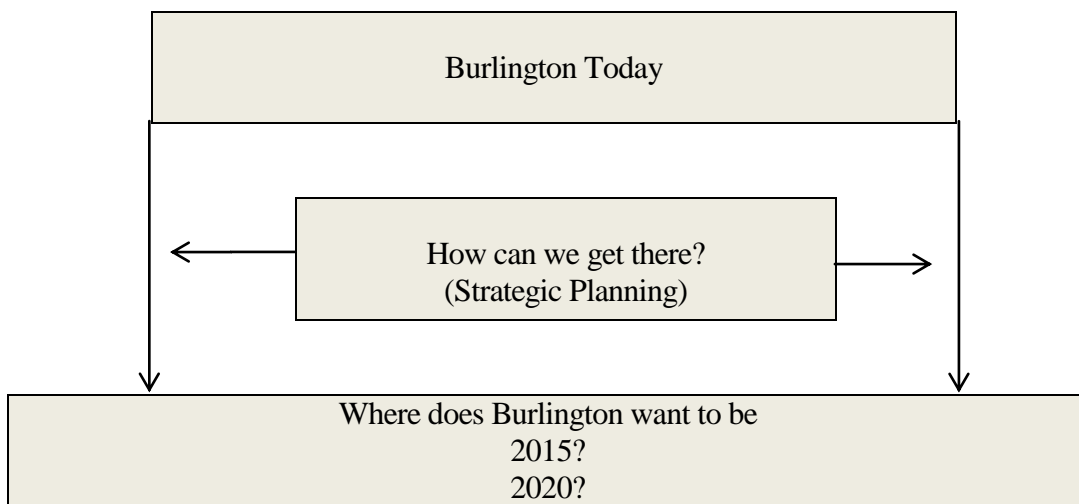
I. STRATEGIC PLANNING: OVERVIEW

In the early 1970's, many firms in the private sector began a formalized planning process critically looking at the organization from top to the bottom and bottom to top. Using this approach, strategic planning became a deliberative process in which management defined goals and objectives, and assessed the internal and external environment to determine impediments to achieving those goals. The process also included an evaluation of the progress on the strategy, and making adjustments to achieving the company's goals and objectives.

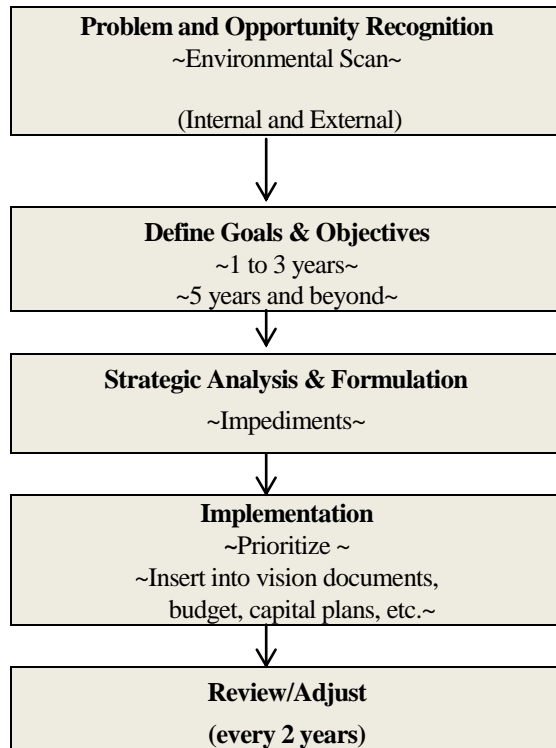
In the 1990's, local governments began to embrace strategic planning. Many saw the benefit in looking into the future and defining what they wanted their governmental organization to look like, determine how to operate efficiently, and accomplish the goals that they established.

In general terms, strategic planning is a process which starts with the concept of: "where do we as an organization want to go" and "how can we get there". The strategic planning process can be generally viewed in the following model:

In general terms, strategic planning is a process which starts with the concept of: "*where are we today*", "*where do we as an organization want to go*" and "*how can we get there*".



A strategic planning process generally encompasses several steps. These are shown in the following diagram:



PROBLEM AND OPPORTUNITY RECOGNITION

Voorhees Associates distributed forms to the Elected Officials and staff to help them evaluate the current “conditions” in the organization and the environment – both Internal and External. The Internal analysis helped identify Burlington’s organizational strengths and weaknesses. The External analysis revealed the threats and opportunities in the “community” – including the County, State and nationally. Commonly, this is known as a SWOT (strengths/weaknesses/opportunities/threats) analysis. See Pages 7 and 8 for a summary of the insight provided by the Elected Officials and staff.

DEFINE GOALS & OBJECTIVES

Voorhees Associates distributed forms to the Elected Officials and staff to help them identify goals or objectives they wished to pursue in both the short term (1 to 3 years) and the longer term (5 years and beyond). Voorhees Associates collected these forms and condensed them and organized these comments into seven (7) major categories. Voorhees Associates then returned to Burlington on July 17th and met individually (or held telephone interviews with those individuals who were unable to attend on the 17th) with the study participants to gain a more thorough understanding of the goals and objectives.

STRATEGIC ANALYSIS & FORMULATION

The Elected Officials and staff met with Voorhees Associates on July 28 to briefly discuss each goal as identified in both the short-term and long-term category. Participants were then given colored “dots” to put

next to their choices for the top six (6) short-term and top six (6) long-term goals. Voorhees Associates then tabulated the results and identified the Elected Official's top choices. We also included the voting of the staff to identify their top concerns. This Report has been prepared to memorialize these findings, to aid in its implementation.

IMPLEMENTATION

The implementation of the plan will take place through several avenues: staff reports, the capital and equipment plans, the annual budget, etc. Voorhees Associates suggests that the top goals and objectives be shared with residents through newsletters and articles in the media.

REVIEW/ADJUST

It is recommended that the strategic planning report be a living document – one which is referred to often. It should be considered annually in preparation of Burlington's budget. The entire document should be re-visited in 2 or 3 years.

II. PARTICIPANTS

The City of Burlington conducted its strategic planning workshop on July 28, 2012 with the following participants in the process:

Elected Officials:

- Robert Miller, Mayor

Alderman:

- Robert Prailes, First District
- Edward Johnson, First District
- Ruth Dawidziak, Second District
- Peter Hintz, Second District
- Tom Vos, Third District
- Steve Rauch, Third District
- Katie Simenson, Fourth District
- Thomas Preusker, Fourth District

Staff:

- Kevin Lahner, City Administrator
- Steve DeQuaker, Finance
- Gayle Falk, Library
- Dan Jensen, Public Works
- Dick Lodle, Fire
- Peter Nimmer, Police
- Megan Watkins, Administration
- Connie Wilson, Public Works

Moderators:

Sharon Morien, Voorhees Associates

Mark Morien, Voorhees Associates

III. EXECUTIVE SUMMARY

There are numerous worksheets and a great deal of information generated throughout this strategic planning process. As an aid to Burlington, we have prepared the following synopsis of the information.

The Playing Field

Voorhees Associates asked the elected officials and staff to scan the INTERNAL (e.g. organization) and EXTERNAL (e.g., community, county, state) environment – looking for strengths and weaknesses. It is important to identify those factors which will help to align a goal with a particular strength. For example, if one of the City’s goals is to evaluate the renovation or construction of the Library, a scan of the INTERNAL environment would reveal no one on staff has that expertise or time to perform this undertaking. A scan of the EXTERNAL environment would need to be done to gauge community support for the project.

Generally, our findings can be summarized as follows:

Internal Environment:

- **Positive Factors:**
 - *Elected officials:* Dedicated employees; City is well run; creative – willing to “think outside the box”.
 - *Staff:* dedicated, talented staff; support from elected officials; high quality equipment; technology important.
- **Negative Factors:**
 - *Elected officials:* possible need for some key staff positions (HR; Economic Development; Park Director); need to monitor impact of economic downturn; high quality staff means they can be hired away.
 - *Staff:* outdated buildings; continue training opportunities; need to focus on: communication, customer service, policies and procedures.

External Environment:

- **Positive Factors:**
 - *Elected officials:* willingness to use economic incentives; small town appeal/pride; low crime; good schools.
 - *Staff:* services provided to community; community is appreciative of services; area natural resources; influence at State level.
- **Negative Factors:**
 - *Elected officials:* need for more volunteers for appointed and elected positions; lack of funding for some service groups; perception of some businesses being “connected”.
 - *Staff:* improvements needed in some municipal buildings; growing demand for Fire/EMS services; political battles at School District; managing expectations of residents as the City is operating with less and the resident’s demands remain the same high level.

One comment which came up in several ways is the need for a refresher course regarding the role of the Elected Officials: policy vs. administration. This could be done in an hour or so to keep everyone on the same page.

See Appendix 1 for the complete comments from the Elected Officials and the staff.

Short-Term Issues and Challenges
(1 to 3 Years)
~ Elected Officials ~

Following a discussion at the July 28th Strategic Planning session, the **elected officials** selected the following items as their short-term priorities (4 votes or more):

8 Study feasibility of combining City of Burlington Fire Department with the Burlington Rescue Squad. Study feasibility of combining City Fire Department with Burlington Town Fire Department. **(staff vote: 4)**

7 Complete development and possible expansion of Burlington Industrial Park and BMOP in order to:

- Strive to increase tax base.
- Position Burlington to be the place businesses *want* to relocate to. **(staff vote: 2)**

6 City Workforce :(all issues below were combined). **(staff vote: 6)**

- Determine the impact of further reductions in workforce on the delivery of the current level of City services, keeping in mind the Staff’s ability to continue to provide the current level of service.
- Identify core services and eliminate non-essential services, keeping in mind residents who are accustomed to current service levels.
- Evaluate changes to work environment and salaries as a result of Act 10 and study the current methodology of compensating employees to determine if a new system to incent/reward employees is needed.
- Create a more cohesive working environment. Eliminate Department “silos” in order to get employees to view themselves as a single workforce.
- Study the number of volunteers needed to maintain adequate response time for Fire and EMS. Consider staffing necessary needs if remote Fire Station is built.
- Maintain competitiveness of employee compensation in order to retain and attract the best and brightest employees.
- Assure continued training in times of cutbacks to maintain certifications needed for proficiency in various classifications.
- Work to change the “culture” of the organization so that employees work on a more “global” level – seeing what needs to be done, even if it isn’t part of their job.

5 Conduct feasibility study for renovation or new construction of Library. **(staff vote: 3)**

4 Continually focus staff’s effort to maintain current levels of service in an environment of stable or declining revenues, keeping in mind the following:

- Maintaining a balanced budget.
- How will potential cuts from the State impact Burlington?

- Are there ways to improve current State aid formula?
- What is the impact of slowing economy on revenues?
- Reluctance to increase property taxes.
- Restrictions/impact of Act 10. **(staff vote: 7)**

4 Inventory and develop a sidewalk replacement program for the community. Construct pedestrian walkway along South Pine Street, south of Dunford Drive (west side). **(staff vote: 2)**

4 Have staff analyze the financial impact due to Emerald Ash Borer disease. **(staff vote: 0)**

See Appendix 2 for the complete voting results.

Long-Term Issues and Challenges
(5 Years +)
~ Elected Officials ~

Following discussion at the July 28 Strategic Planning session, the **elected officials** selected the following items as their long-term priorities (4 votes or more):

9 Technology (all issues below were combined). **(staff vote: 7)**

- Consider going to a paperless environment, including Council Meetings.
- Continue to budget for technology in all Departments (e.g., computers, radios, software, etc.) in times of cutbacks.

(NOTE: the second issue is also Short-term challenge)

8 City Workforce (all issues below were combined). **(staff vote: 7)**

- Develop a succession plan for retirement of Department Heads and develop talent to take on supervisory roles.
- Continue to monitor the makeup of the current Fire Department – are changes necessary? (e.g., correct combination of full time and volunteers and part time staff).
- Encourage diversity of workforce to reflect diversity of community. Assure diversity training takes place for employees working in a diverse community.

5 Identify and encourage residents to volunteer to serve on the City’s Boards and Commissions and to run for elected office. **(staff vote: 3)**

4 Complete development and possible expansion of Burlington Industrial Park and BMOP in order to:

- Strive to increase tax base.
- Position Burlington to be the place businesses *want* to relocate to. **(staff vote: 1) (NOTE: Also Short-term challenge)**

4 Conduct feasibility study for renovation or new construction of City Hall. **(staff vote: 5) (NOTE: Also Short-term challenge)**

See Appendix 3 for the complete voting results.

IV. THE FUTURE

Each year, the City Administrator should perform an analysis which includes a review and status report on the goals and objectives which are being worked on that fiscal year. This should include identification of any obstacles in the path for success. As each goal comes up, adjustments may need to be made to continue the progress on the goals and objectives. Lastly, the strategic planning process should be re-done every 2 or 3 years to “check off” those completed goals and view the progress on those still in the works. New goals would then be developed.

V. ACKNOWLEDGMENT

Voorhees Associates would like to thank the City of Burlington for the opportunity to once again work with you on this important project.

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The Playing Field – Internal Environment – Positive Factors

City Employees

Elected Officials

Positives Factors (Strengths)	Positives Factors (Strengths)
Good, talented, stable workforce; low turnover.	City has good, solid employees. Dedicated and hardworking. Exceptional group of Department Heads.
Good cross-training and training and development opportunities.	From the Mayor on down to Department Heads and employees – City is well run.
Generally, employees get along with each other and are cooperative.	We need to continue to be thinking “out of the box” and be creative in how to run the City and handle budgets.
High quality equipment which is replaced as needed.	City has good, solid employees. Dedicated and hardworking. Exceptional group of Department Heads.
Generally positive atmosphere and good cooperation between Departments.	
Financially stable.	
Great benefits.	
Good use of employee committees.	
Retirements offer the opportunity for new skills and leadership in staff.	
Use of technology can help streamlines and improve processes.	
City Administrator is a visionary with good people skills.	
Efforts to set City goals and tie budget process to achieving those goals helps Council to see connection of spending money to reach goal.	

Dedicated volunteer Firefighters.	
Positive efforts of City Administrator, Mayor and Council to support employees, as well as good communication among same.	
Great Public Works facility.	
Good communication between weekly Department Head meetings.	
Adaptive to change.	

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The Playing Field – External Environment – Positive Factors

City Employees

Elected Officials

Positives Factors (Strengths)	Positives Factors (Strengths)
One stop shop for most services/information at City Hall.	City’s willingness to provide economic incentives.
Community feels comfortable calling for information.	Proximity to Milwaukee, Madison and Chicago.
Service oriented community.	Appeal of living in a small town.
Relatively strong local economy.	Pride in living in Burlington.
Influence at State level is very good.	Service groups willing to operate programs, thus reducing City funding.
Excellent natural resources (Riverfront/Parks, etc.).	Low crime rate.
Commercial hub for the Western portion of Racine County and Eastern portion of Walworth County.	Generally clean, good-looking City.
Wide variety and support for youth recreational activities.	Good schools.
Community is supportive and appreciative of City services.	Volunteering in the community.
Positive image of Fire Department.	
Library usage is increasing.	
Citizen Budget Partners Initiative.	

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The Playing Field – Internal Environment – Negative Factors

City Employees

Elected Officials

Negatives Factors (Weaknesses)	Negatives Factors (Weaknesses)
Communication between Departments and employees is lacking.	City is not large enough to have full time HR Director, Economic Development Director, or Park District Director.
Training opportunities are limited.	City Administrator has too many hats to wear.
Sometimes there is not enough staff to cover time off and workloads can sometimes be high making it difficult to get work done in a timely manner.	Some decisions at City Council and/or staff level made on concern/fear of public reaction.
Some employees feel management has a hidden agenda.	With the downturn in economy, we lost tax base and revenue.
Old, outdated buildings and furniture (City Hall, Fire and Library).	High quality of Department Heads means they could be hired away.
Lack of strong customer service focus.	
Resistance to change by some staff members who see change as a threat to their job.	
Lingering union/management issues.	
Sometimes there is a disconnection between Mayor/Council and Staff.	
Lingering communication issues among Department Heads.	
Retirements result in the loss of experience and historical perspective.	
Need for more Departmental policies and procedures to be	

written.	
Court issues: Clerk, Judge.	
View of City government by union members. Review Elected Official's role with respect to policy and/or administration dichotomy.	

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The Playing Field – External Environment – Negative Factors

City Employees

Elected Officials

Negatives Factors (Weaknesses)	Negatives Factors (Weaknesses)
More communication is needed for residents re: current events/issues (not sure how to resolve without dedicating a full time staff member).	Perception that only “connected” individuals/businesses receive economic incentives.
City Hall is not handicap accessible and extremely difficult for people in wheelchairs to access the building.	Not appeal of living in a small town; inferiority complex.
Access/parking for City Hall patrons is difficult as there is no handicap parking.	Lack of funding for service groups’ operating programs result in upgrades not being performed as well as lack of coordination with schedules.
Unfinished subdivisions and home foreclosures.	Loss of any business will lead to loss of jobs.
Continued reduction of State resources.	Not a lot of residents run for public office.
Factions among downtown business owners make cooperation toward common goals difficult.	Need more volunteers as most seem to be from the same core group.
Lingering criticism of public workers by prominent members of the community.	
Concern that the political battles of school district could spill over to City.	
Continued push for lower taxes despite reductions in resources.	
Growing demand for Fire Services with same staffing levels.	

Organization structure not always followed, so direction comes from more than one place.	
Managing the expectation of citizens regarding providing services with a reduction in budget (doing more with less).	

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Short Term Challenges/Opportunities

Growth/Economic Development

- _____ Define a course of action to recruit businesses to fill vacancies in the downtown and in strip malls.
- _____ Complete development and possible expansion of Burlington Industrial Park and BMOP in order to:
- Strive to increase tax base.
 - Position Burlington to be the place businesses *want* to relocate to.
- _____ Define the City's role in dealing with unfinished subdivisions and foreclosed properties, as well as with banks/financial institutions, to assure adequate property maintenance and the marketing of sites.
- _____ Study the impact of new traffic patterns and resulting effect on downtown businesses caused by the bypass. Does this new traffic pattern prompt new businesses to locate along the bypass?
- _____ Develop an action plan to attract new residents to Burlington, marketing: small town appeal, affordability, community pride, keeping tax base affordable to attract young families.
- _____ Develop Hwy. 36 corridor and establish City "Welcome" signs to those entrances that are gateways to the City.
- _____ Study the use of economic development incentives (are there other incentives the City should use?) to assure that they:
- Are effective?
 - There is not a perception that only "connected" businesses/individuals get "the nod" for funding.
- _____ Find ways to help people start businesses by connecting them with banks, insurance companies, helping them work through local government regulations, etc.

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Short Term Challenges/Opportunities

Fiscal

_____ Explore cost savings ideas, such as:

- Shared City services with other communities, the County and the Township.
- Joint purchasing with other communities.
- Shared significant equipment purchases.
- Leasing options for significant equipment purchases.

_____ Identify core municipal services. Consider outsourcing services that may be more efficiently delivered by a contractual agreement and eliminating those that are not part of the “core services”.

_____ Continually focus staff’s effort to maintain current levels of service in an environment of stable or declining revenues, keeping in mind the following:

- Maintaining a balanced budget.
- How will potential cuts from the State impact Burlington?
- Are there ways to improve current State aid formula?
- What is the impact of slowing economy on revenues?
- Reluctance to increase property taxes.
- Restrictions/impact of Act 10.

_____ Monitor the finances of the Burlington Cemetery.

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Short Term Challenges/Opportunities

Infrastructure/Municipal Facilities/Equipment

- _____ Conduct feasibility study for renovation or new construction of City Hall.
- _____ Conduct feasibility study for renovation or new construction of Library.
- _____ Conduct feasibility study for the building of a remote (secondary) Fire Station.
- _____ Conduct a study to determine the cost for a renovation of existing Fire Station (built in 1969).
- _____ Inventory and develop a sidewalk replacement program for the community.
- _____ Construct pedestrian walkway along South Pine Street, south of Dunford Drive (west side).
- _____ Have staff analyze the financial impact due to Emerald Ash Borer disease.
- _____ Study overall downtown appearance, including facades, signage, streetscape and how to make more pedestrian friendly, keeping in mind there are a lot of back sides to buildings.

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Short Term Challenges/Opportunities

Health and Safety

_____Study feasibility of combining City of Burlington Fire Department with the Burlington Rescue Squad.

_____Study feasibility of combining City Fire Department with Burlington Town Fire Department.

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Short Term Challenges/Opportunities

City Workforce

- _____ Determine the impact of further reductions in workforce on the delivery of the current level of City services, keeping in mind the Staff's ability to continue to provide the current level of service.
- _____ Identify core services and eliminate non-essential services, keeping in mind residents who are accustomed to current service levels.
- _____ Evaluate changes to work environment and salaries as a result of Act 10 and study the current methodology of compensating employees to determine if a new system to incent/reward employees is needed.
- _____ Create a more cohesive working environment. Eliminate Department "silos" in order to get employees to view themselves as a single workforce.
- _____ Study the number of volunteers needed to maintain adequate response time for Fire and EMS. Consider staffing necessary needs if remote Fire Station is built.
- _____ Maintain competitiveness of employee compensation in order to retain and attract the best and brightest employees.
- _____ Assure continued training in times of cutbacks to maintain certifications needed for proficiency in various classifications.
- _____ Work to change the "culture" of the organization so that employees work on a more "global" level – seeing what needs to be done, even if it isn't part of their job.

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Short Term Challenges/Opportunities

Technology

_____ Implementation of GIS for urban forest.

_____ Maintaining technology in all Departments (e.g., computers, radios, software, etc.) in times of cutbacks.

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Short Term Challenges/Opportunities

Community Life

- _____Generate more community interest and input, to lead to a more informed and involved community. Improve image of local government.
- _____Businesses are reporting some difficulty in directing their customers and deliveries to their addresses. Consider streets named “business” in addition to regular City street names.
- _____Improve tourism opportunities in Burlington and greater area.
- _____Analyze the need for additional community events and determine, what, if any role should the City play in facilitating, encouraging, and paying for these additional events.
- _____Make Burlington the place that people want to live, work and play by developing our own slogan, mission statement and/or identity to separate our community from the pack.
- _____Study current snow removal plan to determine if improvements are necessary and program is as efficient as possible.
- _____Address the possibility of relocating the Senior Center in the event Racine County closes current facility.

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Long Term Challenges/Opportunities

Growth/Economic Development

- _____ Work with high schools and technical college to develop skilled workforce needed for local employers.
- _____ Continue to improve the Milwaukee Avenue corridor.
- _____ Define a course of action to recruit businesses to fill vacancies in the downtown and in strip malls.
- _____ Complete development and possible expansion of Burlington Industrial Park and BMOP in order to:
 - Strive to increase tax base.
 - Position Burlington to be the place businesses *want* to relocate to.
- _____ Study the use of economic development incentives (are there other incentives the City should use?) to assure that they:
 - Are effective?
 - There is not a perception that only “connected” businesses/individuals get “the nod” for funding.

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Long Term Challenges/Opportunities

Fiscal

- _____ Convert City street lights to light emitting diode (LED) lights.
- _____ Create storm water utility to pay for storm water infrastructure repair and replacement.
- _____ Continually focus staff's effort to maintain current levels of service in an environment of stable or declining revenues, keeping in mind the following:
 - Maintaining a balanced budget.
 - How will potential cuts from the State impact Burlington?
 - Are there ways to improve current State aid formula?
 - What is the impact of slowing economy on revenues?
 - Reluctance to increase property taxes.
 - Restrictions/impact of Act 10.

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Long Term Challenges/Opportunities

Infrastructure/Municipal Facilities/Equipment

_____ Conduct feasibility study for renovation or new construction of City Hall.

_____ Conduct feasibility study for renovation or new construction of Library.

_____ Conduct feasibility study for the building of a remote (secondary) Fire Station.

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Long Term Challenges/Opportunities

Health and Safety

_____ Monitor the provision of outside services by other agencies (e.g., State/County); HSD; Child Advocacy. If funds are cut, who will provide service?

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Long Term Challenges/Opportunities

City Workforce

- _____ Develop a succession plan for retirement of Department Heads and develop talent to take on supervisory roles.
- _____ Continue to monitor the makeup of the current Fire Department – are changes necessary? (e.g., correct combination of full time and volunteers and part time staff).
- _____ Encourage diversity of workforce to reflect diversity of community. Assure diversity training takes place for employees working in a diverse community.

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Long Term Challenges/Opportunities

Technology

_____ Consider going to a paperless environment, including Council Meetings.

_____ Continue to budget for technology in all Departments (e.g., computers, radios, software, etc.) in times of cutbacks.

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Long Term Challenges/Opportunities

Community Life

_____ Identify and encourage residents to volunteer to serve on the City's Boards and Commissions and to run for elected office.

_____ Improve tourism opportunities in Burlington and greater area.