



STRATEGIC PLAN 2023



TABLE OF CONTENTS

3	Executive Summary
5	Approach and Process
7	Mission/Vision and Core Behaviors <ul style="list-style-type: none"> a. Core Behaviors and Strategic Outcomes b. Stakeholder Desires Visuals
11	Environmental Scan <ul style="list-style-type: none"> a. Organizational Background b. Demographic Trends
13	SWOT Analysis <ul style="list-style-type: none"> a. Visualization of SWOT Analysis
17	Strategic Planning Workshops <ul style="list-style-type: none"> a. Strategic Plan Vision Visuals
20	Public Input Process <ul style="list-style-type: none"> a. Social Pinpoint b. Community Survey c. Business Survey d. Community Workshop
22	Strategic Framework <ul style="list-style-type: none"> a. Need to Extend Strong Culture of Collaboration to Outlying Departments Narrative and Framework b. Newer Staff to Organization and Lack of Defined Policies and Procedures Narrative and Framework c. Continuing to Evolve into a 21st Century Government Narrative and Framework d. Labor Market Woes Pose a Challenge to Service Delivery Narrative and Framework e. Growth Means that Facility Upgrades Will Be a Future Reality Narrative and Framework f. Enhance Internal Operations and Communication Between Staff Narrative and Framework g. Tension and Distrust Between Village Board, Staff, and Community at-Large Narrative and Framework h. Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers Narrative and Framework i. Not All Residents Can Access the Same Quality of Life in DeForest Narrative and Framework j. How Do We Grow? Different Resident Segments Want Different Things Narrative and Framework k. Continued External Growth is Difficult to Maintain and Support Narrative and Framework l. "Nobody Wants to Get Involved in Local Government!" - How Do We Change This? Narrative and Framework
69	Implementation Recommendations
73	Appendix <ul style="list-style-type: none"> a. Core Behaviors b. Social Pinpoint Comment Tabulation c. Community Survey Report d. Business Survey Report e. Community Workshop Report f. Implementation Tool #1: Regular Meetings to Manage Strategic Implementation Progress g. Implementation Tool #2: Issues List: Gathering and Segmenting Organizational Issues h. Implementation Tool #3: Strategic Plan Implementation Tool



ACKNOWLEDGEMENTS

DEFOREST VILLAGE BOARD

Jane Cahill Wolfgram, Village President
Abby Lowery, Trustee through 4/2023
Jan Steffenhagen-Hahn, Trustee as of 4/2023
William Landgraf, Trustee
Colleen Little, Trustee
Brian Taylor, Trustee
Rebecca Witherspoon, Trustee
Jim Simpson, Trustee

DEFOREST VILLAGE DEPARTMENT HEADS

Bill Chang, Village Administrator
Alex Allon, Community Development Director
Judd Blau, Director of Public Services / Deputy Administrator
Brandi Cooper, Zoning Administrator
Carol Herwig, Finance Director
Corie Hoffman, Director of Administrative Services
Calli Lundgren, Village Clerk
Reese O'Malley, Recreation and Community Enrichment Director
James Olson, Chief of Police

OTHER DEFOREST COMMUNITY LEADERS ENGAGED AS A PART OF THIS PROCESS

Greg Hall, Village of DeForest
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Jan Berg, Library Director
Natalie Raemisch, DeForest Area Community and Senior Center
Steve LaFeber, DeForest Windsor Fire and EMS
Dr. Rebecca Toetz, DeForest Area School District

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EXECUTIVE SUMMARY

The following are outcome statements generated through two strategic planning workshops with staff and Village Board members. These outcome statements are supported by specific action steps in the strategic framework of this plan and tie back to the core behaviors established by the Village. This summary gives a broad overview of the desired outcomes over the next decade in a dozen issue areas.

The six internal-facing issues that were addressed include: Need to Extend Strong Culture of Collaboration to Outlying Departments; Newer Staff to Organization and Lack of Defined Policies and Procedures; Continuing to Evolve into a 21st Century Government; Labor Market Woes Pose a Challenge to Service Delivery; Growth Means that Facility Upgrades Will Be a Future Reality; and Enhance Internal Operations and Communication Between Staff.

The six external-facing issues that were addressed include: Tension and Distrust Between Village Board, Staff, and Community at-Large; Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers; Not All Residents Can Access the Same Quality of Life in DeForest; How Do We Grow? Different Resident Segments Want Different Things; Continued External Growth is Difficult to Maintain and Support; and “Nobody Wants to Get Involved in Local Government!” - *How Do We Change This?*

INTERNAL-FACING ISSUES

Need to Extend Strong Culture of Collaboration to Outlying Departments

1. Within one year, results from a survey will suggest positive culture changes within an entity.
2. Intradepartmental communications are enhanced and what collaboration looks like is defined for each outlying department.
3. All Village Departments (and outlying entities) boast a strong, cross-collaborative culture.

Newer Staff to Organization and Lack of Defined Policies and Procedures

1. Within one year, new staff feel more comfortable, productive, and effective in their positions compared to baseline.
2. Departments have standard operating procedures (SOPs) and established training standards to provide good internal and external customer service.
3. As the community grows, move to a more specialized Public Services Department that relies less heavily on cross-trained employees.
4. DeForest has a culture of continuous improvement and fulfilling employee training.

Continuing to Evolve into a 21st Century Government

1. Staff are trained in cybersecurity practices and departments are granted greater trust/access to govern their own IT.
2. Current procedures are reviewed and areas are identified for conversion for digital processes (vs. manual).
3. Enhance customer service and ease of navigating Village systems through technology.
4. Organization has a comprehensive overview and understanding of tools and systems in place, as well as predicting future needs.

Labor Market Woes Pose a Challenge to Service Delivery

1. DeForest is an employer of choice for its workplace culture and non-wage benefits.
2. DeForest is an employer of choice for its competitive wages and compensation.
3. Think innovatively about how to deliver expected service level.
4. Sustain efficient levels of staffing to support desired level of service.

Growth Means that Facility Upgrades Will Be a Future Reality

1. Satellite emergency services location for Police is planned for Southern DeForest.
2. A long-range mindset (10-15+ years) is implemented for facility planning (vs. 3-5 years).
3. Public Services operations and storage are consolidated at Shonkoo site.
4. Community wants and needs are well-understood and Village plans for facility upgrades accordingly.

Enhance Internal Operations and Communication Between Staff

1. Interdepartmental communications are direct, generous, clear, and respectful.
2. Village Departments are on the same page internally which reduces frustrations.
3. Staff understand their preferred communication style and that of their peers.

EXTERNAL-FACING ISSUES

Tension and Distrust Between Village Board, Staff, and Community at-Large

1. Interactions between the Board, Staff, and the public are effective and civil. Everyone feels heard.
2. Expectations are set for elected officials in order to create a healthier working environment.
3. Clear communication is a priority for all parties in order to reduce tension and foster greater trust.
4. All parties are on the same page about their shared goals.

Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers

1. More diverse, accessibly-priced housing options are created for all DeForest residents (including workforce, seniors).
2. Clear policies are adopted related to housing development.
3. A variety of housing options exist for current DeForest residents to downsize and/or stay in the community.

Not All Residents Can Access the Same Quality of Life in DeForest

1. Community members are well-aware of resources, programs, and services that exist.
2. Transportation solutions are being continually explored.
3. Community members understand the level of need and coordinated efforts connect those in need to resources.
4. All DeForest residents can access a higher standard of quality of life.

How Do We Grow? Different Resident Segments Want Different Things

1. The Village continues to grow in a balanced and stable fashion.
2. Growth is sustainable in terms of providing expected services.
3. The community is represented equitably at the Board and committee level.
4. Village staff uses various tools and mediums to reach a broad cross section of the community effectively.

Continued External Growth is Difficult to Maintain and Support

1. The Village delivers relevant, plain English educational content to residents about complex municipal finance topics.
2. Trustees have a broad understanding of TIF and other financing tools are used as a part of the Village's growth strategy.
3. Already developed areas of DeForest are protected and preserved.
4. A 50-year smart growth plan is defined for the Village.

"Nobody Wants to Get Involved in Local Government!" - How Do We Change This?

1. DeForest local government is a civil institution where all can be heard and respected.
2. Information sharing is positive, locally-focused, and works to reduce bias/polarization.
3. Community members see clear avenues to participate in their local government and are excited to do so.

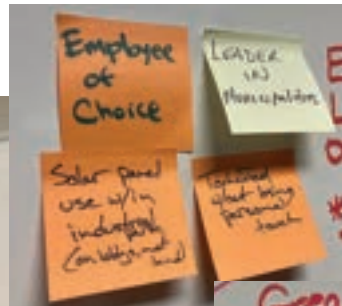
STRATEGIC PLANNING APPROACH AND PROCESS

The objective of this inaugural strategic planning process for the Village is to develop a framework that is consensus-driven to guide the Village Board and staff in the near to long-term future.

Specifically, the January 2023 request for qualifications noted that the following objectives and deliverables were to be met through this process:

- Development of new vision, mission, values, goals and objectives. New values were not established, but a 'pulse check' was taken on existing organizational core behaviors.
- Setting priorities and maximizing innovative opportunities to help to chart a course of action for the Village.
- Identifying how service levels and expected outcomes may be identified and set by the Village board.
- Data gathering from various parties and stakeholders to inform the design of the strategic plan outcomes.
- An implementation methodology that enables the organization to carry out strategic plan outcomes within the context of existing and new organizational workplans.
- Identifying performance measures which can be measured throughout the life cycle of the strategic planning document.

PROJECT STEP	OUTCOMES
1. Internal and External Surveys	Identify key themes from initial survey of staff, Village board members and select community leaders. Deploy a community-wide survey and targeted survey tool for local DeForest businesses in weeks following. An interactive mapping tool hosted by Social Pinpoint was also deployed for community member input.
2. Community Leader Interviews	Dive deeper into key themes and identify issues through confidential one-on-one interviews with Village department heads, elected officials, and representatives from a cross-section of community leaders. A focus group was also held with secondary supervisors within the organization.
3. Mission / Vision / Values Workshop	Facilitate workshop with Village department heads and Village Board to reach a consensus-driven mission and vision for the organization, as well as to evaluate strength of previously-identified core behaviors.
4. SWOT Analysis	Through research to this point, present an understanding of current strengths, weaknesses, opportunities and threats within the organization.



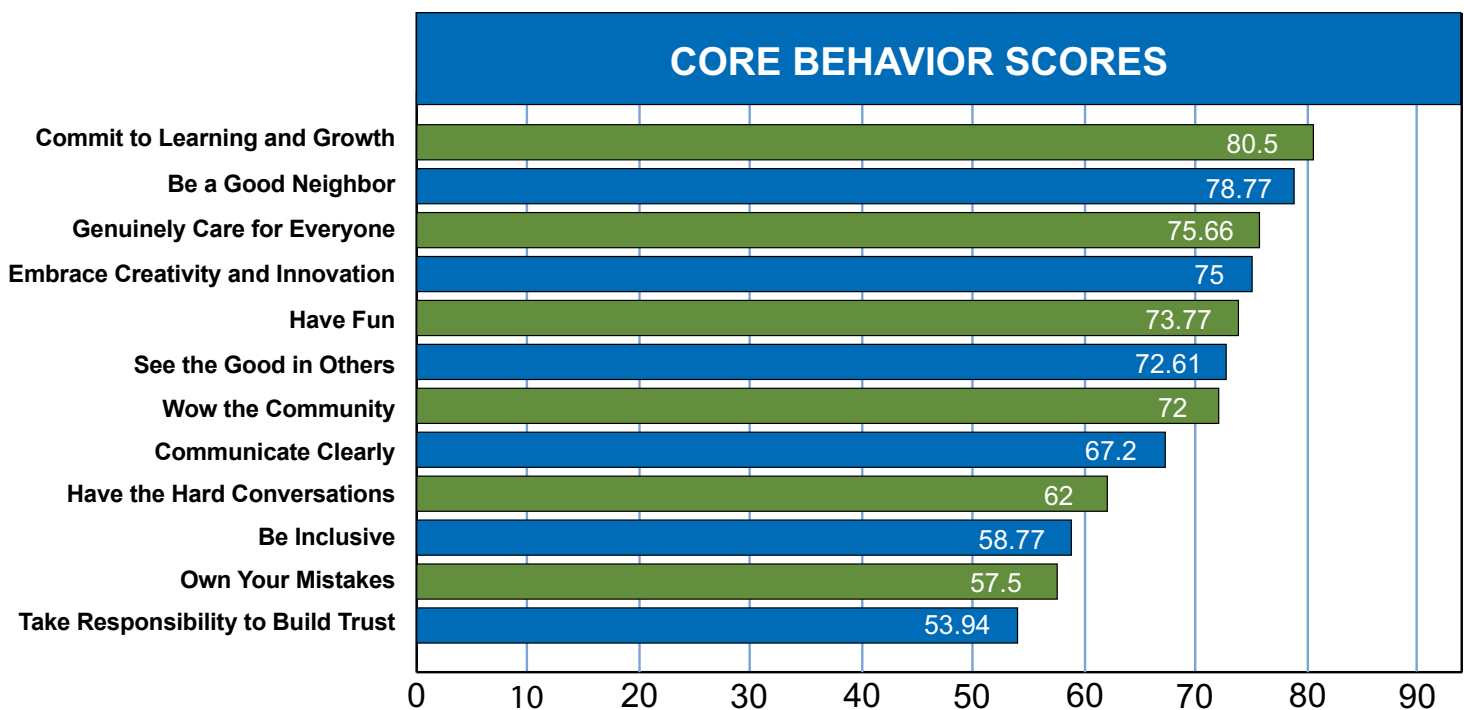
PROJECT STEP	OUTCOMES
5. Strategic Planning Workshops	Conduct workshops (2) for Village staff, and Village Board and department heads to define outcomes around weaknesses and threats for the organization.
6. Community Workshop	Conduct workshop (1) for community members to dive further into major themes identified through the community survey and interactive mapping tool.
7. Strategy Development and Implementation Roadmap	Working with leadership, develop a functional framework that is outcomes-focused from staff and elected officials' feedback at earlier workshops. Provide customized tools and recommendations for plan implementation.
8. Final Presentation	Present the final report and wrap up all research activities.

MISSION, VISION AND CORE BEHAVIORS

A Mission, Vision and Core Behaviors workshop was facilitated with the Village Board and Department Heads on March 29, 2023. During this session, we challenged participants to revisit their broad community vision, consider holistically the desires of intersecting groups (residents, elected officials, appointed staff), and to identify the Village's audiences, contributions, and distinctions. The Village has already adopted internally a list of a dozen core behaviors. Rather than adopting new core behaviors, we had a group discussion ranking the strength of organizational behaviors and identified reasons why some core behaviors lag in their presence.

EVALUATING CORE BEHAVIORS

Workshop participants were asked to score the strength of the dozen core behaviors adopted by the Village. Scores were then averaged and tabulated. All core behaviors received a score above 50/100, but three lagged below a score of 60.



Facilitators encouraged participants to discuss within their small groups reasons why the three core behaviors with the lowest scores received such marks. Comments shared with the group were as follows:

Be Inclusive:

- Don't always get the opportunity to serve the WHOLE community.
- "Outside departments" like Library, Community Center are sometimes excluded.
- Hearing from the same groups again and again and it is hard to tell if they are a vocal minority or an accurate reflection of the community's views.
- Housing – dispute over different types of housing, what type, where to site.
- Can frontline workers access housing in DeForest? Difficult to be inclusive when entry level employees can't be a part of the community where they work.

Own Your Mistakes:

- It is human nature to shy away from owning your mistakes.
- You judge others for how they own (or don't own) their mistakes more so than you judge yourself.
- Do people not take risks out of fear of failure, or out of fear of making a mistake and then having to own it?
(Does this stand in the way of the organization being innovative?)

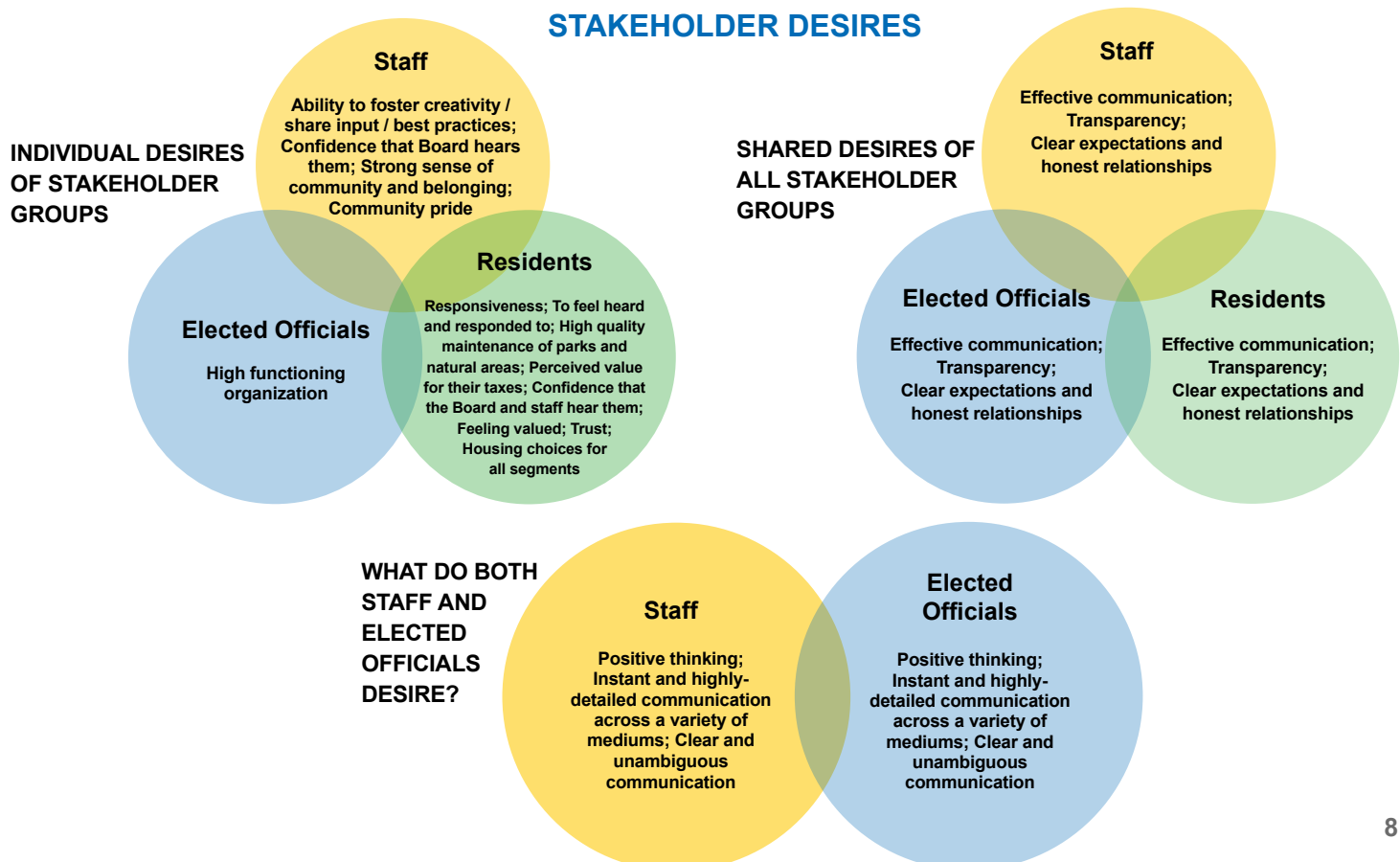
Take Responsibility to Build Trust:

- Trust has increased over the past year in a good direction.
- Still have a long way to go to get to the best place of trust.
- Transparency is the key to getting to a place of trust.
- Learn from how WE react in the moment, trust can come out of how you handle a situation that previously broke trust.
- Unclear communication + rabbit holes on social media contribute to distrust (can employees trust that Trustees have their back and will correct misinformation online?)
- Need more trust between staff and Trustee, as well as between Trustees.
- You can't please everybody, but you want people to trust what you're saying even if they don't like the outcome.
- How do you build trust between staff and Trustees when you don't see each other that often?
- You have an easier time maintaining or regaining trust if you own your mistakes promptly.

Identifying Desires of Intersecting Groups

In small groups participants discussed the individual and shared desires for the Village from the perspective of staff, elected officials, and residents. Visuals from this discussion are included in this chapter.

Overall, it was agreed that all three stakeholder groups desire *effective communication, transparency and clear expectations and honest relationships*.



Community Vision Statements

In small groups of participants, we asked those in attendance to frame an aspirational purpose to guide the organization – and to make this something that may or may not functionally be attainable. We encouraged the use of superlatives in this process to find consensus behind the vision and direction for the organization. Aspirational purposes or vision statements crafted by the group were as follows (as organized into like categories). Six statements were crafted, but when participants had an opportunity to vote on their favorite vision statement, two stood out as the favorites of the group:

1. DeForest is the GOAT (greatest of all time) of Dane County! Marveled for natural resources, well-balanced growth, a community that everyone wants to be like.
2. A community with the best mix of small-town-feel, vibrant programs, activities, amenities, and meticulously stewarded parks and natural spaces.

Identifying a 5-year Mission for this Strategic Plan:

Through a strategic planning process, we build the plane as we are flying it, to some extent.

We challenge organizations to frame broad vision statements and build toward identifying a specific and measurable mission statement for the timeframe of the strategic plan. This does not conflict with or oppose the broad organizational mission or purpose, but it provides clear direction for the coming years.

The three components of a mission statement are audiences, contributions, and sometimes – distinctions. Participants developed lists of these three items which we have been able to piece together into potential missions for the organization over the next five years. As the plan developed in coming weeks across workshops and examining community input, we were able to frame missions that fit the data and outcomes.

AUDIENCES	CONTRIBUTIONS	DISTINCTIONS
<i>Who the Village Serves</i>	<i>What the Village Provides</i>	<i>What Sets the Village Apart</i>
Residents (including seniors, children, families, and low-income populations)	Community Events and Celebrations such as fireworks, food trucks	“Small Town” feel (high degree of social connectedness)
Visitors (those coming to DeForest intentionally)	Public Safety (police and fire)	Exceptional trail system
Travelers (those coming through DeForest on their way to another destination)	High Quality of Life	Streamlined development process
Workforce	Pedestrian Accommodation/high walkability/trail system	Family-friendly community
Businesses / Employers	Public Utilities and Services including water, streets, maintenance, garbage and recycling pickup	Low crime rates/general public safety

AUDIENCES	CONTRIBUTIONS	DISTINCTIONS
<i>Who the Village Serves</i>	<i>What the Village Provides</i>	<i>What Sets the Village Apart</i>
Athletes	Recreation and Enrichment Programs for all ages such as arts & crafts, summer camps, sports teams, social programs, and library programs	Variety of communication mechanisms (DeNews, text alerts, social media)
Developers	Robust Economy with Industry Presence / ability to attract and support new businesses	Yahara River / stewardship of natural resources
Potential Newcomers	Excellent Customer Service	Excellent library
	Tourism Attractions	Good residential:business ratio
	Variety of Housing Products	Responsive Village services that are accessible, available, and visible
	Addressing Blighted Areas	Cool events that are creative and highlight DeForest's cultural heritage
	Excellent School District	High quality amenities
	Retail and Dining	Significant business presence and employment opportunities
	Health and Wellness	Highly responsive staff
	A safe place to stop, refuel, rest, or plan to visit in the future	Recreational programming and events
		Ease of access to multiple transportation corridors

Some potential 5-year mission statements for the Village of DeForest include:

1. To provide all residents a high quality of life while maintaining DeForest's "small town feel" and high degree of social connectedness.
2. To provide visitors and travelers the opportunity to visit DeForest through unique tourism attractions and cool / creative events.
3. To provide existing residents and potential newcomers a variety of housing products and an excellent school district in a safe and family-friendly community.
4. To provide employers and businesses with high quality utilities and public services and easy access to multiple transportation corridors.
5. To provide developers and businesses with land and attraction tools and a highly responsive Village staff and a streamlined development process.
6. To provide all people in DeForest with a healthy and high quality of life through an exceptional trail system and stewardship of natural resources like the Yahara River.

ENVIRONMENTAL SCAN

ORGANIZATIONAL BACKGROUND

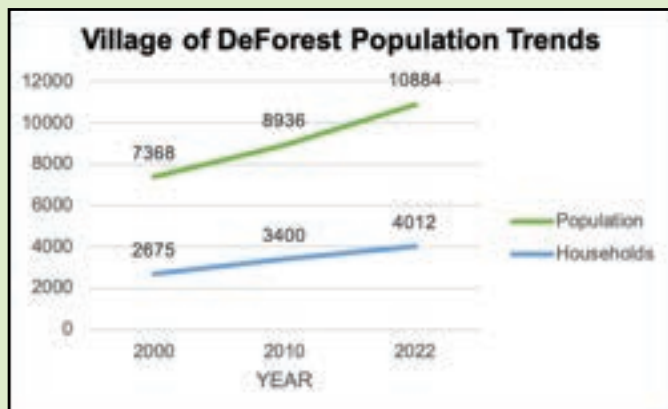
The Village of DeForest is a full-service municipality located in South-Central Wisconsin in Dane County. The community is known for its progressive water management approaches of the Yahara River corridor, safe and welcoming neighborhoods, an expansive park and trail system, and access to major transportation corridors.

The organization has approximately 64 full-time employees, 160 part-time/seasonal employees, 7 municipal departments and 3 utilities including Administration, Community Development, Finance, Police, Public Services, Recreation and Community Enrichment, Sewer, Storm, and Water. The Village also has a jointly funded Community and Senior Center, Fire and EMS Department, and the DeForest Public Library.

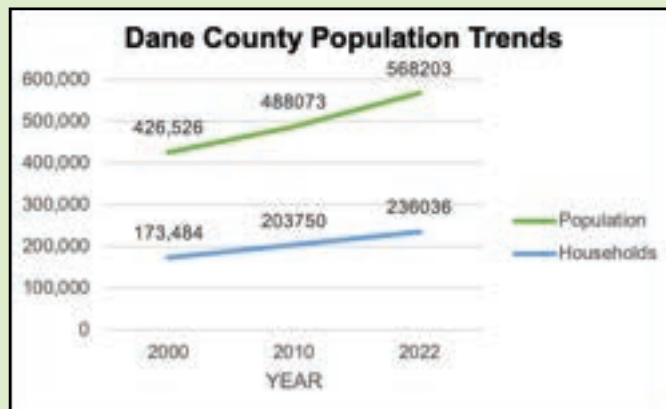
The Village operates under a Board/Manager model of government with a board of seven elected officials and a professional, appointed Village Administrator.

POPULATION AND HOUSEHOLD TRENDS

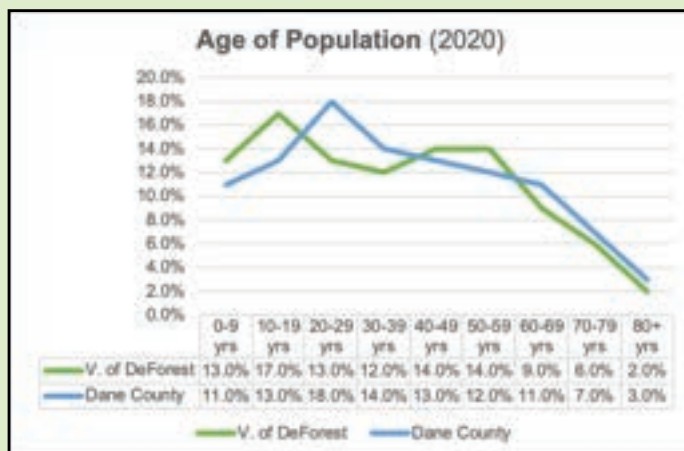
The Village of DeForest has grown steadily in both population and household size since 2000. The municipality has grown at a similar pace to that of Dane County over the last two decades. The Village of DeForest tends to be slightly younger than Dane County on the whole, with a larger percentage of the population ages 0-19 years old. Dane County has a significantly higher 20-39 year old population as a percentage of the whole.



Source: U.S. Census Bureau Data, 2000, 2010, 2020



Source: U.S. Census Bureau Data, 2000, 2010, 2020

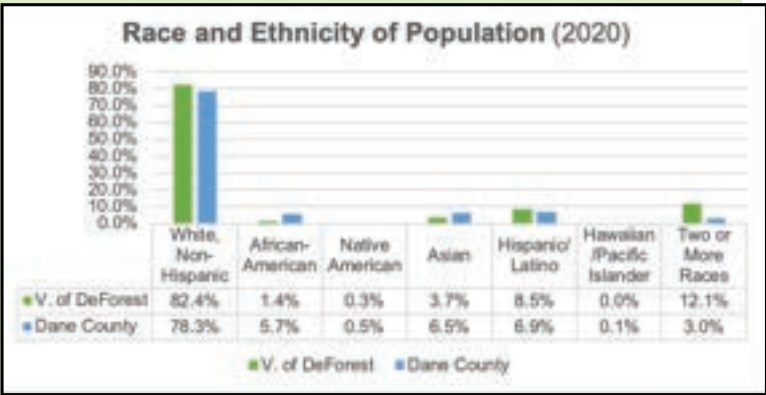


Source: U.S. Census Bureau Data, 2020

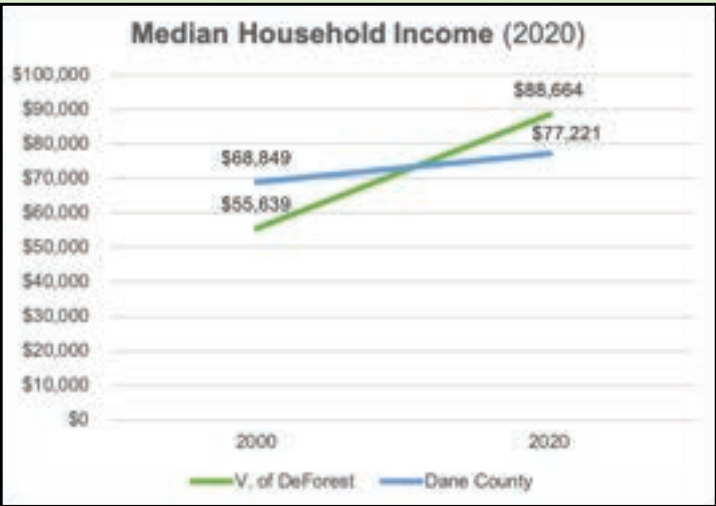
The population of DeForest is predominantly white (82.4%) which is somewhat higher than Dane County (78.3%). DeForest reports greater diversity of Hispanic/Latino populations and Two or More Race populations than Dane County

HOMEOWNERSHIP AND HOUSEHOLD INCOME TRENDS

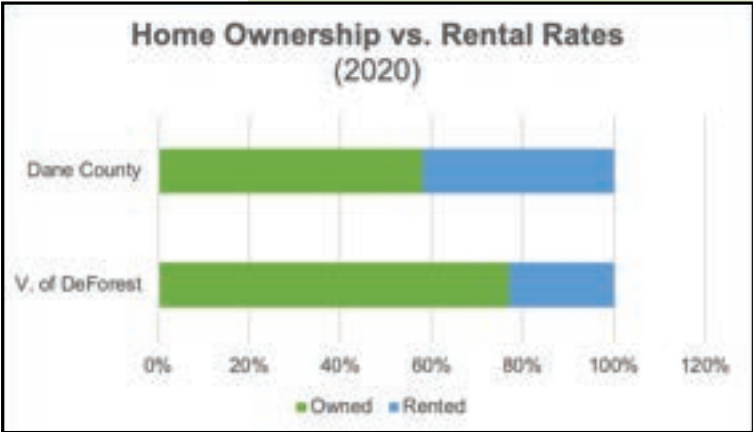
Between 2000 and 2020, the median household income levels in the Village of DeForest outpaced those of Dane County. DeForest also outpaces Dane County in terms of home ownership vs. rentals. The information presented regarding home valuation cohorts is based on the most recent Census data. This assessed valuation data does not include higher value homes in new subdivisions in the Village, and as such reflects lower than is likely accurate.



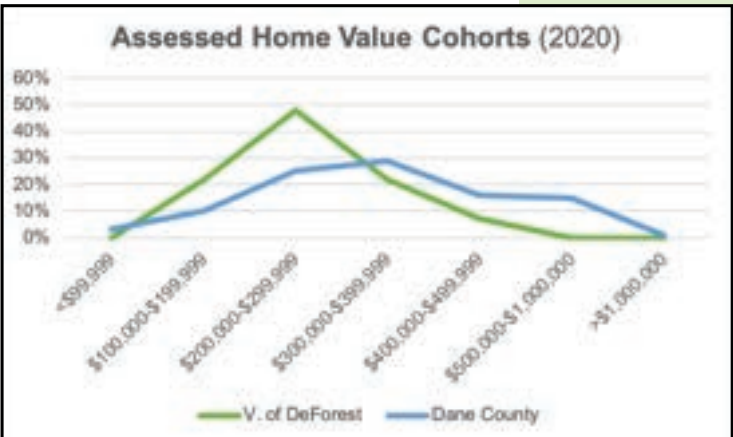
Source: U.S. Census Bureau Data, 2020



Source: U.S. Census Bureau Data, 2000, 2020



Source: U.S. Census Bureau Data, 2020



Source: U.S. Census Bureau Data, 2000, 2020

SWOT ANALYSIS

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS

A key starting point for a municipal strategic planning process is conducting a SWOT analysis. This step requires elected officials and staff to look internally (and often look past an inherent ego that we bring to our professions). All organizations have positive features (strengths), and all organizations have room for improvement (weaknesses). An honest assessment of where an organization can grow and improve itself is key to having productive strategic planning with staff and elected officials. As consultants, we always remind municipalities that organizational problems do not have to become personal problems. But individual staff can play an important role in their organizations' continual self-improvement.

The analysis was developed following the completion of 23 one-on-one interviews with Village Board members, department heads, and community leaders, in addition to facilitating an employee focus group. The SWOT analysis was used as a starting place for the strategic planning workshops that were facilitated in April 2023.

STRENGTHS

Strengths are the things that set you apart as a Community of Choice. These define your image, reputation, your brand, and should be protected at all costs. As these assets begin to degrade, your reputation and brand may face the same consequence.

Professional and Collaborative Team of Village Employees	The Board describes staff members as professional, highly competent and having a good work ethic. They trust staff and appreciate the open lines of communication. Village staff describe team dynamics as healthy, feel that their coworkers are hardworking and that they take great pride in their work, and by extension, the DeForest community.
Strong Sense of Culture and Continuous Improvement Mindset	The organization has a strong sense of what its culture is and how to recruit effectively to strengthen that cultural identity. Ongoing professional and leadership development, as well as identifying "home grown" talent with potential to grow has contributed to a strong continuous improvement mindset.
A Place Where Residents and Businesses Want to Be	Whether you are a family moving to DeForest to access the school district, an empty nester who wants to stay in DeForest for retirement, or a business looking to take advantage of the interstate and Madison metro access, odds are that you want to be in DeForest. It has a reputation in the metro for being a safe and economically vibrant community.
Natural Beauty and Ample Recreational Opportunities to Enjoy It	The Yahara River and miles of recreational trails, as well as the regularly visible wildlife, make DeForest an oasis just outside of the bustling Madison metro. While growth has happened in recent decades, there has been an intentional effort to preserve and protect greenspaces and ensure community access to them.
"Small Town" = High Degree of Social Connectedness	How does a community which has doubled in size over the last 30 years remain a "small town"? It has little to do with population. The "small town" identity that DeForest residents speak to has to do with how highly connected people in DeForest are. From community surveys to school district open houses, DeForest residents are stewards of their community and make an effort to know and stay connected to their neighbors.

OPPORTUNITIES

Opportunities are the tools or strategies you can leverage to address organizational problems. Some of these were the early stages of solutions that we heard participants mention in survey responses or interviews, or some are high level solutions that we've seen peer communities apply to similar challenges. How you use these tools is up to you – but they are in your toolkit at your disposal.

Leadership is More Representative of Community	In the past decade, the Board has reached gender parity reflective of the community and committees are moving in that direction, too. Continuing to ensure that a broad cross-section of the community is represented in local government will help to build trust and to hear diverse viewpoints.
Collaborate with and Learn from Partner Organizations and Neighbors	Village staff don't have to operate in a silo - peer organizations and quasi-governmental organizations are seeking to meet similar needs. Explore partnerships with the Library, Community + Senior Center, or even joint service provision with neighboring Windsor. There are opportunities to learn from these organizations, share stories, identify community needs, and to avoid duplication of efforts.
Empower Elected Officials and Staff New to their Roles through Education	Village Board and Staff turnover in recent years opens an opportunity for refresher education on topics such as levy limits, tax base growth, meeting procedure, open meetings law. Staff can help expand Board members' understanding of staff roles by sharing position descriptions, organizational charts, and encouraging job shadowing by Board members.
"This Place Matters" Focus on a People-Centered Approach to Downtown Revitalization	The high degree of social connectedness in DeForest is a major asset that makes this community special. Intentional efforts to attract and grow small businesses in the downtown area, programming more events in Firemen's Park, and exploring partnerships with the Chamber of Commerce are low hanging fruit opportunities. The current Public Services space in the Village Campus could, in the future, be reimaged as an anchor commercial space adjacent to Firemen's Park. Consider the creation of a neighborhood program to stabilize older residential neighborhoods and facilitate meaningful social connectedness in the community.
Continue to Engage in Efforts to Gain Community Input and Trust	The number of different ways to reach the public makes it harder than ever to effectively reach community members, but this doesn't mean that engagement should fizzle out. Feeling listened to and being invited to participate in engagement efforts is an element of DeForest's strong trait of community stewardship. Look to the strong models of community engagement that the DeForest Area School District uses, explore neighborhood program development, and continue to explore and measure the ROI of using emerging social media platforms. Lastly, treat every customer service interaction as an opportunity to solve residents' problems, add value to their lives, and gain their trust.
Develop a Consensus-Driven Approach to Development	It is likely impossible that there will ever be a time where every resident and every elected official is in 100% agreement on the future of development, but the processes in use can be enhanced in the interest of gaining trust. Formalize development processes to ensure that departments communicate seamlessly internally (no duplication of efforts), and that Trustees are made aware of the high-level information about pending developments earlier in the process. Provide user-friendly, plain English educational tools to the public that simplify TID, budget expenditures, and property taxes to explain the benefits of development.

SWOT ANALYSIS (continued)

WEAKNESSES

Weaknesses are the things your organization is grappling with in the present day. These are fires, whereas Threats or Challenges are smoke. You can't ignore weaknesses and you simply cannot put them on a back burner.

Tension and Distrust Between Village Board, Staff, and Community at Large (External)	Comments have remained civil in public meetings, but both Board members and Staff members feel that they have to be guarded in what they say in meetings. There is a level of incivility and anger seen on social media, which feeds into resident distrust. Having an "us vs. them" mindset between staff and the Board does not contribute to a healthy work environment or a healthy government. Staff do not feel that they can trust elected officials to have their back or correct misinformation, and to some extent, community members do not trust Village staff or Trustees.
Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers (External)	DeForest's desirability paired with the nationwide housing shortage trends has made it increasingly difficult for seniors and young professionals (like entry level teachers, Library employees, Public Services staff or Fire District staff) to be able to find accessibly priced housing in the community. Is it possible to bring more housing stock to market that is accessible on a budget of \$1,000-\$1,500 per month (earnings of \$40,000-\$60,000 annually)?
Not All Residents Can Access the Same Quality of Life in DeForest (External)	Nearly 1 in 5 students at DeForest Area School District qualifies for free or reduced lunches and seniors have expressed concern about the rising cost of living in Dane County and Village of DeForest. Lack of transportation networks poses a challenge for community employers to access workers. Community conversations about how to help residents already living in DeForest can help to reach creative solutions.
Need to Extend Strong Culture of Collaboration to Outlying Departments (Internal)	Departments operating within Village Hall boast a strong and collaborative culture, but sometimes departments that operate largely outside of Village Hall can be left out of the conversation. How can external departments like Public Services, Police, and the Library be engaged more regularly?
Newer Staff to Organization and Lack of Defined Policies/ Procedures (Internal)	DeForest's organizational turnover in recent years has attracted young and passionate professionals who are hungry to get things done. This means that some lack technical expertise or professional experience and need support to grow those skills. Some staff feel that they are constantly "putting out fires" - it seems that dedicating efforts to proactively developing and documenting procedures and policies could alleviate this reactive status quo. A focus on cross-training following procedure development would enhance customer service, too.
How Do We Grow? Different Resident Segments Want Different Things (External)	DeForest is grappling with very different philosophies on how to grow the community moving forward. The Board has a wide gamut of views on whether or not to bring in more "affordable" housing products (including multifamily). There is a wide gamut within the community of what programs and services - as well as facilities - are desired. Some residents want to keep up with the amenities neighboring communities have (like aquatic centers) but aren't supportive of the mechanisms needed to pay for construction or programming of said facilities.

THREATS

Threats are the things your organization is beginning to realize, or which very well may likely be realized in the lifespan of this strategic plan (next 3-5 years). These are smoke, whereas Weaknesses are fire. You might not need to jump immediately into solution generating for these issues, but you don't want to wholly ignore them either.

<p>“Nobody Wants to Get Involved in Local Government!” - How Do We Change This? (External)</p>	<p>Despite the passion and sense of stewardship DeForest residents hold for their community, it has become increasingly difficult to attract committee members or Village Board candidates. Trustee seats often go uncontested, and sometimes there are not even official candidates running for vacancies. What is the root cause of this political apathy? Is it that the culture of the Board has a self-fulfilling reputation? Are Board meetings simply too long and too much of a time commitment? Do people not know about the opportunities?</p>
<p>Continuing to Evolve into a 21st Century Government (Internal)</p>	<p>Village staff describe their work processes as in a limbo of transition toward digital governance. It is not uncommon to find organizations at this stage “doing digital” rather than “being digital”. There are time consuming processes that rely heavily on manual data entry (posing a risk for human error). While moving in a positive direction, there is still a large presence of paper processes that require scanning, and extensive use of Excel spreadsheets being used as patchwork solutions. The organization needs to think through its data-tracking needs (CIP, TID, Development agreements, organizational turnover and HR data) and identify solutions that are automated, reduce risk for human error, and supported by training for staff.</p>
<p>Continued External Growth is Difficult to Maintain and Support (External)</p>	<p>Growth has been predictable and steady in recent decades for the Village, but it can't continue to grow outward perpetually. Available land (both unincorporated and serviceable by water/sewer) is limited in surrounding townships. Board members and staff would like to better understand where the boundaries of growth lie and to approach development mindfully with those boundaries in mind. As TIF districts close in the next decade, a number of operational expenditures (departmental budgets) will shift to the general fund that are presently being financed through TIF expenditures. The pace of growth will need to reach a sustainable (and likely slower) level that supports budgetary needs for the Village AND can sustain the service level expectations held by taxpayers.</p>
<p>Labor Market Woes Pose a Challenge to Service Delivery (Internal)</p>	<p>The Village of DeForest has been fortunate for many years to attract highly skilled, professional team members. The persistent labor market shortages and Baby Boomer retirement wave have made hiring a more competitive landscape industry-wide. Recent position openings have seen more limited applicants and candidate pools. This is particularly being felt for seasonal and part-time Public Services roles. Creative approaches to service delivery OR a change in the level of service delivery for Public Services may be a need in the near future if hiring remains to be difficult.</p>
<p>Growth Means that Facility Upgrades will be a Future Reality (Internal)</p>	<p>Growth can be a bit of a vicious cycle. The more residential development you have, the more school enrollment you have. The more miles of road and acres of park space you add, the more equipment and Public Services staff are needed to maintain them. Entities like the Library and Community & Senior Center are not exempt from the needs that the increasing population have for their spaces. Conversations need to be had in the near-term future about the space needs of the Library, the desire for more community programming and meeting space, and the possibility of centralizing Public Services operations at Shonkoo. How can the organization more mindfully PLAN for growth and anticipate facility needs rather than being surprised by them?</p>
<p>Enhance Internal Operations and Communication Between Staff (Internal)</p>	<p>Staff describe their relationships with colleagues as positive and regard their respective work ethic highly. That said, communication internally could be improved. Some team members describe themselves as lacking the ability to focus on long term or bigger picture goals because they are putting out fires on short-term issues. The youthfulness of leadership within the organization (professionally, not by age) opens up an amazing opportunity to shape procedures and outcomes, but they are building the plane while flying it to some extent. The organization lacks clear policies and procedures, and colleagues might not understand one another's communication styles.</p>

STRATEGIC PLANNING WORKSHOPS

Two strategic planning workshops were held with staff and Village Board members in-person on April 3, 2023. The workshops were focused on defining community vision and desired outcomes within the identified weaknesses and threats from the organizational SWOT Analysis.

DEFINING COMMUNITY VISION

Staff and elected officials were challenged to brainstorm key words and sentences describing how they envisioned the Village government and community of DeForest five years into the future. These words and sentences were captured on sticky notes and organized by facilitators into a thematic story map. This exercise was completed in both the afternoon and evening workshops and visuals are included within this chapter.

DEFINING OUTCOMES FOR WEAKNESSES AND THREATS

The afternoon workshop consisted of a broad cross section of Village Staff members including department heads and representatives from all Village departments. Six internal-facing (operations-related) weaknesses and threats that the organization is currently or will likely be facing soon were reviewed by the group and outcomes were defined.

Topics reviewed included:

- Need to Extend Strong Culture of Collaboration to Outlying Departments
- Newer Staff to Organization and Lack of Defined Policies and Procedures
- Continuing to Evolve into a 21st Century Government
- Labor Market Woes Pose a Challenge to Service Delivery
- Growth Means that Facility Upgrades will be a Future Reality
- Enhance Internal Operations and Communications Between Staff

The evening workshop consisted of Village Board members and department heads. This workshop was focused on six external-facing (community-related) weaknesses and threats. Topics reviewed included:

- Tension Between Village Board, Staff, and Community at Large
- Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers
- Not All Residents Can Access the Same Quality of Life in DeForest
- How Do We Grow? Different Resident Segments Want Different Things
- Continued External Growth is Difficult to Maintain and Support
- Nobody Wants to Get Involved in Local Government! How Do We Change This?

Working in small groups of 3-5 participants, both workshops consisted of an exercise where participants defined the outcome they hope to reach on the issue in five years, brainstormed specific action steps to reach that outcome, and assigned prioritization. Prioritization used a 1, 2, 3 process with one being defined as an emergency, two being defined as important but not urgent, and three being defined as a nice to have outcome that isn't an emergent issue.

WHY THIS APPROACH WORKS

This strategic planning approach puts the do-ers (staff) and decision-makers (Village elected officials) in the driver's seat for their own planning document. Staff consensus and elected official buy-in are critical to developing strategic plans which can be implemented. Our firms take direct feedback from staff and Village elected officials in these workshops and use it to build a strategic framework.

The strategic framework spells out clear outcomes (sourced from participant feedback), denotes specific action steps, assigns a timeline for completion (born from the prioritization exercise with staff), and assigns internal leads and resource needs with leadership input. The final strategic plan should look familiar to staff and Village elected

STRATEGIC PLAN VISION

DEFOREST VISION 2028: Staff Workshop Results

Continued Growth = Change



Geographic Changes: More Annexation | Merging Communities | Landlocked | Community Relationships

Identity Changes: Bigger | Busier | Larger | Population >15k | More Crime | Desire to Remain Safe | Increase Neighborly Connections | More Traffic



More Needs Will Emerge

School Needs: More School Facilities | More Enrollment

Financial Needs: Higher Land Prices | Housing Shortage | Higher Taxes | Desire to be Financially Solvent | Smart Growth | Affordable Living

Transportation Needs: Public Transportation | Possible Mass Transit



Enhanced Services from Village



Infrastructure Enhancements: Expand Village Hall | New Public Works Facility | Consolidate Public Services in one Location | Satellite PD Facility in Southern DeForest | Green Design / Solar Panels | Street Enhancements

Personnel Needs: More Staff | More Public Safety Staff | More Automation | Online Services Improvements | Expanded Emergency Services



CHANGING NEEDS + SERVICES Give DeForest the Opportunity to Remain a Great Community



Destination for Recreation: Greenspace | Paved Trails | More Parks | More Conservancy Land | Disc Golf | Recreation Capital | Pool | Expand Trail System



Destination for Businesses: Revitalized Downtown | Retail Growth | Variety of Food Options | Hotel | Auto Parts Store | Buc-ee's | More Businesses and Services | TID Closures | Industrial Parks Fully Built Out



Preferred Community in Which to Live and Work: Employer of Choice | Energy Efficient | Vibrant | Innovative | Inclusive | Leader | Connected | Unique | Responsive | Partner | Happy | More Opportunities for In-Person Interaction | More Community Events

STRATEGIC PLAN VISION (continued)

DEFOREST VISION 2028:

Village Board + Department Heads Workshop Results

Continued Growth = Change



Geographic Changes: Growing | Sustainable Growth Planned

Identity Changes: Population >12k | More Diverse



More Needs Will Emerge

School Needs:
School Expansions

Housing Needs: More Housing Choices | Affordable Options for Seniors | Diverse Housing Stock | Jefferson Square is Fully Solvent | Fully Completed New Facility for Public Housing Residents

Transportation Needs:
Transit Solution | Mass Transit



Enhanced Services from Village



Infrastructure Enhancements: Consolidate Public Services | Expansion of Public Services | Satellite Police and Fire Facility In Southern DeForest

Personnel Needs: More Village Staff Technified | More Online Services | Sustainable Services/Costs | More Coordinated Services | High End Public Safety

Resource Needs: Expand Relationships with School District | Consolidate Windsor and DeForest Services



Despite Changes, We Know What Makes DeForest Great and We Lean Into Our Strengths



Greenspaces Make Us Great: Preserve Environmental Corridors | Better / More Use of Parks and Facilities | Expanded and Interconnected Trail System | Pool | Pump Track and Skate Park | Enhance Firemen's Park



A Strong Social Fabric Makes Us Great: Vibrant Community | Diverse Opportunities | Taste of DeForest | More Community Events



We are a Destination for Businesses: Expanded Infrastructure | Buc-ee's and MORE at Interstate



Downtown is Thriving: DeForest is a Destination | Downtown Redevelopment of CTH V and Main | New Grocery Store | Free Wi-Fi Downtown | Diverse-Owned Businesses | More Local Businesses

PUBLIC INPUT PROCESS

The Village of DeForest is a highly engaged community with participatory residents. As such, it was significant to Village leadership that the community have an opportunity to participate in the strategic planning process in a meaningful way. There were four main opportunities for Village residents and stakeholders to participate in the strategic planning process.

SOCIAL PINPOINT WEBSITE

The Village of DeForest partnered with community engagement company Social Pinpoint to create a landing page for the strategic planning process. This website outlined WHAT the strategic planning exercise entailed, WHEN and HOW residents and stakeholders could participate, WHY the Village was engaged in this process and provided an interactive mapping tool where participants could leave geotagged comments such as submitting an idea, noting something that is liked, as well as open-ended comments. The Village intends to continue their partnership with Social Pinpoint for future community engagement on other projects.

The Social Pinpoint website was live from March 23-April 17, 2023. Metrics from site performance are garnered by Social Pinpoint through Google Analytics. During this time engagement was as follows:

- 7,379 total visits to landing page
- 1,845 unique users (This metric is tied to IP addresses, which means that if an individual accessed the landing page from two different devices, it would appear as two unique users)
- 114 unique stakeholders
- 236 comments

Comments were tabulated by general theme and are included in the appendix of this plan. Top comments related to expanding trail systems to reach more neighborhoods and commercial / activity areas (15 comments), general road repairs (12 comments), protecting wooded and natural areas (12 comments), and a desire for more sidewalk / pedestrian amenities in both residential and commercial areas (10 comments).

COMMUNITY ONLINE SURVEY

An online survey developed and hosted by Allyson Brunette Consulting was linked from the Social Pinpoint website. Participants could anonymously take the survey answering a variety of questions related to development, customer service in the Village, how they access information, as well as sharing open-ended comments.

The community survey was live from March 23-April 17, 2023. During this time engagement was as follows:

- 518 responses to the survey
- 913 open-ended comments received

Comments were tabulated by general theme and are included in the appendix of this plan as a part of the Community Survey report. Top comments related to a desire for more dining options, preferably not fast food (83 comments), a desire for another or enhanced grocery store (83 comments), general road repairs (64 comments), a desire for a revitalized downtown district (59 comments), lower taxes (56 comments), and an expanded trail system (55 comments).

BUSINESS ONLINE SURVEY

An online survey developed and hosted by Allyson Brunette Consulting was linked from the Social Pinpoint website. Participants could anonymously take the survey answering a variety of questions related to development, their business customer service experience in the Village, how they access information, as well as sharing open-ended comments.

The community survey was live from March 23-April 17, 2023. During this time engagement was as follows:

- 22 responses to the survey
- 9 open-ended comments received

Comments were tabulated by general theme and are included in the appendix of this plan as a part of the Business Survey report.

COMMUNITY WORKSHOP

A community workshop facilitated by Allyson Brunette Consulting was hosted at the DeForest Area High School on April 20, 2023.

The event was promoted heavily on the Village's social media accounts and reminder emails were sent to 100 survey participants who had requested such a reminder. Inclement weather may have reduced participant attendance as the Village was under a tornado watch during the two-hour event. Approximately two dozen participants attended the in-person workshop. Questions were presented to participants at a dozen interactive stations and were generated in response to major themes identified in the community and business survey tools.

A summary of responses received at this event is included in the appendix of this plan.



STRATEGIC FRAMEWORK

INTERNAL ISSUE NARRATIVE #1

Need to Extend Strong Culture of Collaboration to Outlying Departments

The need to extend a strong culture of collaboration to outlying DeForest departments was a weakness identified in the organizational SWOT Analysis. Some departments were described as “stepchildren” while other departments noted that they felt that they were an afterthought when it came to sourcing things like equipment, office supplies, or furniture.

This is not an uncommon issue in municipal organizations and the disconnect can likely be attributed to several key areas:

- Separate governing bodies (commissions, boards) for organizations like the DeForest-Windsor Fire Department, DeForest Area Community and Senior Center, and DeForest Public Library may remove staff within these departments from both Village Board meetings and internal team debrief meetings.
- Different work hours, schedules, or workplace environments remove emergency responders further from fellow departments within the organization.
- Separate physical work environments (certain departments being housed in completely different buildings or areas of the Village).

SWOT Analysis Issue Description:

Departments operating within Village Hall boast a strong and collaborative culture, but sometimes departments that operate largely outside of Village Hall can be left out of the conversation. How can external departments like Public Services, Police, and the Library be engaged more regularly?

INTERNAL ISSUE NARRATIVE #1

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Within one year, results from a survey will suggest positive culture changes within an entity.
2. Intradepartmental communications are enhanced and what collaboration looks like is defined for each outlying department.
3. All Village Departments (and outlying entities) boast a strong, cross-collaborative culture.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Administration should continue in their efforts to make intentional face time with outlying departments and quasi-governmental organizations that work with the Village (or alongside the Village toward the same goals).
- Consider incorporating a Village “round robin” into new employee onboarding for FTE hires. This could include an introduction to the department heads of each Village department, a brief facilities tour, and an explanation of how the employee can expect to interface with other departments. DeForest is still a small enough organization that this could be facilitated with little additional time commitment in new employee onboarding. It sends a clear message that all parts of the Village government organization are highly valued.
- Some organizations use outside consultants or online services to provide personality assessments and learning tools to teams. This can be a valuable exercise to help build self-awareness of individuals within the organization and departments, and to better understand their peers within their direct team and fellow departments. With an anticipated need in the future to have greater cross-training and cross-departmental collaboration, efforts like this to raise self-awareness in strengths and skills will plant valuable seeds for more collaborative work.

Strong Culture of Collaboration Framework

SWOT Challenge: Need to Extend Strong Culture of Collaboration to Outlying Departments

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Within one year, results from a survey will suggest positive culture changes within an entity.	Explore holding quarterly all-staff meetings during business hours for “State of the Village” featuring all departments.	Communicate Clearly	2023-2024	Leadership sets expectation	Village Administrator
	Create a standing time within existing department head meetings to discuss departmental needs.		2023-2024	Leadership sets expectation	Village Administrator
	Explore more Village-wide staff event opportunities for staff to co-mingle. Staff participation could be incentivized to encourage participation.	Have Fun	2023-2024	Leadership sets expectation	Village Administrator
2. Intradepartmental communications are enhanced and what collaboration looks like is defined for each outlying department. <small>**Highest Staff Ranked Outcome</small>	Explore integrated communication tools that will foster interdepartmental connections such as internal newsletter, intranet.	Communicate Clearly	2025-2026	Research, Budgetary Support	Director of Administrative Services
	Explore opportunities to ensure greater understanding of departmental operations such as job shadowing, ride-alongs, department spotlighting, etc.		2025-2026	Research, Leadership sets expectation	Director of Administrative Services
	Ensure that an “open door” policy exists between departments and facilitate regular check-ins between Administration and outlying departments.		2025-2026	Leadership sets expectation	Village Administrator
3. All Village Departments (and outlying entities) boast a strong, cross-collaborative culture.	Create opportunities for departments to share what they do with one another and brainstorm how to share talents and skills cross-departmentally.	Commit to Learning and Growth	2025-2026	Leadership sets expectation	Director of Administrative Services
	Discuss needs and identify gaps in service delivery across departments as an opportunity to solve problems collaboratively.		2025-2026	Leadership sets expectation	Department Heads

INTERNAL ISSUE NARRATIVE #2

Newer Staff to Organization and Lack of Defined Policies and Procedures

The lack of defined policies and procedures within the Village of DeForest and many newer staff members converged as a weakness identified in the organizational SWOT Analysis. We heard staff describe the work environment in Village Hall as “reactive vs. proactive” at times and noted that employee onboarding processes and process documentation could be refined.

While many public sector organizations are anticipating a retirement cliff in years to come, DeForest has already experienced a number of retirements and turnover – positioning them well ahead of the learning curve that many organizations will encounter. DeForest maintains a high level of service delivery (and high expectations from residents). To meet this level of service, employee onboarding and process documentation (which includes ongoing process refinement) are important steps to take to ensure that individuals are trained properly in processes and that team members can fill in for one another in case of absences.

One department that is highly cross trained already is the Public Services department. Department members reflected that this makes onboarding a challenge as it can take almost an entire year for new team members to experience the many seasonal roles inherent in the department's work. This department may be the one candidate within Village government to evaluate for future specialization. If Village population and service demands continue to grow, a more specialized Public Services department may in fact shorten the employee onboarding window and empower easier hiring as roles will be more specialized.

SWOT Analysis Issue Description:

DeForest's organizational turnover in recent years has attracted young and passionate professionals who are hungry to get things done. This means that some lack technical expertise or professional experience and need support to grow those skills. Some staff feel that they are constantly “putting out fires” - it seems that dedicating efforts to proactively developing and documenting procedures and policies could alleviate this reactive status quo. A focus on cross-training following procedure development would enhance customer service, too.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Within one year, new staff feel more comfortable, productive, and effective in their positions compared to baseline.
2. As community grows, move to a more specialized Public Services Department.
3. Departments have standard operating procedures (SOPs) and established training standards to provide good internal and external customer service.
4. DeForest has a culture of continuous improvement and fulfilling employee training.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Train department heads in a process mapping methodology, such as the Kaizen process mapping process. This practice, gleaned from Six Sigma operational management principles, maps out who is responsible for tasks at each step from start to finish. Going through process mapping (either internally or with an outside facilitator or course) helps to ensure that all team members understand how a process should be done and can provide confirmation on the effectiveness of that process implementation.
- Look to peer organizations for new employee checklists and onboarding guidelines. While departmental specifics may vary, creating a consistent employee onboarding process sets new employees up for success from day one.
- Evaluate if there is interest in creating a new employee mentor program. At times new employees do not feel comfortable asking their direct supervisor questions when they first start in a role. Creating a mentor program can allow legacy members of your organization to be a positive influence on new employees, garner stronger social connectedness (particularly cross-departmentally) and enhance the new employee experience.

Defined Policies and Procedures Framework

SWOT Challenge: Newer Staff to Organization and Lack of Defined Policies and Procedures

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Within one year, new staff feel more comfortable, productive, and effective in their positions compared to baseline.	Structured training processes are developed for new hires with clear expectations and a focus on the basics of each role / department.	Commit to Learning and Growth	2023-2024	Leadership sets expectation, Research	Department Heads, Director of Administrative Services
	Develop a structured employee onboarding process that helps staff to feel prepared to handle as many situations as possible.		2023-2024	Leadership sets expectation, Research	Director of Administrative Services
	Establish a point person (or evaluate creation of new in-house or contracted role) responsible for developing training programs.		2023-2024	Leadership sets expectation, Budgetary support	Director of Administrative Services
	Formalize a cohort or mentor program for new hires to socialize employees internally and cross-departmentally.	Be Inclusive	2023-2024	Leadership sets expectation, Research	Director of Administrative Services
2. As the community grows, move to a more specialized Public Services Department that relies less heavily on cross-trained employees.	Evaluate Public Services Department services and gauge at what point a fully cross-trained department no longer makes functional sense for service delivery.	Commit to Learning and Growth	2023-2024	Leadership sets expectation, Research	Public Services Director
	Expedite employee onboarding for Public Services Department by specializing roles vs. training in all areas of Public Services.		2023-2024	Leadership sets expectation, Research	Public Services Director

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Departments have standard operating procedures (SOPs) and established training standards to provide good internal and external customer service.	Departments work internally to identify inefficiencies in processes and document said processes.	Embrace Creativity and Innovation	2023-2024	Leadership sets expectation	Department Heads
	Departments review accuracy of job descriptions on a regular basis (outside of employee turnover) and use position duties to inform training.		2023-2024	Leadership sets expectation	Department Heads
	Develop a process for testing written processes and refining if needed with employee input.		2025-2026	Leadership sets expectation, Research	Department Heads
	Establish an implementation timeline for process documentation for each department.		2025-2027	Leadership sets expectation	Department Heads
4. DeForest has a culture of continuous improvement and fulfilling employee training. <small>**Highest Staff Ranked Outcome</small>	Work to develop organizational culture of continuous improvement and learning. Measure continuous learning in employee evaluations.	Commit to Learning and Growth	2025-2026	Leadership sets expectation	Department Heads
	Create FAQs for each department that are available internally and externally.		2025-2026	Leadership sets expectation	Department Heads
	Conduct casual supervisor check-ins with employees on a quarterly basis to evaluate process implementation and garner employee input on recurring issues.	Be Inclusive	2025-2026	Leadership sets expectation	Department Heads
	Create a centralized Village Knowledge Base that is accessible to all employees and facilitates more efficient service provision.	Commit to Learning and Growth	2027-2028	Leadership sets expectation	Director of Administrative Services
	Identify a vendor to define and build policies and procedures with departments.		2027-2028	Research, Budgetary support	Director of Administrative Services

INTERNAL ISSUE NARRATIVE #3

Continuing to Evolve into a 21st Century Government

The need to continue to evolve into a 21st century government was identified as a threat for the Village of DeForest in the organizational SWOT Analysis. Staff expressed frustration with the current information technology contract authorizations which do not empower staff to problem solve their own issues, but rather rely on an outside contractor. While the intentions behind this policy were good (best cyber security practices), the result is that employees feel that leadership lacks trust in them and that their jobs are more difficult and time consuming to execute.

Beyond the controls assigned for information technology, there appear to be dramatically differing levels of technological literacy within the organization and within the customer base. Staff should be continuously looking for ways to move away from manual data entry / paper-intensive processes that are low value-add tasks and pose a risk for human error. That said, some departments have expressed concern that new technology implementation comes with challenges (such as device responsiveness in the field) and may impede customer service delivery. While the goal is to push forward and find technological solutions to enhance residents' lives, customer service for those who do not feel comfortable using new solutions must be maintained.

Lastly, we heard from both staff and elected officials' desires for a more user-friendly website experience. Local governments are large organizations and websites often (unintentionally) house information in a way that makes sense to in-house staff, but not to customers / users.

SWOT Analysis Issue Description:

Village staff describe their work processes as in a limbo of transition toward digital governance. It is not uncommon to find organizations at this stage "doing digital" rather than "being digital". There are time consuming processes that rely heavily on manual data entry (posing a risk for human error). While moving in a positive direction, there is still a large presence of paper processes that require scanning, and extensive use of Excel spreadsheets being used as patchwork solutions. The organization needs to think through its data-tracking needs (Capital Improvement Planning, Tax Increment Districts, Development agreements, organizational turnover and HR data) and identify solutions that are automated, reduce risk for human error, and supported by training for staff.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Staff are trained in cybersecurity practices and departments are granted greater trust / access to govern their own IT.
2. Current procedures are reviewed, and areas are identified for conversion for digital processes (vs. manual).
3. Organization has a comprehensive overview and understanding of tools and systems in place, as well as predicting future needs.
4. Enhance customer service and ease of navigating Village systems through technology.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- When approaching a website refresh – put on the hat of a user while designing. Focus on the problems or motivation a user might have when using the Village website and frame the way you present your solutions in that fashion. This is sometimes seen in the format of “How can we help you?” pages for information delivery versus compartmentalizing or burying information within department pages.
- When looking at software solutions for the organization, stress in procurement RFPs the desire for programs that can be used cross-departmentally, and which allow for one digital login. Allowing residents to interface with one software program to accomplish multiple tasks showcases digital governance at its best.
- Technological obsolescence continues to outpace the lifespans of fixtures like furniture and equipment. To meet customer expectations for service delivery, the Village can look to peer communities to identify examples of technology CIPs that predict asset lifespan and replacement timeframes. This avoids budget surprises and can help organizations to best reassign assets (rather than assigning duplicates of assets to employees – such as tablets, laptops, and desktop computers).

Evolving into a 21st Century Government Framework

SWOT Challenge: Continuing to Evolve into a 21st Century Government

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Staff are trained in cybersecurity practices and departments are granted greater trust / access to govern their own IT.	Develop system for Administrator password distribution across department heads to reduce wait times and dependence on outside IT contractor.	Embrace Creativity and Innovation	2023-2024	Leadership sets expectation	Village Administrator
	Formalize a cohort or mentor program for new hires to socialize employees internally and cross-departmentally.		2023-2024	Leadership sets expectation	Village Administrator
2. Current procedures are reviewed and areas are identified for conversion for digital processes (vs. manual). <small>**2nd Highest Staff Ranked Outcome</small>	In tandem with departmental process documentation, identify manual or paper-intensive tasks that could be candidates for digitization.	Embrace Creativity and Innovation	2023-2024	Leadership sets expectation, Research	Department Heads
	Increase digital literacy within the organization through training - not leaving staff behind as the organization gravitates toward paperless processes.		2025-2026	Leadership sets expectation	Director of Administrative Services
	Document weekly / monthly tasks in various software programs and ensure that multiple staff are cross-trained in software programs.		2025-2026	Leadership sets expectation, Research	Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Organization has a comprehensive overview and understanding of tools and systems in place, as well as predicting future needs. <small>**Highest Staff Ranked Outcome</small>	Develop a vetting system that is used consistently to measure need for and benefits of implementing new technology (to avoid band-aid solutions).	Embrace Creativity and Innovation	2023-2024	Research	Village Administrator
	Develop an inventory of Village's data management and communication tools and how they are used (or could be used).		2023-2024	Research	Department Heads
	Develop a comprehensive (but user-friendly!) asset and inventory software system.		2025-2026	Research	Finance Director, Village Administrator
	Develop a technological capital improvement plan to plan and budget for digital infrastructure needs.		2027-2028	Research	Finance Director, Village Administrator
4. Enhance customer service and ease of navigating Village systems through technology.	Embed e-commerce capabilities into Village website to reduce manual payment processing and enhance customer service.	Wow the Community	2025-2026	Research, Budgetary support	Finance Director
	Identify gaps on current Village website that make accessing information difficult for customers.		2025-2026	Research	Department Heads, Village Board
	Identify systems that can be used cross-departmentally with one digital login for customers (licensing, permits, tax payment, etc.)		2027-2028	Research	Village Administrator

INTERNAL ISSUE NARRATIVE #4

Labor Market Woes Pose a Challenge to Service Delivery

Labor market woes and the challenge that market conditions pose to service delivery were identified as a threat for the Village of DeForest in the organizational SWOT Analysis. Staff shared concerns about the declining number of qualified candidates in applicant pools for roles and how the Village has “struggled due to its own success”. This is a reference to how wide applicant pools had been in years past for roles within the Village, allowing the organization to hire top notch talent.

A trend we see in other local government organizations is the challenge of filling seasonal roles, particularly in park or Public Services departments. Demographics who had filled these roles in the past, such as retirees or college students are not as reliably filling these roles. We also heard of the “fast food effect”, where Village roles that once competed on wages are now on par or below the hourly rate paid in the private sector for roles that are less physically demanding, or which take place indoors.

The highly competitive environment of hiring has resulted in neighboring communities outpacing the Village of DeForest in part time or seasonal wages.

SWOT Analysis Issue Description:

The Village of DeForest has been fortunate for many years to attract highly skilled, professional team members. The persistent labor market shortages and Baby Boomer retirement wave have made hiring a more competitive landscape industry wide. Recent position openings have seen more limited applicants and candidate pools. This is particularly being felt for seasonal and part-time Public Services roles. Creative approaches to service delivery OR a change in the level of service delivery for Public Services may be a need in the near future if hiring remains to be difficult.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. DeForest is an employer of choice for its workplace culture and non-wage benefits.
2. DeForest is an employer of choice for its competitive wages and compensation.
3. Think innovatively about how to deliver expected service level.
4. Efficient levels of staffing are sustained to support desired level of service.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- The Village does an excellent job of cultivating a positive workplace culture – how can this be more strongly highlighted in recruitment efforts? Is there an opportunity to humanize what it looks like to work for the Village through marketing efforts? Organizations that feature real employees, testimonials, or highlight the human experience of a role (rather than just the pay and position expectations) may attract a greater candidate pool.
- As decision-makers and the keepers of the budgetary process, the Village Board has two clear options on their hands: to either reduce the level of service delivery to meet what staff has the capacity to complete, OR to choose to compete in the realm of pay or non-wage benefits when hiring. The Village Board visited a paid time off and parental leave policy in late 2022 and had much discussion at the time about the need for and impact such policies would have on recruitment and retention. The organization would be well-suited to keep discussions like this top of mind and to revisit frequently how recruitment efforts are performing.
- Allow data to inform decisions rather than emotions. Rather than delivering qualitative insights on recruitment performance such as “the candidate pool was slim”, we encourage staff and the Director of Administrative Services to include quantitative data. This relates closely to the technology solutions discussed in Internal Issue #3: Evolving into a 21st Century Government. This might include sharing with the Village Board the number of qualified applications received for part time or seasonal roles year over year as well as assigning grades or scores as to the quality of applications and sharing the average raw score of applications received. Quantitative data can demonstrate to the Village Board if in fact candidate quality has declined over time and if a shift in wage or non-wage benefits might positively impact results.

Labor Market Woes and Service Delivery Framework

SWOT Challenge: Labor Market Woes Pose a Challenge to Service Delivery

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. DeForest is an Employer of Choice for its Workplace Culture and Non-Wage Benefits.	Explore best avenues to market position openings for Village to attract best candidates in first-round job postings.	Genuinely Care for Everyone	2023-2024	Research	Director of Administrative Services
	Highlight quality of workplace culture prominently in position marketing.		2023-2024	Leadership sets expectation	Director of Administrative Services
	Market Public Services roles to skilled trades training programs as a career opportunity.		2023-2024	Budgetary support, Leadership sets expectation	Director of Administrative Services, Village Board
	Maintain knowledge of competitor communities' paid time off programs and grow non-wage benefits for Village employees.		2023-2024	Research, Budgetary support	Director of Administrative Services, Village Board
	Establish reputation for excellence by providing top notch equipment for departments.		2025-2026	Budgetary support	Director of Administrative Services
2. DeForest is an Employer of Choice for its Competitive Wages and Compensation. <small>**Highest Staff Ranked Outcome</small>	Pay summer LTE roles more competitively to attract best candidates for hard-to-fill roles.	Genuinely Care for Everyone	2023-2024	Research, Budgetary support	Director of Administrative Services, Village Board
	Evaluate on an annual basis the benchmark cost-of-living for DeForest and strive to align base pay with that number.		2025-2026	Research, Budgetary support	Director of Administrative Services, Village Board
	Explore ways of paying employees more or offering one-time sign-on bonuses to attract the best possible staff in the industry.		2025-2026	Research, Budgetary support	Director of Administrative Services, Village Board

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Think Innovatively About How to Deliver Expected Service Level.	Implement cross-training across departments where appropriate to enhance customer service experience.	Wow the Community	2023-2024	Leadership sets expectation	Department Heads
	Use LTE / short-term hires to fill positions as-needed to reduce burden on short-staffed departments.	Embrace Creativity and Innovation	2025-2026	Leadership sets expectation	Department Heads
	Evaluate combo positions as a hiring alternative to hire cross-departmentally or cross-functionally.		2025-2026	Research	Public Services Department
	Explore creating more low-mowing maintenance or no-mow maintenance areas in Village greenspaces.	Be a Good Neighbor	2025-2026	Research	Community Enrichment Department, Public Services Department
	Explore creating an Adopt-a-Park program supported by community volunteers.				
4. Efficient levels of staffing are sustained to support desired level of service.	Evaluate growth of positions in correspondence with facility growth, population growth, and valuation growth.	Commit to Learning and Growth	2025-2026	Research	Village Administrator, Director of Administrative Services
	Establish FTE / LTE staff growth plan.		2025-2026	Research	Village Administrator, Director of Administrative Services
	Evaluate if adding an IT Support professional role to Village staff adds benefit.		2027-2028	Research, Budgetary support	Director of Administrative Services, Village Board

INTERNAL ISSUE NARRATIVE #5

Growth Means that Facility Upgrades Will Be a Future Reality

The reality that continued growth of the community will lead to the future reality of municipal facility upgrades was identified as a threat for the Village of DeForest in the organizational SWOT Analysis. In discussions with staff and Trustees we heard a number of thoughts related to physical space within municipal complexes including:

- Concerns that the DeForest Public Library is running out of space as collections and program volume continue to increase.
- The challenges surrounding limited space for Public Services and the divided presence across two facilities in downtown and at Shonkoo.
- The need for more space inside Village Hall, only a short number of years after facility expansion, with added staff roles.
- The community demand to “keep up” with amenities had by neighboring communities, such as an outdoor pool or indoor aquatic center, a community recreation center, expanded park facilities. These sentiments are not held universally but are represented by some participants in responses to this planning effort and previous engagement efforts facilitated by the Village.

Village staff are strongly desiring a master facility planning effort to wrap their heads around what facility improvements are needs vs. wants, intentional planning toward meeting the costs of those facility improvements, and solutions to manage space needs in the present. Village Board members, on the other hand, support facility improvements when needed, but feel that there needs to be a point of compromise in order to maintain good financial stewardship of local tax dollars.

SWOT Analysis Issue Description:

Growth can be a bit of a vicious cycle. The more residential development you have, the more school enrollment you have. The more miles of road and acres of park space you add, the more equipment and Public Services staff are needed to maintain them. Entities like the Library and Community & Senior Center are not exempt from the needs that the increasing population have for their spaces. Conversations need to be had in the near-term future about the space needs of the Library, the desire for more community programming and meeting space, and the possibility of centralizing Public Services operations at Shonkoo. How can the organization more mindfully PLAN for growth and anticipate facility needs rather than being surprised by them?

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Satellite Police location is planned for Southern DeForest (Fire and EMS already planned).
2. A long-range mindset (10-15+ years) is implemented for facility planning (vs. 3-5 years).
3. Public Services operations and storage are consolidated at Shonkoo site.
4. Community wants and needs are well-understood, and Village plans for facility upgrades accordingly.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Until Public Services can be consolidated in one location with adequate space, weigh the efficiency of storing lesser-used items at a third site, perhaps a leased site located in the Village of Windsor? It sounds as though relocating multiple pieces of equipment and vehicles around Shonkoo is a particular time crunch and inefficiency for the Public Services department.
- Within Village Hall, explore scheduling tools that reduce the number of people in Village Hall at one time to make do with the same amount of space. Flexible scheduling options (such as hybrid work) and intentional scheduling of meetings could reduce the need for overall SF needed (or make the existing SF work for longer). This is a model seen in practice in the private sector more frequently post-pandemic.
- Discuss the use of hot desking, where multiple individuals share a workspace and can plug in within a workspace only when onsite. This may or may not be a good fit for the Village of DeForest.
- When measuring community feedback on facility upgrades or expansions, partner with professional research firms that can guarantee statistical validity of responses. It is important to ensure that a broad cross-section of residents from all demographics is represented in decisions which impact the Village, not just the most highly engaged and vocal portion of residents.

Facility Upgrades: A Future Reality Framework

SWOT Challenge: Growth Means that Facility Upgrades Will Be a Future Reality

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Satellite Police location is planned for Southern DeForest (Fire and EMS location already planned).	Proactively site emergency services in fast-growing areas of DeForest to maintain service response times.	Be a Good Neighbor	2023-2024	Research, Budgetary support	Village Administrator, Police Chief, Fire Chief, Village Board
	Plan for equipment storage for Police and Fire to reduce need for these departments to encroach on Public Services storage space.			Budgetary support	Police Chief, Fire Chief, Public Services Director
2. A long-range mindset (10-15+ years) is implemented for facility planning (vs. 3-5 years). <small>**Highest Staff Ranked Outcome</small>	Develop a long-term facilities management plan for all Village facilities.	Commit to Learning and Growth	2023-2024	Research	Public Services Director, Village Administrator
	Share long-term anticipated capital needs with Board annually to ensure no surprises. Educate Board members on how facilities and equipment directly support expected level of services.	Have the Hard Conversations	2023-2024	Leadership sets expectation	Public Services Director, Village Administrator
	Develop a stable finance plan for anticipated capital needs. Evaluate expanded use of impact fees where feasible.		2023-2024	Research	Finance Director
	Ensure that facility upgrades are equitable across departments where possible and not reinforcing idea that Public Services is on the back burner.		2025-2026	Leadership sets expectation	Village Administrator
	When analyzing staffing needs for Village (resulting from growth), incorporate equipment and facility needs into those conversations.		2025-2026	Research	Director of Administrative Services, Public Services Director

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Public Services operations and storage are consolidated at Shonkoo site.	Prioritize expansion of facilities at Shonkoo for more efficient Public Services vehicle storage and service delivery.	Commit to Learning and Growth	2025-2026	Budgetary support	Village Board
	Explore highest and best potential uses for current Public Services space in Village Campus.		2027-2028	Research	Community Development Director, Finance Director, Public Services Director, Village Administrator
4. Community wants and needs are well-understood and Village plans for facility upgrades accordingly.	Design outreach efforts cross-departmentally and involve outlying departments such as Library, Community and Senior Center, School District to understand needs broadly.	Be a Good Neighbor	2025-2026	Leadership sets expectation, Research	Village Administrator
	Engage in community outreach to understand community pulse on services / space needs.		2027-2028	Leadership sets expectation, Research	Village Administrator, Community Ambassador

INTERNAL ISSUE NARRATIVE #6

Enhance Internal Operations and Communication Between Staff

The state of internal operations and communication between departments was identified as a threat for the Village of DeForest in the organizational SWOT Analysis. Staff expressed concerns about duplication of efforts, feeling like colleagues don't respect (or perhaps, more generously, don't understand) the nature of the work that they do and the time needed for completion, and that things are performed inconsistently across the organization. This issue holds a significant amount of alignment with Internal Issue #2 related to internal policies and procedures.

While staff commended the work ethic and camaraderie existing within the organization, there is room for improvement when it comes to better understanding one another.

SWOT Analysis Issue Description:

Staff describe their relationships with colleagues as positive and regard their respective work ethic highly. That said, communication internally could be improved. Some team members describe themselves as lacking the ability to focus on long term or bigger picture goals because they are putting out fires on short-term issues. The youthfulness of leadership within the organization (professionally, not by age) opens an amazing opportunity to shape procedures and outcomes, but they are building the plane while flying it to some extent. The organization lacks clear policies and procedures, and colleagues might not understand one another's communication styles.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Interdepartmental communications are direct, generous, clear, and respectful.
2. Village Departments are on the same page internally which reduces frustrations.
3. Staff understand their preferred communication style and that of their peers.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Utilize the strategic planning effort to build consensus and a shared vision within the departments and teams in the Village. Our implementation strategy recommends the use of EOS principles which center largely on shared organizational vision and ensuring that every team member fully understands how their individual role serves the larger central purpose of the organization.
- The implementation of policies and procedures recommended under Internal Issue #2 narrative and framework will also help to ensure consistency in how tasks are completed and how communications occur.
- The Village of DeForest stands out to our firms as a leader in how staff are engaged in the organizational core behaviors. There is an opportunity to offer more education and training in individual personality, learning, and communication styles. If staff already respond well to training in a team environment, perhaps outcomes would be positively impacted by colleagues better understanding how and why they communicate in the fashion that they do.
- Lastly, the many mechanisms of how team members in workplace can communicate with one another (phone, in-person, through email, Microsoft Teams chat, text) result in inherent distraction and an inability to engage in deep focus work. The current platform that many local governments use for email communications (Microsoft Outlook through Office 365) includes a useful dataset called Microsoft Workplace Insights. These tools analyze calendar appointments, hours spent logged into Microsoft tools, and email volume and trends to determine how focused or distracted an employee is. This is a useful way to measure a baseline of how and when employees are working.
- Establishing department-wide standards for how to communicate effectively internally can be highly impactful for teams to not only reduce distractions, but to be more respectful of a colleague's time. For example, the following process could reduce the need for an employee to always have their email platform open (a key workplace distraction):
 - o If you need an answer immediately, stop by in-person or call.
 - o If you need an answer in under two hours, use the instant message feature on Microsoft Teams.
 - o If you need an answer but not within two hours, send an email.
- If new communications policies or standards are implemented, they should be communicated across the entire organization AND with elected officials.

Enhance Internal Operations & Communication Framework

SWOT Challenge: Enhance Internal Operations and Communication Between Staff

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Interdepartmental communications are direct, generous, clear, and respectful.	All employees understand how their work is instrumental in reaching a shared end-goal or vision.	See the Good in Others	2023-2024	Leadership sets expectation	Department Heads
	Provide opportunities for departments to learn and be a part of organizational culture. Stronger relationships = more respect.	Take Responsibility to Build Trust	2025-2026	Leadership sets expectation	Department Heads, Village Administrator
	All employees are aware of and aligned with organizational vision.	See the Good in Others	2025-2026	Leadership sets expectation	Department Heads
2. Village Departments are on the same page internally which reduces frustrations. <small>**Highest Staff Ranked Outcome</small>	Define policies and procedures across all departments and share such information in a centralized location.	Embrace Creativity and Innovation	2025-2026	Leadership sets expectation	Department Heads, Village Administrator
	Set expectations for department meetings in order to better understand work designations AND to solve problems collaboratively.		2025-2026	Leadership sets expectation	Village Administrator, Director of Administrative Services
	Set department meeting agendas with time to discuss urgent needs and prioritization can be adjusted as needed.		2025-2026	Leadership sets expectation	Village Administrator, Director of Administrative Services
	Evaluate use of a time management / project management tracking tool to better understand project progress across teams and departments.		2025-2026	Research, Budgetary support	Village Administrator, Director of Administrative Services
3. Staff understand their preferred communication style and that of their peers.	Develop communications framework between staff that encourages communication and relationship-building between these parties, but inform WHICH communication mechanism to use and WHAT response time turnaround can be expected.	Commit to Learning and Growth	2023-2024	Leadership sets expectation	Village Administrator, Department Heads
	Departments have opportunity to receive training on learning and communication styles within teams to enhance team performance.		2027-2028	Budgetary support	Director of Administrative Services
	Establish an internal cultural expectation of understanding one another and not making assumptions.	Genuinely Care for Everyone	2027-2028	Leadership sets expectation	Director of Administrative Services

(End of section: Internal Issues Framework)

STRATEGIC FRAMEWORK

EXTERNAL ISSUE NARRATIVE #1

Tension and Distrust Between Village Board, Staff, and Community at-Large

Tension and distrust between elected officials, staff, and community members was identified as a weakness for the Village of DeForest in the organizational SWOT Analysis. Both staff and Trustees expressed dire concerns with the level of hostility and tense interactions occurring both in-person and online. There is fear that the interactions occurring between elected officials is setting a negative tone for the community and risking the good reputation of the Village.

Elected officials are not subject to following the same policies that staff are for social media, but it would be a positive outcome for relations if elected officials agreed to the same level of decorum in meetings and online that staff are expected to follow. It is evident that the hostile interactions between Trustees have funneled down to the staff level. Trustees perceive the reaction from staff to be a level of defensiveness and that staff are not responsive or receptive to feedback. Staff report that there is a desire to avoid confrontation or conflict with Trustees and there is a level of hesitancy to interact with Trustees and a fear of what might be said online.

It was also shared with our firms that there have been multiple public meetings where decorum has been lacking and that Robert's Rules of Order are followed inconsistently. Despite the actions that are ongoing and negative, all parties we spoke with expressed a desire to do better.

SWOT Analysis Issue Description:

Comments remain civil in public meetings, but both Board members and Staff members feel that they must be guarded in what they say in meetings. There is a level of incivility and anger seen on social media, which feeds into resident distrust. Having an "us vs. them" mindset between staff and the Board does not contribute to a healthy work environment or a healthy government. Staff do not feel that they can trust elected officials to have their back or correct misinformation, and to some extent, community members do not trust Village staff or Trustees.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Interactions between the Board, Staff, and the public are effective and civil. Everyone feels heard.
2. Expectations are set for elected officials in order to create a healthier working environment.
3. Clear communication is a priority for all parties in order to reduce tension and foster greater trust.
4. All parties are on the same page about their shared goals.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Trustees are asking for black and white guidelines on how they should interact with staff (vs. just going through the Administrator), but the truth of it is, all parties need to work on finding the gray area. Relationships can have appropriate boundaries, but trust is earned through building authentic relationships. There is ample room for both staff and Trustees to work on relationship building and mutual respect.
- While not an issue only in DeForest, the ubiquity of the internet as a communication tool has contributed to online disinhibition. What does this mean? In a nutshell, we are meaner to one another from behind a keyboard than we are face to face. Perhaps it is the fact that we don't have to reconcile with the body language of the individual on the receiving end of our words that contributes to this human dynamic. How do we raise the bar and expect better of ourselves and of the organization when it comes to online interactions?
- Elected officials' freedom of speech on their social media accounts is protected, but just because someone CAN do something doesn't mean they SHOULD do something. We strongly encourage DeForest to craft a social media policy for staff and frame the same policy as a pledge for elected officials. While elected officials are not bound to follow it, developing the document together and agreeing of one's individual accord can encourage better behavior.
- We do hope, as well, that this strategic planning process has given both Trustees and staff common ground and a shared vision. We understand that the organization has just gone through a highly contentious election period, but this document and its implementation can be a shared priority for all elected officials.
- Of all the issues we encountered, this one was the most pressing and concerning to us as outside consultants. How can the public trust staff and elected officials if the two parties do not trust one another? Everyone is hoping for better and more respectful outcomes, but it takes an individual and group effort to build trust and relationships and treat one another with civility.

Tension and Distrust Framework

SWOT Challenge: Tension and Distrust Between Village Board, Staff, and Community at-Large

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Interactions between the Board, Staff, and the public are effective and civil. Everyone feels heard. <small>**Highest Staff Ranked Outcome</small>	Explore opportunities for groups to share feedback with the Village in order to reduce conflict.	Be Inclusive	2023-2024	Research, Leadership sets expectation	Village Board, Community Ambassador
	Establish social media policy for staff and ask elected officials to voluntarily follow similar practices in their own social media use.	Own Your Mistakes	2023-2024	Research, Policy change	Village Administrator, Director of Administrative Services, Village Board
	Set expectations that disagreements are handled responsibly and civilly. Political debate should be conducted during duly noticed meetings. Disagreements should be refrained from social media and resolved between parties.		2023-2024	Leadership sets expectation	Village Administrator, Village Board
2. Expectations are set for elected officials in order to create a healthier working environment. <small>**2nd Highest Board/Staff Ranked Outcome</small>	Create and implement clear expectations for how elected officials engage with Village staff (chain of command) with a goal of establishing strong relationships rooted in trust.	Take Responsibility to Build Trust	2023-2024	Leadership sets expectation	Village Administrator, Village Board
	Create opportunity for elected officials to voice concerns directly to Administration on a regular basis in order to address issues.		2023-2024	Leadership sets expectation	Village Administrator, Village Board
	Explore educational opportunities for Trustees on Robert's Rules of Order, Open Meetings Law, closed session item discussion.	Commit to Learning and Growth	2023-2024	Budgetary Support	Village Administrator, Village Board

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Clear communication is a priority for all parties in order to reduce tension and foster greater trust.	Explore holding quarterly community roundtables to share progress and take the temperature on where things are relationally.	Be a Good Neighbor	2023-2024	Leadership sets expectation	Village Administrator, Village Board
	Develop communications framework between Trustees and staff that encourages communication and relationship-building between these parties, but inform WHICH communication mechanism to use and WHAT response time turnaround can be expected.	Communicate Clearly	2023-2024	Leadership sets expectation	Department Heads, Village Board
	Create regular opportunities for staff to ideate, discuss, and solve issues identified internally or by Trustees. Share progress on working through these issues with Board quarterly or more frequently.	Have the Hard Conversations	2025-2026	Leadership sets expectation	Department Heads, Village Administrator
	Explore bringing in an outside facilitator to conduct personality or communication styles training for Trustees to be repeated every two years (post-election) to educate Trustees on their communication styles and best practices for working with other elected officials.		2025-2026	Budgetary support, Leadership sets expectation	Village Administrator, Village Board
4. All parties are on the same page about their shared goals.	Invite Trustees to participate in or share final deliverables from staff training on core values/behaviors.	Be Inclusive	2025-2026	Leadership sets expectation	Director of Administrative Services
	Revisit strategic plan vision and mission annually to ensure that all parties are in consensus about shared goals.		2025-2026	Leadership sets expectation	Village Administrator

EXTERNAL ISSUE NARRATIVE #2

Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers

The lack of housing stock in DeForest and how it is making the community less accessible for seniors and frontline workers was identified as a weakness for the Village of DeForest in the organizational SWOT Analysis. Housing is an issue rife with tension in DeForest as the Dane County / Madison metropolitan area and the state of Wisconsin as a whole struggle with a housing shortage. Post-recessionary impacts, supply chain delays post-pandemic and inflationary supply costs have reduced the ability of developers to construct housing that is accessibly priced for many middle-class earners.

We heard from staff and Trustees, as well as through the community survey and community workshop input, that there are increasingly mixed sentiments on the prevalence of multifamily product. Multifamily product is still profitable to construct, and in many cases can be supported through tax increment incentives or tax credits. There is no shortage of input from all parties involved on whether multifamily product generates more societal issues (crime, traffic, a negative impact on surrounding property values), but the concerns are shared across the board that costs of living are rising at an uncomfortably high pace.

Staff and Trustees both shared their personal experiences in finding housing for their children just moving out on their own, or in helping aging parents downsize out of housing that no longer fits their space needs or mobility needs. Whether or not folks agree with multifamily product as a solution, the root cause is clear: there is not enough variety of housing needed to meet the needs in the community. Discussions with organizations employing frontline workers, such as teachers and emergency responders shared how limited housing options were that met a \$1,000-\$1,500 per month cost.

We also heard that DeForest residents have mixed sentiments on growth, which we will cover more extensively in External Issue #4: How Do We Grow?

SWOT Analysis Issue Description:

DeForest's desirability paired with the nationwide housing shortage trends has made it increasingly difficult for seniors and young professionals (like entry level teachers, Library employees, Public Services staff or Fire District staff) to be able to find accessibly priced housing in the community. Is it feasible to bring more housing stock to market that is accessible on a budget of \$1,000-\$1,500 per month (earnings of \$40,000-\$60,000 annually)?

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. More diverse, accessibly-priced housing options are created for all DeForest residents (including workforce, seniors).
2. Clear policies are adopted related to housing development.
3. A variety of housing options exist for current DeForest residents to downsize and/or stay in the community.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Use partnerships with entities like the DeForest Windsor Chamber of Commerce, DeForest Area School District, and DeForest Area Community & Senior Center to share real stories and understand the locally felt impact. The problem is regional, and it must be addressed regionally, rather than just by the Village in a bubble.
- We have tried in our assessments to avoid using terminology that can be weaponized and used for bias such as “affordable”, “workforce”, or even “low income”. It was evident to our firms through our information gathering and engagements with residents that DeForest is known for its high degree of social connectedness and good neighborliness. Folks who are from DeForest want to help one another, but there appears to be an educational disconnect on where needs are present. We would recommend that the Village partner with entities like the Community and Senior Center, School District, and perhaps even the DeForest Public Library to host educational sessions about housing needs and the real (vs. perceived) impacts of housing development.
- As much as people have mixed feelings about the increasing presence of multifamily product development, it is a product that is financially viable and can be incentivized. Advocacy work should be engaged in by both staff and Trustees to present opportunities to incentivize and grow missing middle forms of housing that fall between single family homes and high-density multifamily products.

Housing for Seniors and Frontline Workers Framework

SWOT Challenge: Lack of Housing Stock is Making DeForest Less Accessible to Seniors, Frontline Workers

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. More diverse, accessibly-priced housing options are created for all DeForest residents (including workforce, seniors). <small>**Highest Staff Ranked Outcome</small>	Engage outside partners (Community and Senior Center, Dane County, School District, etc.) in discussions around needs and solutions.	Be a Good Neighbor	2023-2024	Leadership sets expectation, Research	Village Administrator
	Explore community education sessions on bias and housing needs to ensure that perceptions are grounded in fact.	Have the Hard Conversations	2023-2024	Leadership sets expectation	Village Administrator, Community Ambassador
	Solicit and consider incentivizing rental housing that is accessible to an individual earner between \$40,000-60,000 annually. (\$1,500/mo. In rent)		2025-2026	Research, Budgetary support	Community and Economic Development Director
	Solicit and consider incentivizing owner-occupied housing that is accessible to an individual earner between \$40,000-60,000 annually. (\$1,500/mo. Mortgage payment or \$250,000 maximum purchase price)		2025-2027	Research, Budgetary support	Community and Economic Development Director
	Coordinate with state and/or federal agencies to identify funding sources (TID, tax credits) to support the creation of housing at a lower entry price.	Genuinely Care for Everyone	2025-2026	Research	Community and Economic Development Director

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
2. Clear policies are adopted related to housing development.	Explore best practices in zoning code updates, such as examples distributed through the League of Wisconsin Municipalities.	Commit to Learning and Growth	2023-2024	Research, Policy change	Zoning Administrator, Village Board
	Identify key areas for the development of higher density housing such as multifamily, assisted/independent living facilities.	Have the Hard Conversations	2023-2024	Research, Policy change	Community and Economic Development Director, Village Board
	Develop a clear due diligence process to be used consistently in weighing new proposed housing developments.		2025-2026	Research, Policy change	Community and Economic Development Director, Village Board
3. A variety of housing options exist for current DeForest residents to downsize and/or stay in the community. <small>**2nd Highest Board/Staff Ranked Outcome</small>	Solicit and consider incentivizing housing that is targeted toward the 55+ community	Genuinely Care for Everyone	2025-2026	Research, Budgetary support	Community and Economic Development Director, Village Board
	Explore outside-funded opportunities to keep aging members of the community (or those on fixed income) in their homes.		2025-2026	Research	Community and Economic Development Director, Community and Senior Center
	Coordinate with neighboring municipalities to understand needs of area businesses for employee housing.	Be a Good Neighbor	2025-2026	Research, Leadership sets expectation	Community and Economic Development Director

EXTERNAL ISSUE NARRATIVE #3

Not All Residents Can Access the Same Quality of Life in DeForest

The fact that not all residents can access the same quality of life in DeForest was identified as a weakness for the Village of DeForest in the organizational SWOT Analysis. DeForest residents take great pride in their community, but the negative side of that pride is that there is a level of denial about the fact that not all residents can experience the same quality of life. Despite what the beautiful new subdivisions or meticulously maintained greenspace and corporate and industrial presence might suggest, nearly 20% of students in the DeForest Area School District are experiencing economic hardships, which sheds light on the extent of the challenges existing in the community.

We heard from community-facing organizations that interact with a broad cross-section of families in the community, such as the school district and library, that the needs are increasingly prevalent in DeForest. Transportation poses a major barrier for individuals accessing service as DeForest is highly car dependent. Lack of access to transportation can remove individuals from resources which they need and can contribute to social isolation. Dane County has the lowest non-seasonally adjusted unemployment rate in the State of Wisconsin as of April 2023 at 1.6%. Employers who are seeking all candidates for open positions also rely on transportation networks to access talent.

Staff and Trustees both shared that DeForest has, despite its growth, maintained its high degree of social connectivity and neighborliness toward one another. The work to meet and address community needs must continue.

SWOT Analysis Issue Description:

Nearly 1 in 5 students at DeForest Area School District qualifies for free or reduced lunches, and seniors have expressed concern about the rising cost of living in Dane County and Village of DeForest. Lack of transportation networks poses a challenge for community employers to access workers. Community conversations about how to help residents already living in DeForest can help to reach creative solutions.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Community members are well-aware of resources, programs, and services that exist.
2. Community members understand the level of need and coordinated efforts connect those in need to resources.
3. All DeForest residents can access a higher standard of quality of life.
4. Transportation solutions are being continually explored.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- While transportation infrastructure is a larger issue that will take multiple partners and funding streams to fix, the Village has a major asset on its hands in its expansive trail network. Continuing to improve and enhance multimodal transportation corridors is a huge step in increasing accessibility and transportation options for those who either do not drive or lack regular access to a personal vehicle.
- There have been recurring comments about a need for the enhancement of the user-friendliness of the Village website. We again encourage the Village to approach website design with user insights in mind (framing design around the problems that users seek to resolve). A section of the Village website could be dedicated to connecting residents to resources that solve commonly felt issues, such as food insecurity, access to transportation, or even assistance with things like utilities.
- Just as it is important to have educational awareness on the need for housing in the greater DeForest area, the same applies to facing head on the economic needs in the community. Greater education, delivered through partners like the DeForest Area Community & Senior Center and DeForest Public Library, can reduce stigma and bias.

Accessing Quality of Life Framework

SWOT Challenge: Not All Residents Can Access the Same Quality of Life in DeForest

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Community members are well-aware of resources, programs, and services that exist.	Explore creating a landing page on Village website that provides a directory of service providers, programs, contacts for those in need.	Be a Good Neighbor	2023-2024	Leadership sets expectation, Budgetary support	Community Ambassador
	Explore broad website updates for Village website to enhance user-friendliness for information access.	Wow the Community	2023-2024	Leadership sets expectation, Budgetary support	Community Ambassador
	Use Village channels to promote services and organizations in the community targeting those in need.	Be a Good Neighbor	2025-2026	Leadership sets expectation	Community Ambassador
2. Community members understand the level of need and coordinated efforts connect those in need to resources. <small>**Highest Board/Staff Ranked Outcome</small>	Explore community conversations / education sessions on current resident needs to reduce stigma / raise baseline education.	Have the Hard Conversations	2025-2027	Leadership sets expectation	Village Administrator, Library Director, Community and Senior Center, School District
	Explore funding opportunities to enhance the capacity to serve 55+ community members at DeForest Area Community & Senior Center.	Genuinely Care for Everyone	2025-2026	Research	Village Administrator, Community and Senior Center

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. All DeForest residents can access a higher standard of quality of life.	Work to improve and expand community connections through Village trail system	Wow the Community	2025-2026	Budgetary support, Leadership sets expectation	Community Enrichment Department, Public Services Director, Village Board
4. Transportation solutions are being continually explored.	Explore funding options for transportation solutions for workforce, seniors, kids, etc. to access programs, employment, and resources.	Genuinely Care for Everyone	2027-2028	Research, Budgetary support	Village Administrator, Library Director, Community and Senior Center, School District
	Engage outside partners and neighboring municipalities in discussing and understanding transportation needs and gaps in DeForest.		2027-2028	Leadership sets expectation	Village Administrator, Library Director, Community and Senior Center, School District
	Pair any efforts with community-facing education through Village channels on the need/benefit of transportation solutions.		2027-2028	Leadership sets expectation	Community Ambassador

EXTERNAL ISSUE NARRATIVE #4

How Do We Grow? Different Resident Segments Want Different Things

The fact that there is an unclear path forward about how to continue growing DeForest was identified as a weakness for the Village of DeForest in the organizational SWOT Analysis. This issue has a great deal of overlap with External Issue #2: Lack of Housing Stock Has Made DeForest Less Accessible to Frontline Workers, Seniors. We heard two perspectives emerging clearly from staff, Trustees, and community members: 1. Growth is inevitable and a path toward paying for services, or 2. No more growth. The more realistic perspective lies somewhere in the middle: Some continued growth is inevitable, but we need to understand how much growth is reasonable and where it should happen.

A particular point of pride for the community and something at the core of the community brand identity is the natural spaces, mature trees, and Yahara River corridor. Some folks feel that the pace of development threatens these natural amenities and is bulldozing the irreplaceable elements that make DeForest their unique oasis.

The trend of recent developments has become a soapbox for both certain neighborhoods and certain Trustees that feel that they are representing residents who have gone unheard in the past. This has contributed to some of the tense dynamics addressed in External Issue #1: Tension and Distrust Between Staff, Trustees, and the community at-large.

SWOT Analysis Issue Description:

DeForest is grappling with very different philosophies on how to grow the community moving forward. The Board has a wide gamut of views on whether to bring in more “affordable” housing products (including multifamily). There is a wide gamut within the community of what programs and services - as well as facilities - are desired. Some residents want to keep up with the amenities neighboring communities have (like aquatic centers) but aren’t supportive of the mechanisms needed to pay for construction or programming of said facilities.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. The Village continues to grow in a balanced and stable fashion.
2. Growth is sustainable in terms of providing expected services.
3. The community is represented equitably at the Board and committee level.
4. Village staff uses various tools and mediums to reach a broad cross section of the community effectively.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Residents and elected officials could both benefit from a primer on how local governments function at their core. We’ve heard comments from residents saying, “They’re not listening to us!”. While their sentiment and frustration can be understood, it is a necessary reminder that municipal governments function as republics vs. as direct democracies. Definitions are listed below for reference.
 - o Republic: a form of government in which a state is ruled by representatives of the citizen body... Because citizens do not govern the state themselves, but through representatives, republics may be distinguished from direct democracy. (Source: Encyclopaedia Britannica Online Version)
 - o Direct Democracy: also called pure democracy, forms of direct participation by citizens in democratic decision making, in contrast to indirect or representative democracy. Direct democracies may operate through an assembly of citizens or by means of referenda and initiatives in which citizens vote on issues instead of for candidates or parties. (Source: Encyclopaedia Britannica Online Version)

- One of the core behaviors of the Village of DeForest is to “Own Your Mistakes”. These behaviors need to be regularly presented to Village Trustees, as well. Elected officials are the decision makers and the buck stops with them. Sometimes staff need to own their mistakes when things are poorly handled or executed, but if a policy decision (such as adoption of a plan, ordinance, resolution, or development agreement) is not well-received by the community, the buck stops with the elected officials. While an uneasy job at times, citizens do not make final decisions on policy issues, the elected officials do. If citizens are unhappy with the outcomes of a policy decision, they make their voice heard most effectively during future elections on who represents them.
- This does not mean that staff and Trustees should not engage the community. The Village of DeForest has had excellent participation in past workshops, surveys, and using digital tools like the community survey and Social Pinpoint site for this strategic planning effort. Engagement is a meaningful way to check the pulse of the community AND to validate decisions made by elected officials.
- Elected officials also hold a fiduciary responsibility to be good stewards of taxpayer dollars and govern spending through the municipal budget. Many residents participating in the community survey for this strategic planning process expressed views of “We don’t want any more development” but also noting how the financial pressures of increasing property taxes were being felt by them. To meet the fiduciary responsibilities held by elected officials in a state funding model that is inherently dependent on net new construction and property tax generation, it is a lose-lose for elected officials to try to explain this to anti-development residents.
- Solutions we wholeheartedly recommend to these complex issues are to increase the level of education – both for elected officials AND the community at-large. We see some natural areas for elected officials to receive education on the following topics:
 - o Cost of actual service delivery for new construction
 - o How impact fees can work to fund the infrastructure and service delivery needs associated with growth
- Lastly, in keeping with the recommendations made in External Issue #1: Tension and Distrust Between Staff, Trustees, and Elected Officials – elected officials do not want to feel like they are being caught off guard or surprised by development plans. Staff and leadership can engage in advance notice of development opportunities in the pipeline in executive session to give elected officials more time to think on the impacts of development. Items shared in executive session cannot, of course, make their way out to the public. Nor should they – decisions rest with the elected officials in the republic form of government, not with the citizenry directly. Elected officials need to own the decisions they make in confidence as the buck stops with them. If they make a mistake, they must own it and face the consequences when the citizens vote in a future election.
- On a staff level, we have heard folks accusing the Village of being non-transparent. It seems that staff are fighting a losing battle in this regard as they are highly communicative on several channels. By continuing to develop and deliver high quality content online and in various mediums, and by relying on elected officials to share information from official Village channels, there is hope that the accusation of transparency can be disproven.

How Do We Grow? Framework

SWOT Challenge: How Do We Grow? Different Resident Segments Want Different Things.

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1.The Village continues to grow in a balanced and stable fashion. <small>**Highest Board/Staff Ranked Outcome</small>	Establish goals for commercial development value and residential development value on annual and multi-year basis to support budget needs.	Communicate Clearly	2023-2024	Research, Leadership sets expectation	Community and Economic Development Director
	Calculate cost of service delivery averages to residential developments vs. commercial developments and use this information to inform development goals.		2023-2024	Research	Community and Economic Development Director, Public Services Director
	Calculate cost of service delivery to new subdivisions on a linear SF cost basis.	Commit to Learning and Growth	2023-2024	Research	Community and Economic Development Director, Public Services Director
2. Growth is sustainable in terms of providing expected services. <small>**2nd Highest Board/Staff Ranked Outcome</small>	Identify staffing needs in relationship to population measures, miles of road, or other functional metrics. Proactively estimate staffing needs 2-5+ years out vs. within one budget cycle.	Embrace Creativity and Innovation	2023-2024	Research	Community and Economic Development Director, Public Services Director, Finance Director
	Analyze and maximize use of impact fees in development to capture implementation costs for service delivery.		2025-2026	Research	Community and Economic Development Director, Public Services Director, Finance Director

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. The community is represented equitably at the Board and committee level.	Hold neighborhood listening sessions throughout the community to reach more community members.	Be Inclusive	2023-2024	Leadership sets expectation	Village Administrator, Community Ambassador
	Explore a model of ward representation for the Village Board vs. at-large positions.		2027-2028	Research	Village Administrator, Clerk
	Explore means of measuring statistical validity of resident participation measures.		2027-2028	Research	Village Administrator, Community Ambassador
	Explore establishing goals for diversity in representation on committees, to more intentionally represent the makeup of DeForest.		2027-2028	Leadership sets expectation	Village Administrator, Community Ambassador
4. Village staff uses various tools and mediums to reach a broad cross section of the community effectively.	Explore continued use of new communication mediums to reach more community members.	Wow the Community	2023-2024	Research, Budgetary support	Community Ambassador, Village Board
	Support communications staff with adequate training in utilizing new and emerging communication mediums.	Commit to Learning and Growth	2023-2024	Research, Budgetary support	Community Ambassador, Village Board
	Use multiple channels to engage residents on their desires for service delivery.	Be Inclusive	2025-2026	Research, Budgetary support	Community Ambassador, Village Board
	Use multiple channels to engage residents on their desires for community amenities.		2025-2026	Research, Budgetary support	Community Ambassador, Village Board
	Explore the use of a CRM (Customer Relationship Management) tool to track customer interactions and deliver relevant communications.	Wow the Community	2027-2028	Research, Budgetary support	Village Administrator, Director of Administrative Services, Village Board

EXTERNAL ISSUE NARRATIVE #5

Continued External Growth is Difficult to Maintain and Support

Continued external growth and the challenges in maintaining and supporting such growth was identified as a threat for the Village of DeForest in the organizational SWOT Analysis. This issue has significant overlap with External Issue #4: How Do We Grow? We heard from Trustees and community member input that there are growing pains with the rapid clip of development in recent years. There is a lack of understanding of how TIF works with the public (not uncommon, as these tools are complex) and frustration with the amount of interstate-facing chain development. Residents and Trustees appear to want to see more development that reinforces DeForest's small town and destination identity. New dining, retail options and a walkable downtown area were consistently heard comments on community input tools.

Dane County and the DeForest Area School District levies make up a significant portion of resident property tax bills, but it is unclear if an explanation of that fact will help sentiments, or if folks are just frustrated by the financial pressures they are feeling in inflationary times. Some residents, it seems younger families, desire the amenities held by neighboring municipalities. Needs vs. wants must be distinguished as the cost of living continues to rise.

SWOT Analysis Issue Description:

Growth has been predictable and steady in recent decades for the Village, but it can't continue to grow outward perpetually. Available land (both unincorporated and serviceable by water/sewer) is limited in surrounding townships. Board members and staff would like to better understand where the boundaries of growth lie and to approach development mindfully with those boundaries in mind. As TIF districts close in the next decade, several operational expenditures (departmental budgets) will shift to the general fund that are presently being financed through TIF expenditures. The pace of growth will need to reach a sustainable (and likely slower) level that supports budgetary needs for the Village AND can sustain the service level expectations held by taxpayers.

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. Trustees have a broad understanding of TIF and other financing tools which are used as a part of the Village's growth strategy.
2. Already developed areas of DeForest are protected and preserved.
3. A 50-year smart growth plan is defined for the Village.
4. The Village delivers relevant, plain English educational content to residents about complex municipal finance topics.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Residents and elected officials could both benefit from educational tools and infographics that break down complex municipal finance topics in plain English. We see some clear avenues for additional education in areas such as:
 - o How the municipal budgeting process and levy limits work.
 - o How tax increment districts and tax increment financing work.
 - o Why continued growth is necessary for service delivery and amenity expansion.
- A map should be developed that shows future areas of growth and what the physical (geographic boundaries and utility service boundaries) of future growth are. There seems to be a question in some Trustees' mind about "where does growth stop?"
- It is understandable with the quality of the community that DeForest is why residents are afraid that that community (and what makes it special) might be lost through continued growth. We're not sure that stopping or slowing growth is the solution to maintaining DeForest's identity. While many residents expressed loving the "small town identity" of DeForest, we don't believe that this is solely tied to population size. It is tied instead to social connectedness and social fabric. These elements can be supported and strengthened through intentional programming, events, and organizations that foster neighborliness and community connections.
- We also highly recommend that the Village explore neighborhood stabilization efforts in existing, older residential neighborhoods. The Community Development Authority may be able to help with developing and marketing fund programs or neighborhood organization efforts. These efforts align well with the community identity of a strong social fabric and connectedness and serve to help those in moderately priced housing stay in the community.

External Growth Maintenance Framework

SWOT Challenge: Continued External Growth is Difficult to Maintain and Support

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. Trustees have a broad understanding of TIF and other financing tools which are used as a part of the Village's growth strategy.	Explore opportunities to advocate in Madison for increased revenue sharing, reducing budget and levy limitations.	Embrace Creativity and Innovation	2023-2024	Research	Village Administrator
	Explore opportunities to advocate in Madison for favorable changes to TID laws and levy limits.		2025-2026	Research	Village Administrator
	Find or develop educational content for Trustees on municipal fiscal tools and limitations such as TIF, levy limits, budget constraints, net new construction.	Commit to Learning and Growth	2025-2026	Research, Leadership sets expectation	Community and Economic Development Director, Community Ambassador
	Establish benchmarks for development that give preference to developments which can self-fund all or most infrastructure needs, or which can be supported wholly by PAYGO incentives.		2027-2028	Research, Policy change	Community and Economic Development Director, Village Board
2. Already developed areas of DeForest are protected and preserved.	Explore mechanisms to stabilize physical conditions of existing residential neighborhoods such as redevelopment planning/districts, home rehabilitation programs.	Be a Good Neighbor	2025-2026	Research, Budgetary support	Community and Economic Development Director, Village Board
	Explore mechanisms to maintain the social fabric of existing residential neighborhoods such as neighborhood association programs that are community-managed.		2025-2026	Research, Budgetary support	Community and Economic Development Director, Village Board
	Explore ways to partner with entities like the DeForest Windsor Chamber to support local business development in the community.		2025-2026	Leadership sets expectation	Community and Economic Development Director

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. A 50-year smart growth plan is defined for the Village.	Create a map to share with elected officials and P&Z committee members that illustrate the functional boundaries of future growth (sewer service areas, municipal boundaries, border agreement boundaries).	Communicate Clearly	2027-2028	Research	Zoning Administrator, Community and Economic Development Director
4. The Village delivers relevant, plain English educational content to residents about complex municipal finance topics. <small>**Highest Board/Staff Ranked Outcome</small>	Find or develop educational content for residents that explain how net new construction, levy limits, and municipal budgeting operate.		2027-2028	Research, Leadership sets expectation	Finance Director, Community Ambassador
	Find or develop educational content for residents on how new development supports valued services and how TIF works.		2027-2028	Research, Leadership sets expectation	Community and Economic Development Director, Community Ambassador
	Find or develop educational content for residents that explains the cost of delivering valued services and simplifies property tax bills.		2027-2028	Research, Leadership sets expectation	Finance Director, Community Ambassador

EXTERNAL ISSUE NARRATIVE #6

“Nobody Wants to Get Involved in Local Government!” How Do We Change This?

The lack of interest in civic participation in the Village was identified as a threat in the organizational SWOT Analysis. This is the inherent ‘chicken or the egg’ question that stood out to our firms as we engaged with staff, Trustees, and heard anonymous community input through the community survey and Social Pinpoint website. Does the lack of interest in local government result in a lack of competition which fuels bad behavior OR does the bad behavior which exists between Trustees deter further community involvement?

The truth is, we can’t be 100% certain either way – but we heard universally from Trustees that they were concerned about how elections are often uncontested and that there seems to be a level of apathy from residents on getting involved in their governing body. How can the organization raise the bar for the decorum that occurs within the Village government AND garner more interest simultaneously? This issue has a good deal of overlap with External Issue #1: Tension and Distrust Between Staff, Trustees, and the Community At-Large.

SWOT Analysis Issue Description:

Despite the passion and sense of stewardship DeForest residents hold for their community, it has become increasingly difficult to attract committee members or Village Board candidates. Trustee seats often go uncontested, and sometimes there are not even official candidates running for vacancies. What is the root cause of this political apathy? Is it that the culture of the Board has a self-fulfilling reputation? Are Board meetings simply too long and too much of a time commitment? Do people not know about the opportunities?

Strategic Outcomes for this Issue:

These strategic priorities are detailed in the strategic framework, with specific action steps aligned to each outcome.

1. DeForest local government is a civil institution where all can be heard and respected.
2. Information sharing is positive, locally-focused, and works to reduce bias/polarization.
3. Community members see clear avenues to participate in their local government and are excited to do so.

Consultant Recommendations

Beyond what was generated from a staff level on this topic and reflected in the strategic framework, the consultants recommend the following:

- Increase the bar for how Trustees treat one another (and how residents treat Trustees, staff) by exploring civility pledges. Rather than looking backward at hurtful comments or tense interactions in the past, all parties can agree to look forward and engage in shared practices of mutual respect.
- While we touched in an earlier chapter on how elected officials' content sharing cannot be governed as it would be a restriction on freedom of speech, we can always encourage elected officials to share information without modifying or editing it to portray a personal perspective. This is a fine line that elected officials must walk – their position carries weight and things said on their personal or professional social media platforms carry weight with community members. A reminder that communication should be framed as accurate, positive, and productive can help to reduce the distrust held by some members of the public.
- Serving as a Trustee is a major time commitment – it is not always likely that an individual is going to make their first foray into local government be such a time consuming one. Trustees and staff alike can serve as ambassadors for promoting lesser time commitment opportunities to be involved, such as committee appointments that meet less frequently, or even the creation of ad hoc committees focused on key issues of interest.
- We heard from Trustees that some do not feel that they have a strong understanding of the organizational structure of municipal departments or what office roles in Village Hall “do” day to day. This information gap serves no one in a positive fashion. New Trustees can be ‘onboarded’ just as new employees are to have a high-level understanding of what employees do day-to-day to keep the Village functioning. To take this even further, it cannot be expected that community members will understand what staff do if elected officials who are exposed to Village decisions and policies do not understand these roles. There is room for education here, as well.
- The City of Appleton, WI designed and deployed a citizen's academy for residents to learn the inner workings of municipal government, akin to a police academy or leadership development program. The “Appy Academy” was well received by residents and received awards for its innovation – at the time of the last cohort there was a waiting list for citizen participation. The result of the program was not only raising the level of awareness of municipal government functions for specific members of the public, but it also created ‘brand ambassadors’ so to speak for the municipality and an opportunity to correct misinformation at the local level.

Local Government Involvement Framework

SWOT Challenge: “Nobody Wants to Get Involved in Local Government!” - How Do We Change This?

Reviewing Team: Village Staff and Department Heads

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
1. DeForest local government is a civil institution where all can be heard and respected. <small>**Highest Board/Staff Ranked Outcome</small>	Explore examples of civility pledges contents and effectiveness in other local governments.	Own Your Mistakes	2023-2024	Research, Leadership sets expectation	Director of Administrative Services, Village Administrator
	Establish clear expectations for duration, topics, and nature of public participation in local government meetings.	Communicate Clearly	2023-2024	Research, Policy change	Village Administrator, Village Board
2. Information sharing is positive, locally-focused, and works to reduce bias/polarization.	Communications from the Village focus on community pride and the positives occurring in the community. Trustees refrain from misinforming the public or fomenting distrust.	Own Your Mistakes	2023-2024	Leadership sets expectation	Community Ambassador, Village Board
	Establish clear expectations about how information is shared: staff create non-biased informational content, and trustees share said content without modifying or editing.		2023-2024	Leadership sets expectation	Village Administrator, Village Board
	Integrate strategic plan outcomes and consensus-backed goals into communications. Remind everyone that we ALL want DeForest to remain a strong and healthy community.	Communicate Clearly	2023-2024	Leadership sets expectation	Community Ambassador, Village Board

Desired Outcome by 2028	Action Steps to Reach Outcome	Core Behavior	Staff Proposed Timeline	Resources Needed to Complete Action Step	Lead on Action Step
3. Community members see clear avenues to participate in their local government and are excited to do so. <small>**2nd Highest Board/Staff Ranked Outcome</small>	Establish clear expectations about committee roles and responsibilities - ensure that members feel heard through their participation.	Be Inclusive	2025-2026	Leadership sets expectation	Community Ambassador, Village Board
	Explore opportunities for community engagement and listening beyond attending regular Board or Committee meetings.		2025-2026	Research, Leadership sets expectation	Community Ambassador, Village Board
	Explore the introduction of ad hoc committees for specific projects to introduce community members to local government with a lesser time commitment.	See the Good in Others	2025-2026	Research, Leadership sets expectation	Village Administrator, Village Board
	Explore ways to directly educate the public on how their local government “works” behind the scenes. Develop and deploy a “Discover Your DeForest” program to educate citizens on Village operations and goals, available tools and resources, and see their tax dollars at work.	Communicate Clearly	2027-2028	Research, Leadership sets expectation, Budgetary support	Village Administrator, Village Board

IMPLEMENTATION AND FUTURE PLANNING CONSIDERATIONS

In the development of this plan, Village staff, Village Trustees, and DeForest community members were involved in a meaningful way in the planning process. Over time, these individuals will change, and it is important that this plan remains a fluid document, capable of changing with changing leadership. As the faces that make up the Village of DeForest's leadership change in the coming years, organizational or community desires, priorities, and wishes may also evolve. This document should be reviewed and updated more regularly than once every five years.

Whether the Village decides to continue with future strategic planning efforts beyond this plan, internal goal setting and performance reviews are important parts of organizational evolution and serving community needs as a local government.

Specific recommendations for implementation and progress measurement in the Village of DeForest:

POSITION DESCRIPTION REVIEWS

DeForest has enjoyed significant employee longevity in the past (a testament to the positive organizational culture), but the community should prepare for shorter tenure within the industry as trends in longevity shift. There should be an effort to ensure that position descriptions are reviewed as a part of annual performance reviews, as well as engaging in management feedback within that process. Keeping position descriptions ensures that employees understand the expectations of them, and leadership expectations align, as well.

CONTINUE THE POSITIVE WORK ON WORKPLACE CULTURE AND BEHAVIORS

DeForest employees offered high praise of the ongoing meetings and trainings that focus on cultural behaviors and core values. We strongly recommend that DeForest continue these practices and complement them with training focused on learning and communication styles within teams. Where possible, we recommend that the core behaviors be highlighted in employee recruitment to stand out from other municipal organizations competing for talent.

INTRODUCE STAY INTERVIEWS

We recommend that the Village look to implement the more contemporary trend of twice annual "stay interviews" with current employees. Too often, ongoing issues within departments are not brought forward until an employee feels that leaving the organization is their only option. This demonstrates a communication failure that could prevent avoidable employee separations. Casual and conversational touchpoints between managers and team members are a way to unearth challenges early on, as well as an opportunity to revisit if roles are the right fit for employees and vice versa. These short interviews (thirty minutes or less) may also generate running lists of issues to discuss in regular departmental goal setting meetings.

REGULAR GOAL SETTING MEETINGS + CHECK-INS

As a part of your implementation toolkit, we have included several documents that we recommend clients embed into their regular department head or team meetings. The process involves a high frequency of touchpoints with the strategic plan, as well as framing goals within much shorter timeframes (weekly or bi-weekly, quarterly) as a less intimidating way to chip away at the large number of goals in a five-year document.

This meeting frequency is based on the concepts of EOS (Entrepreneurial Operating System) outlined initially in the 2012 book *Traction: Get a Grip on Your Business* by Gino Wickman. The main tenets of this management book are:

- Ensuring that all parties within businesses (or organizations) are aligned on goals.
- That each individual within an organization has specific, measurable goals which they are working toward and understands fully how these goals relate to the bigger organizational goals.
- Empowering management with performance measures to measure how employees are performing with goals in-mind.

Goal setting is a bit different in practice in a governmental organization as it is not profit-centered, but the practice of establishing and clearly sharing goals and values within an organization is sound.

We recommend that clients commit to the following time commitment organizationally for best results in strategic plan implementation:

- Weekly (or bi-weekly) 1-1.5-hour meetings with department heads or department teams to check-in on goals and ideate / discuss / solve on emerging issues.
- Quarterly half-day sessions for department heads to frame goals and issues for the upcoming 90 days.
- Annual 2-hour goal setting meeting for department heads to identify 5-7 goals for the organization for the upcoming year.
- Annual 1-hour goal setting meeting for department heads to identify 15-20 goals for the organization for the upcoming three years.
- Strategic planning process once every 3-5 years over the course of multiple 1–2-hour workshops engaging department heads, staff, elected officials and community members.

As you can see, department heads and staff are the do-ers within the organization (whereas elected officials are the deciders who enact policy). As such, the lion's share of planning falls to department heads. In order to engage and keep elected officials abreast of these planning meetings, we recommend that summary reports be shared with the Village Board on a quarterly, or preferably, monthly basis.

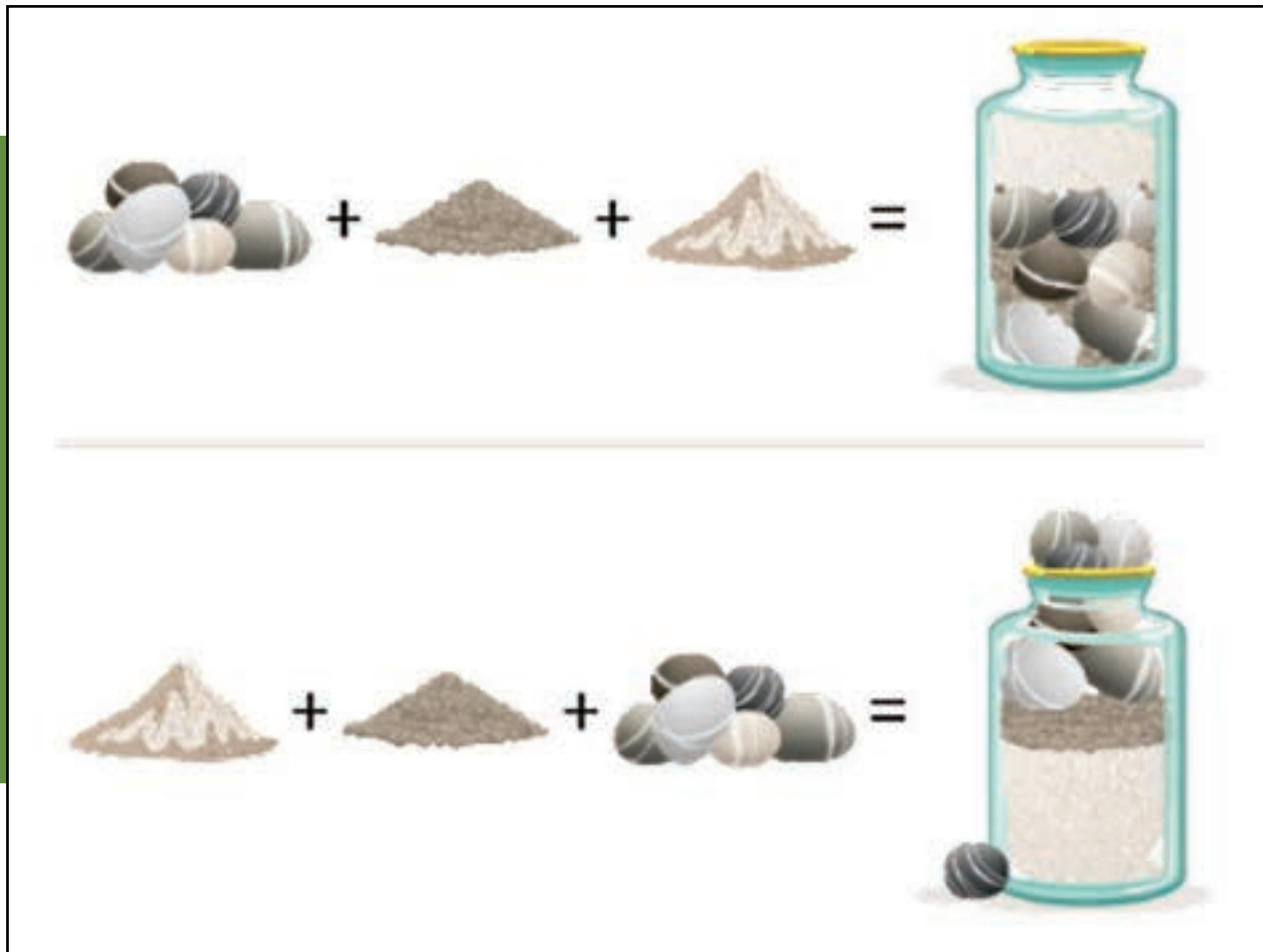
ROCKS, PEBBLES, SAND IN STRATEGIC PLANNING

We often refer to this visual tool of rocks, pebbles, and sand in discussing implementation and regularly re-visiting strategic planning. Too often, organizations view strategic planning as a back burner activity that they must do every 3-5 years, rather than a practice that is ongoing and is just as much a priority as day-to-day tasks.

The visual can be explained as follows:

- Sand: Your day-to-day tasks and commitments, such as regular meetings, correspondence
- Pebbles: Your recurring commitments that occur less frequently than on a weekly basis, such as committee or Board meetings, budget cycles, elections, etc.
- Rocks: One-off activities that occur on an annual or less frequent basis, like strategic planning.

If you see a jar as the time that you have within a day, week, quarter, or year – the theory is that you must make time to fit all these demands on your time and attention. If you start with your sand and pebble tasks, you will not be able to fit the rock tasks in with your current time (as shown in the bottom image).



If you start with your rocks as your priority and build them into your schedule intentionally (as we recommend by following the regular goal setting meetings and check-ins), you can fit your pebble and sand tasks in around the rocks. This is demonstrated in the top image – where all the different tasks fit into the time jar.

Three implementation tools are included in the appendix of this plan, including:

- Regular Meetings to Manage Strategic Implementation Progress
- Issues List: Gathering and Segmenting Organizational Issues
- Strategic Plan Implementation Tool (Fillable document). This will also be sent to your organization directly as a Microsoft Word document for you to use within your organization.

Additional reading recommendations we suggest for your organization include:

- Traction: Get a Grip On Your Business by Gino Wickman (2012) BenBella Books (Management-facing)
- What the Heck is EOS?: A Complete Guide for Employees in Companies Running on EOS by Gino Wickman and Tom Bouwer (2017) BenBella Books (Employee-facing)

As a gesture to our clients, we provide a copy of each of these books to your organization to jumpstart your strategic plan implementation process.

Future Planning Considerations

Our firms' goals are to provide our clients with plans that are embraced by staff and leadership, and which are functional to implement. This means that our plans are designed with the end-users' ease of use in mind. We design a strategic framework that provides clear direction and a checklist of action steps to move forward with and a recommended timeline for completion. We know that the unexpected often happens, and changes like leadership movement or staff turnover may interrupt strategic plan implementation.

As such, for plans of this length, we recommend a check-in at the end of years 1 and 2 between clients and our firm. In these 30-minute check-in meetings, we meet with clients to understand the following:

- How implementation is proceeding.
- How responsible internal leads are implementing their assigned action steps and what barriers to completion exist.
- How metrics surrounding implementation are being shared with elected officials and taxpayers.
- How the public is responding to the strategic goals.

Our firms will follow up directly with the Village of DeForest in:

- June 2024 (1 year from plan adoption)
- June 2025 (2 years from plan adoption)

We recommend that all strategic plan clients begin initiating the planning process for their next strategic plan in the final 12 months of their current plan scope. For this current plan, we recommend that DeForest begin in earnest the process of soliciting a new firm for the next five-year iteration in the beginning of 2028.



APPENDIX

CORE BEHAVIORS

COMMUNICATE CLEARLY.

Communicate in a way that moves the project and the Village forward. Don't just talk at people - help them to understand your idea and what action needs to be taken. Set clear expectations and over-communicate them. Recognize the different ways everyone contributes to the conversation and ensure all voices are heard. Ask specifically for what you need to be successful. When someone asks for clarification, be generous in your communication until understanding is reached. Remember: clear is kind, unclear is unkind.

SEE THE GOOD IN OTHERS.

When one person succeeds, we all succeed. Focusing on the positive or negative aspects of a situation or a person is a choice. Choose to see the good. Take the time to recognize and celebrate teammates for their kindness, hard work, and support. Celebrate together when a community member shares praise. When faced with a challenge, focus on the benefits, no matter how slight or unimportant they seem. Always choose to see the good in your team and the community. Give generous amounts of high-fives, fist pumps, and "you did it!"s.

HAVE FUN.

There is no reason why local government and having a good time need to be mutually exclusive! Tell (appropriate) jokes. Smile. Laugh until it hurts. Do cartwheels in Village Hall. Take time to celebrate small victories, big wins, and resident success stories. Enjoy the incredibly unique, genuine and amazing people you are surrounded by each day. Bring your authenticity and humor. Keep it lighthearted. Enjoy the ride.

OWN YOUR MISTAKES.

Mistakes will happen - confidently own yours. Proactively communicate and ask for help to fix it. "I made a mistake" are some of the most important words you can say. Actively call attention to issues (or potential issues) rather than trying to hide them. Focus on what you can learn from the mistake, and what you will do differently going forward. Share your learning with the team. Use it to fuel the continuous improvement of our processes and service. Taking accountability when things go wrong will set a positive example for others to do the same.

HAVE THE HARD CONVERSATIONS.

Not every conversation will be easy. Be vulnerable. Be courageous. Say what needs to be said, but do so with respect and kindness. Don't just sit back and let things happen - step up, be proactive and do the right thing, even when it feels uncomfortable. Start with "The story I'm telling myself is...". Admit what you don't know and ask for help when you need it, say "I don't get it, help me understand why that's important". Be transparent on what you need and why. Bring your ideas to the table without fear of embarrassment. Don't fear negative feedback - fear silence. Shift your perspective on feedback, actively seek it out (both positive and constructive) from your team and the residents, and receive it with gratitude and grace.

GENUINELY CARE FOR EVERYONE.

Build relationships with co-workers on the foundation of respect and authentic care. You aren't here to just punch a time clock - it's about so much more than that. Take time to connect, build trust, and get to know each other personally. When someone is struggling, volunteer your assistance. When someone asks for help, give it generously. Ask yourself, "What can I do to help them be their best?". Give feedback because you care about them and are dedicated to their success - be open, honest, and compassionate. Look out for their best interests, while they look out for yours. Let this genuine care fuel the work you do for the residents of the Village - it's contagious!

TAKE RESPONSIBILITY TO BUILD TRUST.

Trust must exist for success to be achieved. Trust that everyone will show up everyday to do what's best for the Village. If you don't trust an idea, an approach, or a teammate - self-reflect, first. What needs to happen for you to have trust? Communicate this clearly. If you've broken trust, realize it's not about your intention - it's about their experience. Apologize, and ask what can be done to rebuild trust. Take responsibility to rebuild it.

BE INCLUSIVE.

Promote allyship and create a safe space where everyone feels included, valued and has a sense of belonging. Be yourself and know that you belong here. Everyone has a voice and a valued opinion. Recognize, compliment, and celebrate people for who they are and appreciate that the differences of the team are what make it stronger.

WOW THE COMMUNITY.

Connect with the community and form true relationships. Go the extra mile and always overdeliver. Take every opportunity to WOW the residents, stakeholders, customers, and businesses. Ask them what they need and listen empathetically. If you don't have the answer, say so, and quickly go

find it. If they need something that can't be provided internally, connect them to someone who can help. Care about their holistic needs, first. Step outside of yourself and walk in their shoes. Their joy is your joy. Help them in every way possible.

COMMIT TO LEARNING & GROWTH.

Be hungry for personal and professional growth. Passionately and enthusiastically take on new challenges. Try things you haven't tried before and do things that don't necessarily come easy to you. See discomfort as a good thing: a sign of learning, growth, change, and forward progress. Level up your skills. Learn from your mistakes. Collaborate cross-functionally by openly and selflessly sharing your knowledge. Let the thrill of learning trump your fear of failure. Choose to have a growth mindset - value life-long learning and continuous improvement.

EMBRACE CREATIVITY & INNOVATION.

Have an open-minded approach to everything you do. Welcome and encourage diversity of thought. Be curious. Ask thoughtful questions with an intention to learn. Challenge the thinking "this is how it's always been done here". Be proactive by calling attention to issues or potential issues before a mistake might be made. Instead of putting out fires, work to prevent them. Enjoy the fact that each problem creates an opportunity for innovation and collaboration. Share your learning with the rest of the team.

BE A GOOD NEIGHBOR.

Care deeply for the Village of DeForest whether you are a resident or an employee, or both. Put ethics and equity at the forefront of everything you do. Indulge in the work you do and be proud of the results you create. Remember your purpose for what you do every day. Change your mindset from "have to do" to "get to do". Proactively show you care by anticipating needs and treating the Village like it's your own home.

Summary of Open-Ended Comments on Social Pinpoint website

More Developments and Improvements that make DeForest Unique	19
More dining options (preferably nicer chains or sit-down, independently-owned)	5
Microbrewery	4
Update strip mall by Pick n Save to higher density mixed use	3
Walkable shopping district	2
Retail options	2
More unique businesses	2
Downtown revitalization	1

Preserve the Natural Spaces in DeForest	23
Protect wooded & natural areas	12
More street trees in commercial corridors and residential areas	7
More parks and greenspaces	2
Sustainability initiatives	2

Better Village Services & Communication	19
General road repairs	12
More streetlights	6
Faster Fire response time	1

Improve Quality of Life for Residents of all ages	43
More sidewalks in residential areas	10
Another or enhanced / higher end Grocery store	8
Community Rec. Center	5
Lower speed limit on River Road	5
Stop Signs to reduce vehicular speed	5
Speed bumps to reduce speed	2
More Library programs	2
Teen / youth space or programming	1
Family activities	1
Community activities	1
Senior housing	1
Invest in Library	1
Change names of indigenous named streets	1

More Indoor/ Outdoor Rec Opportunities	49
Expanded trail system that is interconnected	15
More bathrooms on trails, expanded hours for park bathrooms	5
Basketball courts	4
Tennis courts	3
Pet waste facilities in parks	3
Outdoor pool	2
Community Rec. Center	2
Skate park	2
Large dog park	2
Ice skating	2
More pickleball courts	2
More shade in parks	2
More parks and greenspaces	1
Disc Golf Course	1
Aquatic Center	1
2nd phase of athletic complex	1
Indoor ice rink	1

We Only Want Certain Types of Development	1
Fewer apartments	1

Other comments / Themes	39
General road repairs	12
Fix County Highway V	6
Improve low density older commercial	6
Fix parking lot by Pick 'n Save	4
Redevelop underperforming properties	4
Update strip mall by Pick n Save to higher density mixed use	3
Quiet train crossings	2
No Engine braking in Village signs	2

Things are Getting Too Expensive	4
More commercial development near Athletic Complex	3
More commercial growth	1

Please Don't Change Things Too Much	10
Remove Pinseekers	5
No Buc-ee's	3
Fewer apartments	1
No disc golf course	1

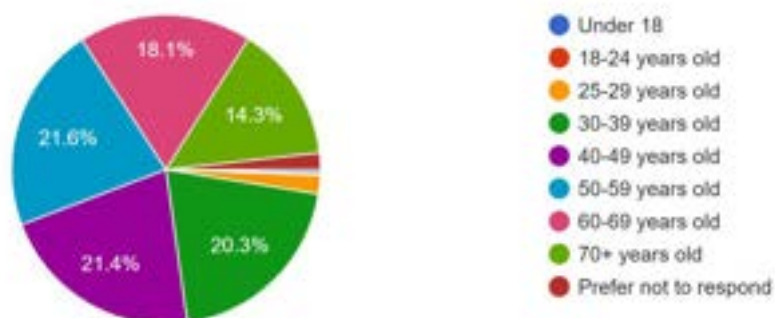
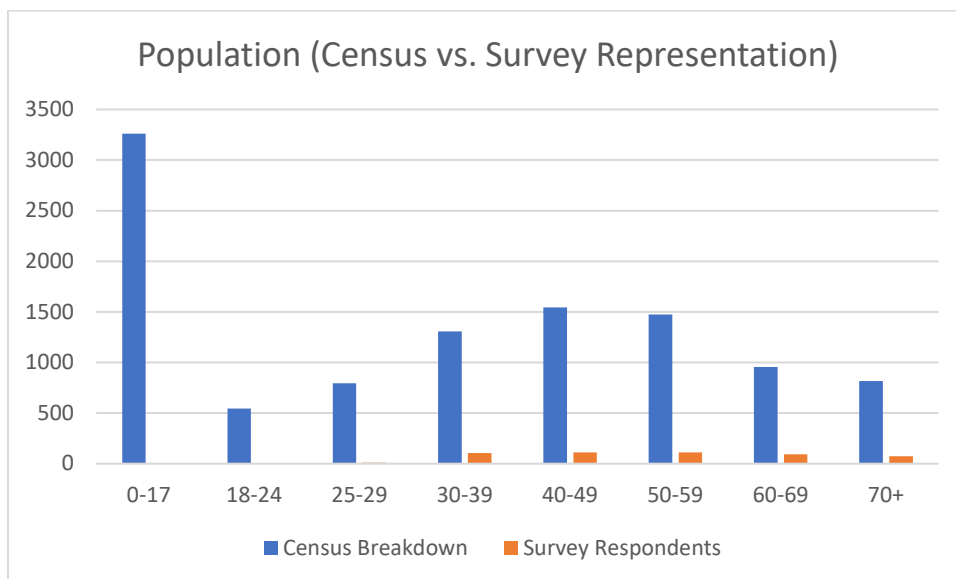
DeForest Community Survey

518 respondents at the time of survey closing on 4/17/2023. Please note that this survey was distributed organically (no paid distribution mechanisms). No geographic information about where participants live was collected to confirm residency. As such, the results of this survey cannot be confirmed to be statistically significant.

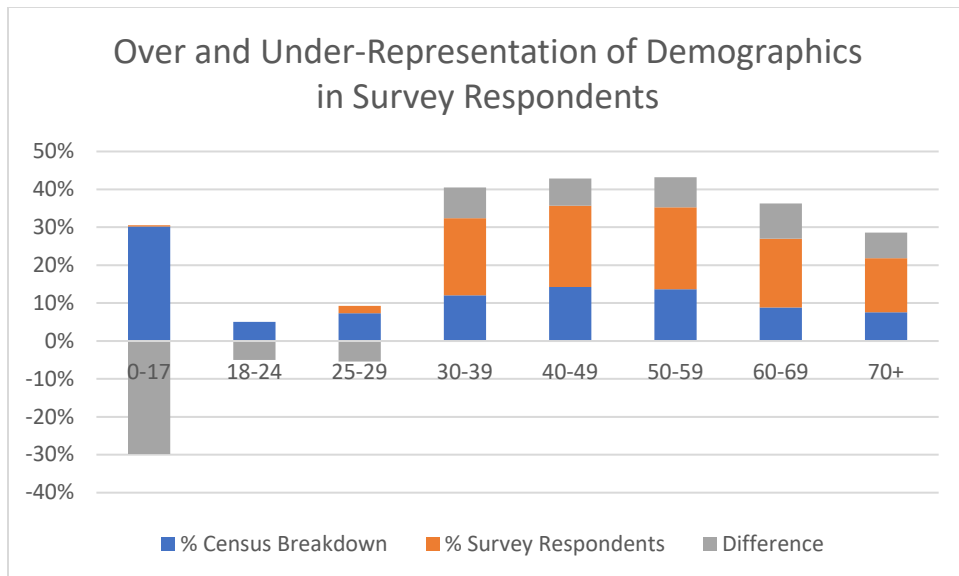
1. Please share your age:

Please share your age:

518 responses



**Using data from 2020 American Community Survey*

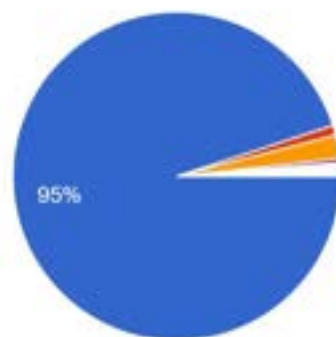


The gray bar represents how much an age demographic was over or under-represented compared to the proportion of residents overall. Demographics under age 30 were underrepresented, and demographics over age 30 were overrepresented.

2. Please share information with us about your living situation:

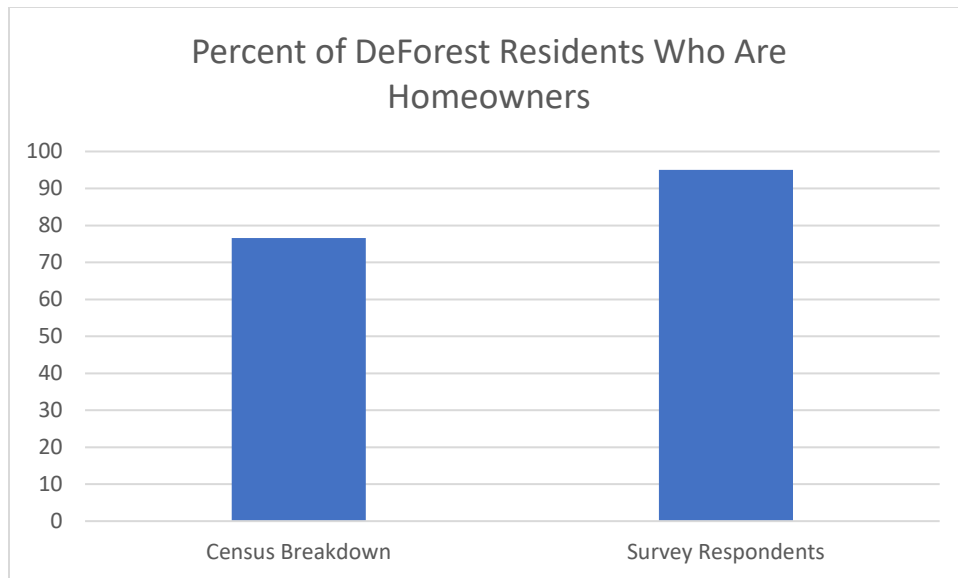
Please share information with us about your living situation:

518 responses



- I own my home.
- I rent a single or two-family home.
- I rent an apartment.
- I live in an assisted or independent livi...
- condo
- Over 55 community
- Rent a townhouse
- I live in Jefferson Square.

▲ 1/2 ▼



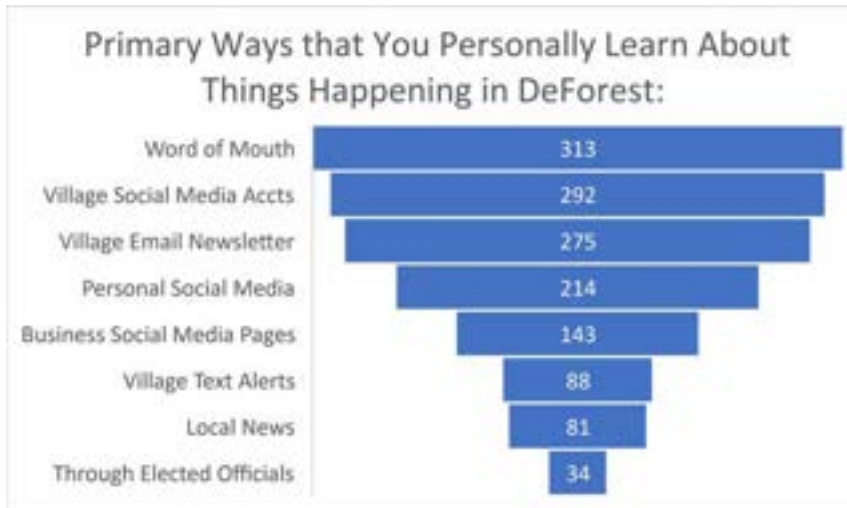
**Using data from 2020 American Community Survey. Homeowners vs. Renters are overrepresented in this survey.*

3. How long have you lived in the Village of DeForest?

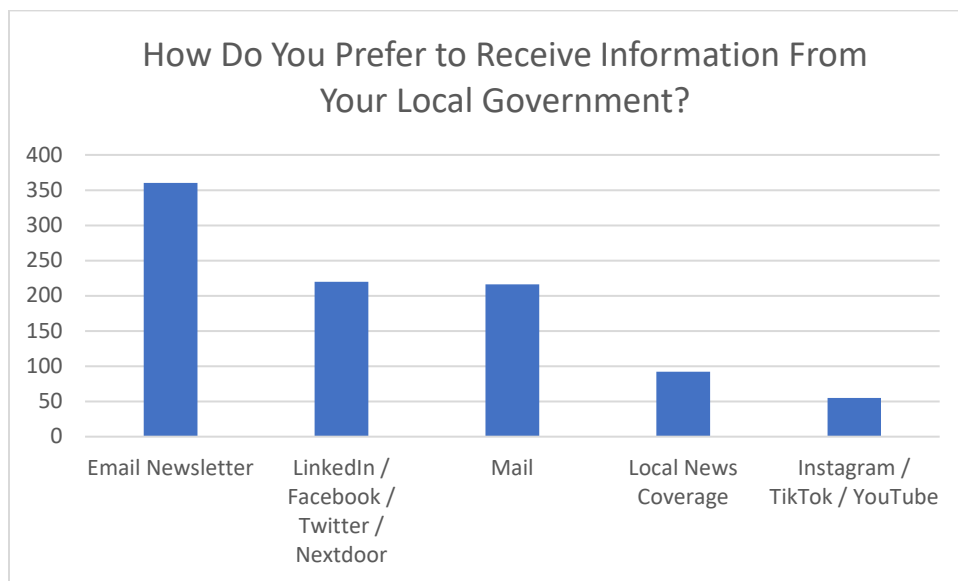
How long have you lived in the Village of DeForest?
518 responses



4. What are the primary ways that you personally learn about things happening in DeForest? Select all that apply.



5. Information comes at us from many different directions. How do you prefer to receive information from your local government? Please select all that apply.



6. Post-pandemic, the way in which we access information and services has changed dramatically. Please select the response that best fits your perspective on accessing information and services from your local government.

Post-pandemic, the way in which we access information and services has changed dramatically. Please select the response that best fits your perspective on accessing information and services from your local government.
517 responses



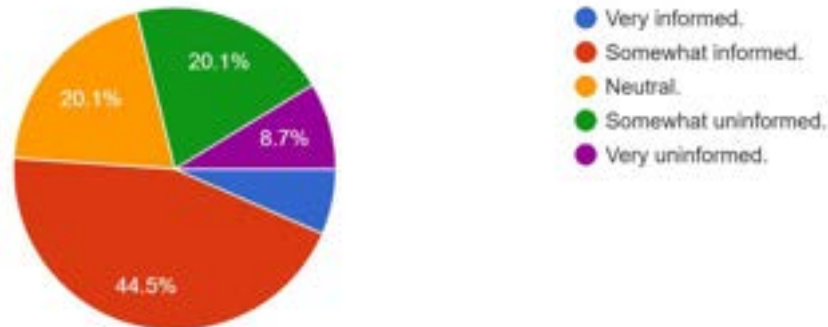
Full text version of answers that was cut off in image:

- I like to receive information and services online, on my own time. The last thing I want to do is make a trip to Village Hall.
- I prefer to start my research on information and services online, but I'm totally okay making a trip to Village Hall if needed.
- I prefer to make a phone call to get information and services.
- I prefer to talk to someone in-person to get information and services.
- Don't Know.

7. Rate how informed you feel personally about things happening in the Village of DeForest. (For example: new commercial development, new residential development, recreational programs, etc.)

Rate how informed you feel personally about things happening in the Village of DeForest. (For example: new commercial development, new residential development, recreational programs, etc.)

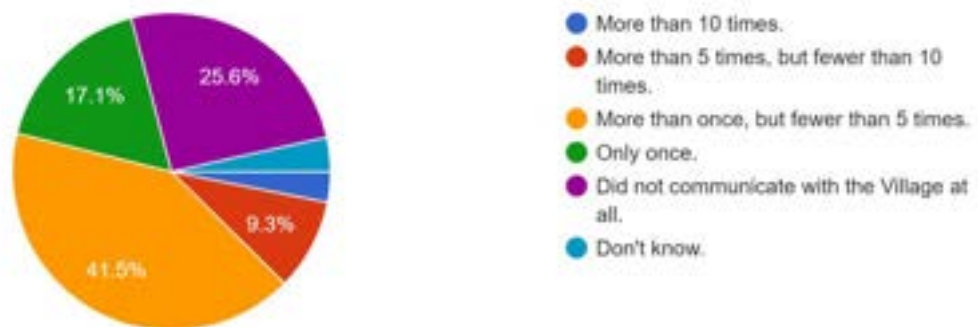
517 responses



8. In the last year, estimate how many times you made communication with the Village of DeForest regarding services or with service-related questions.

In the last year, estimate how many times you made communication with the Village of DeForest regarding services or with service-related questions.

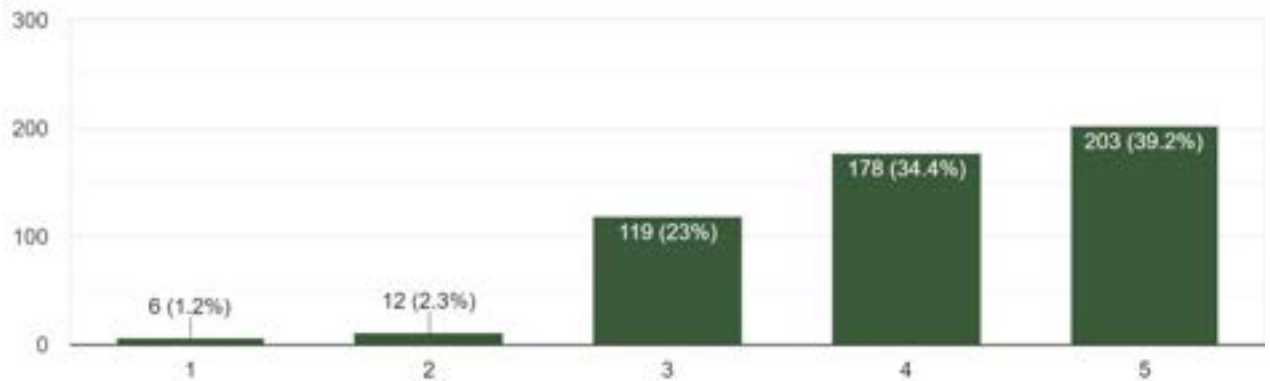
516 responses



9. How would you rate the Village of DeForest customer service with 1 being Poor and 5 being Very Good?

How would you rate the Village of DeForest customer service?

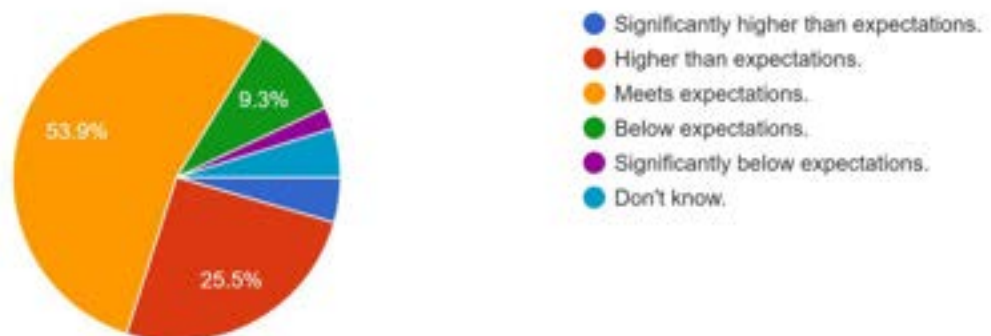
518 responses



10. What is your satisfaction with the overall quality of services provided to you by the Village of DeForest?

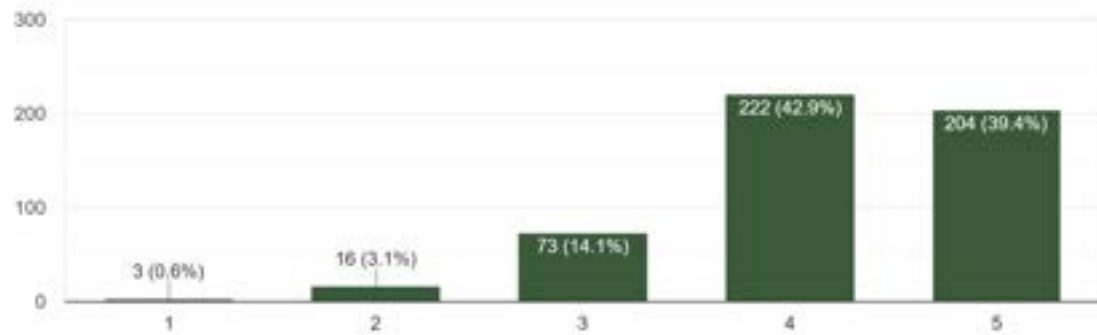
What is your satisfaction with the overall quality of services provided to you by the Village of DeForest?

518 responses



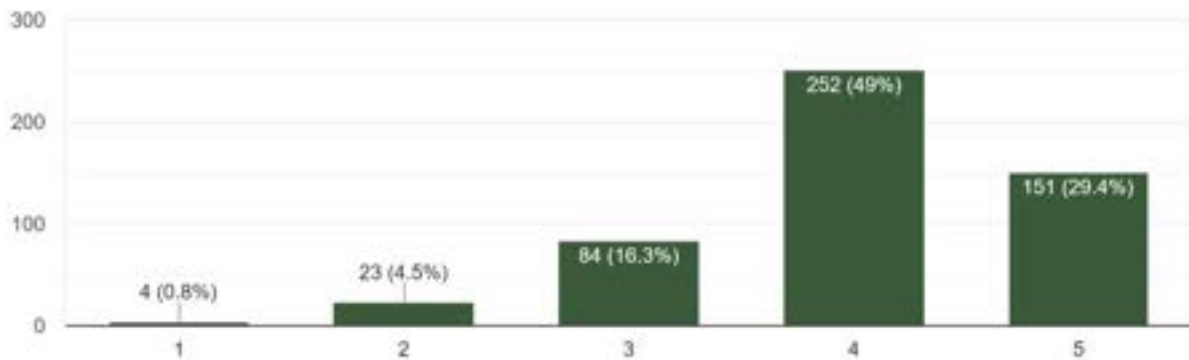
11. Rate your level of satisfaction with the overall feeling of safety in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

Rate your level of satisfaction with the overall feeling of safety in the Village of DeForest.
518 responses



12. Rate your level of satisfaction with the overall quality of life in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

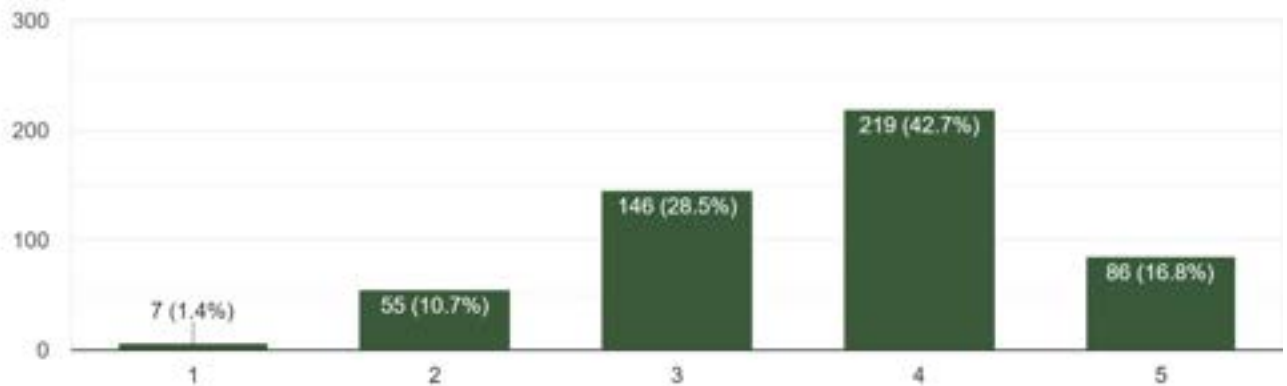
Rate your level of satisfaction with the overall quality of life in the Village of DeForest.
514 responses



13. Rate your level of satisfaction with the overall appearance of the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

Rate your level of satisfaction with the overall appearance of the Village of DeForest.

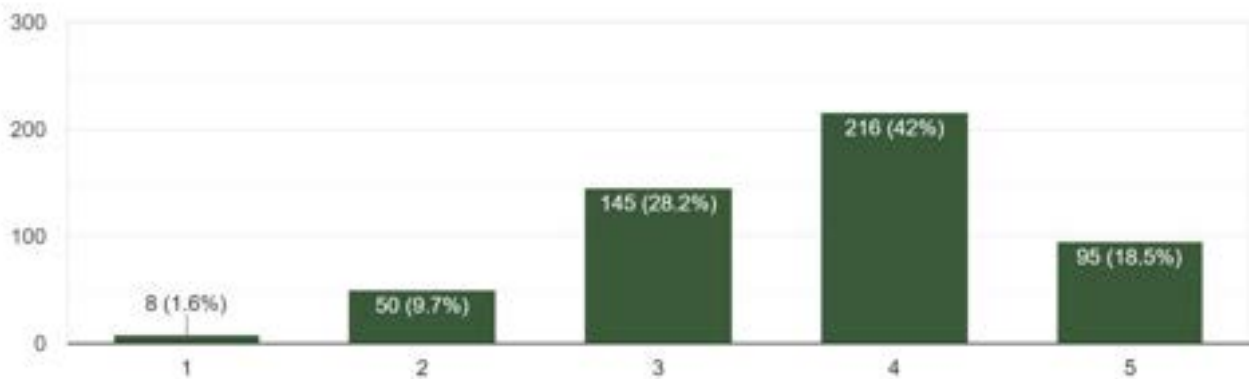
513 responses



14. Rate your level of satisfaction with the overall image of the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

Rate your level of satisfaction with the overall image of the Village of DeForest.

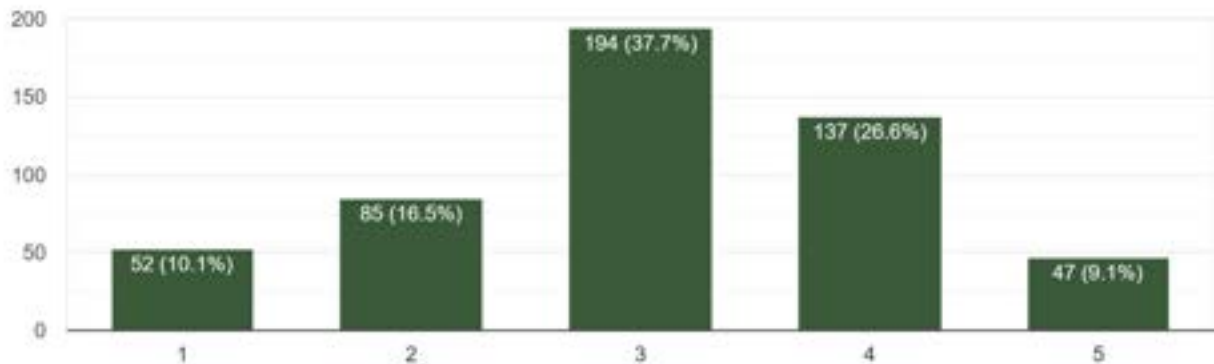
514 responses



15. Rate your level of satisfaction with the quality of new commercial development in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

Rate your level of satisfaction with the quality of new commercial development in the Village of DeForest.

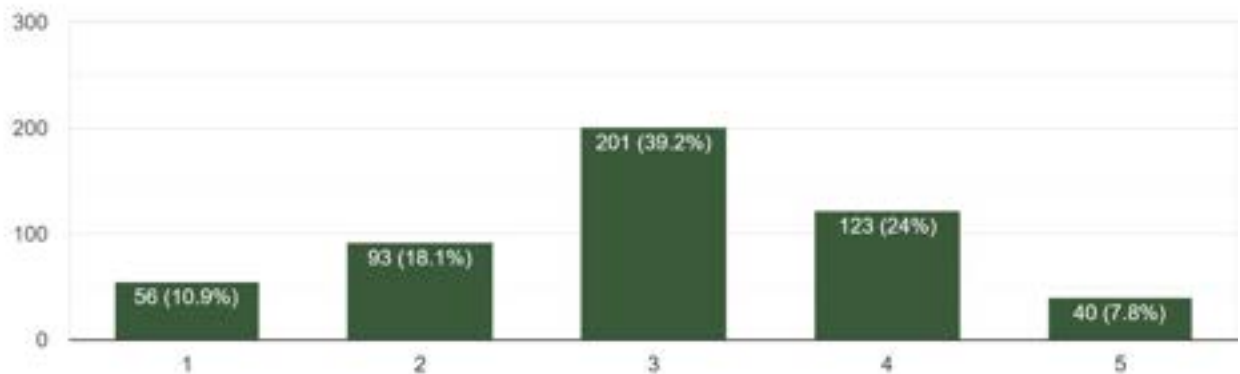
515 responses



16. Rate your level of satisfaction with the quality of new residential development in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

Rate your level of satisfaction with the quality of new residential development in the Village of DeForest.

513 responses



Open-Ended Questions

More than 800 open-ended comments were submitted. Sharing direct responses (verbatim) compromises the confidentiality of this survey. In order to share the themes from this portion of the survey, we have organized responses and quantified them by general themes. Multiple responses from the same party reiterating the same theme were only counted one time. The attached summary organizes responses into similar buckets to share a sense of what major themes were addressed as priorities by survey participants.

Summary of Open-Ended Comments in Community Survey

More Developments and Improvements that make DeForest Unique 250

More dining options (preferably nicer chains or sit-down, independently-owned)	83
Downtown revitalization	59
Retail options	40
More unique businesses	24
Microbrewery	15
Update strip mall by Pick n Save to higher density mixed use	12
Music venue	4
More arts	4
Walkable shopping district	3
Flower baskets in downtown and by signage	3
More nightlife activities	1
Indoor winter farmers market	1
Children's museum	1

Preserve the Natural Spaces in DeForest 82

Protect wooded & natural areas	45
More street trees in commercial corridors and residential areas	15
More parks and greenspaces	13
Sustainability initiatives	4
Community gardens and greenhouses	2
Citizen conservation group	1
Dark skies community designation	1
Expand prairie	1

Better Village Services & Communication 123

General road repairs	64
More resident information on development	8
Change in elected leadership	6
Better code enforcement	5
Faster snowplowing	5
More streetlights	5
Better Trustee communications	4
Improved transparency	4
Public input opportunities	3
Safety improvement of Vinburn/N Towne Rd intersection	3
Expand Police Dept	2
Update water and sewer infrastructure	2
Update Village website	2
Listen to residents	2
Better Public Works equipment	1
Better social media decorum from elected officials	1
Faster brush pickup	1
Fine free at library	1
Large item drop-off location	1
More paper shred events	1
New ethics committee	1
Community compost site	1

Improve Quality of Life for Residents of all ages 211

Another or enhanced / higher end Grocery store	83
More workforce / affordable housing	26
Teen / youth space or programming	18
Community Rec. Center	16
Family activities	8
Community activities	7
More sidewalks in residential areas	6
Senior housing	6
Improve school facilities	5
Invest in Library	5
More arts	4
More diversity	4
More public transportation	4
Childcare options	3
Improve quality of public education	3
More money for schools	2
Speed bumps to reduce speed	2
Less racism	2
More Library programs	2
Increase safe spaces for LGBTQ+ community	1
Senior programming	1
Lower speed limit on River Road	1
More DEI learning opportunities	1
Less protectionist "take care of their own" attitudes	1

More Indoor/ Outdoor Rec Opportunities 162

Expanded trail system that is interconnected	55
Outdoor pool	17
Community Rec. Center	15
More parks and greenspaces	12
More bathrooms on trails, expanded hours for park bathrooms	9
Disc Golf Course	8
Aquatic Center	6
Mountain bike trail	5
Skate park	5
Large dog park	4
Make Yahara River able to be kayaked	4
Ice skating	3
2nd phase of athletic complex	3
Playground at athletic complex	3
More rec opportunities in parks	2
Dog wash at Dog Park	2
Indoor ice rink	2
More pickleball courts	2
Lights on trail system	1
More nature programs for adults	1
Parks committee	1
Tennis courts	1
Update older parks	1

We Only Want Certain Types of Development 94

Fewer apartments	32
No more housing	19
No pool	9
No disc golf course	8
Less commercial growth	4
No affordable housing	4
No keeping up with other communities	4
No more splash pads	4
No low income people	3
Larger lot setbacks	1
Less money on athletic / parks improvements	1
Less parks for kids	1
More high end subdivisions	1
No big box retail	1
No more bike trails	1
No mixed zoning	1

Other comments / Themes 138

General road repairs	64
Fix County Highway V	28
Update strip mall by Pick n Save to higher density mixed use	17
Fix parking lot by Pick 'n Save	15
Quiet train crossings	5
Update houses in older neighborhoods	4
Redevelop underperforming properties	4
Improve low density older commercial	1

Things are Getting Too Expensive 85

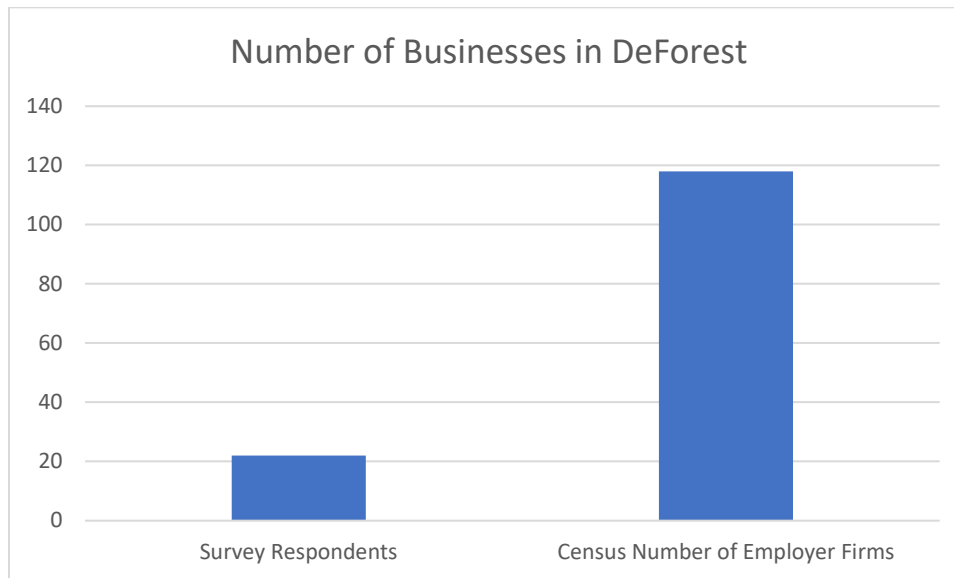
Lower taxes	56
More commercial growth	17
Lower water bills	6
More commercial development near Athletic Complex	3
Diversify tax base	2
Less money for school district	1

Please Don't Change Things Too Much 148

Fewer apartments	32
No more housing	19
Slow down residential development	17
Remove Pinseekers	17
Small town atmosphere	13
Less development	12
No disc golf course	7
No Buc-ee's	7
Less TIF use	7
Less commercial growth	5
No affordable housing	4
No keeping up with other communities	4
No low income people	3
No mixed zoning	1

DeForest Business Survey

22 respondents at time of survey closing on 4/17/2023. Please note that this survey was distributed organically (no paid distribution mechanisms). No geographic information about where participants live was collected to confirm residency. As such, the results of this survey cannot be confirmed to be statistically significant.

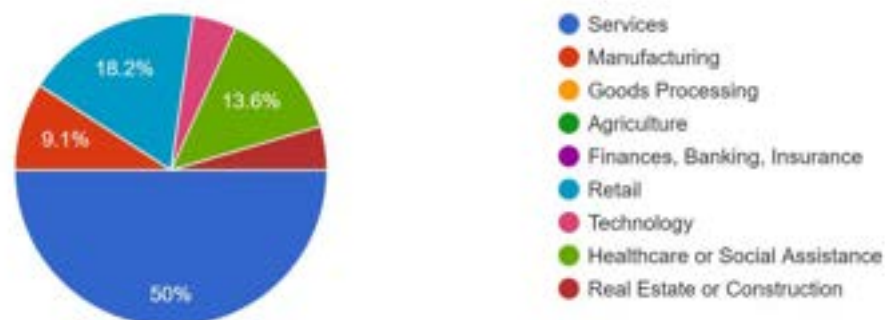


2017 Reference data from US Census Bureau, 2018 Annual Business Survey (ABS) Program. This number does not include any businesses that do not have payroll expenditures.

1. What industry category best fits your business?

What industry category best fits your business?

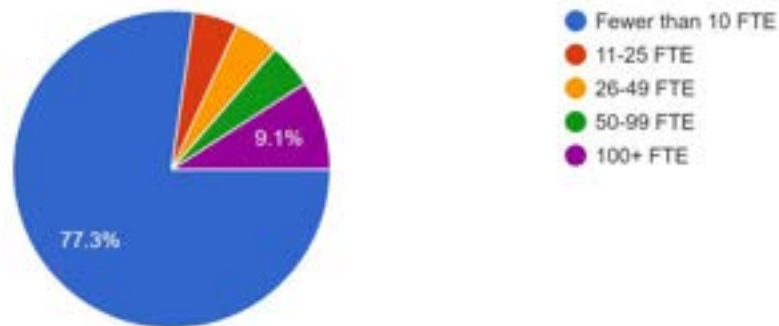
22 responses



2. How many full-time equivalent employees does your business have?

How many full-time equivalent employees does your business have?

22 responses



3. If your business has multiple locations, please select the option that best describes your DeForest location. If you only have one location, please select the first response.

If your business has multiple locations, please select the option that best describes your DeForest location. If you only have one location, please select the first response.

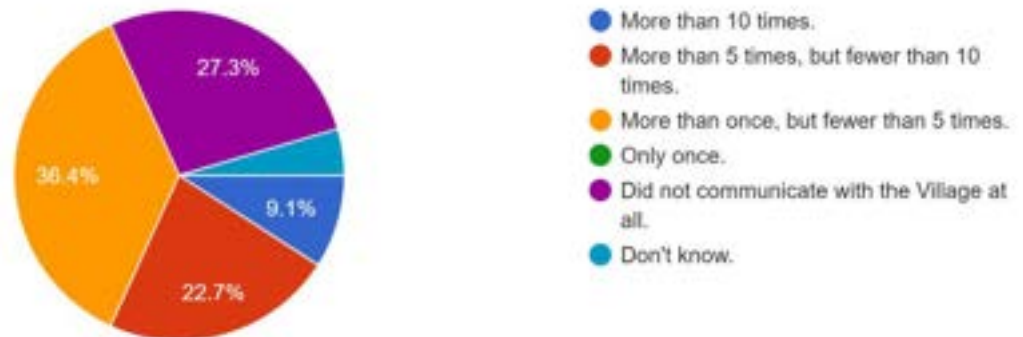
22 responses



4. In the last year, estimate how many times your business made communication with the Village of DeForest regarding services or with service-related questions.

In the last year, estimate how many times your business made communication with the Village of DeForest regarding services or with service-related questions.

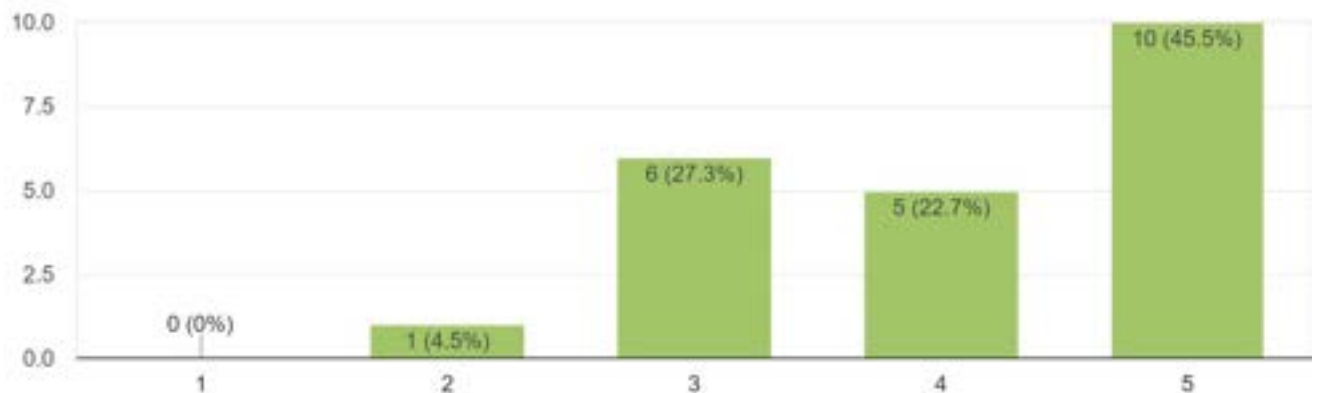
22 responses



5. How would you rate the Village of DeForest customer service with 1 being Poor and 5 being Very Good?

How would you rate the Village of DeForest customer service?

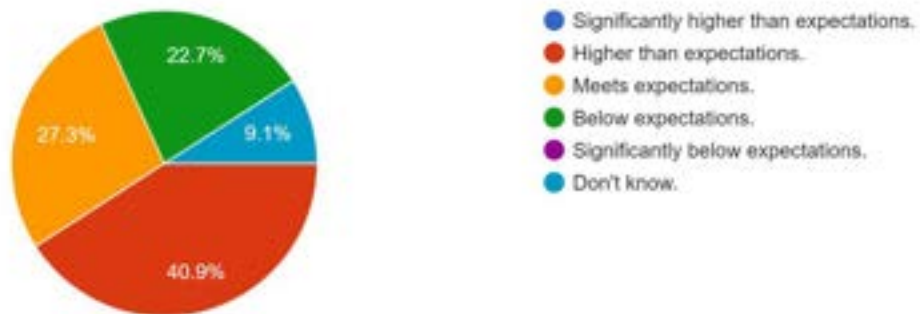
22 responses



6. What is your satisfaction with the overall quality of services provided to your business by the Village of DeForest?

What is your satisfaction with the overall quality of services provided to your business by the Village of DeForest?

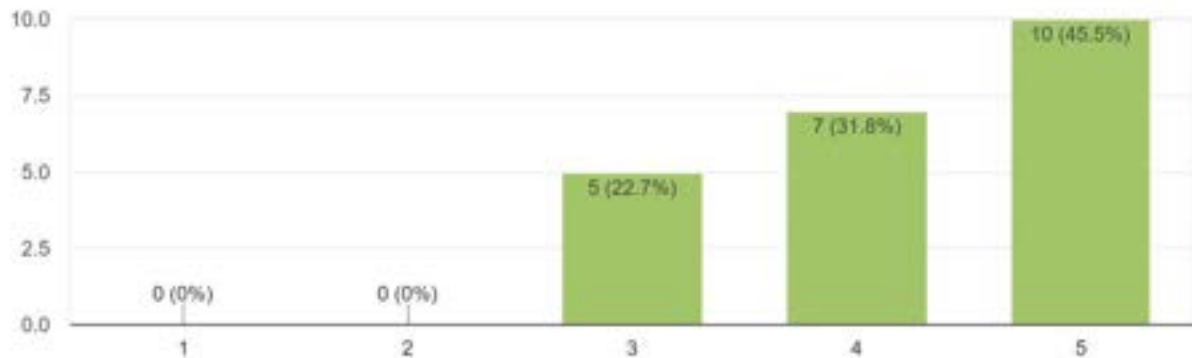
22 responses



7. Rate your level of satisfaction with the overall feeling of safety in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

What is your overall satisfaction with the overall feeling of safety in the Village of DeForest?

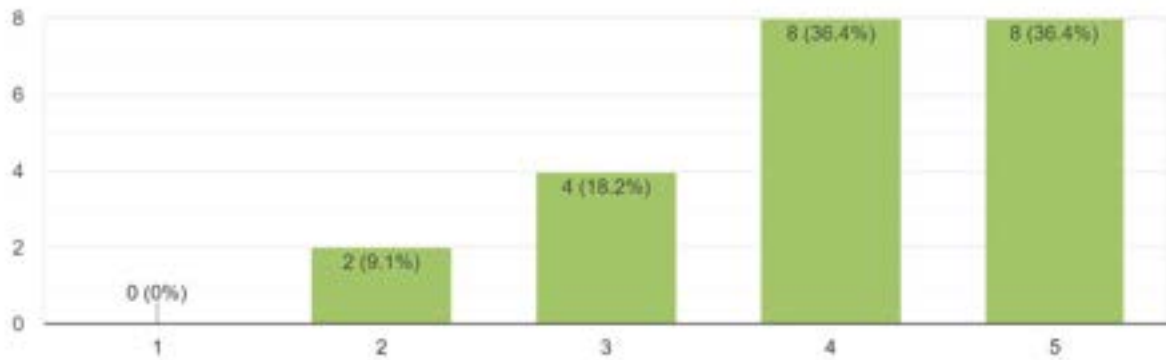
22 responses



8. Rate your level of satisfaction with the overall quality of life in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

What is your overall satisfaction with the overall quality of life in the Village of DeForest?

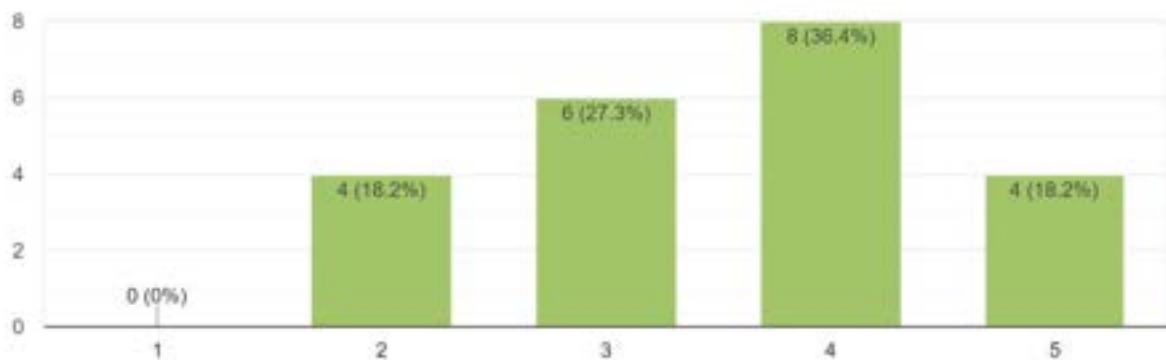
22 responses



9. Rate your level of satisfaction with the overall appearance of the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

What is your overall satisfaction with the overall appearance of the Village of DeForest?

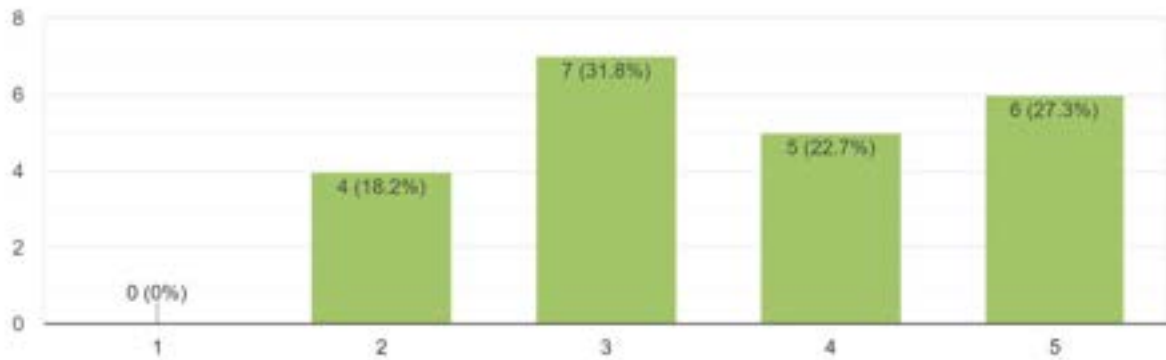
22 responses



10. Rate your level of satisfaction with the overall image of the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

What is your overall satisfaction with the overall image of the Village of DeForest?

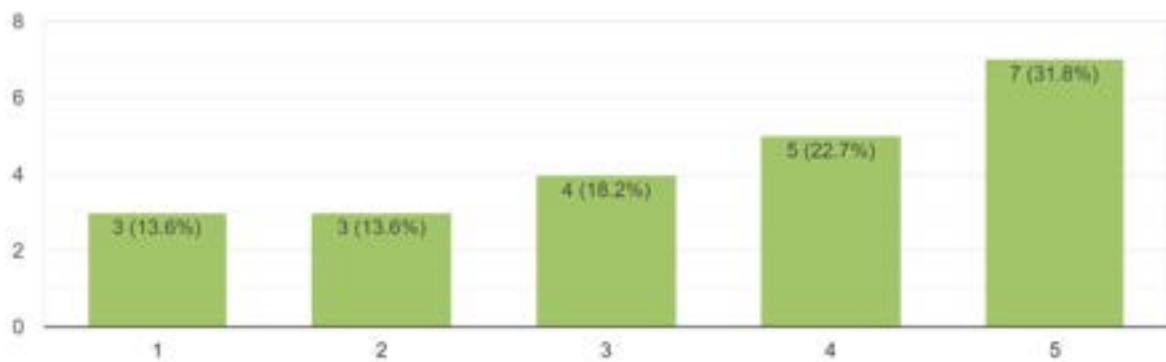
22 responses



11. Rate your level of satisfaction with the quality of new commercial development in the Village of DeForest with 1 being Very Dissatisfied and 5 being Very satisfied.

What is your overall satisfaction with the quality of new commercial development in the Village of DeForest?

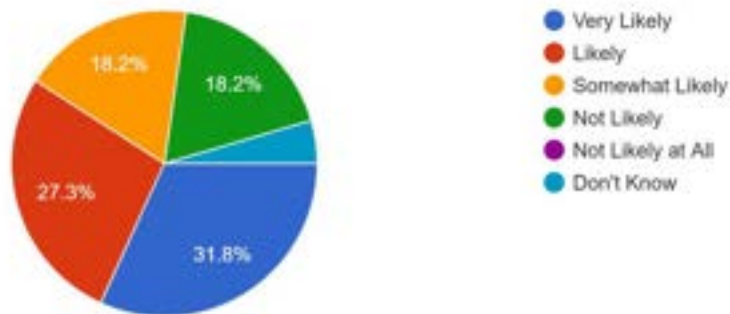
22 responses



12. How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

How likely would you be to recommend the Village as a business location to friends, family, and co-workers?

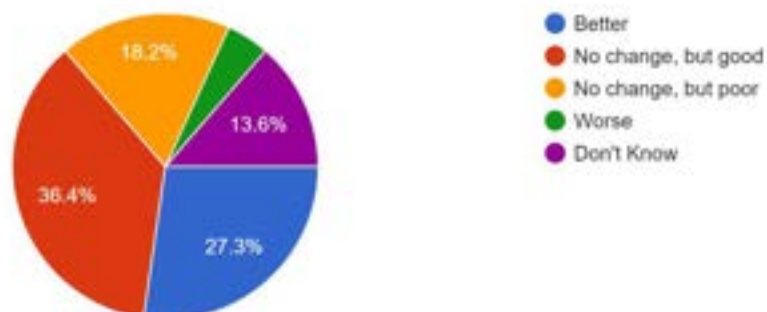
22 responses



13. How would rate the overall business atmosphere in the Village of DeForest today, compared to 2019?

How would you rate the overall business atmosphere in the Village of DeForest today, compared to in 2019?

22 responses



Open-Ended Questions

Nine (9) open-ended comments were submitted. Sharing direct responses (verbatim) compromises the confidentiality of this survey. In order to share the themes from this portion of the survey, we have organized responses and quantified them by general themes as indicated below:

Desire for more support for small businesses

- Hope to see more community support
- Hope to see more Village support for small businesses (vs. incentives provided to large businesses)
- Would like to see more space available for small businesses – especially with warehouse space available
- Would like to see more social media attention on existing business (vs. only featuring new businesses)

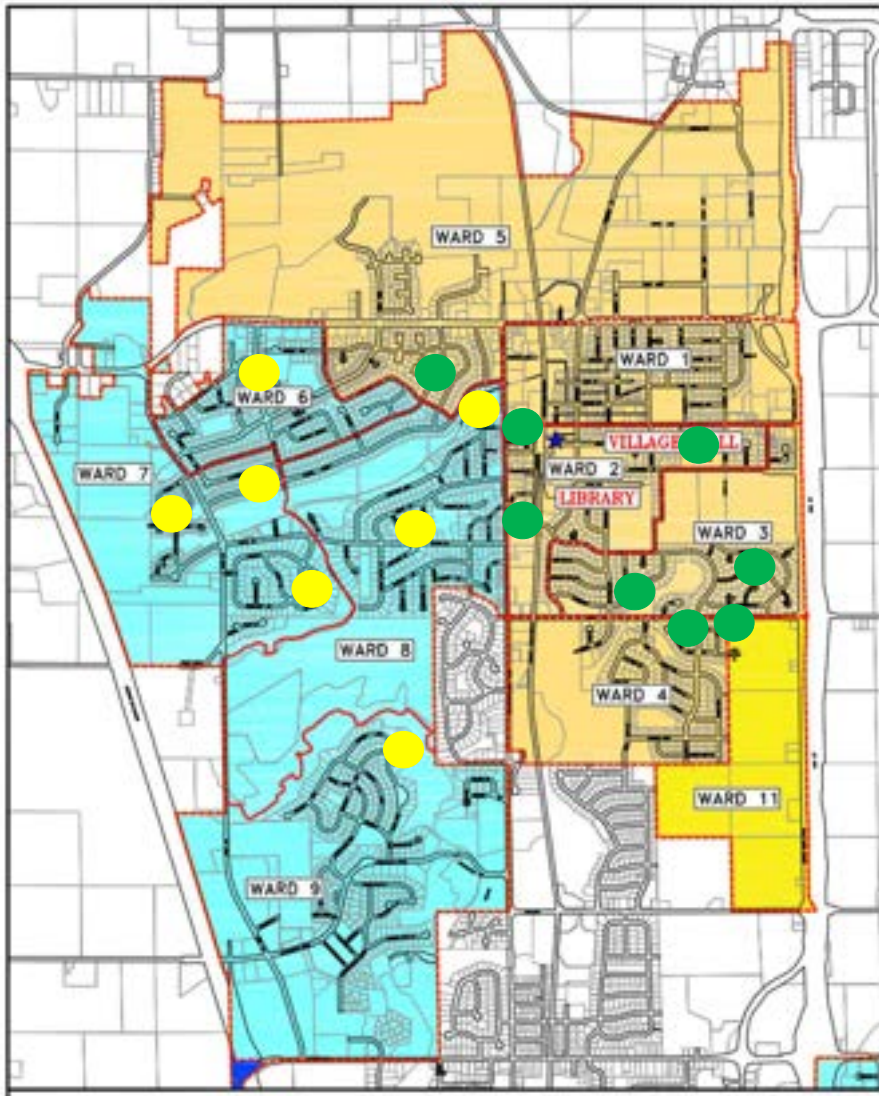
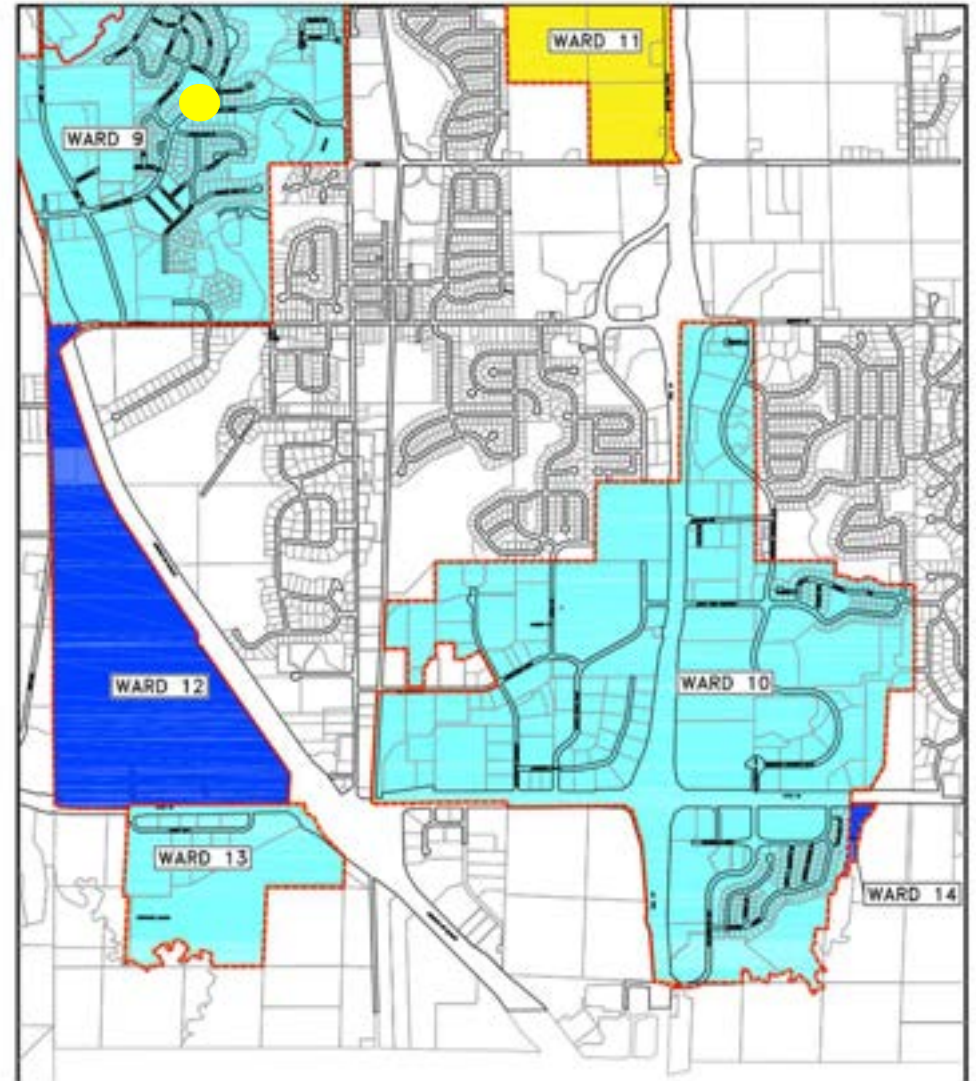
Desire for Downtown Revitalization

- Potential for downtown revitalization and better business environment
- Downtown DeForest could be a destination like Waunakee
- Need more small businesses to attract local residents to spend money in DeForest

Be Mindful of Impacts of “Rubber Stamping” Development

- Concern about long term impacts of zoning approvals of new businesses
- Don't want to see new businesses drive out existing businesses
- Be cognizant of noise impacts of businesses on surrounding uses

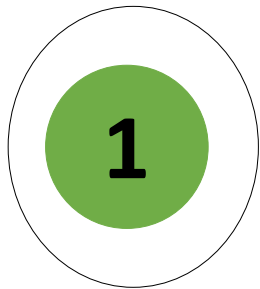
Station 1. Please Indicate Where You Live



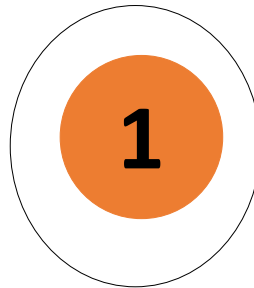
Station 2. Welcome! Please tell us more about your household!

Please place a sticker in the group that represents your age range.

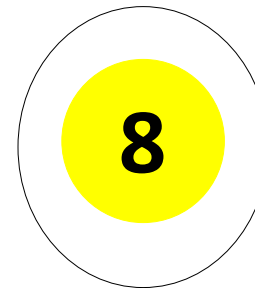
Single



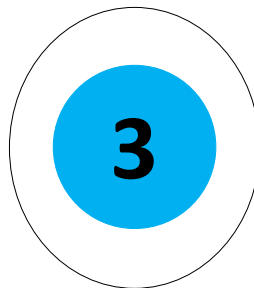
Young Professional
without kids



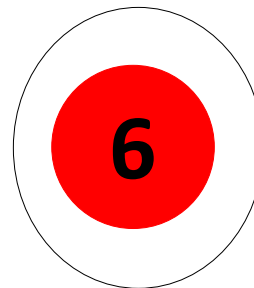
Family living
with kids



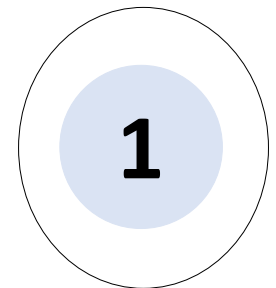
Empty
Nester



Retiree
without kids



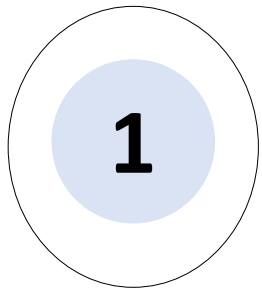
Other



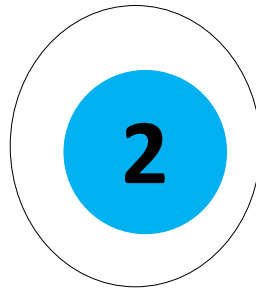
Station 3. Welcome! Please tell us more about yourself!

Please place a sticker in the group that represents how long you've lived in DeForest.

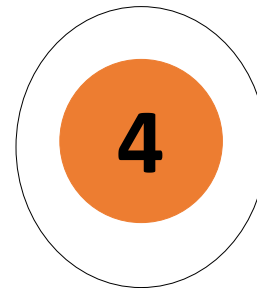
Less than 1 year



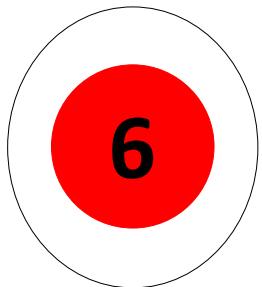
1-4 years



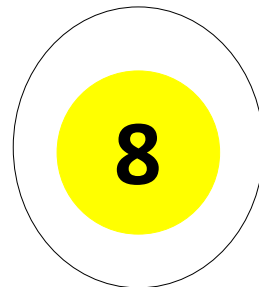
5-9 years



10-19 years



20+ years



Don't live in DeForest? Please write on a Post-It where you do live and add it here!

Station 4. Parks and Greenspace in DeForest

★ = Denotes top selection

Parks and greenspace are a part of the high quality of life in DeForest. If you had to ONLY PICK TWO, which amenities would you like to see more of? Please use up to two stickers to answer.

13



Expansion and increased connectivity of paved trail systems



High Quality Sports Venues (baseball, soccer, softball, volleyball, pickleball)

18



More trees and natural, open spaces to enjoy



2

Winter Recreation Offerings (Sledding hill, ice skating)



3

Swimming Offerings (Outdoor pool, Indoor aquatic center)

2



Yahara River Access (for boating, kayaking, fishing)

4



Affordable Public Spaces for Rent (Shelters, gazebos, etc.)

Station 5. Downtown DeForest

Dozens of survey respondents indicated that they'd love to see DeForest have more of a defined "downtown" district. In your mind, what makes a "downtown" different from other commercial areas? Choose up to TWO.

★ = Denotes top selection



Historic look & feel



Highly walkable or bikeable



Public art of all kinds



Décor like planters, furniture



Events, festivals, things to do

- Public art (local artists)
- Should be more dragon art!
- Diverse commercial stores

Other – add a Post-It!

Station 6. Showcase DeForest!

Imagine that you have one night or day out to showcase DeForest to someone who has never been here before. Tell us how you're spending it by using markers or Post-Its.

Where are you going?

- **Western Green Park / Trail (8)**
- **Bowling**
- **Library (5)**
- **Fireman's Park (4)**
- **Veteran's Park**
- **Poppy Seed**
- **Small shops**
- **Splashpad**
- **Showing off the dragon on E. Elm!**
- **Driving around**
- **No clue!**

What are you eating?

- **North + South (7)**
- **Family Restaurant**
- **El Alegre (2)**
- **Aranda's (4)**
- **BB Jack's (2)**
- **Norske Nook (4)**
- **Locally-owned establishment (2)**
- **Just not fast food**
- **Nothing (packed snacks)**

What are you doing?

- **Walking the trail (9)**
- **Entertaining at home**
- **Hanging out**
- **HS Pool**
- **Hiking or biking (2)**
- **Playing in the splashpad**
- **Shopping**
- **Eating**
- **Enjoying the library**

Station 7. You Choose the Trade-Offs

Survey respondents indicated that residents want very different things. If you HAD to pick one trade-off (something some people think of as good, accompanied by something others might think of as bad), which would it be?

1

The BEST paved roads but HIGHER taxes.

LOWER taxes but MORE chain businesses by the Interstate.

5

Bountiful NATURAL GREENSPACES but HIGHER taxes. ★

LOWER taxes but MORE housing of all kinds.

1

1

MORE spaces for teens and kids but HIGHER taxes.

LOWER taxes but FEES for more Village services.

No more GROWTH of new residential, but HIGHER taxes.

A BUSTLING DOWNTOWN but MORE TRAFFIC. ★

5



= Denotes top selection

Station 8. Social Connectedness

Wherever we go, people share with us how highly connected community members are in DeForest. A small town means that people know one another and take care of one another!

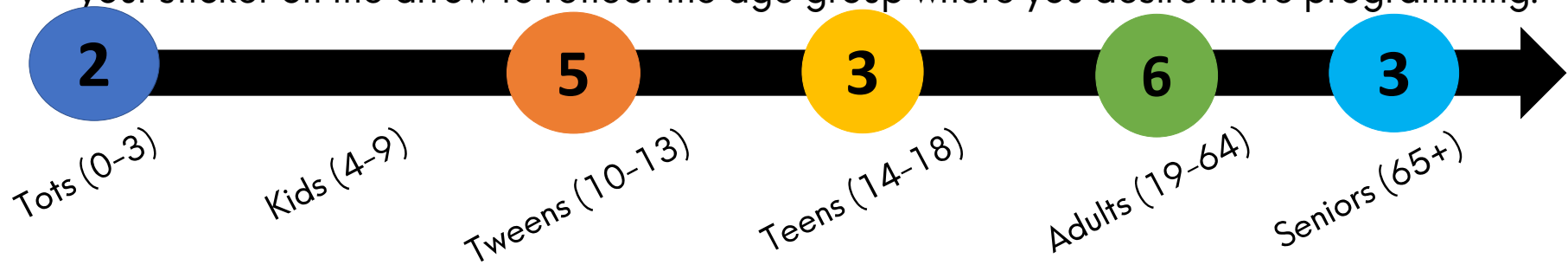
- Meeting people on walking trails (4)
- Events at Firemen's Park (4)
- Meeting people in my neighborhood (3)
- Library programs (2)
- Farmer's Market (2)
- Through children in school (4)
- Community spirit

- Saying yes to helping one another
- Want an attractive central place like a destination downtown (4)
- Through our church
- Through volunteerism (2)
- Welcoming everyone
- Less "low income" housing

Using a Post-It, share in a few words how you feel connected to your fellow community members in DeForest.

Station 9. Recreation or Library Programming in DeForest

Is there a gap in program or activity offerings for a specific age or generation? Please place your sticker on the arrow to reflect the age group where you desire more programming.



If you've attended a DeForest Recreation or Library program, we'd love your feedback! Please share on a Post-It the event you attended and what you thought of it.

- Free community gardens to support local food bank
- Village job shadowing
- Loved the Haunted Library!
- Love the library programs

- Want a skate park + pump track
- Love Brews, Friyays and park-centered events
- Sports leagues and art programs

- Would like more yoga classes
- Line dancing, swimming lessons, adult programs
- Zumba, Bike Rodeo, Movies in the Park
- 14-18 yr. internships

Station 10. Community Needs in DeForest

Some emerging needs for our greater community are listed below. If you know someone personally, like a friend or family member, who is facing one these issues below in DeForest please place a sticker next to that issue.



Anxiety or Depression



8



Accessing Transportation



Difficulty Meeting People in the Community

7

5

- No cabs
- No food delivery
- Need more sidewalks



Food Insecurity

3



Social Isolation

1



= Denotes top selection

Station 11. Supporting Entrepreneurs in DeForest

We heard you loud and clear in the survey that you'd like to see more locally-owned businesses in DeForest. If you have ever been interested in starting a business (or know someone who was/is), what stopped them from opening that business? Share with a Post- It if the reason is something else!



Access to Startup Funds

4



Education on How to Start a Business

4

• Local grants or incentives



Difficulty Finding a Place to Lease or Buy



5

• Need space for small businesses



Uncertainty about Taxes or Government Regulations

3



Access to Affordable Health Insurance

3



= Denotes top selection

Station 12. What Does “Small Town” Mean to You?

People often describe DeForest as a “small town”. What does that mean to you? Add your answer on a Post-It if none of these fit.



High degree of social connection (you know one another!)



16



Things don't change that much

1



Traditional agricultural community

2



High degree of homeowners vs. renters

9



Safe, “white picket fence” type town

12



= Denotes top selection



REGULAR MEETINGS TO MANAGE STRATEGIC PLAN IMPLEMENTATION PROGRESS:

STRATEGIC PLANNING PROCESS:

TIME COMMITMENT: 1-2 hour workshops over several months

FREQUENCY: Once every 3-5 years

HOW TO APPROACH: Work with an outside consultant so that all leaders can be engaged in this process.

3-YEAR GOAL SETTING:

TIME COMMITMENT: 1 hour

FREQUENCY: Annually

HOW TO APPROACH: Annually your leadership should establish their three-year goals. This includes setting measurable goals and painting a picture of what the organization looks like. Encourage members of your leadership team to brainstorm a list of bullet points describing the organization three years into the future. Individuals should also note bullet points that put into writing their personal (individual) goals within the organization over the next three years.

1-YEAR GOAL SETTING:

TIME COMMITMENT: 2 hour

FREQUENCY: Annually

HOW TO APPROACH: This process is similar to establishing your three-year goals, but less is more here. You don't want to go so overboard on goal setting that you can only accomplish a small percentage of them. What are your measurable goals for this year? What does the organization look like? If you're struggling to segment out near-term goals vs. longer-term goals – revisit your measurable goals for the three-year picture and select 5-7 of them to be expedited as 1-year goals.

QUARTERLY GOAL SETTING:

TIME COMMITMENT: Half or full day

FREQUENCY: Quarterly

HOW TO APPROACH: You can either pull directly from your strategic plan for this step or use the IDS approach to discussing issues and come up with new goals that have presented themselves since your last strategic plan update. The goal is to take your big picture goals and issues and boil them down to a "90-day world". You can only move the organization forward 90 days at a time – so strategic planning goals must be revisited frequently. Once quarterly, the leadership team should list everything that they would like to close out within the quarter – it might be a really long list at first!



QUARTERLY APPROACH CONTINUED...

Now your goal is to whittle the list down. Your goal is to get the organization down to 3-7 quarterly goals to address. Those that don't make the cut can either be tabled for a future quarterly discussion, combined with another goal, or eliminated from discussion. Your goal is to set yourself up for success – meaning that 80% of your quarterly goals are reached.

Quarterly goals should be aligned with Action Steps – meaning that they are measurable, specific, actionable, and have a responsible party assigned.

Managers will also set quarterly goals within their departments and teams. This gives every individual direct accountability in implementing strategic goals.

When you meet to establish the goals for the NEXT quarter – begin with a review of your current quarterly rocks. Did one not get completed? You can roll it into the following quarter. Is it 95% complete? Note the remaining tasks on someone's to-do list and take it off your next quarter's goal list.

WEEKLY OR BI-WEEKLY GOAL SETTING:

TIME COMMITMENT: 1-1.5 Hours (make sure you start and end on time!)

FREQUENCY: Weekly or bi-weekly

HOW TO APPROACH: If departmental or leadership team meetings are a new concept – it needs to be stressed that attendance is critical. This is the main way that individuals within your organization will have a touchpoint with your strategic plan. They need to be there and prioritize attendance at this standing meeting.

- A weekly or bi-weekly meeting should have several key components:
- Share “headlines” or brief successes (rapid fire, shared at a high level). This builds camaraderie and elevates spirits before you go into issue discussion.
- Quarterly goal review: Each goal should be read out loud and the person who is assigned to that goal should state simply if it is “on track” or “off track”. No need to discuss why at this point.



WEEKLY OR BI-WEEKLY APPROACH CONTINUED...

- To-Do List: If a quarterly goal is a 90-day goal – what can you do over the next 7-14 days to reach that 90-day goal? Everyone with a 90-day goal with their name next to it should list 2-4 to-dos for the coming week(s). They'll have to share at the next meeting if their to-do list has been accomplished. This gives individuals direct engagement in strategic plan implementation AND fosters accountability as they'll have to report back in 1-2 week's time.

Revisit Issues List. Follow the IDS approach to boiling down issues to their root cause, discussing solutions, and committing to solving by developing to-do list items. This is the bulk of your meeting – this is where you bring your team together to focus on problem solving – the heart of strategic planning.

- Circle back and close out: To-do list should be read out loud for all in attendance. Close out meeting.

Department heads should encourage small group check-ins with their teams, as well. As department heads grow more familiar with the concept of check-in meetings and goal setting, they'll be able to effectively facilitate these exercises with their teams.



ISSUES LIST

GATHERING AND SEGMENTING ORGANIZATIONAL ISSUES

The goal is to create an organization where all employees feel safe voicing issues. Issues have a variety of sizes and scopes. Issues that have been brought forward in the strategic planning process may be sorted into these three categories. Every issue brought forward may not be a candidate for immediate consideration – but they should all be sorted into one of the three categories below.

BIG PICTURE ISSUES:

This is an organization-wide issue that can be addressed 90+ days from now. It's not an immediate need – not something that needs to be solved this week or even this quarter. But it's still important – so let's document it to be addressed at a later date.

- ***When to discuss this issue?*** At the quarterly goal setting meeting.

LEADERSHIP TEAM ISSUES:

These issues must be addressed within 90 days. These issues are not departmental (they have organization-wide impact).

- ***When to discuss this issue?*** At the weekly or bi-weekly department head meeting.

DEPARTMENTAL ISSUES:

These are “local” issues and should be managed within their department (rather than engaging organization-wide leadership).

- ***When to discuss this issue?*** At the weekly or bi-weekly department-wide meeting.

HOW TO APPROACH ISSUES

Use the Identify – Discuss – Solve Approach:

<https://www.engagemultiplier.com/resources/ultimate-meeting-template/>

1. Identify the real problem & root cause – use 5 Whys approach (encourage your team to ask 5 whys to boil down to a root cause of an issue)
2. Discuss the problem – this should be quick and structured. Everyone is free to ask questions and suggest actions. With this caveat! An individual should only voice their recommendation ONCE – anything further is politicking and is non-productive. The person who brought forth the issue says what they will do about this and writes down their to-do (taking accountability).
3. Solve the problem – this approach may solve the problem, or it may reroute back to an issues list if further discussion is needed.



STRATEGIC PLAN IMPLEMENTATION TOOL

Enter Organization Name

CORE VALUES	
10 YEAR VISION STATEMENT	<i>Enter Vision</i>
10 YEAR MISSION STATEMENT	<i>Enter Mission</i>

Adapted from the Vision/Traction Organizer™ tool developed as a part of The EOS Model™.



7-10 YEAR FOCUS	4-6 YEAR FOCUS
FUTURE DATES: <i>Add Date</i>	FUTURE DATES: <i>Add Date</i>
<i>What Action Steps from this Plan will be Completed?</i> ○ <i>Enter Action Steps</i>	<i>What Action Steps from this Plan will be Completed?</i> ○ <i>Enter Action Steps</i>
<i>What does NAME look like as an organization at this time?</i> <i>Answer to question</i>	<i>What does NAME look like as an organization at this time?</i> <i>Answer to Question</i>



2-3 YEAR FOCUS

FUTURE DATES: *Add Date*

What Action Steps from this Plan will be Completed?

○ *Enter Steps*

What does NAME look like as an organization at this time?

Answer to question



1 YEAR FOCUS	QUARTERLY FOCUS oStep 1	BIG PICTURE ISSUES LIST
FUTURE DATE: <i>Add Date</i>	FUTURE DATE: <i>Add Date</i>	UPDATE QUARTERLY
<i>What Action Steps from this plan will be completed?</i> 1. <i>Add Step</i> 2. <i>Add Step</i> 3. <i>Add Step</i>	<i>What Specific Actions will you take on this quarter? Who will do them?</i> 1. <i>Add Action (Who)</i> 2. <i>Add Action (Who)</i> 3. <i>Add Action (Who)</i>	<i>What are the issues your organization is facing?</i> 1. <i>Add Issue</i> 2. <i>Add Issue</i> 3. <i>Add Issue</i>
<i>What Goals do you have for the organization this year?</i> 1. <i>Add Goal</i> 2. <i>Add Goal</i> 3. <i>Add Goal</i>		