

VILLAGE OF LOMBARD
REQUEST FOR BOARD OF TRUSTEES ACTION
For Inclusion on Board Agenda

____ Resolution or Ordinance (Blue) _____ *Waiver of First Requested*
____ Recommendations of Boards, Commissions & Committees (Green)
 x Other Business (Pink)

TO: PRESIDENT AND BOARD OF TRUSTEES
FROM: Scott Niehaus, Village Manager
DATE: May 9, 2018 (B of T) Date: May 17, 2018
TITLE: Village of Lombard Strategic Plan Update 2018-2019

BACKGROUND/POLICY IMPLICATIONS:

Attached for your consideration is a copy of the Village of Lombard 2018-2019 Strategic Plan Update for review and approval. The 2018-2019 Strategic Plan Update document provides progress reports and refinements to the initial Village of Lombard Strategic Plan for 2016-2018.

Review (as necessary):

Village Attorney X _____	Date _____
Finance Director X _____	Date _____
Village Manager X <u> SN </u> _____	Date <u> 5/9/18 </u> _____

NOTE: All materials must be submitted to and approved by the Village Manager's Office by 12:00 noon, Wednesday, prior to the Agenda Distribution.



#180244

MEMORANDUM

TO: Scott Niehaus
Village Manager

FROM: Nicole P. Aranas *NPA*
Assistant Village Manager

DATE: May 9, 2018

SUBJECT: Village of Lombard Strategic Plan Update 2018-2019

Attached please find a copy of the Village of Lombard 2018-2019 Strategic Plan Update for review and approval by the Village Board of Trustees. The Strategic Plan Update for 2018-2019 provides progress reports and refinements to the initial Strategic Plan for 2016-2018, a document developed to identify a shared vision, priorities, initiatives and operational strategies to guide Village operations.

The Strategic Plan Update process involved development of Strategic Initiative Update Reports for each of the strategic initiatives identified in 2016. The Update Reports identified project status, target completion date, milestones and major activities, recent progress, upcoming work and considerations to the initial initiatives. Following development of the Updated Reports, elected officials and Village staff conducted a workshop to review the reports, evaluate progress on existing strategic initiatives and propose refinements for the plan moving forward. Feedback from these processes was used to amend the existing Strategic Priorities, Desired Outcomes, Key Outcome Indicators and Strategic Initiatives and draft the 2018-2019 Strategic Plan Update.

A copy of the 2018-2019 Strategic Plan Update is being presented here for review and potential approval by the Village Board of Trustees. Upon final approval by the Village Board of Trustees the 2018-2018 Strategic Plan Update will be shared, posted to the Village website, and append Village Budget Documents. Please let me know of any issues, questions or concerns.



Village of Lombard **Strategic Plan Update**

2018 - 2019

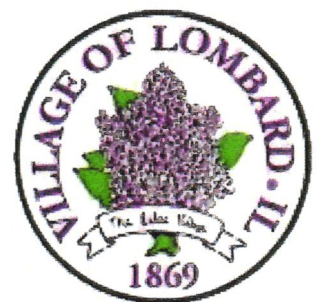


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EXECUTIVE SUMMARY

The Village of Lombard engaged in a strategic planning process over multiple sessions under the facilitation of Craig Rapp of the Center for Governmental Studies at Northern Illinois University. The sessions yielded an improved understanding of effective governance and a draft strategic plan for the three-year period 2016-2018. The Village has revisited its priorities, progress and outcomes and developed this Strategic Plan Update for 2018-2019.

The strategic plan consists of a set of four *strategic priorities*, which are the highest priority issues for the Village; a series of *key outcome indicators*, which reflect desired outcomes; and a set of *performance targets*, which define the success measures.

At initial planning meetings, the Village reviewed the organization's strengths, weaknesses, opportunities and threats (SWOT analysis), identified the major challenges facing the Village, and adopted the four strategic priorities of the plan. The group clarified priority definitions, and established a set of desired outcomes for each. The outcomes are monitored through a set of key outcome indicators (KOI's)-and measured by a set of performance targets.

The group developed and reviewed a draft set of strategic initiatives and action plans for each priority. The initiatives are the projects and programs necessary to achieve the outcomes identified.

An update report for each strategic initiative was prepared by Village staff and jointly reviewed with the Village Board of Trustees at a workshop in 2017. Targets and strategic initiatives were updated accordingly and the Strategic Plan Update for 2018-2019 was prepared.

Updated strategic priorities, key outcome indicators, performance targets and initiatives are summarized on the following page. Strategic initiative update reports for each strategic initiative have been prepared and are attached within the document.



VILLAGE OF LOMBARD UPDATED STRATEGIC PLANNING SUMMARY

Strategic Priority	Desired Outcome	Key Outcome Indicator (KOI's)	Target	Strategic Initiatives
Financial Stability FINANCE	Financial strength	Bond rating	1) BBB in 5 years from resolution 2) AA+ in 10 years from resolution	Improve bond rating through resolution of LPFC debt issue Set policy for revenue review CIP refined/updated to reflect major infrastructure projects by 2019
	Increased general fund revenue	General fund tax revenue	1) Annual delivery of balanced budget 2) Annual review and elimination of structural budget deficits on early and timely basis	
	Discretionary spending minimized	Spending	Expenditures aligned with available revenues and comparable municipalities	
	Resources invested in strategic priorities	Revenue-Goal alignment	Major capital projects funded by 2019	
Economic Development GROWTH	Business base expansion	New businesses	1) Occupancy rates exceeding market 2) Ground broken-101 S. Main 3) Use identified for proposed Sam's Club site	Develop policy targeting reduction of development costs Develop business retention initiative aimed at key sites Develop incentive policy targeted at specific businesses and key sites Develop statistical reporting document for performance measurement Sale/development of TIF property
	Business offerings broadened	Business diversity	Policy w/ratios tied to incentives adopted	
	People visiting from outside Lombard increased	Spending from outside Lombard	Annual increases to sales, F&B, H/M tax exceeding benchmarks.	
	Good businesses retained	Retention rate	Zero net loss	
Communication and Community Image CUSTOMER	Be primary source for community news/information	Stakeholders preferences	Village named preferred source for Village news in survey	Village representation at 30% of Village events Conduct a citizen survey Develop analytic reporting for communication goals Implement employee customer service training policy Adopt policy on citizen response
	Citizen interaction increased	Attendance at Village events	Resident interaction at 30% of Village events	
	Public perception of Village improved	Public perception in community survey	Majority of respondents indicate Village is approachable	
Operational Sustainability OPERATIONS	High quality services delivered	Service levels	Core service levels determined in all depts.	Establish core service levels Develop one internal and one external partnership Establish minimum standards for employee training/education
	Competent, capable workforce	Employee training	All employees meet minimum standards	
	Organizational partnerships improved	Shared services agreements	One new internal, one new external	

STRATEGIC PLANNING PROCESS

The initial focus of the first Village of Lombard leadership team governance and strategy session was a discussion of leadership team dynamics, and a review of good governance practices—particularly the roles and responsibilities of each person.

EFFECTIVE GOVERNANCE, GROUP STRENGTHS, TEAM ISSUES

The Board of Trustees reviewed and discussed the role of governance—first participating in an interactive discussion of roles and responsibilities, and then examining the Carver Policy Governance model, which was presented as a best practice example. The group discussed how they compared to the best practices. It was generally agreed that the leadership team had come through a difficult period of time. A discussion of issues occurred related to the recent changes, the responsibilities each member had to represent the community, and to open, transparent communication.

Following the governance discussion, the Village President, Trustees and Village Manager were joined by members of the senior management team for the development of the strategic plan.

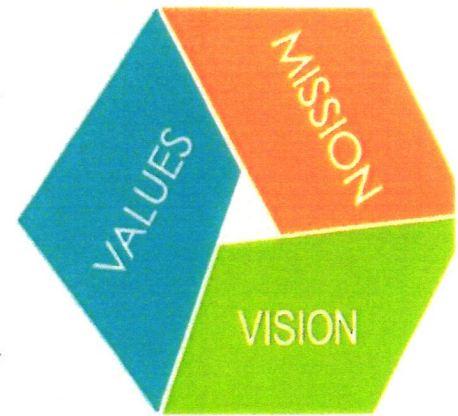


STRATEGIC PLAN DEVELOPMENT - REVIEWING THE ENVIRONMENT, SETTING PRIORITIES

The leadership team subsequently began the process of developing the strategic plan. Strategic planning is a process that helps leaders examine the current state of the organization, determine a desired future state, establish priorities, and define a set of actions to achieve specific outcomes. The process followed by the Village was designed to answer four key questions:

- (1) Where are we now?
- (2) Where are we going?
- (3) How will we get there?
- (4) What will we do?

The team engaged in a review of their Mission, Vision and Guiding Principles. A broad discussion about the Village's value proposition, organizational culture, and "Why", informed the process. The group examined the existing statements. In each case, they felt that the statements were up to date, and reflected the current reality. They are listed below:



MISSION STATEMENT

The Mission of the Village of Lombard is to provide superior and responsive governmental services to the people of Lombard.

VISION STATEMENT CONCEPTS

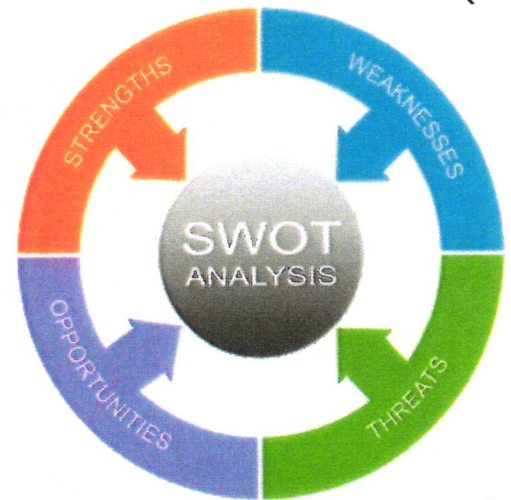
Our shared Vision for Lombard is a community of excellence exemplified by its government working together with residents and businesses to create a distinctive sense of spirit and an outstanding quality of life.

GUIDING PRINCIPLES

- The Village of Lombard will continue to proactively address issues related to public safety, and to plan for future public safety needs that may arise. Public safety is considered to include police, fire, and public works services.
- The Village of Lombard will continue to maintain a proactive stance in carefully monitoring the financial resources of the community.
- The Village of Lombard should continue with proactive, yet financially prudent, planning for capital improvements as reflected in the ten-year Capital Improvement Program.
- The Village of Lombard and other governmental agencies should continue working in a spirit of strong intergovernmental cooperation, as has been the practice up to the present time.
- The Village of Lombard should continue to foster customer-friendly policies.

SWOT ANALYSIS

Following the mission, vision and guiding principles discussion, the group conducted an assessment of the environment within which the Village operates. This was done via a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis: a process that examines the organization's internal strengths and weaknesses, as well as the opportunities and threats in the external environment. To facilitate this, a SWOT questionnaire was distributed to the Board and senior management team in advance of the planning session. The SWOT process revealed the most frequently mentioned characteristics in each area:



STRENGTHS

- Board and staff, transparency and communication, customer service, sense of place, finances

WEAKNESSES

- Limited financial resources, aging/outdated facilities (infrastructure), professional development, stormwater (lack of facilities), bond rating (Westin)

OPPORTUNITIES

- Community development, branding, infrastructure, green, service

THREATS

- Springfield/LGDF, unfunded mandates/pensions/PSEBA, development/downtown, Westin, expansion of non “core services”

The group then engaged in an exercise using the summarized SWOT data. They compared strengths with opportunities and weaknesses with threats, to determine which opportunities would maximize strengths, and which weaknesses would be exacerbated by the threats. This effort helped to crystalize the current challenges and opportunities facing the community. The results of this analysis are listed below:

STRENGTHS-OPPORTUNITIES

(Make good things happen)

- Economic development (across the Village)
- Branding
- Service enhancement
- Green initiatives

WEAKNESSES-THREATS

(Keep bad things from happening)

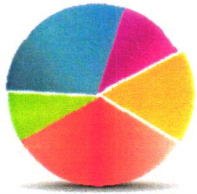
- Westin
- Financial resources (made worse by Springfield)
- Development of key parcels
- Service expansion

This led to the identification of a broad set of issues and/or challenges facing the community:

ISSUES/CHALLENGES

- Westin

- Financial stability
- Economic development
- Branding/image
- Service expansion
- Communication with the community
- Aging infrastructure
- Maintaining service levels
- Aging population
- Changes-increasing crime
- Anti-government sentiment
- Operational sustainability
- Addressing demographic changes
- Workforce development



STRATEGIC PRIORITIES

STRATEGIC PRIORITIES

Once the current challenges were identified, the group discussed the issues that were most important over the next two years. From that discussion, a set of four Strategic Priorities were established as follows:

1. Financial Stability
2. Economic Development
3. Communication and Community Image
4. Operational Sustainability

DEFINING THE STRATEGIC PRIORITIES

In order to clarify the meaning of each priority in the context of Lombard, the group identified key concepts for each.

1) FINANCIAL STABILITY

Water treatment, roads, utilities, surface water-stormwater, building-systems, standards, funding, planning

2) ECONOMIC DEVELOPMENT

Communications, improve, individual accountability, increase, new revenues/channels, new technology, networking

3) COMMUNICATION AND COMMUNITY IMAGE

Focused, effective decision-making group, respectful, open-minded, agree to disagree

4) OPERATIONAL SUSTAINABILITY

Preserve, plan, promote, balanced approach

DETERMINING SUCCESS: DEFINING THE KEY OUTCOME INDICATORS

After identifying strategic priorities, the group focused on developing a set of desired outcomes. Once the outcomes were established, Key Outcome Indicators (KOI's) were defined and Performance Targets were developed. KOI's are measures that will be tracked to reveal progress toward the desired outcomes. Performance Targets define successful outcomes, expressed in measurable terms.

The alignment created between Outcomes, KOI's, Targets and Strategic Priorities is important, not only for clarity, but also for maintaining a disciplined focus on the desired results.

DESIRED OUTCOMES, KEY OUTCOME INDICATORS AND TARGETS BY PRIORITY AREA

FINANCIAL STABILITY

Outcome: Financial strength; **KOI:** Bond rating; **Target:** (1) BBB in 5 years from resolution; (2) AA+ in 10 years from resolution

Outcome: Increased revenue in the general fund; **KOI:** General fund tax revenue; **Target:** (1) Annual delivery of balanced budget; (2) Annual review and elimination of structural budget deficits on early and timely basis

Outcome: Discretionary spending minimized; **KOI:** Spending; **Target:** Expenditures aligned with available revenues and comparable municipalities



Outcome: Resources invested in strategic priorities; **KOI:** Revenue-Goal alignment; **Target:** Major capital projects funded by 2019

ECONOMIC DEVELOPMENT

Outcome: Business base expansion; **KOI:** New businesses; **Target:** (1) Occupancy rates exceeding market; (2) ground broken at 101 S. Main; (3) Use identified for proposed Sam's Club site

Outcome: Business offerings broadened; **KOI:** Business diversification; **Target:** Adopted policy with ratios tied to incentives

Outcome: People visiting from outside Lombard increased; **KOI:** Spending from outside Lombard; **Target:** Annual increases to sales, food and beverage, hotel motel taxes exceeding benchmarks

Outcome: Good businesses retained; **KOI:** Retention rate; **Target:** Zero net loss

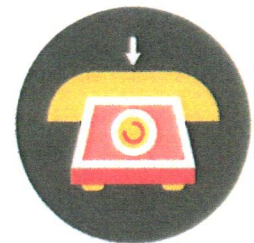


COMMUNICATION AND COMMUNITY IMAGE

Outcome: Be primary source for community news/information; **KOI:** Stakeholders preferences; **Target:** Village named as top source for Village news in survey

Outcome: Citizen participation increased; **KOI:** Attendance at Village sponsored events; **Target:** Resident interaction at 30% of Village events

Outcome: Public perception of the Village improved; **KOI:** Community Survey re: public perceptions; **Target:** Majority of respondents indicate Village is approachable

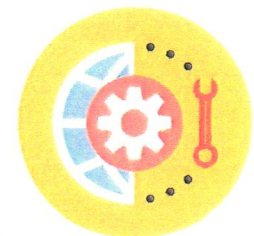


OPERATIONAL SUSTAINABILITY

Outcome: High quality services are delivered; **KOI:** Service levels; **Target:** Core service levels determined for all departments

Outcome: Competent, capable workforce; **KOI:** Employee training; **Target:** All employees meet minimum standards

Outcome: Partnerships improve the organization **KOI:** Shared services agreements; **Target:** One new internal and one new external agreement



IMPLEMENTING THE VISION – DEVELOPING STRATEGIC INITIATIVES AND ACTION PLANS

To successfully address the strategic priorities and achieve the intended outcomes expressed in the Targets, it is necessary to have a focused set of actions, including detailed implementation steps to guide organizational effort. The Village of Lombard will accomplish this through strategic initiatives developed for each priority. Strategic initiatives are broadly described, but narrowly focused activities that are aligned with the priorities, and targeted to the achievement of outcomes expressed in the Targets.

At the workshop, the group identified an initial list of initiatives for each strategic priority listed below. Staff and the Board, through various committees, worked collaboratively to further refine these strategic initiatives with the development of detailed action steps necessary for implementation.

FINANCIAL STABILITY

- a. Improve bond rating through resolution of LPFC debt issue
- b. Set Policy for Revenue Review
- c. CIP Refined/Updated to Reflect Major Projects by 2019

ECONOMIC DEVELOPMENT

- a. Develop Policy Targeting Reduction of Development Costs
- b. Develop Business Retention Initiative Aimed at Key Sites
- c. Develop Incentive Policy Targeted at Specific Businesses & Key Sites
- d. Develop Statistical Reporting Document for Performance Measurement
- e. Sale/Development of TIF Property

COMMUNICATION AND COMMUNITY IMAGE

- a. Village representation at 30% of Village events
- b. Conduct a citizen survey
- c. Develop analytic reporting for communication goals
- d. Implement employee customer service training policy
- e. Adopt policy on citizen response

OPERATIONAL SUSTAINABILITY

- a. Establish core service levels

- b. Develop one internal and one external partnership
- c. Establish minimum standards for employee training/education




STRATEGIC INITIATIVE UPDATES

In 2017, the Village evaluated progress on each of the strategic initiatives identified in 2016. A Strategic Initiative Update Report was prepared for each strategic initiative. Each Strategic Initiative Report identified the following: Project Status; Target Completion Date; Milestones & Major Activities; Recent Progress; Upcoming Work; and Considerations moving forward. The Strategic Initiative Update Reports and an overall summary are attached to this document as Exhibit A.

A dashboard summary summarizing Progress Status by Strategic Initiative and individual detailed Strategic Initiative Update Reports are attached here as Exhibit A. In summary, 14 strategic initiatives are categorized as On-Track, having no issues likely to affect project scope, schedule and or budget with successful project completion expected. One strategic initiative has been categorized as At Risk, with known or potential issues likely to affect project scope, schedule and/or budget but with successful project completion still achievable. No strategic initiatives were evaluated as Critical, having significant unresolved issue that will impact project scope, schedule or budget with successful completion unlikely.

Progress Status by Strategic Initiative

Status Indicator Key

	Count
 Green: On-track – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected. <u>An asterisk (*) indicates completion.</u>	14
 Yellow: At-risk – known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.	1
 Red: Critical – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely w/o changes or additional resources.	0

The Village Board of Trustees and management staff met to review the Strategic Initiative Update Reports and refine initiatives, targets, outcomes, and key outcome indicators, as needed. The identified updates are reflected in the Updated Strategic Planning Summary and Individual Strategic Initiative Update Reports contained in this document.

STRATEGIC PLANNING PARTICIPANTS

The strategic plan and update were developed with the hard work and dedication of many individuals. The Board led the way, defining a direction and a set of outcomes that are important to the community. The Manager and senior staff all spent time engaged in new ways of thinking to come up with a set of plans that will help the Board successfully measure and achieve the outcomes they defined.

Elected Officials

Village President
Board of Trustees

Keith Giagnorio
Reid Foltyniewicz
Mike Fugiel
Bill Johnston
Robyn Pike
Bill Ware
Dan Whittington
Sharon Kuderna

Village Clerk

Senior Management Team




Village Manager
Assistant Village Manager
Human Resources Director
Director of Public Works
Director of Community Development
Police Chief
Fire Chief
Finance Director
Communications Coordinator

Scott Niehaus
Nicole Aranas
Kathy Dunne
Carl Goldsmith
Bill Heniff
Roy Newton
Rick Sander
Tim Sexton
Avis Meade

Village of Lombard Strategic Plan Progress Update

Progress Status by Strategic Initiative

Status Indicator Key

		Count
	Green: <i>On-track</i> – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected. <u>An asterisk (*) indicates completion.</u>	14
	Yellow: <i>At-risk</i> – known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.	1
	Red: <i>Critical</i> – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely w/o changes or additional resources.	0

I. Financial Advocacy

Strategic Initiatives

	Status	Target Date
1. Improved bond rating through resolution of LPFC debt issue	On-track	Undetermined
2. Set policy for revenue review*	Completed	Ongoing
3. CIP refined/updated to reflect major projects by 2019	At-risk	2019

II. Economic Development

Strategic Initiatives

	Status	Target Date
1. Develop policy targeting reduction of development costs	On-track	2019
2. Develop business retention initiative aimed at key sites	On-track	2019
3. Develop incentive policy targeted at specific businesses and key sites*	Completed	Completed
4. Develop statistical reporting document for performance measurement	On-track	2019
5. Sale/development of TIF property	On-track	2019

III. Communication and Community Image

Strategic Initiatives

	Status	Target Date
1. Village representation at 30% of Village events*	Completed	Ongoing
2. Conduct a citizen survey*	Completed	Ongoing
3. Develop analytic reporting for communication goals	On-track	2019
4. Implement employee customer service training policy and citizen response policy	On-track	2019

IV. Operational Sustainability

Strategic Initiatives

	Status	Target Date
1. Establish core service levels	On-track	2019
2. Develop one internal and one external partnership*	Completed	Ongoing
3. Establish minimum standards for employee training/education	On-track	2019



FINANCIAL STABILITY

Strategic Initiative Update Report

- 1. Strategic Priority
- 2. Desired Outcome
- 3. Key Outcome Indicator (KOI)
- 4. Target
- 5. Strategic Initiative
- 6. Project Status

Finance – Financial Stability

Financial Strength

Bond Rating

**BBB in 5 years
AA+ in 10 years**

RESOLUTION OF THE LPFC DEBT ISSUE

On-going

7. Target Completion Date: **Undetermined**

Project Plan

8. Milestones & Major Activities

Review status, draft briefings for major updates, and position Village finances for bond rating improvements.

Progress Update

9. Recent Progress

- The Village has engaged in discussions with key stakeholders involved in the LPFC debt issue and has agreed to contribute towards the restructuring of the LPFC's debt.
- The Village has otherwise taken proactive steps to strengthen those elements of its financial position under its direct control by adoption of a long range financial plan and complementing policies.

10. Upcoming Work

- Honor terms of Restructuring Support Agreement and continue engagement with key stakeholders.
- Continue communications with the public and bond rating agencies.

11. Considerations

- Successful completion of this initiative is still possible but multiple factors controlling the outcome of this issue are outside of the Village span of control.
- Target amended from BBB in 5 years and AA+ in 10 years overall, to BBB in 5 years and AA+ in 10 years from resolution of the debt issue by the LPFC.
- Village to work towards small bond issue with property tax backing to rebuild credit.

Status Indicator Key

- Green:** *On-track* – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected.
- Yellow:** *At-risk* - known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.
- Red:** *Critical* – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely without substantial changes or additional resources.



FINANCIAL STABILITY

Strategic Initiative Update Report

1. Strategic Priority

Finance – Financial Stability

2. Desired Outcome

**Increased General Fund Revenue
Discretionary Spending Minimized**

3. Key Outcome Indicator (KOI)

**General Fund Tax Revenue
Spending**

4. Target

**Annual revenue growth exceeding state and national performance.
Discretionary spending increases limited to 2%**

5. Strategic Initiative

SET POLICY FOR REVENUE REVIEW

6. Project Status

Completed

7. Target Completion Date:

Ongoing

Project Plan

8. Milestones & Major Activities

Research policy options, Finance & Administration Committee Review and approval of policy by Village Board.

Progress Update

9. Recent Progress

- Village developed multi-year Long Range Financial plan and related policies to align annual revenues and expenditures to eliminate structural budget deficits. Long Range Financial Plan included expense reductions and revenue enhancements to ensure annual delivery of balanced budgets.
- Village revised financial policy to provide for revenue review every three years. Existing fee schedules to be evaluated to determine whether they are comparable to fees charged by other municipalities with the goal of remaining competitive at the mid-point or 50% range of surveyed communities.
- Revenue and fees reviewed and evaluated in 2016.
- 2016 and 2017 discretionary spending limited to 2% or less.
- Adopted financial reserve policy and developed building fund using year-end revenues covering expenses under the CIP

10. Upcoming Work

11. Considerations

- The Village will continue annual review and maintenance of financial plan moving forward.
- Amend targets to better align with outcome of long range financial plan: (1) annual delivery of a balanced budget, (2) annual review and elimination of structural budget deficits on an early and timely basis, and/or (3) expenditures aligned with available revenues and comparable municipalities.

Status Indicator Key



Green: *On-track* – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected.



Yellow: *At-risk* - known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.



Red: *Critical* – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely without substantial changes or additional resources.



FINANCIAL STABILITY

Strategic Initiative Update Report

- 1. Strategic Priority
- 2. Desired Outcome
- 3. Key Outcome Indicator (KOI)
- 4. Target
- 5. Strategic Initiative
- 6. Project Status

Finance – Financial Stability

Resources invested in strategic priorities

Revenue-Goal Alignment

Major storm water projects funded by 2018

CIP REFINED/UPDATED TO REFLECT MAJOR PROJECTS BY 2019

At-Risk

7. Target Completion Date: 2019

Project Plan

8. Milestones & Major Activities

Identify priority CIP projects, review with Public Works Committee and approve funding for key projects.

Progress Update

9. Recent Progress

- CIP updated annually to reflect major projects with continued emphasis on storm water management and infrastructure improvements.
- Storm water improvements funded through the CIP include the North Broadway pump station, Gatz Pond Outfall, Rt. 53 pump station, as well as inspection and maintenance of additional Village pump stations, detention facilities and manholes throughout the Village. Roosevelt Road water main lining improvements approved and constructed.
- Water and sewer rate study set to identify funding source for future storm water improvements.

10. Upcoming Work

Water and sewer rate study to identify potential funding source for future storm water capital improvements. Review and evaluation of current project funding sources and water and sewer enterprise funds.

11. Considerations

- Village should continue active use of IEPA revolving loan for future improvement funds where applicable due to limited bonding capability.
- Evaluate realignment of water and sewer revenues and use of non-home rule tax with goal of providing consistent and necessary funding for CIP projects.
- Refine strategy to seek funding for all types of CIP projects, not only stormwater improvements.
- Consideration should be given to messaging, communications and public awareness efforts regarding project funding needs and the source of revenues.

Status Indicator Key



Green: *On-track* – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected.



Yellow: *At-risk* - known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.



Red: *Critical* – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely without substantial changes or additional resources.



ECONOMIC DEVELOPMENT

Strategic Initiative Update Report

1. Strategic Priority	Growth – Economic Development	
2. Desired Outcome	Business base expansion	
3. Key Outcome Indicator (KOI)	New businesses	
4. Target	Occupancy rates exceeding market Ground breaking at 101 S. Main Use identified for proposed Sam's Club site	
5. Strategic Initiative	DEVELOP INCENTIVE POLICY TARGETED AT SPECIFIC BUSINESSES AND KEY SITES	
6. Project Status	Completed	7. Target Completion Date: Ongoing

Project Plan

8. Milestones & Major Activities	Research and compare policies, recommendation by ECDC, Village Board approval of policy, market and communicate policy to developers.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> Economic Development Policy was developed and approved by Village. Incentive agreements under policy are in place with Mariano's, Yorktown Commons, Sam's Club and Bluestone/Thornton's. Mariano's development was approved and constructed. RFP issued for 101 South Main property Butterfield Yorktown TIF created for development Northern Seminary
10. Upcoming Work	<ul style="list-style-type: none"> Develop a program for the purposes of tracking progress of incentives upon full development and commencement of business operations. Use of TIF towards development of Northern Seminary property.
11. Considerations	<ul style="list-style-type: none"> Continue evaluation and monitoring of retail business occupancy rates given recent market trends. Evaluate potential programs and policies to support Yorktown retail development Develop and track measurable data to evaluate the effectiveness and impact of incentives in place.

Status Indicator Key	<div style="display: flex; flex-direction: column; gap: 10px;"> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #00b050; margin-right: 10px;"></div> <p>Green: <i>On-track</i> – no issues likely to affect project scope, schedule and/or budget. Successful project completion is expected.</p> </div> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #ffff00; margin-right: 10px;"></div> <p>Yellow: <i>At-risk</i> - known or potential issues are likely to affect project scope, schedule and/or budget. Successful project completion still achievable.</p> </div> <div style="display: flex; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #ff0000; margin-right: 10px;"></div> <p>Red: <i>Critical</i> – significant unresolved issues will impact project scope, schedule and/or budget. Successful project completion unlikely without substantial changes or additional resources.</p> </div> </div>
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ECONOMIC DEVELOPMENT

Strategic Initiative Update Report

1. Strategic Priority	Growth – Economic Development	
2. Desired Outcome	Business base expansion Good businesses retained	
3. Key Outcome Indicator (KOI)	New businesses Retention rate	
4. Target	Occupancy rates exceeding market Ground breaking at 101 S. Main Use identified for proposed Sam’s Club site Zero business net loss	
5. Strategic Initiative	DEVELOP POLICY TARGETING REDUCTION OF DEVELOPMENT COSTS	
6. Project Status	On-track	7. Target Completion Date: 2019




Project Plan

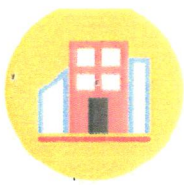
8. Milestones & Major Activities	Amend building codes, implement NWS enhancements for on-line permit submittal and tracking and communicate code and process changes.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> • Amended Building Codes to allow for Type 3 and Type 5 construction. • Amended building/plumbing codes. • Implemented enhancements to allow for on-line permit submittal and tracking. • Permit and development fees evaluated and reduced. • Implemented use of Skype/Facetime video technology for field inspections. • Permit fees have been reviewed and determined to be competitive
10. Upcoming Work	<ul style="list-style-type: none"> • Additional software enhancements to facilitate online permit applications, processing and review/inspection tracking. • Communications with businesses, development community and public regarding process and code improvements. Outreach and training for residents and contractors on online processes.

11. Considerations	
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ECONOMIC DEVELOPMENT

Strategic Initiative Update Report

- 1. Strategic Priority
- 2. Desired Outcome
- 3. Key Outcome Indicator (KOI)
- 4. Target
- 5. Strategic Initiative
- 6. Project Status

Growth – Economic Development

Good businesses retained

Retention rate

Zero net loss of businesses

DEVELOP BUSINESS RETENTION INITIATIVE AIMED AT KEY SITES

On-track

7. Target Completion Date: 2019

Project Plan

8. Milestones & Major Activities

Identify key sites, develop business retention program, review of retention program by ECDC, business visitation program, "Welcome to Lombard" program, new business follow-up and representation of Village of Lombard at trade shows and events.

Progress Update

9. Recent Progress

- Staff inventoried key development sites which are most ripe for redevelopment and compiled a database inventory.
- Developed business retention program including introduction letter, business database, Village information and promotional efforts.
- Staff reached out to businesses for business retention meetings and has met with a number of local businesses.
- Presentations made to ECDC Committee by Choose DuPage, College of DuPage Small Business Development Center, Illinois DCEO, PACE and DuPage workNet.
- Staff is updating the "Business Resource Handbook" and "Green Building Handbook" and updated information on the Village website.

10. Upcoming Work

- Continued effort to communicate with local large businesses, business corridors, and key business sectors.
- Presentation to ECDC planned regarding the Roosevelt Road corridor retail market.

11. Considerations

- Continue business development and business retention in downtown Lombard

Status Indicator Key



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ECONOMIC DEVELOPMENT

Strategic Initiative Update Report

1. Strategic Priority	Growth – Economic Development	
2. Desired Outcome	Business offerings broadened Business base expansion Good businesses retained	
3. Key Outcome Indicator (KOI)	Business diversity New businesses Retention rate	
4. Target	Policy with ratios tied to incentives adopted Occupancy rates exceeding market Zero net loss of businesses	
5. Strategic Initiative	DEVELOP STATISTICAL REPORTING DOCUMENT FOR PERFORMANCE MEASUREMENT	
6. Project Status	On-track	7. Target Completion Date: 2019

Project Plan

8. Milestones & Major Activities	Develop metrics for measurement, promote Lombard through Business Visitation program, update Business Resource Handbook, develop Green Building Handbook and Revise economic development information on Village website.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> Worked with state and local entities to develop metrics for economic development measurement. Report to ECDC and Village Board with focus on elements influenced by local actions. Created and shared development maps across multiple platforms and media.
10. Upcoming Work	<ul style="list-style-type: none"> Develop a monthly report containing certain key metrics.
11. Considerations	<ul style="list-style-type: none"> Develop a tracking program to serve as a performance measurement tool relating to the implementation of the Village incentive policy. Potential performance measurements include annual building permits, tracking of developments in progress, and heat maps of developments in progress.

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ECONOMIC DEVELOPMENT

Strategic Initiative Update Report

1. Strategic Priority	Growth – Economic Development	
2. Desired Outcome	Business base expansion?	
3. Key Outcome Indicator (KOI)	New businesses?	
4. Target	Occupancy rates exceeding market?	
5. Strategic Initiative	SALE/DEVELOPMENT OF TIF PROPERTY	
6. Project Status	On-track	7. Target Completion Date: 2019

Project Plan

8. Milestones & Major Activities	Explore alternate land use concepts for property, conduct Village Board workshop to seek direction, develop RFP, solicit responses to RFP, initiate review process and negotiate terms and parameters of development agreement.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> Village identified preferred use for 101 S. Main property and has issued a Request for Proposals to development market for consideration. Established TIF district for the Northern Baptist Seminary property to support development.
10. Upcoming Work	<ul style="list-style-type: none"> Evaluate responses to RFP for 101 S. Main Street redevelopment project and pursue project implementation. Utilize newly established TIF for Northern Baptist Seminary property to pursue successful redevelopment.
11. Considerations	<ul style="list-style-type: none"> Continue communications regarding disposition of property at development locations to the general public, adjacent stakeholders and other local governmental partners. Pursue RFP for 101 S. Main to evaluate market interest and proposals for development of the site.

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COMMUNICATION AND COMMUNITY IMAGE

Strategic Initiative Update Report

1. Strategic Priority	Customer – Communication and Community Image	
2. Desired Outcome	Be primary source for community news/information Public perception of Village improved	
3. Key Outcome Indicator (KOI)	Stakeholders preferences Public perception in community survey	
4. Target	Village named preferred source for Village news in survey Majority of respondents indicate Village is approachable	
5. Strategic Initiative	CONDUCT A CITIZEN SURVEY	
6. Project Status	Completed	7. Target Completion Date: Ongoing

Project Plan

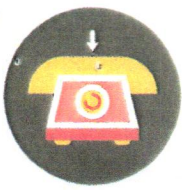
8. Milestones & Major Activities	Research survey methods, Community Relations Committee recommends survey instrument, survey administered, results compiled and reported to Village Board and public.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> • Researched various survey methods and Community Relations Committee recommended survey with National Research Center. • Conducted a village-wide community survey through National Citizen Survey and compared outcomes to national and regional benchmarks. • Survey outcomes presented to Village Board, advisory Committees and community partners. • Village sources were named as a preferred information source within survey and majority of respondents indicated that the Village is approachable.
10. Upcoming Work	Continue information sharing throughout the community and application of outcomes to other communications initiatives where appropriate.
11. Considerations	<ul style="list-style-type: none"> • Village Board direction to conduct the next survey concurrent with needs of Police Department CALEA accreditation in 2020. • Community Relations Committee will evaluate survey instrument and identify additional topics, questions or revisions, as needed.

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COMMUNICATION AND COMMUNITY IMAGE

Strategic Initiative Update Report

1. Strategic Priority

Customer – Communication and Community Image

2. Desired Outcome

**Be primary source for community news/information
Public perception of Village improved**

3. Key Outcome Indicator (KOI)

**Stakeholder preferences
Public perception in community survey**

4. Target

**Village named preferred source for Village news in survey
Majority of respondents indicate Village is approachable**

5. Strategic Initiative

VILLAGE REPRESENTATION AT 30% OF VILLAGE EVENTS

6. Project Status

Completed

7. Target Completion Date: Ongoing

Project Plan

8. Milestones & Major Activities

Identify events for Village presence, present to Community Relations Committee, and execute attendance at identified events.

Progress Update

9. Recent Progress

- Village presence at half of all Lombard Summer Concerts and Cruise Nights. Dedicated Village of Lombard table with activities, personnel and giveaways.
- Representation and public interaction at Arts & Crafts Fair, Spooktacular, Jingle Bell Jubilee, District 44 Back to School Tailgate, and Park District Touch-a-Truck.
- Village held open-house communication initiatives on Woodmore development and other area construction and infrastructure improvement projects.

10. Upcoming Work

Ongoing and continuing efforts to have presence and increase visibility of Village of Lombard at local events.

11. Considerations

- Village should evaluate adoption of a social media policy to protect and preserve the public's positive perception of the Village.
- Additional specific local events or methods of participation/ representation for the Village to pursue will be identified, as needed.

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COMMUNICATION AND COMMUNITY IMAGE

Strategic Initiative Update Report

1. Strategic Priority	Customer – Communication and Community Image	
2. Desired Outcome	Public perception of Village improved	
3. Key Outcome Indicator (KOI)	Public perception in community survey	
4. Target	Majority of respondents indicate Village is approachable	
5. Strategic Initiative	IMPLEMENT EMPLOYEE CUSTOMER SERVICE POLICY AND ADOPT CITIZEN RESPONSE POLICY.	
6. Project Status	On-track	7. Target Completion Date: 2019




Project Plan

8. Milestones & Major Activities	Evaluate customer service policies for each department, adopt consistent/universal customer service policy, and implement customer service policy. Identify citizen response policies, develop and adopt, citizen response policy and implement training on citizen response policy.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> • Village maintains a high level of customer service, quickly providing high-quality responses to direct citizen inquiries. • Conducted staff training on interpersonal communication skills training for Village employees. • Training and coaching session conducted for Village Hall personnel.
10. Upcoming Work	<ul style="list-style-type: none"> • Evaluation, inventory, and documentation of existing customer service practices to standardize across organization. • Formal policies to be developed.
11. Considerations	<ul style="list-style-type: none"> • Board considerations: <ul style="list-style-type: none"> ○ Document policy of having a live person answer telephone inquiries; ○ Document policy of providing a smooth transition for transferred calls and not "cold" transferring customers from one line to the next without introduction; ○ Document current process of having front counter staff involved and informed of major initiatives and communications plans.

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COMMUNICATION AND COMMUNITY IMAGE

Strategic Initiative Update Report

1. Strategic Priority

Customer – Communication and Community Image

2. Desired Outcome

Be primary source for community news/information

3. Key Outcome Indicator (KOI)

Stakeholders preferences

4. Target

Village named preferred source for Village news in survey

5. Strategic Initiative

DEVELOP ANALYTIC REPORTING FOR COMMUNICATIONS GOALS

6. Project Status

On-track

7. Target Completion Date:

2019

Project Plan

8. Milestones & Major Activities

Identify areas of measurement and goals, collect data on communications efforts, present analytic reports to Community Relations Committee and Village Board.

Progress Update

9. Recent Progress

- Developed analytic reporting to track and present communications efforts.
- Reporting and results presented to Community Relations Committee.
- For 2016, the Village had more than 3,000 followers on Facebook and 2,000 on Twitter, reflecting increases of 43% and 3% respectively.

10. Upcoming Work

Share reporting and results with Village Board of Trustees.

11. Considerations

- Share communications stats with Community Relations Committee and Board quarterly;
- Track whether people are reading and receiving messaging on major communications initiatives;
- Include statistics on how long people are on our website;
- Target continued growth of communications initiatives and outreach.

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OPERATIONS

Strategic Initiative Update Report

1. Strategic Priority	Operational Sustainability - Operations	
2. Desired Outcome	High quality services delivered	
3. Key Outcome Indicator (KOI)	Service Levels	
4. Target	Core service levels determined in all departments	
5. Strategic Initiative	ESTABLISH CORE SERVICE LEVELS	
6. Project Status	On-track	7. Target Completion Date: 2019

Project Plan

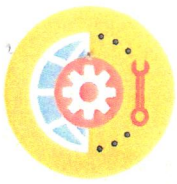
8. Milestones & Major Activities	Identify core service levels, evaluate service level expectations, refine level of services, implement applicable modifications.
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Progress Update

9. Recent Progress	<ul style="list-style-type: none"> Pursuant to Long Range Financial Planning, departments evaluated current service levels and core services. Service level modifications identified and realigned with budget. Service level modifications made including: taxi subsidy program; DuPage Senior Services programs; Village Hall lobby hours; banner and winter décor; street sweeping; Police Department lobby hours; start time for downtown clean-ups and evaluation and modification of vacated employee positions. Programs and service levels specifically evaluated but not modified included Fire Department public education program, quartermaster system for FD uniforms, accreditation programs. Evaluated FD emergency medical service calls and implemented third ambulance.
10. Upcoming Work	Continue evaluation of core service levels independently and in connection with the annual budget process and implementation of long range financial plan.
11. Considerations	<ul style="list-style-type: none"> Adoption of a formal OCI pavement condition standard to establish a level of service goal for pavement condition. Continued Fire Department evaluation of vehicles and apparatus list. Evaluation and review of fleet list and needs Village-wide. Village staff to continue evaluation of budget as part of long range financial planning to identify and evaluate non-essential and enhanced service provision.

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OPERATIONS

Strategic Initiative Update Report

1. Strategic Priority

Operational Sustainability - Operations

2. Desired Outcome

Competent Capable Workforce

3. Key Outcome Indicator (KOI)

Employee Training

4. Target

All employee meet minimum standards

5. Strategic Initiative

ESTABLISH MINIMUM STANDARDS FOR EMPLOYEE TRAINING/EDUCATION

6. Project Status

On-track

7. Target Completion Date:

2019

Project Plan

8. Milestones & Major Activities

Identify training standards, implement training, fund training/education within the budget, monitor and track employee training.

Progress Update

9. Recent Progress

- Employee training offered including: harassment training; DOT training, supervisory training; conflict resolution training; EAP training; improving interpersonal communication skills.
- Minimum training standards met in FD and PD consistent with Departmental and accreditation standards.
- Established training SOPs and cross-training program in Public Works Department. Training protocols and timelines established for each position.

10. Upcoming Work

- Evaluate tracking mechanism and formal training matrices to ensure employee training needs, training opportunities and schedules are aligned.
- Establish minimum training in connection with employee job descriptions.

11. Considerations

- Ensure adequate opportunities exist for employee training and development beyond mandatory or required minimum training standards (e.g., elective and professional development opportunities)

Status Indicator Key



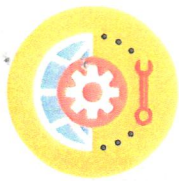
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OPERATIONS

Strategic Initiative Update Report

- 1. Strategic Priority
- 2. Desired Outcome
- 3. Key Outcome Indicator (KOI)
- 4. Target
- 5. Strategic Initiative
- 6. Project Status

Operational Sustainability – Operations

Organizational partnerships improved

Shared service agreements

One new internal and one new external

DEVELOP ONE INTERNAL AND ONE EXTERNAL PARTNERSHIP

Completed

7. Target Completion Date: Ongoing

Project Plan

- 8. Milestones & Major Activities

Identify opportunities for external shared services, pursue shared service opportunities, and implement partnerships.

Progress Update

- 9. Recent Progress

- External partnerships – Glen Ellyn boundary agreement with revenue sharing potential; external PW partnerships for saw cutting, concrete rehab, sewer televising; joint purchase of vehicles, salts, trees and equipment; joint traffic signal maintenance; joint application and implementation of FD training simulator; joint PD training for State-mandated law enforcement training (cost-sharing); gas pump use by external groups; ambulance at GEHS football games; PW partnership with COD on leadership training through IPSI.
- Internal partnership – FD/PD collaboration on Emergency Response for special events; reallocation of Finance Accounting Assistant functions between Human Resources, CD and Village Clerk's Office; consolidation of facilities operations within PW; and PD/PW collaboration on gun range improvements.

- 10. Upcoming Work

- Continue identifying opportunities and implementing partnerships externally and internally within the organization.
- Explore shared license plate reader with Glen Ellyn.

- 11. Considerations

- Identify opportunities for further partnership with Yorktown Center, Park District, National University of Health Sciences and DuPage County;
- Evaluate opportunity for shared IT services with other government agencies.

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