



# ***VILLAGE OF CARY***

## ***Three-Year Strategic Work Plan Summary***

***Adopted by the Village Board of Trustees on January 20, 2015***

## Village of Cary - Strategic Plan Summary 2014-16

Strategic Priority	Key Outcome Indicator (KOI)	Target	Strategic Initiatives
<b>FINANCE</b>	Bond Rating	Maintain current rating – Aa2	a) Redefine the budgeting system b) Develop and update financial policies c) Develop long-term financial plan d) Needs assessment for Enterprise Resource Planning system e) Develop and implement Finance Department. succession plan
	Fund Balances	40-45% of general fund revenues	
	Outside/Alternative Revenue sources	5 new revenue sources	
<b>GROWTH</b>	Commercial/retail/industrial vacancies	Reduce rate 15-20%	a) Implement Economic Development strategy b) Establish policy framework for Economic Development and tax generation c) Initiate actions specified in Comprehensive Plan d) Comprehensive TIF analysis e) Revise and plan for Meyer site
	Key development sites	Contact property owner/broker of strategic development properties quarterly	
	Sales tax	Increase by 5% each year	
<b>MAINTENANCE</b>	Police/Village Hall facility	Funding strategy, location, needs analysis-completed	a) Develop comprehensive facilities plan b) Implement pavement management system c) Phase II Sunset Crest drainage project d) Master flooding mitigation study e) Develop facilities and equipment replacement funds
	Infrastructure reliability	Streets meet 70 Pavement Rating Condition, meet all regulations, funding plan adopted	
	New Metra station	Funding strategy, location, needs analysis-completed	
<b>LEADERSHIP</b>	Respectful personal communications	Quarterly meetings to review/resolve	a) Develop Board guidelines for respectful discourse b) Develop and implement a public information plan c) Develop a mechanism for receiving feedback regarding municipal services
	Things done right	No issues reconsidered	
	Decisions	Decisions aligned w/ Strategic/Comp Plan	
<b>WORKFORCE</b>	Promotable employees	At least 1 internal candidate for mgmt. openings	a) Develop career development plan and training goals for all positions b) Develop and conduct employee survey c) Establish value proposition expectations- Board and staff
	Engaged employees	75% of employees take the employee survey	

**Strategic Priority: CAPITAL INVESTMENT**  
**Initiative: Develop comprehensive facilities plan**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Assess current Village Hall & Police Dept. facility	Summary report with cost estimates and suggested timelines for necessary repairs/maintenance	Public Works	2 <sup>nd</sup> quarter 2015
Identify potential site locations for Police Department and Village Hall	Village Board consensus on suggested site location(s) and direction for more detailed analysis	Police & Public Works	4 <sup>th</sup> quarter 2015
Evaluate options for Metra station and investigate outside funding	Options for Metra station are discussed	Administration	1 <sup>st</sup> and 2 <sup>nd</sup> quarter 2015
Conduct needs assessment studies for police, Village Hall and set project goals	Village Board consensus on goals and project direction	Police & Public Works	1 <sup>st</sup> quarter 2016
Conduct public outreach	Completion of surveys & public meeting	Administration	2 <sup>nd</sup> quarter 2016
Conduct facility assessment and site analysis studies for Police Department and Village Hall	Village Board consensus on preferred option(s) and project direction	Police & Public Works	3 <sup>rd</sup> quarter 2016
Final Village Board direction on new facility implementation	Village Board workshop & consensus	Administration	4 <sup>th</sup> quarter 2016

**Strategic Priority: CAPITAL INVESTMENT****Initiative: Implement pavement management system**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
As funding is available, implement at least \$1 million annually towards pavement management (resurfacing and pavement preservation)	Maintain a "fair" or better pavement condition rating (>70) for the overall system and a pavement condition rating of >75 for major collectors	Public Works	Annually
Utilize a pavement management system to create an annual rehabilitation plan as well as a dynamic multi-year capital improvement program	System is utilized with an updated pavepro pavement management database and GIS layers	Public Works	1 <sup>st</sup> quarter 2015
Enhance infrastructure assessment and inspection processes	Revised standard operating procedures and implement for each annual maintenance program	Public Works	1 <sup>st</sup> and 2 <sup>nd</sup> quarter 2015
Explore alternative pavement preservation techniques	Summary memo with recommendations on alternative treatments for future implementation	Public Works	2 <sup>nd</sup> quarter 2015

**Strategic Priority: CAPITAL INVESTMENT****Initiative: Phase II Sunset Crest drainage project**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Public meeting	Hold public informational meeting with residents, staff and Village Board	Public Works	4 <sup>th</sup> quarter 2014
HMGP grant agreement	Executed agreement with IEMA by Village Board	Public Works	1 <sup>st</sup> quarter 2015
Property acquisition	Complete appraisals, purchase offers, deed restrictions and closings	Public Works	2 <sup>nd</sup> quarter 2015
Engineering & permitting for demolition and grading	Prepare grading plans, finalize IEMA coordination, issue request for bids and award bids	Public Works	2 <sup>nd</sup> quarter 2015
Demolition and grading	Complete demolition and grading, and receive final inspection sign-off from IEMA	Public Works	4 <sup>th</sup> quarter 2015
Project closeout	Reimbursement from FEMA	Public Works	1 <sup>st</sup> quarter 2016
Complete analysis of other flooding mitigation measures to supplement the HMGP buyout project	Implement at least one additional flooding mitigation measure	Public Works	3 <sup>rd</sup> quarter 2016

**Strategic Priority: CAPITAL INVESTMENT****Initiative: Comprehensive Flooding Mitigation Master Plan**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Conduct a comprehensive flooding mitigation master plan for various locations Village-wide	Conceptual design and cost estimates for potential drainage improvements	Public Works	4 <sup>th</sup> quarter 2015
Update multi-year capital improvement program	Village Board approval of proposed CIP and annual budget	Public Works	Annually
Seek grant opportunities and other alternative funding mechanisms	Identification of available grants and submit application(s) for funding	Public Works	Annually

**Strategic Priority: CAPITAL INVESTMENT****Initiative: Develop facilities & equipment replacement funds**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Identify strategy for structure of replacement funds (separate category w/line items, separate accounts for each building & equipment, etc.)	Preferred structure for new accounts identified and proposed for next fiscal year budget	Finance	1 <sup>st</sup> quarter 2015
Add new fund account(s) to next fiscal year budget	Placeholder account(s) established	Finance	1 <sup>st</sup> quarter 2015
Identify sustainable funding strategy for both facility replacement and equipment replacement funds	Identify at least two funding sources and a structure in the village's budget	Finance	4 <sup>th</sup> quarter 2015

**Strategic Priority: ECONOMIC DEVELOPMENT****Initiative: Implement Economic Development Plan**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Continue to implement the goals and objectives outlined in the 2013 Economic Development Plan	Status report to the Village Board on recommended action items	Community Development	2 <sup>nd</sup> quarter 2015, ongoing
Develop quarterly updates on retail, office and industrial vacancies throughout the Village.	Provide quarterly status reports to the Village Board on current vacancy levels	Community Development	2 <sup>nd</sup> quarter 2015, ongoing
Continue to represent the Village of Cary at local trade shows and events.	Provide progress reports and potential leads to the Village Board following each event	Community Development	Ongoing
Continuously enhance the Village website promoting current and upcoming development projects	Create a "Projects" page on the Village website	Community Development	1 <sup>st</sup> quarter 2015
Establish semi-annual broker meetings with landlord representatives and prospective brokers interested in Cary	Host breakfast or lunch meetings to share information and learn more about the current status of vacant properties	Community Development	4 <sup>th</sup> quarter 2015

**Strategic Priority: *ECONOMIC DEVELOPMENT*****Initiative: *Establish policy framework for Economic Development & tax generation***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
As part of the Economic Development Plan status report, provide the Village Board with a detailed fiscal analysis of existing vacancies throughout all land use types.	Report to Village Board on quantifying the fiscal impacts of filling vacancies.	Community Development /Finance	3 <sup>rd</sup> quarter 2015, 2015 and on-going
Establish a detailed business improvement grant program focusing on exterior improvements for new and existing businesses.	Village Board approves a defined program focusing on minimum eligibility requirements and maximum loan amount.	Community Development /Admin	3 <sup>rd</sup> quarter 2015
Develop a "Shop Local" campaign in coordination with the CG Chamber educating residents about the importance of keeping sales tax dollars in Cary.	Brochures and posters that can be given to local businesses.	Community Development /Cary-Grove Chamber	4 <sup>th</sup> quarter 2015
Establish a clear vision for future use of the remaining revolving loan fund balance by working with DCEO.	DCEO provides the Village direction regarding use of the funds	Community Development	2 <sup>nd</sup> quarter 2015
Develop an annexation strategy/plan identifying strategic opportunities for future growth. Identify future fiscal impacts and capital improvements.	Plan approved by Village Board	Community Development /Finance/Public Works	2 <sup>nd</sup> quarter 2016

**Strategic Priority: *ECONOMIC DEVELOPMENT*****Initiative: *Initiate actions specified in Comprehensive Plan***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Initiate a RFP for consultant services for a comprehensive update of the Zoning and Subdivision Ordinance	Village Board approves a scope of services and budget for updating the Zoning and Subdivision Ordinance	Community Development/ Administration	1 <sup>st</sup> quarter 2015
Select a consultant and begin an update to the Village Zoning Ordinance	Consultant hired to complete an update to the Zoning and Subdivision Ordinance	Community Development	2 <sup>nd</sup> quarter 2015
Develop a strategy for corridor enhancements to Village entry way signage	Create plans and obtain budgets for new gateway signage	Community Development/Public Works/ Administration	4 <sup>th</sup> quarter 2015
Develop a strategy for the future redevelopment of the former Maplewood site by partnering with School District 26	Marketing and development strategy developed for the site	Community Development/ Administration	2 <sup>nd</sup> quarter 2015
Work with the owner and broker for the Selcke Property and Jack's Channel property to develop a marketing strategy that reflects the recommendations of the comprehensive plan	Marketing strategy developed	Community Development	3 <sup>rd</sup> quarter 2015
Update the Village Sign Ordinance	Comprehensive update the Village's Sign Ordinance complete	Community Development	1 <sup>st</sup> quarter 2016

**Strategic Priority: *ECONOMIC DEVELOPMENT*****Initiative: *Comprehensive TIF analysis***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Prepare an RFQ/RFP for consultant services to review both existing TIF Districts, assist with the develop of strategies to enhance implementation of the districts and assess the possible creation of a new TIF(s)	Work with the Village Board to develop a scope of services, budget and hire a TIF/Financial consultant	Community Development /Finance/ Administration	3 <sup>rd</sup> quarter 2016
Establish a strategy for maximizing the use of existing TIF funds in TIF 1 as part of the potential redevelopment of the Selcke property	Village Board approves a specific policy for using TIF funds to help spur development activity on the Selcke property.	Community Development /Administration	3 <sup>rd</sup> quarter 2016

**Strategic Priority: *ECONOMIC DEVELOPMENT*****Initiative: *Revise & plan for Meyer site***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Establish a strategy for the possible future extension request by Meyer Material for mining activities	Timeframe for submitting for an amendment is developed.	Community Development /Administration	3 <sup>rd</sup> quarter 2015
With the assistance of a consultant, establish a detailed Vision Plan for the future redevelopment of the Meyer Material property. This should include a potential partnership with the Cary Park District.	Village Board approves a scope of services, budget and hires a planning consultant	Community Development/ Administration	2 <sup>nd</sup> quarter 2016

**Strategic Priority: *EFFECTIVE GOVERNANCE*****Initiative: *Develop Board guidelines for respectful discourse***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Research communities that have a code of conduct/core values for elected officials and employees	Examples provided to Village Administrator	Administration	3 <sup>rd</sup> quarter 2015
Draft a Village of Cary code of conduct/core values	Provide draft to COTW	Administration	4 <sup>th</sup> quarter 2015
Revise draft based on feedback from the COTW	Village Board approve the policy	Administration	1 <sup>st</sup> quarter 2016

**Strategic Priority: *EFFECTIVE GOVERNANCE*****Initiative: *Develop and implement a public information plan***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Review existing public information tools the Village currently utilizes	Public information tools are identified	Administration	2 <sup>nd</sup> quarter 2015
Research what tools other communities are utilizing	Public information tools from other communities are gathered	Administration	2 <sup>nd</sup> quarter 2015
Review findings and recommendations with Village Administrator	VA is provided report outlining options	Administration	2 <sup>nd</sup> quarter 2015
Begin process for implementing new public information tools as needed	Public information tools are implemented and process is communicated with the Village Board	Administration	3 <sup>rd</sup> quarter 2015
Effectively communicate with the stakeholders the options that are available to them	Stakeholders are information of the public information tools that are available to them.	Administration	3 <sup>rd</sup> quarter 2015

**Strategic Priority: EFFECTIVE GOVERNANCE****Initiative: Develop a mechanism for receiving feedback regarding municipal services**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Develop an RFP for conducting a community wide survey	RFP created	Administration	3 <sup>rd</sup> quarter 2015
Communicate with residents the significance of the survey	Notices provided to residents about survey	Administration	3 <sup>rd</sup> quarter 2015
Hire a consultant to assist with the survey	Village Board approves a contract with the consultant to conduct the survey	Administration	4 <sup>th</sup> quarter 2015
Have residents complete the survey	Ensure there is a mechanism for all residents to complete the survey (electronic, written, other means)	Administration	2 <sup>nd</sup> quarter 2016
Review results with the Village Board	Discuss results with the Village Board	Administration	4 <sup>th</sup> quarter 2016
Make recommendations for improvements based on the survey	Village Board reviews and approves action steps	Administration	Ongoing
Communicate with residents regarding certain actions that were taken	Provide updates to the residents through various media sources	Administration	Ongoing

**Strategic Priority: FINANCIAL STABILITY****Initiative: Redefine the budgeting system**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Revamp monthly financial report to provide Village Board and Management Team monthly budget update	Develop new monthly financial report format that enhances reporting to Village Board and Management Team	Finance/ Administration	2 <sup>nd</sup> quarter 2015
Quarterly review of all Capital Improvement projects related to scheduling and work completed to date	Work with Dept Heads on respective projects to assess status of budgeted projects to be completed	Finance/Dept Heads	Ongoing
Mid-year budget report to determine ability to attain budgeted revenues and expenditures at fiscal year end	Work with Dept heads to provide fiscal year end projections	Finance	4 <sup>th</sup> quarter 2015
Compile and develop Amended Budget, if needed, due to unbudgeted expenditures arising during the fiscal year	Track significant unbudgeted expenditures that arise during the year	Finance	1 <sup>st</sup> & 2 <sup>nd</sup> quarter each fiscal year
Provide projected fiscal year end fund balance and work with Village Administrator on Fund Balance Policy recommendations	Review with Village Administrator	Finance	1 <sup>st</sup> quarter 2015 (projections) 3 <sup>rd</sup> quarter 2015 (Recommendations)

**Strategic Priority: FINANCIAL STABILITY****Initiative: *Develop & update financial policies***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Develop procedures manual for payroll and accounts payable operating procedures	Written procedures manuals approved by Village Board	Finance	2 <sup>nd</sup> quarter 2015
Develop procedures manual for year-end processes for calendar payroll year end and fiscal year closing.	Written procedures manual approved by Village Board	Finance	2 <sup>nd</sup> quarter 2015
Internal review of current payroll and purchasing policy to determine if changes need to be made and approved	Update policies, if needed.	Finance	2 <sup>nd</sup> quarter 2015
Draft a debt policy in anticipation of debt being issued in the future related to facilities	Presentation to COW regarding draft policy	Finance/ Administration	2 <sup>nd</sup> quarter 2015
Review capitalization threshold for current fixed asset policy	Updated fixed asset policy	Finance/ Administration	2 <sup>nd</sup> quarter 2015

**Strategic Priority: FINANCIAL STABILITY****Initiative: *Develop long-term financial plan***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Develop 5 year capital program	List of projects over a 5 year period approved by Village Board	Dept Heads	3 <sup>rd</sup> quarter 2015
Update Trilogy study and water rates based on water improvements outlined in Capital Plan	New water & sewer rates developed every 5 years based on 5 year Capital Improvement Program	Finance/Public Works	Ongoing
Develop financing plan for new Police Facility and/or new Village Hall	Provide long-term debt financing using existing revenue sources	Finance/ Administration	4 <sup>th</sup> quarter 2015
Restrict budget funding to projects that will be completed within the current fiscal year	Allows for realistic capital project funding in future fiscal years	All Dept Heads	Ongoing

**Strategic Priority: FINANCIAL STABILITY****Initiative: Needs assessment for an Enterprise Resource Planning (ERP) system**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Develop team with representation from all departments to determine existing use and future needs	Discussion with Dept Heads and team is formulated	Finance	2 <sup>nd</sup> quarter 2015
Create a list of pro's and con's to determine benefits from a new ERP system	Needs analysis is completed	Finance	2 <sup>nd</sup> quarter 2015
Select an individual to spearhead the process and to act as spokesperson during implementation	Select project leader	Finance	2 <sup>nd</sup> quarter 2015
Develop timeline and action plan for new ERP selection and implementation	Plan consensus by Village Management Team, Village Board approval of proposed plan	Finance	2 <sup>nd</sup> quarter 2015
Create RFP for ERP system	RFP distributed to interested vendors	Finance	2 <sup>nd</sup> quarter 2015
Review and meet with representatives from firms currently providing municipal software	Provide potential software vendor list	Finance	3 <sup>rd</sup> quarter 2015
Finalize contract with a vendor	Village Board approves contract	Finance	3 <sup>rd</sup> quarter 2015

**Strategic Priority: FINANCIAL STABILITY****Initiative: Develop & implement Finance Department succession plan**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Continue cross-training in various operating functions (i.e. payroll, utility billing, accounts payable, accounts receivable)	Cross-training completed	Finance	1 <sup>st</sup> quarter 2015
Review of Lauterbach & Amen Contract	Future succession plan completed	Finance/ Administration	2 <sup>nd</sup> quarter 2015

**Strategic Priority: *WORKFORCE DEVELOPMENT*****Initiative: *Develop career development plan & training goals – all positions***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Compile list of current job descriptions, qualifications and required certifications for each position	Group similar positions, develop a list	Administration/Dept Heads	2 <sup>nd</sup> quarter 2015
Discuss training expectations with employees during performance review process.	Meeting with employee during performance review	Dept Heads	2 <sup>nd</sup> quarter 2015
Establish general career development and training needed for all employees. Separate mandatory and non-mandatory training.	Create a training manual for all positions		4 <sup>th</sup> quarter 2015
Have Department Safety Committees and Executive Safety Committee review training from a risk management perspective	Safety Committee reviews training manual	Administration	Ongoing
Implement Training program	Budget for training	Administration/Dept Heads	Ongoing
Review positions and consider components of succession planning	Village Administrator discusses with the Village Board on an annual basis	Administration	Ongoing

**Strategic Priority: *WORKFORCE DEVELOPMENT*****Initiative: *Develop & conduct employee survey***

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Develop an employee survey	Survey distributed	Administration	4 <sup>th</sup> quarter 2015
Communicate with the employees the significance of the survey	Discussion during employee meetings, email and in-person	Administration/Dept Heads	4 <sup>th</sup> quarter 2015
Have employees complete survey	Create a mechanism for all employees to have access to the survey (Electronic, written, other means)	Administration	1 <sup>st</sup> quarter 2016
Review results and make recommendations for improvement	Discuss results with Dept Heads and develop recommendations	Administration	1 <sup>st</sup> quarter 2016
Implement actions of the survey	Discuss action steps with the Village Board	Administration /Dept Heads	1 <sup>st</sup> quarter 2016
Communicate with employees regarding the actions that were taken as a results of the survey	Discussion during employee meetings, email and in-person	Administration	2 <sup>nd</sup> quarter 2016
Repeat the survey annually	Distribute survey	Administration	Ongoing

**Strategic Priority: WORKFORCE DEVELOPMENT****Initiative: Establish value proposition expectations – Board & staff**

<b>Actions</b>	<b>Measure of Success</b>	<b>Who's Responsible</b>	<b>Target Date</b>
Research existing data (exit interviews, feedback from employees)	Summary created	Administration	3 <sup>rd</sup> quarter 2015
Have employees complete survey	Create a mechanism for all employees to have access to the survey (Electronic, written, other means)	Administration	1 <sup>st</sup> quarter 2016
Review results of the survey	Discuss results with Dept Heads and develop recommendations	Administration	1 <sup>st</sup> quarter 2016
Develop a statement indicating the Village's value proposition	Review with the Village Board	Administration	2 <sup>nd</sup> quarter 2016
Implement value proposition	Share with employees and new employees during the onboarding process	Administration	2 <sup>nd</sup> quarter 2016