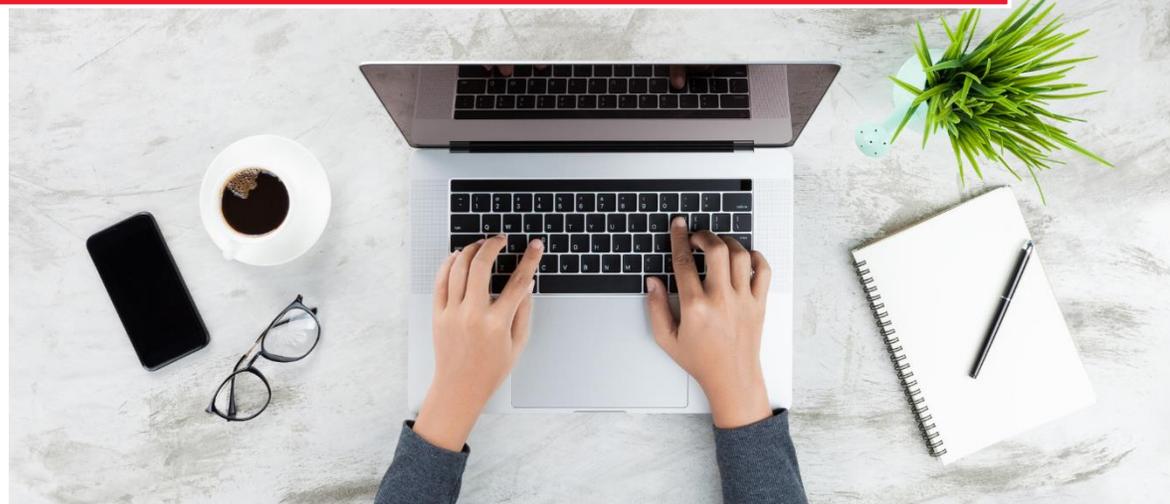




City of Milton 2020 – 2024 Strategic Plan Project Charter & Work Plan



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Project Charter

Background

In 2007, the City of Milton Common Council approved a strategic plan. Since then the strategic plan has not been updated or revised. The Common Council and staff will be working together to develop a new strategic plan for the City of Milton that will span 2020 – 2024.

Goals

- Establish a transparent and inclusive strategic planning process that involves elected officials, employees, and community members.
- Adopt a strategic plan that serves as a guide for decision making in all areas of operation for the City of Milton.
- Provide regular communication to elected officials, staff, and the public about the strategic planning process and the implementation and use of the completed strategic plan.
- Develop a process for annual reviews of the strategic plan.

Scope

- Establish the project charter and timeline to develop a strategic plan for the City of Milton.
- Create a mission, vision, and values for the City of Milton as a whole.
- Perform internal and external scans of the current climate in the City of Milton to determine major issues and challenges for the community and organization.
- Provide internal and external engagement and input opportunities for staff and community members.
- Develop goals, objectives, strategies, and actions based on the major issues and challenges identified and community and staff feedback.
- Finalize a complete document that summarizes the information obtained through the strategic planning process, and that showcases the finalized issues and challenges, goals, objectives, strategies, and actions to move the community forward.

Project Team

Project Management

Title	Name	Phone	Email
Project Manager / Admin. Services Director	Inga Cushman	(608) 868-6900 ext. 5	icushman@milton-wi.gov

Department Heads

Title	Name	Phone	Email
City Administrator	Al Hulick	(608) 868-6900 ext. 6	ahulick@milton-wi.gov
Finance Director / Treasurer	Dan Nelson	(608) 868-6900 ext. 3	dnelson@milton-wi.gov
Police Chief	Scott Marquardt	(608) 868-6910	smarquardt@milton-wi.gov
Public Works Director	Howard Robinson	(608) 868-6914	hrobinson@milton-wi.gov
Library Director	Ashlee Kunkel	(608) 868-7462	kunkel.ashlee@als.lib.wi.us
City Clerk	Leanne Schroeder	(608) 868-6900 ext. 2	lschroeder@milton-wi.gov

Elected Officials

<i>Title</i>	<i>Name</i>	<i>Phone</i>	<i>Email</i>
Mayor	Anissa Welch	(608) 751-7198	awelch@milton-wi.gov
Aldersperson	Lynda Clark	(608) 290-5674	lclark@milton-wi.gov
Aldersperson	Devin Elliott	(608) 921-5105	delliott@milton-wi.gov
Aldersperson	Ryan Holbrook	(608) 577-0492	rholbrook@milton-wi.gov
Aldersperson	Larry Laehn	(920) 540-9927	llaehn@milton-wi.gov
Aldersperson	Theresa Rusch	(608) 295-5468	trusch@milton-wi.gov
Aldersperson	Bill Wilson	(608) 868-9180	bwilson@milton-wi.gov

Employee Focus Group

This group will convene to discuss the major issues and challenges facing the City of Milton, and what the City of Milton is doing well. The Department Heads will recommend employees from their departments to the Employee Focus Group. The Employee Focus Group will consist of three representatives from the Police Department, two from the Public Works Department, one from the Milton Public Library, and one from City Hall. These allocations are based on the number of employees in each department.

Community Focus Group

This group will convene to discuss the major issues and challenges facing the City of Milton, and what the City of Milton is doing well. This group will be representative of the community. The goal is to have a representative from the following organizations (in no particular order):

Milton Area Chamber of Commerce (MACC)	Milton Historical Society / Milton House Museum	The Gathering Place Senior Activity Center
School District of Milton	Milton Area Youth Center	Rock County Supervisor
Milton College Preservation Society	Milton Masonic Temple	Milton Lions Club
Milton Optimist Club	United Way	Community Action
Rock County Economic Development	Milton Food Pantry / Milton Community Action	Janesville Area Convention & Visitors Bureau (JACVB)
Local Businesses (Five Representatives)	Faith Community (Three Representatives)	Citizens (Five Representatives)

Those interested in serving will be asked to complete an application. The Mayor will review the applications for the focus group, and then make a recommendation to Council.

High School Student Focus Group

This group will convene to discuss the major issues and challenges facing the City of Milton, and what the City of Milton is doing well. This group will be representative of the Milton High School population with three representatives from each grade level, 9-12. The City of Milton will work with the School District of Milton on promoting this community service opportunity to the students. The City of Milton will inquire whether this opportunity will qualify for Silver Cord Hours. The Mayor will review applications for the focus group, and then make a recommendation to Council.

Key Stakeholders

	Low Support	High Support
High Impact	<ul style="list-style-type: none"> • Staff and elected officials who lack “buy-in” for the strategic planning process or who don’t understand the process or need. • Community members who view strategic planning as a “waste of time.” 	<ul style="list-style-type: none"> • Staff and elected officials who are motivated to complete the strategic planning process and see the value in its completion. • Community members who are in support of the organization spending time to complete a strategic planning process. • Media who are interested and supportive of the process.
Low Impact	<ul style="list-style-type: none"> • Individuals who don’t follow news about the City of Milton. • Employees who are not invested in the progress of the City of Milton as a community or organization. • People who live in surrounding townships. 	<ul style="list-style-type: none"> • People from outside of the community who are interested and supportive of the process, such as other local government professionals. • People who live in surrounding townships.

Project Milestones

- Community Survey
- Employee Survey
- Employee Focus Group – Department Heads will determine who will serve as representatives for their departments.
- Community Focus Group – Applications will be accepted for those interested in serving. Mayor Welch will make a final decision who will be on the focus group.
- High School Student Focus Group – Applications will be accepted for those interested in serving. Mayor Welch will make a final decision who will be on the focus group.
- Strategic Plan Completed
 - Mission
 - Vision
 - Values
 - Major Issues / Challenges – External & Internal
 - Goals
 - Objectives
 - Strategies / Actions
 - Major Strategic Initiatives (Optional)

Project Budget

There is not a specified budget for this process. The main items needed to complete this process will be paper, printing, markers, dry erase boards, flip chart paper, and computers.

Constraints, Assumptions, Risks, and Dependencies

The major constraint will be time. Will elected officials, staff, and others involved in the process have enough time to dedicate to the strategic planning process? The assumption is that all involved believe this is an important process to continue to move the community and organization in a positive direction, and those involved will make time in order for the process to be successful. The assumption leads to the risk those involved are not committed or motivated to follow through with the process. This process will be

dependent upon the buy-in from elected officials, staff, and others involved. Leaders in the organization will need to educate staff members about the importance of strategic planning.

Project’s Criteria for Success

All deadlines will be met or adjusted as necessary to keep the project on track. The final strategic plan will be approved by Council on or before September 1, 2020 to ensure it is ready before 2021 budget decisions are made.

Work Plan

Phase 1: Preparation

Action	Tasks	Timeline	Lead
Meeting 1: Present an overview of the proposed strategic planning initiative to the Department Head Team.	<ul style="list-style-type: none"> • Present the project charter, work plan, and timeline to the Department Head Team for feedback. 	Monday, March 2, 2020, at 11:30 a.m.	Inga Cushman, Administrative Services Director
Meeting 2: Present the proposed strategic plan initiative to the Common Council for approval to proceed.	<ul style="list-style-type: none"> • Present the project charter, work plan, and timeline to the Common Council. • Common Council approval of the strategic plan initiative and accompanying documents with any requested modifications. 	Tuesday, March 3, 2020, At 6 p.m.	Al Hulick, City Administrator
Establish webpage on City of Milton’s website for the strategic planning process, and consider additional social media and other outreach options during the strategic planning process.	<ul style="list-style-type: none"> • Determine what documents, links, and text to include on the webpage. • Determine whether subpages are necessary and create those as needed. • Create electronic versions of the focus group applications. • Explore additional ways to engage and update the community on the process. 	Publish webpage(s) on March 4, 2020. Ongoing after Council approval to pursue the project.	Inga Cushman, Administrative Services Director
Identify members of focus groups	<ul style="list-style-type: none"> • Contact potential focus group members for the Employee Focus Group, Community Focus Group, and High School Student Focus Group. • Open application process. • Bring names to Council for approval 	Begin process March 3, 2020. Council Approval of Focus Group Members: Tuesday, May 5, 2020, at 5 p.m.	Mayor Anissa Welch

Action	Tasks	Timeline	Lead
Employee Survey	<ul style="list-style-type: none"> • Consult with Department Head Team and Common Council on the questions to include in the survey. • Create paper and electronic versions of the survey. 	Council Review of Survey: Tuesday, May 19, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Community Survey	<ul style="list-style-type: none"> • Consult with Department Head Team and Common Council on the questions to include in the survey. • Input from relevant committees, commissions, and boards. • Create paper and electronic versions of the survey. 	Council Review of Survey: Tuesday, May 19, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director

Phase 2: Mission, Vision, & Values

Action	Tasks	Timeline	Lead
Meeting 1: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> • Kick-off strategic planning process. • Review project charter. • Develop Mission, Vision, and Values 	Tuesday, May 5, 2020, at 5 p.m.	Inga Cushman, Administrative Services Director
Mission, Vision, & Values Report	<ul style="list-style-type: none"> • Create a document outlining the Mission, Vision, & Values as discussed in the previous meeting. 	Final report due May 14, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 2: Presentation of completed Mission, Vision, and Values to the Common Council	<ul style="list-style-type: none"> • The Mission, Vision, and Values will be presented to the Common Council based on the May 7, 2020 discussions. • Common Council will have the opportunity to provide feedback for modifications. 	Tuesday, May 19, 2020, at 6 p.m.	Al Hulick, City Administrator

Phase 3: Major Issues / Challenges			
Action	Tasks	Timeline	Lead
Meeting 1: Department Head Team	<ul style="list-style-type: none"> Identify Major Issues / Challenges 	Monday, May 18, 2020, at 10 a.m.	Inga Cushman, Administrative Services Director
Meeting 2: High School Student Focus Group	<ul style="list-style-type: none"> Identify Major Issues / Challenges 	Week of May 18, 2020	Inga Cushman, Administrative Services Director
Meeting 3: Common Council	<ul style="list-style-type: none"> Identify Major Issues / Challenges 	Tuesday, June 2, 2020, at 5 p.m.	Inga Cushman, Administrative Services Director
Meeting 4: Employee Focus Group	<ul style="list-style-type: none"> Identify Major Issues / Challenges 	Thursday, June 4, 2020, time TBD	Inga Cushman, Administrative Services Director
Meeting 5: Community Focus Group	<ul style="list-style-type: none"> Identify Major Issues / Challenges 	Thursday, June 11, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Employee Survey	<ul style="list-style-type: none"> Distribute the survey and collect responses. Review responses and develop a report. 	Distribute: May 20, 2020. Response Deadline: June 19, 2020 Report Deadline: June 24, 2020	Inga Cushman, Administrative Services Director
Community Survey	<ul style="list-style-type: none"> Distribute the survey and collect responses. Review responses and develop a report. 	Distribute: May 20, 2020. Response Deadline: June 19, 2020 Report Deadline: June 24, 2020	Inga Cushman, Administrative Services Director
Major Issues / Challenges Report	<ul style="list-style-type: none"> Create a document outlining the Major Issues / Challenges as discussed in the meetings and surveys for this phase. 	Ongoing from the first meeting in this phase until the last. Final report due July 2, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 6: Presentation of Major Issues / Challenges to Common Council	<ul style="list-style-type: none"> Present information obtained from the steps above regarding Milton's major issues / challenges. Common Council will have an opportunity to provide feedback on the information and the process. 	Tuesday, July 7, 2020, at 5 p.m.	Al Hulick, City Administrator

Phase 4: Goals, Objectives, Strategies, & Actions

Action	Tasks	Timeline	Lead
Meeting 1: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> Develop Goals based on identified Major Issues / Challenges determined in Phase 3. 	Tuesday, July 7, 2020, at 5 p.m.	Inga Cushman, Administrative Services Director
Meeting 2: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> Develop Objectives based on the established goals at the July 9, 2020 meeting 	Tuesday, July 14, 2020, at 5 p.m.	Inga Cushman, Administrative Services Director
Meeting 3: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> Develop Strategies based on the established objectives at the July 16, 2020 meeting 	Tuesday, July 21, 2020, at 5 p.m.	Inga Cushman, Administrative Services Director
Goals, Objectives, Strategies Report	<ul style="list-style-type: none"> Create a document outlining the Goals, Objectives, and Strategies as discussed in the meetings for this phase. 	Ongoing from the first meeting in this phase until the last. Final report due July 29, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 4: Presentation of Goals, Objectives, and Strategies to the Common Council	<ul style="list-style-type: none"> Present the established Goals, Objectives, and Strategies to the Common Council. A draft of the Strategic Plan will be available for the Common Council to review. The Common Council will have the opportunity to provide feedback on the Goals, Objectives, and Strategies or other aspects of the Strategic Plan. 	Tuesday, August 4, 2020, at 6 p.m.	Al Hulick, City Administrator

Phase 5: Approval

Action	Tasks	Timeline	Lead
Meeting 1: Community Presentation of Completed Strategic Plan	<ul style="list-style-type: none"> • Formal presentation of the draft strategic plan. • Attendees will have the opportunity to provide additional comments on the completed plan. • Create document outlining the feedback from the community. 	Meeting: Thursday, August 13, 2020, at 6 p.m. Community Feedback Report Deadline: Friday, August 14, 2020, at 9 a.m. for Council packet	Al Hulick, City Administrator
Meeting 2: Common Council review of Community Presentation	<ul style="list-style-type: none"> • Common Council will review the feedback received from the community on the draft strategic plan. • Common Council will provide direction to staff regarding what to modify in the draft plan based on the feedback. • Final opportunity for the Common Council to provide their own feedback on the draft plan. 	Tuesday, August 18, 2020, at 6 p.m.	Al Hulick, City Administrator
Meeting 3: Common Council Approval of Strategic Plan	<ul style="list-style-type: none"> • The Common Council will approve the Strategic Plan. 	Tuesday, September 1, 2020, at 6 p.m.	Al Hulick, City Administrator