



Strategic Plan 2017

Table of Contents

Introduction 1

Our Guiding Principles..... 2

Our Strategic Framework 3

Our Goals and Strategies 4

 Goal 1: Vibrant strong community and neighborhoods 4

 Goal 2: Strong community identity and engagement..... 6

 Goal 3: Efficient and effective operations and collaborations 8

 Goal 4: Diverse and inclusive neighborhoods and governmental services..... 10

 Goal 5: Financial stewardship..... 11

Strategies Completed between 2015 and 2017 12

Implementation Schedule..... 14

Next Steps and Implementation 18

The Strategic Planning Process..... 19

Contact Information 31



Introduction

Kalamazoo Charter Township is a highly visible and well-respected municipality within Kalamazoo County and the state of Michigan.

The Board of Trustees for Kalamazoo Charter Township, the Township Manager and the Staff of Kalamazoo Township have developed this strategic plan with assistance from Dams & Associates. It provides the Township with a roadmap for services to residents, citizens, businesses, and internal organization development.

The strategies in this plan are specific, measurable, actionable, realistic, and time-framed. The Board of Trustees and staff will review the progress quarterly and will update the plan annually as needed.

Donald D. Martin
Township Supervisor

Dexter A. Mitchell
Manager



Our Guiding Principles

Our Vision

We envision Kalamazoo Charter Township with enhanced

- Community identity and engagement
- Diversity, inclusion, and equity
- Respect for all human rights
- Openness and welcome to all populations
- Economic opportunity
- Intergovernmental collaboration

Our Mission

The mission of Kalamazoo Township is to provide government services that promote a safe, healthy, accessible, and economically viable community to live, work, learn, and play.

Our Core Values

As members of Kalamazoo Charter Township, our values guide our governance and our interactions with residents, visitors, and each other. We commit to being:

Ethical

Dealing with our community honestly, fairly, and justly

Respectful

Honoring the value of everyone we interact with

Transparent

Practicing openness in our decisions and actions

Responsive

Providing optimal service proactively and effectively

Competent

Continually building knowledge to best serve the people

Economical

Prudent with our community's precious financial resources

Our Strategic Framework

The strategic framework shows that the vision can only be achieved if Kalamazoo Township executes against the strategic goal and strategies.



Our Goals and Strategies

Goal 1: Vibrant strong community and neighborhoods				
1. Strategy a. Tactic	Target Date	Owner	Resources	Status
1. Develop a schedule for regular board member visits to businesses	4Q 2017	Molly Cole		
2. Conduct an internal review of ordinances related to blight and make recommendations as needed with priorities and timelines	1Q 2018	Planning Commission		
3. Develop recommendations for the creation of TIF districts, DDAs, and Corridor Improvement Authorities	3Q 2018	Pat Hudson		
4. Institute proactive community policing to prevent crime	4Q 2018	Board of Trustees		
a. Define 'community policing'	1Q 2018	Chief Bourgeois		
b. Submit applications for outside funding for community policing	1Q 2018	Chief Bourgeois		
c. Increase the number of community police officers, pending funding	4Q 2018	Board of Trustees		
d. Additional annual training in de-escalation strategies	4Q 2018	Chief Bourgeois		
5. Collaborate more with Southwest Michigan First	Ongoing	Dexter Mitchell		
a. Provide quarterly updates to Board of Trustees	1Q 2018	Dexter Mitchell		
b. Provide economic development tools, such as surveys				

Goal 1: Vibrant strong community and neighborhoods				
1. Strategy a. Tactic	Target Date	Owner	Resources	Status
c. Advocate with MDOT and Kalamazoo County Road Commission regarding 131 and M-43				
6. Increase awareness of and measure progress towards sustainability	Ongoing	Mark Miller		
a. Create a Township Climate Action Plan	4Q 2018	Mark Miller		
b. Increase the level of participation in the Michigan Green Communities Challenge	Ongoing	Mark Miller		
7. Present options for improving the enforcement of ordinances related to blight	Ongoing	Don Martin		
8. Attract more businesses	Ongoing	Dexter Mitchell		
a. Develop and provide information on micro grants to small businesses	1Q 2018	Dexter Mitchell		
9. Educate residents and businesses on area resources	Ongoing			
a. Develop a plan for partnering with organizations like Community Homeworks, Building Blocks to provide information on homeownership and environmental and economic change	1 Q 2018	Jennifer Strebs		

Goal 2: Strong community identity and engagement				
1. Strategy a. Tactic	Target Date	Owner	Resources	Status
1. Develop a process for creating and/or participating in community events inside and outside of the Township (e.g., one event/neighborhood/year)	1Q 2018	Molly Cole		
2. Create a plan for consistent branding	2Q 2018	Steve Leuty		
a. Create and publish an annual event calendar	4Q 2017	Molly Cole		
b. Provide regular opportunities for police and community to interact	Ongoing	Dexter Mitchell Sherine Miller		
c. Increase social and recreational opportunities to attract businesses	Ongoing	Dexter Mitchell Sherine Miller		
d. Create a "Trustee for a Day" program				
3. Support neighborhood associations more intentionally	Ongoing	Board of Trustees		
a. Develop a process for providing relevant Township information to the neighborhood associations (1) Seek input from associations regarding content	4Q 2017	Dexter Mitchell		
b. Develop policy for attending neighborhood association meetings/functions and report back to board	2Q 2018	Board of Trustees		
4. Create a communication plan that reflects the Township's diversity	1Q 2018	Dexter Mitchell		
a. Create a social media strategy	1Q 2018	Jennifer Strebs		
b. Collect email addresses and cell phone numbers to enable free communication to residents	Ongoing	Molly Cole		

Goal 2: Strong community identity and engagement

1. Strategy a. Tactic	Target Date	Owner	Resources	Status
c. Enhance webpage to provide more online information and services	Ongoing	Molly Cole		

Goal 3: Efficient and effective operations and collaborations

1. Strategy a. Tactic	Target Date	Owner	Resources	Status
1. Develop a process for conducting staff evaluations. The process should include:	3Q 2017	Dexter Mitchell		
a. External wage analysis study				
b. Pay scale review for employees				
2. Implement a document management system	1Q 2018	Mark Miller		
3. Create standard operating procedures to capture institutional knowledge, including task analyses	2Q 2018	Department Heads		
a. Purpose of task analyses is to streamline operations				
b. Conduct quarterly all-staff continuous improvement meetings	Ongoing	Dexter Mitchell		
4. Create, maintain, and regularly review job descriptions for all staff positions	3Q 2018	Dexter Mitchell		
5. Complete implementation of present Master Plan	3Q 2019	Pat Hudson		
6. Complete implementation of the Parks and Recreation Master Plan	4Q 2019	Steve Leuty		
7. Develop a Township dashboard of measures of success	2Q 2018	Dexter Mitchell		
8. Develop the next five-year Township Master Plan	3Q 2019	Planning Commission		
9. Conduct an annual joint meeting with the Board of Trustees, Road Commission, Planning Commission, and the ZBA	3Q 2018	Jeremy Hathcock		
a. Review the status of long-term plans, including but not limited to Master Plan, Non-motorized Plan, Strategic Plan, and the Capital Improvement Plan (CIP)	1Q 2018	Mark Miller		

Goal 3: Efficient and effective operations and collaborations

1. Strategy a. Tactic	Target Date	Owner	Resources	Status
10. Develop a comprehensive technology plan	4Q 2018	Mark Miller Dexter Mitchell	Brian Bowman	
11. Evaluate elected position status for 2020-2024 term	4Q 2019	Don Martin Sherine Miller Mark Miller		
12. Pursue second Township of Excellence Award	2019	Board of Trustees		
13. Implement best practices as suggested by the MTA and other professional resources	Ongoing	Policy and Administration Committee		
a. Review manuals and identify areas of improvement	1Q 2018	Mark Miller		
b. Use policy and employee manuals more effectively and continue to improve them	Ongoing	Dexter Mitchell		
14. Continue to pursue open communication with federal, state, county, and local elected officials and municipalities	Ongoing	Township Board		
15. Continue implementation of the Non-motorized Transportation Plan	Ongoing	Nicolette Leigh		
a. The plan should address more signage for bike trails with distance, direction, and destination (DDD)				
16. Strengthen the morale in all Township departments	Ongoing	Don Martin		
a. Conduct regular formal anonymous engagement surveys	3Q 2018	Dexter Mitchell		

Goal 4: Diverse and inclusive neighborhoods and governmental services

1. Strategy a. Tactic	Target Date	Owner	Resources	Status
1. Develop a process to broaden the scope of advertising job and committee opportunities with the Township	2Q 2018	Dexter Mitchell		
a. Reach out to underrepresented populations				
2. Develop and implement a youth academy with the Township's police and fire departments to get underrepresented youths interested in public safety careers (e.g., mentoring)	2Q 2018	Don Martin		
3. Develop a plan for working towards a police department that mirrors our community	2Q 2018	Dexter Mitchell Chief Bourgeois		
4. Implement a plan to educate the board on diversity	2018	Board of Trustees		
5. Improve ADA accessibility of Township buildings	Ongoing	Jennifer Strebs Steve Leuty		
a. Make main door to Township Hall ADA accessible	1Q 2018			
6. Create or support ongoing community efforts to reinforce community values of equality, diversity, and inclusion	Ongoing	Dexter Mitchell		
7. Require diversity and inclusion training for staff	Ongoing	Board of Trustees		

Goal 5: Financial stewardship				
1. Strategy a. Tactic	Target Date	Owner	Resources	Status
1. Evaluate current financial reports to determine whether they meet board’s oversight needs	1Q 2018	Nicolette Leigh		
2. Implement an aggressive road maintenance schedule	2Q 2018	Don Martin		
3. Develop a long-term maintenance plan for water and sewer	2019	Don Martin Dexter Mitchell Mark Miller Jennifer Strebs		
4. Identify and pursue appropriate local, state, and federal grant opportunities	Ongoing	Nancy Desai		
a. Obtain a grant database	4Q 2017	Nancy Desai		
b. Develop a plan to identify opportunities to work with area resources to assist in researching and writing grants (e.g., Western Michigan University, Kalamazoo Community Foundation)	4Q 2017	Nancy Desai		
5. Explore collaboration opportunities with other municipalities	Ongoing	Don Martin		
6. Hold quarterly meetings with Finance Administrator	Ongoing	Nancy Desai		
7. Continue to seek solutions regarding water and sewer rates	Ongoing			

Strategies Completed between 2015 and 2017

Goal 1: Vibrant strong community and neighborhoods

1. Present options for improving the enforcement of ordinances related to blight
2. Attract more businesses
 - a. Publish a list of vacant properties in areas zoned as industrial and commercial
 - b. Develop a mixed-used ordinance to bring more employment to the Township
3. Educate residents and businesses on area resources
 - a. Develop a welcome packet for new home owners in the Township; include area businesses' coupons and a business directory

Goal 2: Strong community identity and engagement

1. Create a plan for consistent branding. The plan should address the following:
 - a. Consider a contest to create a new logo
 - b. "Welcome to the Township" signs
 - c. "Welcome to the ___ Neighborhood" signs
2. Develop a process for creating and/or participating in community events inside and outside of the Township: Create a rotating annual open house event
3. Improve townhall building signage

Goal 3: Efficient and effective operations

1. Explore full-time professional staff
2. Adopt Kalamazoo Township Policy Manual
3. Develop an internship program for Township government
4. Implement roadway improvements as approved by the voters in February 2015
5. Implement best practices as suggested by the MTA and other professional resources
 - a. Develop a Parks and Recreation Committee
 - b. Adopt complete streets policy, including transit facilities, sidewalks, multi-use paths

Goal 4: Diverse and inclusive neighborhoods and governmental services

1. Develop and implement a citizens' academy with the Township's police and fire departments to expand residents' experiences with Township services across neighborhoods, socio-economic status, gender, and race



Implementation Schedule

This schedule may be adjusted based on emerging priorities and budget amendments.

Strategies Sorted by target date	2017	2018				2019	2020
		Q1	Q2	Q3	Q4		
3.1. Develop a process for conducting staff evaluations.	3Q						
1.1. Develop a schedule for regular board member visits to businesses	4Q						
2.2.a. Create and publish an annual event calendar	4Q						
2.3.a. Develop a process for providing relevant Township information to the neighborhood associations	4Q						
5.4.a. Obtain a grant database	4Q						
5.4.b. Develop a plan to identify opportunities to work with area resources to assist in researching and writing grants	4Q						
1.2. Conduct an internal review of ordinances related to blight and make recommendations as needed with priorities and timelines		1Q					
1.4.a. Define 'community policing'		1Q					
1.4.b. Submit applications for outside funding for community policing		1Q					
1.5.a. Provide quarterly updates to Board of Trustees		1Q					
1.8.a. Develop and provide information on micro grants to small businesses		1Q					
1.9.a. Develop a plan for partnering with organizations like Community Homeworks, Building Blocks to provide information on homeownership and environmental and economic change		1 Q					

Strategies Sorted by target date	2017	2018				2019	2020
		Q1	Q2	Q3	Q4		
2.1. Develop a process for creating and/or participating in community events inside and outside of the Township (e.g., one event/neighborhood/year)		1Q					
2.4. Create a communication plan that reflects the Township’s diversity		1Q					
2.4.a. Create a social media strategy		1Q					
3.2. Implement a document management system		1Q					
3.13.a. Review manuals and identify areas of improvement		1Q					
3.9.a. Review the status of long-term plans, including but not limited to Master Plan, Non-motorized Plan, Strategic Plan, and the Capital Improvement Plan (CIP)		1Q					
4.5.a. Make main door to Township Hall ADA accessible		1Q					
5.1. Evaluate current financial reports to determine whether they meet board’s oversight needs		1Q					
2.2. Create a plan for consistent branding			2Q				
2.3.b. Develop policy for attending neighborhood association meetings/functions and report back to board			2Q				
3.3. Create standard operating procedures to capture institutional knowledge, including task analyses			2Q				
3.7. Develop a Township dashboard of measures of success			2Q				
4.1. Develop a process to broaden the scope of advertising job and committee opportunities with the Township			2Q				
4.2. Develop and implement a youth academy with the Township’s police and fire departments to get underrepresented youths interested in public safety careers (e.g., mentoring)			2Q				

Strategies Sorted by target date	2017	2018				2019	2020
		Q1	Q2	Q3	Q4		
4.3. Develop a plan for working towards a police department that mirrors our community			2Q				
5.2. Implement an aggressive road maintenance schedule			2Q				
3.16.a. Conduct regular formal anonymous engagement surveys				3Q			
1.3. Develop recommendations for the creation of TIF districts, DDAs, and Corridor Improvement Authorities				3Q			
3.4. Create, maintain, and regularly review job descriptions for all staff positions				3Q			
3.9. Conduct an annual joint meeting with the Board of Trustees, Road Commission, Planning Commission, and the ZBA				3Q			
1.4. Institute proactive community policing to prevent crime					4Q		
1.4.c. Increase the number of community police officers, pending funding					4Q		
1.4.d. Additional annual training in de-escalation strategies					4Q		
1.6.a. Create a Township Climate Action Plan					4Q		
3.10. Develop a comprehensive technology plan					4Q		
4.4. Implement a plan to educate the board on diversity		2018					
3.5. Complete implementation of present Master Plan						3Q	
3.8. Develop the next five-year Township Master Plan						3Q	
3.6. Complete implementation of the Parks and Recreation Master Plan						4Q	
3.11. Evaluate elected position status for 2020-2024 term						4Q	

Strategies Sorted by target date	2017	2018				2019	2020
		Q1	Q2	Q3	Q4		
3.12. Pursue second Township of Excellence Award						2019	
5.3. Develop a long-term maintenance plan for water and sewer						2019	

Ongoing Strategies

- 1.5. Collaborate more with Southwest Michigan First
- 1.6. Increase awareness of and measure progress towards sustainability
 - 1.6.b. Increase the level of participation in the Michigan Green Communities Challenge
- 1.7. Present options for improving the enforcement of ordinances related to blight
- 1.8. Attract more businesses
- 1.9. Educate residents and businesses on area resources
- 2.2.b. Provide regular opportunities for police and community to interact
- 2.2.c. Increase social and recreational opportunities to attract businesses
- 2.3. Support neighborhood associations more intentionally
- 2.4.b. Collect email addresses and cell phone numbers to enable free communication to residents
- 2.4.c. Enhance webpage to provide more online information and services
- 3.3.b. Conduct quarterly all-staff continuous improvement meetings
- 3.13. Implement best practices as suggested by the MTA and other professional resources
 - 3.13.b. Use policy and employee manuals more effectively and continue to improve them
- 3.14. Continue to pursue open communication with federal, state, county, and local elected officials and municipalities
- 3.15. Continue implementation of the Non-motorized Transportation Plan
- 3.16. Strengthen the morale in all Township departments
- 4.5. Improve ADA accessibility of Township buildings
- 4.6. Create or support ongoing community efforts to reinforce community values of equality, diversity, and inclusion
- 4.7. Require diversity and inclusion training for staff
- 5.4. Identify and pursue appropriate local, state, and federal grant opportunities
- 5.5. Explore collaboration opportunities with other municipalities
- 5.6. Hold quarterly meetings with Finance Administrator
- 5.7. Continue to seek solutions regarding water and sewer rates

Next Steps and Implementation

- Communicate the Strategic Plan to staff and external key stakeholders – clearly and often.
- Have internal conversations on how staff and elected officials can contribute to the mission and vision and live the core commitments.
- Develop and implement detailed tactical action plans as needed.
- Track progress and identify data trends.
- Focus on strategy throughout the year through strategy-based staff and board meeting agendas and annual progress reports.
- Regularly report updates and results to all key stakeholders.
- Use process and outcome metrics for continuous improvement toward service excellence.
- Celebrate success!
- Regularly review, validate, and update the strategies.

The Strategic Planning Process

This section of the Strategic Plan documents the planning process and the results of the planning activities from the August 26, 2017, retreat.

This record may be used to refresh the strategies and to orient new staff and elected officials.

Planning Participants

Donald D. Martin*	Supervisor
Sherine M. Miller	Treasurer
Mark E. Miller*	Clerk
Jeremy L. Hathcock	Trustee
Nicolette Leigh	Trustee
Steven C. Leuty	Trustee
Jennifer A. Strebs*	Trustee
Dexter A. Mitchell*	Manager

* Denotes member of Planning Team



Planning Calendar

Date	Event	Participants
August 9, 2017	<u>Pre-Planning Meeting</u> <ul style="list-style-type: none"> Prepare planning retreat 	Planning Team
August 26	<u>Strategic Planning Retreat</u> <ul style="list-style-type: none"> Affirm guiding principles Review strategic accomplishments Conduct SWOT and gap analyses Brainstorm strategies to close gaps 	Board of Trustees
August 30	<u>Create the Strategic Plan #1</u> <ul style="list-style-type: none"> Review retreat results Determine with 2015 strategies to continue into new plan 	Planning Team
September 12	<u>Create the Strategic Plan #2</u> <ul style="list-style-type: none"> Review new strategies Determine target completion dates and strategy owners 	Planning Team
September 15	<u>Create the Strategic Plan #3</u> <ul style="list-style-type: none"> Check draft plan against planning activities and make final adjustments Review next steps: Rollout and implementation 	Planning Team
	Dams & Associates submits draft plan	
	Board of Trustees reviews and adopts the final plan	

SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Your current capabilities Capitalize upon these strengths to fulfill the mission and move toward the vision 	<ul style="list-style-type: none"> Your current opportunities for improvement If not addressed in the strategic plan, weaknesses could impede fulfillment of mission and progress toward vision.

Given your strengths and weaknesses, we determined whether the trends and their impacts identified at the first planning retreat presented potential opportunities or threats to achieving your mission and vision.

Opportunities	Threats
<ul style="list-style-type: none"> Identify trends that can become advantages for fulfilling your mission and vision. 	<ul style="list-style-type: none"> The strategic plan's goals and objectives must address threats so they do not impede progress toward your mission and vision.

Trends are (future) external events that may have a positive or negative impact on your operation and services.

Trends in the following four separate but overlapping environments and their *direct impact* on your operations were identified. These environments need to be continuously assessed and monitored:

Social environment	Economic environment	Political environment	Technological environment
<ul style="list-style-type: none"> Broad changes in society that occur over time Changing demographics Other 	<ul style="list-style-type: none"> National and global economic outlook Impact of (un)-employment Other 	<ul style="list-style-type: none"> Changes in government regulations Development of special interest groups Other 	<ul style="list-style-type: none"> Developments in communication technology Internet and social media Electronic communication Other

SWOT Analysis: Strengths and Weaknesses

This list reflects participants' perception of Kalamazoo Charter Township's current strengths and weaknesses.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Road infrastructure • Committed and engaged elected officials • Citizen involvement • Strong staff – skills, commitment • Not running a deficit • Township government is closest to the people • Variety of ideas, fresh eyes • Strong professional police and fire services • Diversity of housing stock • Centrally located within the county • Three options of school districts in the Township • Hospitals • Treating all four neighborhoods with equity • Transparency 	<ul style="list-style-type: none"> • Residents and visitors don't know when they enter the Township • Residents don't know whether they live in the Township • Housing blight • Decaying housing stock – including commercial buildings • Lack of business investment • Lack of ability to get on/off 131 • Lack of proactive communication strategies (e.g., social media) • Low investment in parks – not enough parks • No venue for outdoor events • Low voter turnout • No community building • Four separate communities: No center or downtown • Running out of cemetery space • Poor relationship with MDOT • Bad street lights / non-LED street lights

SWOT Analysis: Opportunities

Opportunities are defined as trends that can become advantages for fulfilling your mission and vision. Opportunities do not have to be specifically addressed by the strategic plan's strategies.

Social Trends	Impact on Kalamazoo Charter Township
1. Aging population	Need for public transit
2. Younger generation has different values	More involvement by younger people

Technology Trends	Impact on Kalamazoo Charter Township
1. Coming broadband internet	Increased home businesses
2. Renewable energy	Cheaper energy Area of growth Individual/onsite energy generation Green community

SWOT Analysis: Threats

Threats are defined as trends whose impact on the organization cannot be addressed without further intervention. Unaddressed threats can severely limit your ability to deliver results. Your strategic plan must address these threats so they do not impede progress toward your mission and vision.

Social Trends	Impact on Kalamazoo Charter Township
1. Aging population	Need for more public health care Need for more police and fire services Increasing blight as aging homeowners cannot take care of their property
2. Lack of good paying jobs	Lower tax base Fewer funds for services Deteriorating housing stock, especially rentals Stressed families > More calls for police Lack of community involvement
3. Medical and recreational marijuana	Requires policy Unknown impact on safety
4. Higher crime rates at Township borders	70% use of police
5. Younger generation has increased economic pressure	Less home ownership

Political Trends	Impact on Kalamazoo Charter Township
1. Increasing polarization in both electorate and governance	Makes intergovernmental collaboration more difficult (esp. with state government) Loss of revenue sharing Arguments over functions Decrease of local power Increased public mistrust in government
2. Political disengagement	Lower voter turnout Less participation

SWOT Analysis: Threats - continued

Economic Trends	Impact on Kalamazoo Charter Township
1. Short-term and vacation rentals, including Airbnb	Policing issues Instability Zoning issue
2. Fewer jobs due to automation	See Social Trends: Lack of good paying jobs
3. Lack of business investment	See Social Trends: Lack of good paying jobs
4. Continue losing businesses	Fewer jobs (see social trends) Lack of revenue People don't come into Township
5. Privatization (e.g., schools, water)	Less public control
6. City of Kalamazoo Foundation for Excellence: Residents move from Township to City: More housing price competition	Possibly negative impact on property values leads to less tax revenue
7. Non-traditional businesses	Require new regulations

Technology Trends	Impact on Kalamazoo Charter Township
1. Renewable energy	Costly permitting process No electrical vehicle infrastructure
2. Green infrastructure	Losing opportunities
3. eBikes and eScooters	No regulation for new transportation modes
4. Increase in cyber security threats	Liability Cost

Gap Analysis Results

The gap analysis identified gaps and barriers could impede progress toward Kalamazoo Charter Township’s vision.


Gaps are listed in the order discussed, not in the order of priority. Items within each gap reflect participants’ perceptions. Duplicate or similar items may reflect contributions from different participants. The purpose of this chart is to show consensus and alignment with respect to the top gaps and barriers.

Identity and Engagement	Collaboration and Infrastructure	Funding and Financial Management
Community engagement Township identity Lack of community identity (K-Twp brand) Lack of resident awareness of township government Community identify township? Neighborhood associations Twp identity Exterior signage Understanding equity Open communication Improved community communication strategy (social media) Public Media Network not utilized enough Communication with every resident	Intergovernmental community Limits to collaboration Transportation Partnerships Maintaining infrastructure (conserving assets) Infrastructure Blight and brownfields	Limited financial resources to meet goals Decreasing revenue to meet goals likely Funding Money \$
		Board Priorities Board members losing focus (between terms) Limited time to deal with important issues (tyranny of the urgent) Goal setting
	Law Enforcement Pro-active (vs. re-active) policing (community policing) Police	Economic Development Need for new / more industries and jobs Jobs

Strategic Plan Terminology

Goal



A measurable statement directly contributing to the vision that is observable and measurable. Goals describe the *future state* that will be achieved if all strategies underneath a goal are successfully implemented (“mini-vision”). It does not describe an action.

Goals as Actions 	Goals as Future State 
Demonstrate and enhance the value of all majors, confirming competitive distinctiveness of our program offerings	Our academic programs give our university and our graduates a competitive advantage
Enhance relevance, responsiveness to market needs, and student retention of foundational business skills and knowledge expected of all Business majors	All Business majors are fluent in foundational business skills and knowledge that are relevant and reflect market needs
Create administrative support processes that are efficient and effective	Administrative support processes are efficient and effective

Strategy

An action statement that contributes to achieving the goal within a specified target completion date and by a specified owner. Each goal will have multiple strategies.

A strategy specifies the result of the action – an observable *deliverable* (e.g., a plan, process, procedure, statement, report, draft, equipment, facility, etc.).

Strategies Without Deliverables 	Strategies Specifying Deliverables 
Review and prioritize academic programs	Implement a regular standardized process to review and prioritize academic programs
Identify value- and non-value added regulations while being responsive to emerging issues	Identify and prioritize value- and non-value added regulations on a quarterly basis while being responsive to emerging issues
Expedite the design and delivery of new curricula and programs	Develop and communicate the process to expedite the design and delivery of new curricula and programs
Conduct succession planning	Implement an annual staff review and succession planning process

Tactic

A tactic helps achieve a strategy. Not every strategy requires tactics. Tactics may have their own target completion dates and owners that may or may not differ from the target completion dates for the strategy.

Measure of Success

The metric you will use to gauge high-level success for the mission, vision, and strategic goals. The measure of success does not include a target or direction.

For example, you are designing a highly efficient sports car. Measures of success may include “top speed (mph),” “fuel consumption (mpg),” and “acceleration (time from 0 to 60 mph in seconds).”

Targets

The targets for these automotive measures may be expressed numerically, such as 220 mph; 60 mpg; and 3.0 seconds.

In the absence of an established baseline or clear industry standards, the target may be left blank. The first year of data collection will provide a baseline against which a sensible target can then be set.

Organizational Dashboard








An overview graphic showing the key measures of success for an organization. A dashboard should include the goal statement, measure of success, historic performance, the current target, and the current status in traffic light colors.

‘Less is more’ is an adage that should also guide the development of dashboards. The more that can be seen on one page or one web screen, the better. Detailed data may be provided via drill-down links.

A very useful and practical example is shown on the next page.

ACADEMIC INITIATIVES	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2020 Goal	Current Status
A. Enhancing the undergraduate and graduate student experience									
1. Student to Faculty Ratio ¹		19:1	19:1	19:1	19:1	18:1	19:1	18:1	▼
2. NSSE High Impact Practices Participation (% First-Year, % Seniors)	45% / 77%			48% / 94%			43%/81%	62% / 94%	▼
3. USNWR, America's Best Colleges Rank (Publics)	18	18	17	18	16	18	16	10	▲
4. Gallup Well-being Index ²						40%	39%	N/A	—
5. Graduate/Professional Student Academic Experience Index	72			71			69	75	▼
6. USNWR, Number of Graduate and Professional Programs in Top 25 ³	49	57	60	56	55	54	48	65	▼
B. Developing the Discovery Themes of Energy and Environment, Food Production and Insecurity, Health and Wellness									
1. Discovery Theme Faculty Hired ⁴						23	56	185	▲
C. Developing eLearning									
1. Number of online programs offered			6	6	7	10	13	N/A	▲
2. Number of online course sections taught	506	560	646	589	831	1,023	1,200	N/A	▲
3. Number of students enrolled in online courses	19,647	22,719	26,959	24,817	31,325	37,957	46,450	N/A	▲
D. Discussing new models of faculty evaluations and rewards in a collaborative climate									
1. Total Research Expenditures: Rank among Public Universities ⁵	7	9	11	10	11	12	11	8	▲
2. Increase tenure-track faculty by 8 to 10% ⁶	3,043	2,982	2,930	2,903	2,848	2,844	2,738	3,128	▼
E. Balancing affordability and access and excellence for our students									
1. Provide \$40M in additional scholarships and financial aid	\$91.5M	\$96.9M	\$108.6M	\$127.2M	\$138.2M	\$147.4M	\$163.5M	\$148.3M	▲
1a. Increase merit-based aid	\$64.9M	\$67.5M	\$70.8M	\$77.6M	\$87.9M	\$98.9M	\$108.3M	N/A	▲
1b. Increase need-based aid	\$26.6M	\$29.4M	\$37.8M	\$49.6M	\$50.3M	\$48.5M	\$55.2M	N/A	▲
2. Undergraduate Graduation Rate (within six years) ⁷	74.9%	78.0%	79.7%	82.4%	83.2%	83.5%	83.1%	85.0%	—
2a. Undergraduate URM Graduation Rate (within six years) ⁸	63.9%	68.3%	73.7%	74.2%	74.4%	75.4%	75.1%	N/A	—
2b. Undergraduate First Generation Graduation Rate (within six years)				74.7%	75.8%	76.2%	74.6%	N/A	—
F. Enhancing the arts at Ohio State and our connections with the Columbus arts community									
To be developed								N/A	

¹ Ohio State definition changed to conform with US News & World Report definition in 2010-11
² Recent alumni who are *thriving* in three or more elements of well-being; National average is 29.6%
³ Represents published rankings between 2011 and 2016
⁴ Represents the number of faculty who accepted offers during that year. 2020 goal is cumulative
⁵ Source: NSF, Researcher FY 2009-2014

 Meets or Exceeds Goal	 Performance Up
 Caution	 No Performance Change
 Below Goal - Action Needed	 Performance Down
 Data Pending	

<http://oaa.osu.edu/board-of-trustees-scorecard.html>

Benefits of this type of dashboard:

- One page.
- Easy to read and understand. It avoids flashy gauges, pie charts, and infographics.
- Provides additional information for the data, such as short explanations of environmental factors that impact a metric that might lie outside the organization's control.
- Has time-series data. This is not just a snapshot of the state of affairs. Data go back six years plus the current year. This is critical in identifying trends without having to refer to previous charts, graphs, dashboards, or board minutes.
- Includes a column for the target. Not all dashboards include targets, which makes it difficult to assess progress.
- Includes red-yellow-green status indicators.
- Uses arrows to indicate the change in performance since the last update.

Contact Information



Donald D. Martin, Supervisor

Phone (269) 381-8083

Email supervisor@ktpw.org

Web Site www.ktpw.org

Address 1720 Riverview Drive
Kalamazoo, Michigan 49004



Peter Dams, Ph.D., President

Phone (269) 501-3000

Fax (866) 472-0554

Email pdams@damsandassociates.com

Web Site www.DamsandAssociates.com

Address 876 Miller Road
Plainwell, Michigan 49080