

Summary Report

Strategic Planning and Goal Identification Workshops 2011

for the
Village of Long Grove, Illinois

Workshops – Winter 2011
Final Prioritization – Summer 2011

Village of Long Grove, Illinois

Strategic Planning and Goal Identification Workshops

Summary Report

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INTRODUCTION

As an organization, you have now placed yourselves among the special class of municipal governments that engage in formalized strategic planning and goal setting. As we discussed during the workshop, executive-level retreats and strategic planning sessions are not a new phenomenon for progressive organizations. The value of such processes continues to be recognized by policy-making boards and executive staffs in both private and public organizations. Strategic planning is a preferred approach to guiding the Village's future rather than making decisions issue by issue or crisis by crisis. Your workshop provided a positive setting to set aside time to methodically—"strategically" - determine where it is you want to go as a community and as a Village government. Your work will serve the Village's residents and organization well into the coming years. We congratulate you on the investment you made in the special workshops we held.

Keep in mind, however, that your achievements will be realized only through the judicious use of your limited professional staff. The high standards of performance you expect can place a strain on the organization as excellence requires adequate staff time, expertise and resources. In the end, quality equates to tough choices in prioritization and resource allocation. Only a limited number of objectives, goals and services can be effectively managed and implemented at a given time. In a very realistic sense, **clear and stable priorities** must be maintained if the Village desires to stretch its resources as far as they can go.

Resist the temptation to "re-arrange" priorities as the fiscal year moves along. Stick to the results of your efforts throughout this process and your budgeting process—don't pull a seemingly "easy" goal from the bottom of the list of priorities just because it seems "easy." I have seen this scenario in a few organizations I have worked with, and in a matter of a few months—a whole new "priority" list emerges that can unravel the consensus list developed in the group setting. This kind of "continuous" shifting sets up a confusing tone in the organization.

Outline of Exercises and Discussion Sessions

Session I. Visions of the Future

Exploration and identification of the Village's desired future condition.

Each participant was asked to articulate what he or she perceives to be the preferred future state of the Village one, five, ten and twenty years down the road. What services, programs, staffing levels, capital needs and general facets would or should be present at the Village and in the Village at these intervals? Board members and other participants were asked to jot down their ideas ahead of time and then be ready to share them with the group during the first session. This was a brainstorming exercise—any and all ideas about the Village's future were encouraged and shared. No evaluative or judgmental debate was permitted during this session.

The format for all of the discussion sessions used in the planning effort of employed approaches that were highly participative and interactive. The process utilized a group discussion approach called Nominal Group Technique where participants were assured equal opportunities to speak and share opinions by the facilitator. During the sessions, individuals had the opportunity to generate and share individual ideas, weigh alternatives, and further refine their thinking. As these ideas were shared and debated, the group worked steadily toward a consensus of organizational value, purpose, future directions and priorities.

A FUTURE VIEW OF LONG GROVE, ILLINOIS

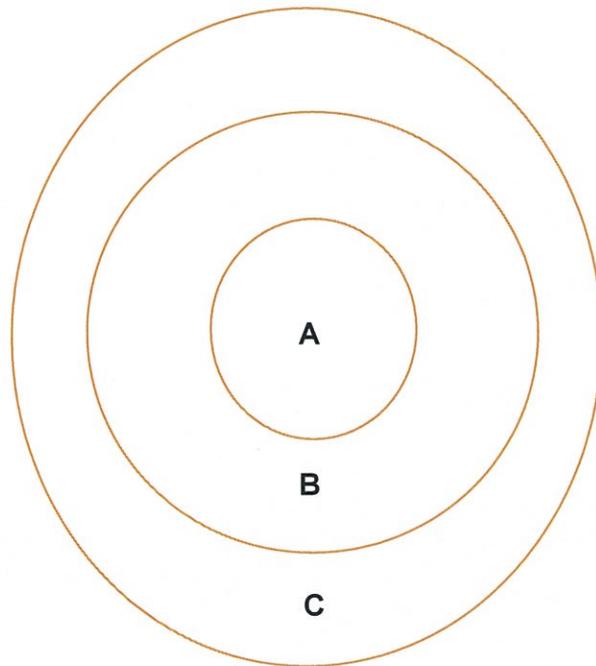
VISION STATEMENTS

Participants conducted this exercise by responding to the phrase: "In 15 – 20 years when I return to Long Grove I hope to see, or think I will see...."

1. Long Grove established as a "Green Community". Re-establish Long Grove as an environmental leader.
2. Senior residential community clustered housing.
3. Current village hall space a destination/historical space.
4. Stay a Brigadoon – keep our heritage but be comfortable and change. (1)
5. A Williamsburg type community – need more sports/recreation facilities for the youth.
6. Maintain that "refuge" feel – relax, beauty, peace of Long Grove.
7. Capitalize on our historic aspects.
8. A community theatre.
9. Our current Master Plan fulfilled.
10. A new village hall (a modern professional setting). (1)

11. Vibrant beautiful community.
12. Beautiful systematically managed open space.
13. A strong art community.
14. More connectivity between parts of the community – subdivision barriers.
(Community at large as a living space. Community known for social interaction.)
15. People walking around interacting/engaged pathways, etc. (1)
16. Long Grove is a “refuge” from urban living.
17. Pathways, openness, natural setting – higher quality plants (non-invasive).
18. Every street looking like Archer.
19. A sound commercial tax base that reflects the community.
20. Downtown, quality offerings you can’t find in other places – a good destination that’s different.
21. Overcome the separation created by subdivisions – a “green space” in the center of the town – places to connect (restaurants, shop, hotel)
22. “Community interconnection”

Session II. Circle of Influence-Group Exercise



- A. Issues or goals the Group has total control/influence over
- B. The Group has some influence and control on the issue
- C. The Group has limited or no direct control or influence on the issue

Circle of Influence Environmental Scanning.

Participants were introduced to a leadership exercise entitled "Circle of Influence." The premise is that sub-groups of the participants work to develop responses to some simple, but extremely effective and thought-provoking questions about crucial issues and the level of direct influence or control the group has over the issue. Participants' members were broken up into two working groups and asked to respond to a series of structured questions designed to initiate discussion and reveal perspectives, challenges and key issues facing the Village government and community. The participants' responses were recorded by each group and discussed by all participants. The responses provided by each group are recorded below. Issues identified with the letter A indicates issues the group has significant influence or control over, the letter B indicates issues the group has moderate influence or control over, and letter C indicates issues the group has limited or very little direct control over. Groups were given the assignment to name their "team" in a spirit of camaraderie and teamwork among group members. Responses to the exercise questions are presented below:

Team #1 – "Can-Do" Group

- A. – Operate village on a balanced budget
 - Pathway system master plan
 - Arts hotel/spa master plan and zoning
 - Update comprehensive land use plan
 - Survey to find out what residents want
 - Update village infrastructure and develop a plan
 - Outreach and recruiting of new businesses/arts/hotel
 - Control of litigation costs
- B. – Route 22 widening
 - Infrastructure deteriorating
 - Adding a commercial base for added tax revenues
- C. – Route 53 construction
 - Instituting local property tax

Team #2 – Joanne's Marauders

- A. – Architectural contest
 - Core historic functions
 - Survey Residents
 - Improve Communications
 - Open space maintenance
- B. – Vibrant downtown
 - Old McHenry Road
 - Green
 - Canvass showcase
 - Finances
 - Sources of revenue
 - Fundraising
- C. – Illinois 53

Session III. Internal and External Environmental Scan

The next step of the strategic planning process was a review and accounting of the internal and external factors present in the environment that can potentially impact the success of the Village, both negatively and positively.

Given the futuristic statements of the preceding session, and the challenges raised in the Surrender or Lead exercise, participants were then asked to identify what constraints and practical difficulties are likely to be encountered that will make it difficult to achieve the desired future state. These elements included both internal and external factors, conditions, trends, regulations, agencies, resources, etc. Furthermore, what are the organization's strengths and weaknesses? In what areas does it regularly excel, and in what areas are there difficulties or shortcomings in terms of expertise, resources, training, etc.? What opportunities are on the horizon that can be used to its advantage? Conversely, what trends lay ahead that would be obstacles or hindrances?

S.W.O.T. EXERCISE (Strengths, Weaknesses, Opportunities, Threats)

INTERNAL

STRENGTH	WEAKNESS
<ul style="list-style-type: none"> ◆ Open space ◆ Location ◆ No debt (1) ◆ Nature friendly eco-sensitive ◆ Affluent ◆ Existing downtown ◆ Different downtown ◆ Uniqueness ◆ "Cache" ◆ Effective board ◆ Passion ◆ Vision – Williamsburg-like development feel ◆ Lack of conflict 	<ul style="list-style-type: none"> ◆ Financially challenged ◆ Subdivision disconnects ◆ Decaying infrastructure ◆ Lack of infrastructure ◆ Aging infrastructure in historic downtown ◆ Perception of difficult to work with ◆ Limited resources/small staff ◆ Time constraints

EXTERNAL

OPPORTUNITY	THREAT
<ul style="list-style-type: none"> ◆ Grant opportunities ◆ Business outreach ◆ Location/market profile ◆ Historic image ◆ “Brand” ◆ “Blank canvass” ◆ Unique opportunities ◆ Open space ◆ Underdeveloped properties ◆ T.I.F. District ◆ Create a strategy and target particular developments ◆ Route 53 ◆ Communications ◆ Other government groups in community 	<ul style="list-style-type: none"> ◆ Economy ◆ Decaying infrastructure ◆ Route 53 ◆ County highway ◆ Improvements on McHenry Road ◆ Misperceptions

Session IV. Nominal Group Goal Identification

Board Member and Senior Management Staff

This session provided the forum for the collaborative establishment of strategic goals and objectives necessary to achieve the future vision of the Village. With the preceding sessions serving as a sound foundation for goal setting, the final sessions were lengthy presentations and discussions of goals or action items needed to achieve the future visions as expressed by the group. To begin the process, each participant was allotted time to highlight the three or four most important policy/program goals that he or she thinks the Village should accomplish in the next one to five years. The Village Manager also added important goals after hearing the issues identified by the Board.

Goals could be highly specific or general. Again, only questions of clarification were permitted to be asked during this session. Evaluative or judgmental assertions/debates were deferred to a follow-up session where all participants engaged in open discussions of the goals or action items, their impact on the region, the organization, and their relative importance to the Village's current or future circumstances.

Classification. At the end of the open discussion, participants were asked to classify each goal according to a matrix model of complexity and time. Agreed criteria were used to classify a goal as short- or long-term and as complex or routine. The purpose of the exercise is to group goals of roughly the same "type" together so when prioritization occurs, the participants can avoid the problem of comparing "apples to oranges".

All statements were recorded on chart paper. The goals and their classifications as short- or long-term, complex or routine are indicated below. Agreed criteria were used for classifying goals as either routine or complex: short-term goals were those goals that could or should be completed or substantially underway by the end of the coming fiscal year. Complex goals were goals that required extraordinary resources, specialists, funding or the agreement of outside organizations or agencies. Routine goals, although not necessarily simple, were goals that could be accomplished upon unilateral decision of the Board and within present budget streams or with minor revenue enhancements or reallocations.

Open Group Discussion and Consolidation of Goals

This final phase of the discussion served as the forum for the Board members and staff to discuss, evaluate and debate the ideas and goals offered by each participant in the previous sessions. Participants are asked to give their opinions, evaluations and judgments of the worthiness and value of different policy objectives.

Following the classification exercise, the group was asked to delineate, via a ranking exercise, which goals should be given higher priority than others. Group members were provided ranking sheets where point values were assigned to each goal in each quadrant of the matrix by individuals. The resulting narrowing of short- and long-term objectives and actions required to attain goals and achieve the future vision was an important outcome of this phase of the process.

Prioritization of Goals

The final prioritized rankings, across all corners of the goals matrix, are listed below. The calculation of goal ranking consisted of "forced ranking" where the ranking of each identified goal is averaged by the ranking given by all board members. For example, if a goal is given the scores of 2, 5, 6, 6, 1, 2 and 3, the average total would be 3.57. The lower the score, the higher the priority. Again, the average totals were based on the ratings provided. Note: Some goals were not ranked by all individuals.

BOARD FINAL PRIORITIZED SHORT-TERM GOALS

				LONG GROVE 2011 SESSION Prioritized Short-Term Complex
YOUR RANKING	TOTAL SCORE	AVERAGE	GOAL ID #	GOAL
1, 1, 1, 1, 4, 5, 1, 4, 1	19	2.1	1	Sell Reed Turner Home and other properties
3, 2, 2, 2, 1, 2, 2, 1, 4	19	2.1	13	Develop a multi-prong strategy to work with county on McHenry Road
7, 3, 7, 3, 2, 4, 4, 6, 2	38	4.2	17	Explore new customers and maximization of municipality water system at Sunset.
8, 4, 3, 7, 5, 8, 7, 2, 3	47	5.2	9	Conduct needs assessment alternatives for village hall/offices
2, 8, 4, 9, 3, 1, 9, 9, 6	51	5.7	12	Revisit Public v. Private Road Issue
6, 9, 5, 4, 7, 3, 5, 7	46	5.8	20	Maximize intergovernmental synergies on key issues
9, 5, 6, 8, 8, 3, 6, 3	48	6.0	16	Launch an architectural/design contest for Long Grove Village Center (historical district) like Williamsburg
4, 6, 8, 6, 6, 6, 5, 7, 8	56	6.2	18	Regionally explore both storm water and potable water
5, 7, 9, 5, 9, 7, 8, 8, 5	63	7.0	19	Investigate storm water options for Buff Creek watershed

LONG GROVE 2011 SESSION
Prioritized
Short-Term Routine

YOUR RANKING	TOTAL SCORE	AVERAGE	GOAL ID #	GOAL
1, 4, 1, 11, 2, 8, 6, 2, 2	37	4.1	6	Identify alternative revenue sources for village/long-term fiscal plan
2, 2, 7, 9, 1, 2, 3, 3, 11	40	4.4	14	Develop process/procedure and habit of costing out decisions
6, 5, 8, 1, 3, 9, 2, 1, 8	43	4.8	7	Update our website
11, 7, 2, 4, 7, 6, 1, 5, 3	46	5.1	2	Lease or sell soccer fields at Menards
3, 9, 6, 5, 4, 3, 5, 8, 10	53	5.9	21	Develop a sound infrastructure maintenance/improvement plan
4, 8, 5, 2, 9, 4, 4, 9, 12	57	6.3	22	Improve direct communication with residents – explore alternatives
10, 12, 3, 7, 6, 13, 7, 6, 1	65	7.2	3	Formation of an environmental committee
8, 10, 9, 6, 5, 5, 10, 10, 5	68	7.6	5	Review Comprehensive Plan map/zoning districts (update and use)
9, 11, 4, 3, 8, 12, 8, 11, 4	70	7.8	4	Create an email update on environmental issues
5, 13, 12, 10, 11, 1, 11, 7, 6	76	8.4	10	Develop a resident survey (and implement)
7, 1, 10, 13, 10, 10, 9, 13, 7	80	8.9	8	Improving our reputation as a development friendly organization
12, 6, 11, 12, 12, 7, 12, 4, 13	89	9.9	11	Develop an outreach committee for businesses
13, 3, 13, 8, 13, 11, 13, 12, 9	95	10.6	15	Consider use of a grant czar/consultant

BOARD FINAL PRIORITIZED LONG-TERM GOALS

LONG GROVE 2011 SESSION Prioritized Long-Term Complex				
YOUR RANKING	TOTAL SCORE	AVERAGE	GOAL ID #	GOAL
1, 4, 1, 4, 3, 1, 2, 1, 4	21	2.3	6	Make Long Grove a dining destination like Highwood
3, 3, 3, 1, 1, 3, 6, 4, 1	25	2.8	1	Village-wide connected pathway system
4, 5, 7, 2, 2, 5, 1, 5, 3	34	3.8	5	Bring senior/retirement housing options to Long Grove
2, 6, 2, 6, 4, 4, 5, 2, 6	37	4.1	4	Bring a small boutique hotel to Long Grove with a restaurant and a bar
6, 1, 4, 5, 6, 6, 4, 6, 2	40	4.4	9	Implement a downtown streetscape program
7, 7, 6, 7, 5, 2, 3, 3, 5	45	5.0	7	Explore adding parcels for increased downtown open space and parking
5, 2, 5, 3, 7, 7, 7, 7, 7	50	5.6	8	Revisit Metra station for Long Grove at the north end (Star-line)

**LONG GROVE 2011 SESSION
Prioritized
Long-Term Routine**

YOUR RANKING	TOTAL SCORE	AVERAGE	GOAL ID #	GOAL
1, 2, 2, 1, 1, 1, 1, 3, 1	13	1.4	2	Improve maintenance of pathway plan
2, 1, 1, 3, 3, 3, 2, 2, 2	19	2.1	3	Explore creation of Recreation Program function – explore partnering with other Recreation Departments
3, 3, 3, 2, 2, 2, 3, 1, 3	22	2.4	10	Develop a long-term Route 53 strategy

Conclusion

This report's value will be realized as a working guide to both the Village Board and staff as you pursue the issues explored during the strategic planning process. This report is designed to capture the content of your discussions and to assist the organization in developing action plans in a follow-up session for appropriate committees, departments and elected officers.

The next step is for your senior staff to review the results and fine-tune these objectives in their action-planning session and report back to the Board and appropriate committees on how and when they might be most efficiently and effectively addressed. What is apparent from the exchange of ideas and dialogue during the discussion sessions and workshops is that the organization is fortunate to have elected leadership and a management team that is looking ahead.

One noted organizational observer summarized the challenges of progress this way:

*"The art of progress is to preserve order amid change,
and change amid order..." A.F. Whitehead*

Good luck with the ambitious year that lay ahead.

Strategic Planning Model*

Converting Vision & Strategies into Goals



* Model generally represents the steps that are taken for this type of initiative.

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**NON-PRIORITIZED
GOAL STATEMENTS AS PRESENTED BY PARTICIPANTS**

SHORT-TERM GOALS

LONG GROVE STRATEGIC PLANNING SHORT-TERM COMPLEX	
GOAL ID #	GOAL
1	Sell Reed Turner Home and other properties
9	Conduct needs assessment alternatives for village hall/offices
12	Revisit Public v. Private Road Issue
13	Develop a multi-prong strategy to work with county on McHenry Road
16	Launch an architectural/design contest for Long Grove Village Center (historical district) like Williamsburg
17	Explore new customers and maximization of municipality water system at Sunset.
18	Regionally explore both storm water and potable water
19	Investigate storm water options for Buff Creek watershed
20	Maximize intergovernmental synergies on key issues

**LONG GROVE STRATEGIC PLANNING
SHORT-TERM ROUTINE**

GOAL ID #	GOAL
2	Lease or sell soccer fields at Menards
3	Formation of an environmental committee
4	Create an email update on environmental issues
5	Review Comprehensive Plan map/zoning districts (update and use)
6	Identify alternative revenue sources for village/long-term fiscal plan
7	Update our website
8	Improving our reputation as a development friendly organization
10	Develop a resident survey (and implement)
11	Develop an outreach committee for businesses
14	Develop process/procedure and habit of costing out decisions
15	Consider use of a grant czar/consultant
21	Develop a sound infrastructure maintenance/improvement plan
22	Improve direct communication with residents – explore alternatives

LONG-TERM GOALS

LONG GROVE STRATEGIC PLANNING LONG-TERM COMPLEX	
GOAL ID #	GOAL
1	Village-wide connected pathway system
4	Bring a small boutique hotel to Long Grove with a restaurant and a bar
5	Bring senior/retirement housing options to Long Grove
6	Make Long Grove a dining destination like Highwood
7	Explore adding parcels for increased downtown open space and parking
8	Revisit Metra station for Long Grove at the north end (Star-line)
9	Implement a downtown streetscape program

LONG GROVE STRATEGIC PLANNING LONG-TERM ROUTINE	
GOAL ID #	GOAL
2	Improve maintenance of pathway plan
3	Explore creation of Recreation Program function – explore partnering with other Recreation Departments
10	Develop a long-term Route 53 strategy

ICE BREAKER

This reminds me of:

- ◆ Old device wrapped up in a new way – kind of like our downtown
- ◆ Tied knot how to unravel – entangled threads
- ◆ The need for resources “fools gold”.
- ◆ Time – challenge of time and how to get things done – prioritized
- ◆ Timer’s moving forward activities – sports pathways
- ◆ Represents infrastructure – we need to be stewards to improve
- ◆ Globe – long view/quality of life view – vision of Long Grove – quality of life in Long Grove
- ◆ My heart is really in this Village – get others excited about the town as much as I am
- ◆ Buckeye – keep an eye on our resources and natural beauty but need access – pathways
- ◆ Communication – phone line is the old way – need to use new ways

EXHIBIT 1

(This exhibit provides a detailed presentation of rankings by complexity and by timeframe.)

EXHIBIT 2

(This exhibit illustrates the overall ranking of all goals
no matter the timeframe or the complexity.)

Combined Overall Rankings

GROUP AVG	GOAL ID #	GOAL	
1.4	2	Improve maintenance of pathway plan	Long-term Routine
2.1	1	Sell Reed Turner Home and other properties	Short-term Complex
2.1	13	Develop a multi-prong strategy to work with county on McHenry Road	Short-term Complex
2.1	3	Explore creation of Recreation Program function – explore partnering with other Recreation Departments	Long-term Routine
2.3	6	Make Long Grove a dining destination like Highwood	Long-term Complex
2.4	10	Develop a long-term Route 53 strategy	Long-term Routine
2.8	1	Village-wide connected pathway system	Long-term Complex
3.8	5	Bring senior/retirement housing options to Long Grove	Long-term Complex
4.1	6	Identify alternative revenue sources for village/long-term fiscal plan	Short-term Routine
4.1	4	Bring a small boutique hotel to Long Grove with a restaurant and a bar	Long-term Complex
4.2	17	Explore new customers and maximization of municipality water system at Sunset.	Short-term Complex
4.4	14	Develop process/procedure and habit of costing out decisions	Short-term Routine
4.4	9	Implement a downtown streetscape program	Long-term Complex
4.8	7	Update our website	Short-term Routine
5.0	7	Explore adding parcels for increased downtown open space and parking	Long-term Complex
5.1	2	Lease or sell soccer fields at Menards	Short-term Routine
5.2	9	Conduct needs assessment alternatives for village hall/offices	Short-term Complex
5.6	8	Revisit Metra station for Long Grove at the north end (Star-line)	Long-term Complex
5.7	12	Revisit Public v. Private Road Issue	Short-term Complex
5.8	20	Maximize intergovernmental synergies on key issues	Short-term Complex
5.9	21	Develop a sound infrastructure maintenance/improvement plan	Short-term Routine
6.0	16	Launch an architectural/design contest for Long Grove Village Center (historical district) like Williamsburg	Short-term Complex
6.2	18	Regionally explore both storm water and potable water	Short-term Complex

GROUP AVG	GOAL ID #	GOAL	
6.3	22	Improve direct communication with residents – explore alternatives	Short-term Routine
7.0	19	Investigate storm water options for Buff Creek watershed	Short-term Complex
7.2	3	Formation of an environmental committee	Short-term Routine
7.6	5	Review Comprehensive Plan map/zoning districts (update and use)	Short-term Routine
7.8	4	Create an email update on environmental issues	Short-term Routine
8.4	10	Develop a resident survey (and implement)	Short-term Routine
8.9	8	Improving our reputation as a development friendly organization	Short-term Routine
9.9	11	Develop an outreach committee for businesses	Short-term Routine
10.6	15	Consider use of a grant czar/consultant	Short-term Routine