

The background is a vibrant, abstract collage of colors and shapes. It features large, irregular blocks of orange, light blue, yellow, and red. Overlaid on these are various geometric forms: triangles, rectangles, and curved lines. A prominent white outline of a stylized human figure is visible in the lower right quadrant. The overall aesthetic is modern and energetic.

SUMMARY REPORT

**STRATEGIC PLANNING
WORKSHOP
FOR
THE VILLAGE OF
WESTCHESTER, ILLINOIS**

DECEMBER 5, 2006

Village of Westchester, Illinois

Strategic Planning & Organizational Mission Workshop

Summary Report

INTRODUCTION and EXECUTIVE SUMMARY

As an organization, the Village of Westchester have now placed itself among the elite class of municipalities that endorse and engage in formalized strategic planning and goal setting. The world in which we all operate continues to rapidly change and grow more complicated. In turn, the challenges and choices that face the Village in operating a municipal corporation are likewise more complex and challenging than ten years ago, five years ago and even two years ago.

Consider some of the trends within and beyond the borders of Westchester; changing demographics, value shifts, development and re-development pressures, changing attitudes, tax limitations, demands for service, State and Federal mandates, transportation problems, infrastructure needs etc. These are just a representative sampling of the many factors that impact on the how, what, when, where and whys of establishing policy and delivering services within the Village and the surrounding area it serves.

The fact is this—the needs and demands on the Village far exceed the available resources to tackle all of them. The answer is not to throw up your “collective hands” and guide the Village’s affairs issue by issue or crisis by crisis, but rather to set aside time to methodically “strategically” determine where it is you want to go as a municipal corporation and put in place the priorities and actions that will allow you to get there. The Village’s efforts on December 5, 2006 will serve the Village’s residents and organization well into the coming years.

General Comments & Observations

Congratulations on a job well done! The approach of the participants was one that seemed to embrace collective goals and thinking, as well as individual opinions and perspectives. The group’s working dynamics were open and largely positive, a must for making progress and for getting things done. While differences of opinion and approach are expected on particular issues or policies, I sensed that the group and staff have the ability to focus on the overall good of the community and the organization.

Now that we have spent time focusing on the Village’s future and learning each others perspectives, we should make it a priority to take the list developed and work it into the plans and actions of the Village for the year ahead. A lot of hard work and effort are endemic in the goals established. They can’t all be addressed at once, but consistent guidance will assure that most will be initiated, accomplished or well underway in some form by this time next year. The Board’s steady hand, coupled with a dedicated and committed staff effort will bring us a long way toward meeting the

goals. Through your support and direction, the Village can achieve positive results by selectively dedicating time, energy and financial and, personnel resources to the most critical goals and operations.

However, the Village should remain mindful that achievements will be realized only through the judicious use of professional staff and ancillary specialists. The high standards of performance that the Village Board alluded to do come at a price; excellence can place a strain on the system because excellence requires adequate staff time and resources. In the end, excellence equates to tough choices in resource allocation. Only a limited number of objectives, goals and services can be effectively managed and implemented at a given time. This is not to say that all is lost or that 10 more staff members are needed to do the job. What it does mean, in a very realistic sense, is that clear and stable priorities must be maintained if the Village desires to stretch the use of its resources as far as they can go

Furthermore, the Village Board must resist the very real temptation to “rearrange the chairs” as the fiscal year moves along. Stick to the product of the efforts in December 5, 2006; don’t pull a seemingly easy goal from the bottom of the list of priorities just because it seems easy. Think for a moment, what kind of message this sends to staff and the public. Constant reshuffling will cause others to wonder whether or not you are guiding this organization with a clear vision and clear goals in mind, or whether you’re reacting to changing breezes or reformulated agendas of a minority view. Lastly, be sure to review the organization’s capacity to accomplish all that you have identified in the accompanying report. Understanding the staff capacity or the need for outside specialists will be an important early step in future planning

A summary of the outcomes of the workshop are presented below for easy reference, A more detailed presentation of the process that was employed and other discussion elements can be found in the detailed section of this report.

Summary of Results

This most critical phase of the workshop’s discussions served as the forum for Village Board members and staff to discuss, evaluate and debate the ideas and goals offered by each participant. Participants were asked to give their opinions, evaluations and judgments of the worthiness and value of different policy objectives.

As part of the exercise, the group was asked to classify and prioritize the goals that were developed. Using a forced ranking methodology, participants were asked to delineate which goals should be given high priority, why some should not be considered and why some goals, although worthy, should receive low priority or be re-defined. Point values were assigned to each goal in each quadrant by individuals. The resulting consensus ranking of short and long-term objectives and actions required to attain goals and achieve the future vision was the final outcome of the workshop.

Prioritized Goals and Actions As Determined By Average Ranking Scores

Depicted below are the results of the 2006 ranking of organizational priorities. Each member was directed to score the first priority in each category a 1, second priority a 2, and so on until each issue in the category was assigned a priority ranking. The priority rankings were determined by computing the average score for each issue from the priority ranking results provided. The result of the rankings has been attached as Exhibit 1 to this document.

PRIORTIZED SHORT TERM GOALS - ROUTINE

1. Explore New Revenue Sources
2. Formal Budget Planning Sessions in Public w/Entire Board
3. Create a Central Information File Containing Information
4. To Eliminate Unnecessary Fees & Taxes
5. To Provide Transparency to our Residents
6. Centralize Village Purchasing
7. Create Accountability & responsibility Standards for Staff
8. Examine Consolidated Service Delivery
9. Offer More Services & Information to Residents & Businesses & Stakeholders on the Village Website
10. Offer the Residents & Businesses the Ability to Pay for Bills/Services On-Line or Through Direct Debit
11. More Comprehensive Training for Personnel
12. Improve Municipal Facilities
13. Program for General Maintenance of Village
14. Create Partnerships with Other Village Governments (School & Park)
15. Job Descriptions for Village Employees
16. Rotate Committee Assignments to Improve Knowledge Base
17. Continue to Secure Grants for Beautification
18. Citizen Police Academy

PRIORITIZED SHORT TERM GOALS - COMPLEX

1. Develop Financial Policies to "Guide" Policy Decisions
2. Develop Commitment to Long Range Planning (Capital Plan & 5 Year Budget)
3. Establish Long Term Goals for Economic Development
4. Create a Human Resources Person/Source in the Village
5. New Centrally Located Fire Department/Municipal Center
6. Change from Annual Appropriation Method to Annual Budget Method
7. To Ensure We Have the Best Fire & Police Protection
8. Assist Police Patrol via use of Cameras in High Crime Areas
9. Red Light Camera Program – Safety

PRIORTIZED LONG TERM GOALS - ROUTINE

1. To Gain the Trust of our Residents & Employees as a Village
2. Revitalize Village's Existing Business Structures
3. Traffic/Stop Sign Plan

PRIORTIZED LONG TERM GOALS - COMPLEX

1. Develop a Comprehensive Land Use Plan
2. Economic Development of Existing Commercial Corridors
3. Update Westchester Municipal Code
4. Program for Alley & Street Repair & Replacement
5. Equipment Replacement Program
6. Evaluate and Set Up Program for Sewer System Replacement & Repair
7. Make Westchester a "Home Rule" Village to Increase Sales Tax Revenue
8. New High School District or Improve High School District

Conclusion

This report's value will be realized as a working guide to the Board and Staff as they pursue the agenda and issues that were raised and developed during the session. Remember, try for small wins first; don't try to accomplish it all at once. The organization must further commit to developing action plans in a follow-up session with the management team. Developing alternatives, debating options and building consensus will take time and some adjustment of expectations and opinions on the part of many. As you can see, there is plenty of work to do. The next step is for staff to review the results and fine-tune these objectives in their action-planning session and report back to the Village Board on how and when they might be most efficiently and effectively addressed.

What is very apparent from the exchange of ideas and discussion during the planning session is that the organization is fortunate to have a staff and elected leadership that are looking ahead. What is equally apparent are the differing philosophies on how to manage, react and adapt to Westchester's future.

When faced with these multi-faceted issues that may tempt you to go in several different directions, refer back to the list of strategic priorities, these long and short term goals should serve as the Village's road map. Use the goals as a guide to the future. Understand and discuss when it's necessary and appropriate to deviate off the path you have created. Without a doubt unanticipated circumstances and issues will arise, and it will be imperative for the Village to react. Recognize those events, deal with them, and then get back on track.

Lastly, take advantage of the skills and talents of the staff and the specialists you use to help them out. There's an abundance of ideas, perspective and experience there waiting to be tapped. Encourage their ideas and then weigh them; they might not all be winners, but the process of discovery and problem solving is enriched by new ideas and creativity where and when it's fostered.

In summary, after reviewing the notes and materials from the session it is clear that Westchester has got an edge on most organizations, particularly many local governments. It's looking ahead, but more importantly, it's good for the community. This vision of the future is a great undiscovered benefit that may not be immediately recognized. Organizational adaptation, innovative methods and difficult policy choices, while remaining cost competitive with superior services, are not the kinds of issues a status quo organization puts on its agenda. Don't be discouraged by some unexpected developments or detours along the way. Unexpected findings, slow consensus and uncertainty are normal byproducts of change and risk taking. But remember above all, stay the course and resist the urge to flip-flop or hopscotch your way to the future.

Nonetheless, the Village leaders are all looking in the right direction. There may be some thickets ahead, but follow the lead of others that brought the organization and community to the point it is today. Build on each success; solidify the changes then move on to the next step. In a community made up of diverse members, with admittedly different needs and perspectives, one best answer to these thorny issues will be very elusive. That's where judgment, thorough review, and an eye on your long-term intentions will come heavily into play. In summary, that's where leadership really makes a difference.

Detailed Report of Exercises and Discussion Sessions

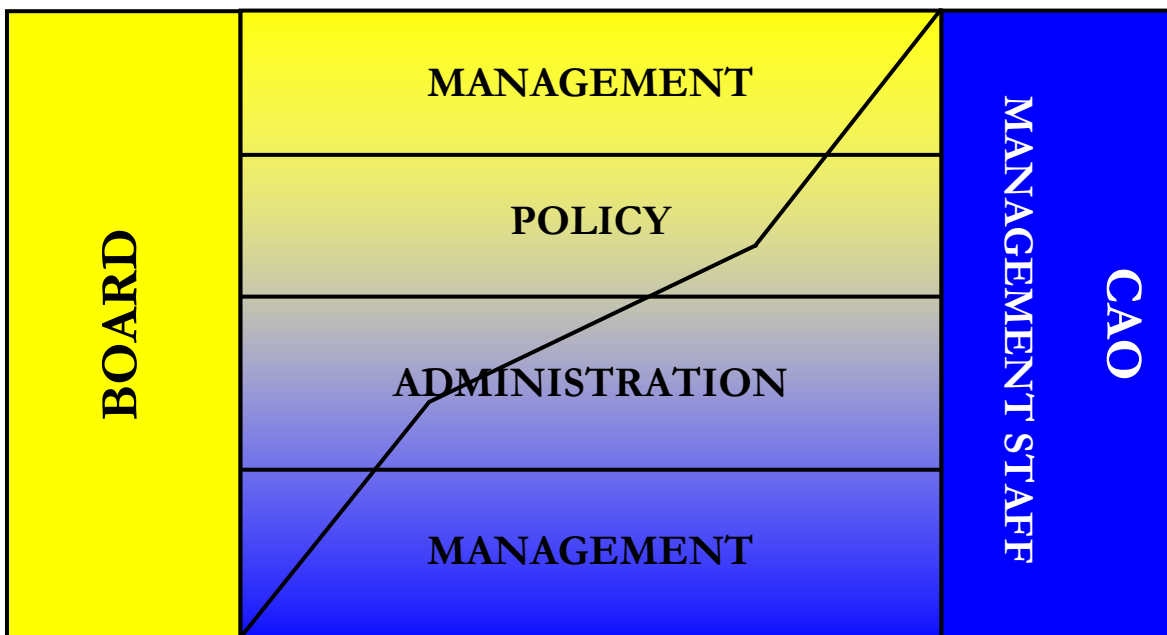
PHASE I. ROLES AND THE MISSION/VISION

A. ROLES & LEADERSHIP

The group was led through a discussion on purpose, arenas, roles and identity. What is our governing philosophy and what is the role of the Board? What are our core values? The importance of reflecting upon and clarifying the roles of organizational players is vital to strategy development. Only strategies that are consonant with the organization's philosophy, roles and core values are likely to succeed.

As part of the above discussion, the city leadership model advanced by noted local government theorist, James Svara was discussed. A replication of Svara's model is presented below for reference.

ROLE OF GOVERNING BOARDS AND CAOs (per SVARA)



REVIEW OF MISSION

The first discussion of the workshop session focused on developing an understanding and consensus among group members of the basic philosophy and policy framework that defines the Village's very existence and guides the organizations actions and priorities. Although a "final form" mission statement per se was not the intended outcome, the ideas expressed below capture the groups view of the Villages overall mission.

Who are we and why are we here? - An exploration of the Village's overall mission. The organization's mission, in tandem with its mandates, provides its reason for being. What are the

underlying social, community and political needs that the organization seeks to fill? How do we respond to those needs? What is our mission? Responses and discussion notes are reported below:

- Provide quality services to residents & businesses
- Partnership
- Accountability and Responsiveness
- Responsive to the needs...
- Communication between departments
- Fiscal responsibilities
- Dedication to long term departments that benefit the community
- Management of resources
- Convenience through planning
- Commitment to the ENTIRE Village (planning)
- Visitors...
- Equity & fairness
- Communication
- Central coordination of operations
- Rockville, MD – *“We are a dedicated organization committed to enhancing the quality of life in Rockville by providing premium services in response to the needs of everyone who visits, works and lives in our city”*
- Northville, MI – *“The mission of the elected officials, volunteers, and staff of the City of Northville is to provide quality public services in partnership with its citizens, businesses, schools and other governmental agencies”*

Based upon the feedback and dialogue, the following mission statement has been developed for consideration by the Village Board of Trustees. The use of the Mission Statement should be more than just a tag line, but should permeate the day-to-day operations and planning efforts of the Village.

“The mission of the Village of Westchester is to provide quality public services in an efficient and cost effective manner in partnership with its residents, businesses, schools and other governmental agencies.”

PHASE II. THE GOAL SETTING/STRATEGIC PLANNING PROCESS

STRATEGIC PLANNING DISCUSSION PHASES & PROCESS

The format for the discussion sessions held were highly participative and interactive. The process employed a group discussion approach called *Nominal Group Goal Identification* technique where participants were assured equal opportunities to speak and share opinions. During the sessions, individuals had the opportunity to generate and share individual ideas, as well as work together as a group and in small teams to develop ideas, weigh alternatives, and further refine their thinking. As these ideas were shared and debated, the group was working steadily toward a consensus of organizational values, purpose, future directions and priorities.

Although the word planning appears in the description, it must be emphasized at the outset that the end result of this process is not to create a “plan” that sits on a bookshelf like a trophy. Rather, the primary outcome is to foster strategic thinking and communication among Village Board members and staff. The end result of this session should be a viable listing of identified and prioritized objectives that mesh with your overall vision of the Village’s near-term and long-term future,

INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN

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. Participants were asked to identify what constraints and practical difficulties are likely to be encountered or would 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 the Village 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.

Responses were received from Board/Staff respondents prior to the workshop session and are presented in the following lists. The environmental scan was discussed in terms of realizing the Village’s mission and vision.

INTERNAL SCANNING	
STRENGTHS	WEAKNESSES
EXPERIENCED EMPLOYEES	AGING FACILITIES
DEDICATED STAFF	NO EMPLOYEE STRUCTURE
NEW VILLAGE MANAGER	TOO MANY BOSSES
NEW VILLAGE ATTORNEY	NO DEFINED JOB DESCRIPTIONS
NEW PRESIDENT	NO DIRECTION OF PROCEDURES AND HOW TO DO THINGS CORRECTLY
KNOWLEDGEABLE VILLAGE MANAGER	AGING INFRASTRUCTURE
STRONG & DEPENDABLE POLICE & FIRE	GOOD OLD BOYS SYSTEM
EXPERIENCED STAFF	RESISTANCE TO CHANGE
MOST DEPARTMENTS HEADED BY PROFESSIONALS	DEPENDENCE ON PAST PRACTICES
RECENT HIRING OF A TRAINED AND EDUCATED PROFESSIONAL MANAGER	LACK OF MODERN FACILITIES & SYSTEMS

INTERNAL SCANNING	
STRENGTHS	WEAKNESSES
EMPLOYEE BASE HAS GREAT DEAL OF KNOWLEDGE AND TENURE-ALL FACETS OF SERVICES	SEEDY APPEARANCES
WILLINGNESS OF LEADERSHIP TO IDENTIFY WEAKNESSES AND CHANGE	A DIVISIVE BOARD WITH NO DIRECTION
STRONG CORE SERVICES (I.E. POLICE & FIRE)	LEGACY OF BOARD INTERFERENCE IN THE WORKPLACE
VILLAGE MANAGER WITH DRIVE AND VISION	LACK OF TRUST AMONG/WITHIN CERTAIN DEPARTMENTS
MANY EMPLOYEES WHO LIVE IN TOWN AND WANT TO STAY	NOT FLEXIBLE AND NON-USER FRIENDLY VILLAGE SOFTWARE SYSTEMS
OPEN EXCHANGE OF IDEAS	LACK OF PLANNING FOR FUTURE NEEDS/IMPROVEMENTS-AGING INFRASTRUCTURE
PERSONAL SERVICE	NO SENSE OF WHAT IT MEANS TO BE A VILLAGE OF WESTCHESTER EMPLOYEE
MANY DEDICATED EMPLOYEES	UNDER UTILIZATION OF SPACE IN VILLAGE HALL/BUILDING POORLY LAID OUT
FRIENDLY WORKING ENVIRONMENT	TOO MANY MANUAL PROCEDURES/ PROCESSES STILL BEING USED
EXPERIENCED EMPLOYEES	STAFF NOT BEING TRAINED/EDUCATED AND/OR ADAPTING AND USING CURRENT TECHNOLOGY
NEW VILLAGE LEADERSHIP	LACK OF DIRECTION AS TO HOW THINGS ARE TO BE DONE/ACCOMPLISHED
CURRENTLY THE VILLAGE OFFERS EMPLOYEES GREAT BENEFITS	LACK OF DIVERSIFICATION OF WORK FORCE
EMPLOYEES THAT CARE ABOUT THE CITIZENS OF WESTCHESTER	AGING MUNICIPAL FACILITIES
EXPERIENCED STAFF	NO FORMAL SAFETY PROGRAM
DEDICATED BOARD	NO DIRECT CHAIN OF COMMAND
DIVERSIFIED TAX BASE	INADEQUATE MUNICIPAL FACILITIES
CONTINUITY OF STAFF	INADEQUATE DEPARTMENTAL STAFFING
CONCERN FOR COMMUNITY	LACK OF OVERALL STAFFING VISION/PLACEMENT
	OVERALL AGING OF VILLAGE CAPITAL ASSETS
	VILLAGE PRESIDENT/BOARD SATISFIED WITH STATUS QUO
	AGING INFRASTRUCTURE
	POOR COMMUNICATION POLICIES
	UNIONIZATION OF PUBLIC WORKS
	PATRONAGE HIRING OVER DECADES HAS LEFT US WITH MANY UNQUALIFIED EMPLOYEES-SOME DRAWING EXCESSIVE SALARIES
	LACK OF POLICIES TO ENSURE QUALITY/VALUE
	CONSTANT INTERNAL BICKERING
	VILLAGE DOES NOT ACCEPT CREDIT CARDS
	LACK OF TECHNOLOGY
	NO EMPLOYEE EVALUATIONS
	DIGGING OUT OF OUR PAST ADMINISTRATION
	LACK OF DIRECTION. NO EMPLOYEE INPUT EVER SOLICITED

INTERNAL SCANNING	
STRENGTHS	WEAKNESSES
	OLD EQUIPMENT
	AGING FLEET VEHICLES
	A BOARD THAT CANNOT WORK TOGETHER BECAUSE OF TOO MANY PERSONALITY CLASHES
	LOSS OF THAT EMPLOYEE BASE DUE TO RETIREMENTS
	PREVIOUS LACK OF WANTING TO PLAN FOR THE FUTURE
	AGING OUTDATED EQUIPMENT
	LACK OF BUILDING MAINTENANCE PROGRAM
	OUT DATED MUNICIPAL CODE
	NO AMORTIZATION IN BUDGET PLANNING
	HUMAN RESOURCES POLICIES
	MORE DISCIPLINED EMPLOYEE ACCOUNTABILITY
	LACK OF EFFICIENCY UTILIZING SPACE/STORAGE
	LACK OF ORGANIZATION WITHIN VILLAGE
	NO REAL HUMAN RESOURCES DEPARTMENT
	EMPLOYEE MORAL IS LOW
	VILLAGE IS FALLING BEHIND IN TECHNOLOGY
	AGING FIRE DEPARTMENT EQUIPMENT
	LACK OF MANPOWER
	LACK OF PROFESSIONAL STAFF
	LABOR UNIONS
	LACK OF ORGANIZATIONAL FOCUS
	CONTINUITY OF STAFF
	AGING MUNICIPAL FACILITIES
	INFRASTRUCTURE ISSUES
	WEAK PLANNING DOCUMENTS
	LACK OF CURRENT TECHNOLOGY
	OUTDATED VILLAGE CODE
	CONCERN FOR COMMUNITY

EXTERNAL SCANNING	
OBSTACLES	ASSETS/OPPORTUNITIES
TOO MANY EMPTY STORE FRONTS	CLOSE TO CITY
NO UNIFORMITY IN BUSINESS AREAS	BEDROOM COMMUNITY
NO PUBLIC HIGH SCHOOL	NO INDUSTRY
LOW TAXES	FAMILY ORIENTED COMMUNITY
NOT HOME RULE	LOW REAL ESTATE TAXES
STREETS IN NEED OF REPAIR	GOOD ELEMENTARY SCHOOLS
STONE ALLEYS	GREAT SERVICES (I.E. POLICE, FIRE, ETC.)
AGING STORE FRONTS	CENTRAL LOCATION & PROXIMITY TO X-WAYS
NO VIABLE HIGH SCHOOL	HOMES ARE SOLID, WELL BUILT & ATTRACTIVE, ALBEIT SMALL
INABILITY TO EXPAND	SENSE OF COMMUNITY-CLOSENESS
ILLOGICAL & RIDICULOUS VILLAGE/ SCHOOL BOUNDARY VIS-A-VIS HILLSIDE	AVAILABILITY OF PUBLIC TRANSPORTATION

EXTERNAL SCANNING

OBSTACLES	ASSETS/OPPORTUNITIES
SAVE THE PRAIRIE SOCIETY & DNR	GOOD ELEMENTARY SCHOOL SYSTEM
FEW MAJOR "NAME" BUSINESSES	GOOD PARK DISTRICT
PUBLIC HIGH SCHOOL DISTRICT	PROXIMITY TO MEGA-SHOPPING (OAK BROOK)
OPPOSITION BY SAVE THE PRAIRIE TO ANY DEVELOPMENT NEAR THEM	CLOSE TO MAJOR HIGHWAYS/INTERSTATES FOR EASY ACCESS TO CHICAGO, O'HARE, MIDWAY AND VARIOUS POINTS IN ALL DIRECTIONS
VILLAGE ALMOST COMPLETELY DEVELOPED, LITTLE VACANT/UNDEVELOPED LAND	GOOD BUS SERVICE ON ALL MAJOR STREETS RUNNING THROUGH THE VILLAGE
TOO MANY PUBLIC BODIES; VILLAGE, PARK, DISTRICT 92.5, LIBRARY, THAT DO NOT SEEM TO WORK TOGETHER, OR IF THEY DO SO, DO ONLY ON A TEMPORARY BASIS	PRESENCE OF TWO MAJOR FOOD CHAINS SO RESIDENTS CAN STAY WITHIN VILLAGE TO MAKE FOOD PURCHASES
MUST LEAVE WESTCHESTER TO MAKE MAJOR PURCHASES: AUTO, APPLIANCES, CLOTHING	CLOSE PROXIMITY TO OAK BROOK SHOPPING CENTER & YORKTOWN MALL FOR SHOPPING
FEELING AMONG RESIDENTS THAT CERTAIN SECTIONS OF VILLAGE ARE IGNORED, WITH OTHER SECTIONS RECEIVING MORE ATTENTION/IMPROVEMENTS	CLOSE PROXIMITY TO LOYOLA UNIVERSITY MEDICAL CENTER
DECLINING POPULATION	FAIRLY ACTIVE CHAMBER OF COMMERCE
INCREASING SENIOR PROPORTION OF POPULATION DEMANDING MORE SERVICES	PRESENCE OF RECENTLY CO-ED PRIVATE HIGH SCHOOL, ST. JOSEPH, IN WESTCHESTER AND REPUTATION OF ITS MALE BASKETBALL PROGRAM
VILLAGE LANDLOCKED FOR SPACE	REPUTATION OF DISTRICT 92.5 IN EDUCATION, PLUS HAVING TWO PAROCHIAL GRAMMAR SCHOOLS, WHICH ALLOWS RESIDENTS CHOICES IN EDUCATION FOR THEIR CHILDREN

PHASE III. NOMINAL GROUP GOAL IDENTIFICATION

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 included presentations and discussions of goals or action items needed to achieve the future vision. Goals that had previously been submitted by participants that identified important policy/program goals that the Village should accomplish in the next one to five years were discussed. Questions of clarification were asked during this session and duplicative goals/objectives were consolidated. Participants engaged in open discussions of the goals or action items, their impact on the community or organization, and their relative importance to the Village's current or future circumstances. At the end of the open discussion, participants were asked to classify each goal according to a matrix model of complexity and time. 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.

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.

NON-PRIORITIZED COMPLEX GOALS

1. Change from Annual Appropriation Method to Annual Budget Method
2. Develop and Implement Financial Policies for the Village
3. Develop Commitment to Long Range Planning (Capital Plan & 5 Year Budget)
4. Make Westchester a "Home Rule" Village to Increase Sales Tax Revenue
5. Move Toward "Home Rule" - Educate the Public
6. Assist Police Patrol via use of Cameras in High Crime Area
7. Economic Development of Existing Commercial Corridors
8. Establish Long Term Goals for Economic Development
9. Create a Human Resources Person/Source in the Village
10. To Ensure We Have the Best Fire & Police Protection
11. Develop a Comprehensive Land Use Plan
12. Update Westchester Municipal Code
13. Evaluate & Set Up Program for Sewer System Replacement/Repair
14. Red Light Camera Program – Safety
15. New Centrally Located Fire Department – Municipal Center
16. New High School District or Improve High School District
17. Program for Alley & Street Repair/Replacement
18. Program for General Maintenance of Village (i.e. Grass)
19. Equipment Replacement Program

NON-PRIORITIZED ROUTINE GOALS

1. Explore New Revenue Sources
2. Formal Budget Planning Sessions in Public w/Entire Board
3. Offer the Residents/Businesses the Ability to Pay for Bills/Services On-Line or

- Through Direct Debit
4. To Eliminate Unnecessary Fees & Taxes
 5. Create a Central Information File Containing Information
 6. More Involvement between Police & Fire Departments and Schools
 7. Create Partnerships with Other Village Governments (School & Park)
 8. Offer More Services/Information to Residents/Businesses/Stakeholders on the Village Website
 9. To Provide Transparency to our Residents
 10. Continue to Secure Grants for Beautification
 11. Revitalize Village's Existing Business Structures
 12. Job Descriptions for Village Employees
 13. More Comprehensive Training for Personnel
 14. Create Accountability & Responsibility Standards for Staff
 15. Rotate Committee Assignments to Improve Knowledge Base
 16. To Gain the Trust of our Residents & Employees as a Village
 17. Centralize Village Purchasing
 18. Citizen Police Academy - Funding (Overtime)
 19. Examine Consolidated Service Delivery
 20. Improve Municipal Facilities
 21. Traffic/Stop Sign Plan

PHASE IV. OPEN GROUP DISCUSSION & PRIORITIZATION

This final phase of the discussion served as the forum for Village 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 why certain goals should be given high priority, why some should not be considered, and why some goals, although worthy, should receive low priority or be redefined. Point values were assigned to each goal in each quadrant by individuals. The resulting consensus ranking of short and long-term objectives and actions required to attain goals and achieve the future vision was the final outcome of this phase of the process. The final prioritized rankings are listed below:

Depicted below are the results of the President and Boards 2001 ranking of organizational priorities. Each member was directed to score the first priority in each category a 1, second priority a 2 and so on until each issue in the category was assigned a priority ranking. The priority rankings were determined by computing the average score for each issue from the priority ranking results provided,

PRIORITIZED SHORT TERM GOALS - ROUTINE

1. Explore New Revenue Sources
2. Formal Budget Planning Sessions in Public w/Entire Board
3. Create a Central Information File Containing Information
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16. Rotate Committee Assignments to Improve Knowledge Base
17. Continue to Secure Grants for Beautification
18. Citizen Police Academy

PRIORITIZED SHORT TERM GOALS - COMPLEX

1. Develop Financial Policies to "Guide" Policy Decisions
2. Develop Commitment to Long Range Planning (Capital Plan & 5 Year Budget)
3. Establish Long Term Goals for Economic Development
4. Create a Human Resources Person/Source in the Village
5. New Centrally Located Fire Department/Municipal Center
6. Change from Annual Appropriation Method to Annual Budget Method
7. To Ensure We Have the Best Fire & Police Protection

8. Assist Police Patrol via use of Cameras in High Crime Areas
9. Red Light Camera Program – Safety

PRIORTIZED LONG TERM GOALS - ROUTINE

1. To Gain the Trust of our Residents & Employees as a Village
2. Revitalize Village's Existing Business Structures
3. Traffic/Stop Sign Plan

PRIORTIZED LONG TERM GOALS - COMPLEX

1. Develop a Comprehensive Land Use Plan
2. Economic Development of Existing Commercial Corridors
3. Update Westchester Municipal Code
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5. Equipment Replacement Program
6. Evaluate and Set Up Program for Sewer System Replacement & Repair
7. Make Westchester a "Home Rule" Village to Increase Sales Tax Revenue
8. New High School District or Improve High School District

This report's value will be realized as a working guide to the Board and staff as they pursue the agenda and issues that were raised and developed during the session. Remember, try for small wins first; don't try to accomplish it all at once. Developing alternatives, debating options and building consensus will take time and some adjustment of expectations and opinions on the part of many. As you can see, there is plenty of work to do. The next step is for staff to review the results and fine-tune these objectives in their action-planning session and report back to the Village Board on how and when they might be most efficiently and effectively addressed. But remember— above all, stay the course resist the urge to flip—flop or hopscotch your way to the future.

PHASE V. GROUP EXERCISE - "SURRENDER OR LEAD"

Participants were introduced to a leadership exercise entitled "Surrender or Lead". The premise is that sub-groups of the participants work to develop responses to some simple, but extremely effective and thought provoking questions. Participants were broken up into three working groups and asked to respond to a series of structured questions designed to initiate discussion and reveal perspectives, challenges and frustrations of the participants as a whole. The participants' responses were recorded and discussed. The responses provided by each group are recorded below. Underlined sections are key phrases that groups were asked to respond to. Groups were given names of Chicago sports franchises to assist in group identification and to offer a spirit of camaraderie among group members. Responses to the exercise questions are presented below:

CUBS

1. We want to improve services, but have no funds.
2. We can't expand, because we are landlocked.
3. If it weren't for the high school system, we would be more marketable.
4. We have to plan for the future, because it makes us more efficient.
5. Superior service makes us more desirable.

BEARS

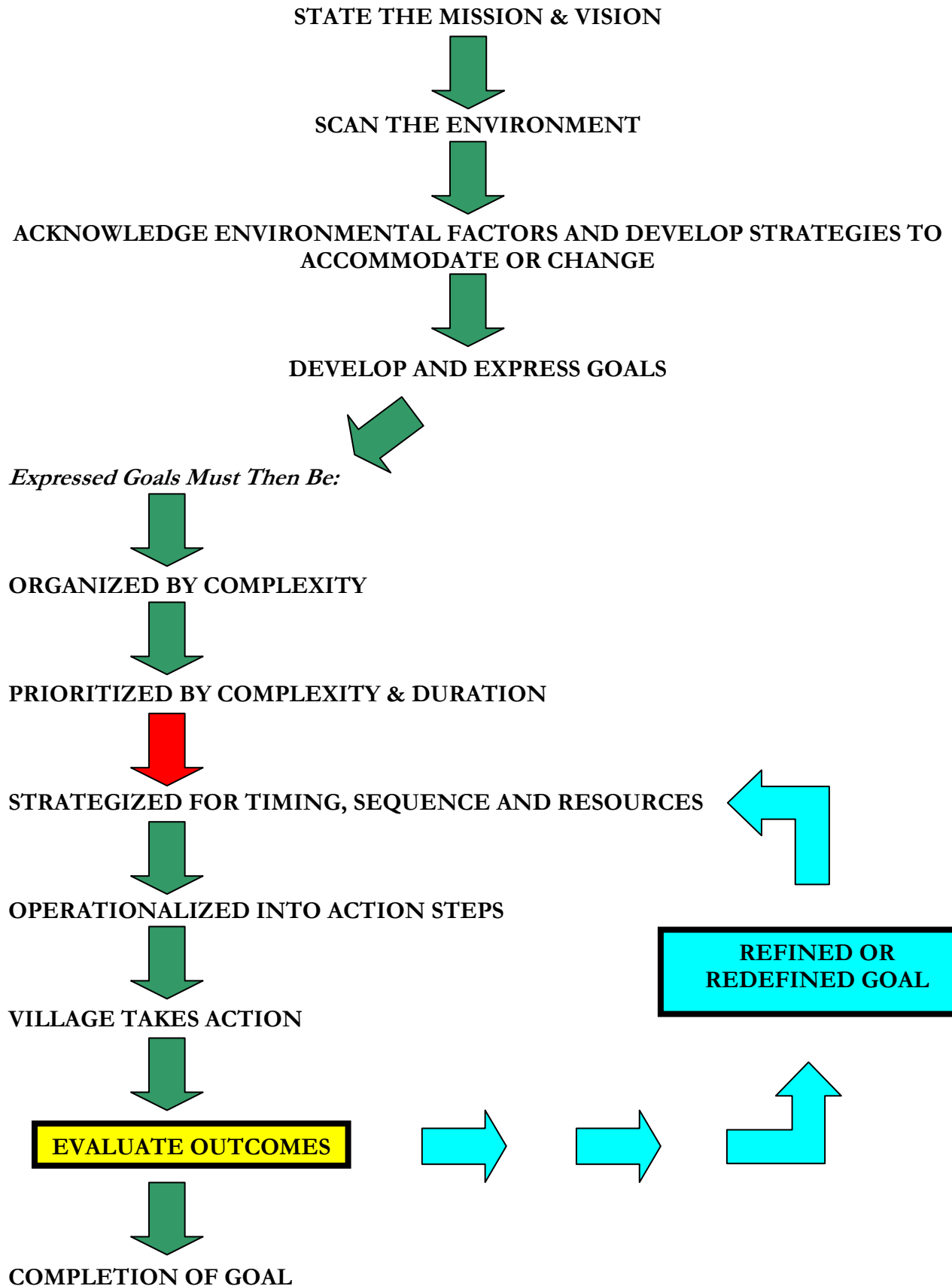
1. We want to attract top retailers, but have no plan.
2. We can't bring in extra revenue, because we are non-home rule.
3. If it weren't for excuses, we would succeed.
4. We have to serve the public, because it is our responsibility.
5. Progress makes us, look good.

BULLS

1. We want to develop, but can't agree on how to do it.
2. We can't give up, because there is too much at stake.
3. If it weren't for falling revenues, we would provide more extensive services.
4. We have to find ways to work together, because you cannot have progress without cooperation.
5. Cooperation makes us unbeatable.

Each group nominated a spokesperson and presented responses to the "Surrender or Lead" exercise. A very lively and insightful discussion followed the presentation of the above responses. Participants were both amazed and encouraged by the similarity of the responses given the independent work of each group in developing the responses.

THE STRATEGIC PLANNING MODEL USED IN THIS EXERCISE



Village of Westchester Exhibit 1

Short-Term Complex Goals																	Average Score	Rank	
Develop Financial Policies to "Guide" Policy Decisions	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	2.000	1
Develop Commitment to Long Range Planning (Capital Plan & 5 Year Budget)	2	1	4	5	1	2	2	2	2	2	9	1	1	2				2.615	2
Establish Long Term Goals for Economic Development	5	9	2	3	7	3	1	2	2	5								3.900	3
Create a Human Resources Person/Source in the Village	3	3	7	4	4	4	3	5	3	6	7	5						4.545	4
New Centrally Located Fire Department/Municipal Center	5	2	3	5	3	4	7	8	6	6	4	4	9	6	4			5.067	5
Change from Annual Appropriation Method to Annual Budget Method	7	6	3	2	3	7	4	7	6	5	6							5.091	6
To Ensure We Have the Best Fire & Police Protection	4	3	6	6	9	5	7	7	8	4	5	4	5	9	2			5.600	7
Assist Police Patrol via use of Cameras in High Crime Areas	9	6	9	7	8	6	9	9	8	8	6	9						7.833	8
Red Light Camera Program - Safety	8	8	8	8	5	8	7	7	8	8	10	8	9					7.846	9

Long-Term Complex Goals																	Average Score	Rank	
Develop a Comprehensive Land Use Plan	1	2	3	2	2	2	3	2	2	2	3	2	2	2	2	1		2.071	1
Economic Development of Existing Commercial Corridors	4	1	1	4	1	1	1	1	3	6	1	1	1	3				2.154	2
Update Westchester Municipal Code	3	5	1	3	8	2	1	6	5	3	8							4.091	3
Program for Alley & Street Repair & Replacement	2	4	8	4	5	7	3	5	3	3	3	6	5					4.462	4
Equipment Replacement Program	6	6	6	6	6	4	4	4	4	1	8	5	4					5.000	5
Evaluate and Set Up Program for Sewer System Replacement & Repair	8	5	7	6	5	4	5	6	4	7	4	4	5	7	4	5		5.375	6
Make Westchester a "Home Rule" Village to Increase Sales Tax Revenue	5	8	7	35	35	5	7	7	2	6	2	7						10.500	7
New High School District or Improve High School District	7	3	8	7	20	10	8	8	6	7	7	8						8.250	8

Short-Term Routine Goals																	Average Score	Rank	
Explore New Revenue Sources	3	1	1	2	8	2	2	1	2	1	2	1	2	2				2.250	1
Formal Budget Planning Sessions in Public w/Entire Board	13	1	1	7	1	1	2	2	1	17	1	7						4.500	2
Create a Central Information File Containing Information	8	6	4	3	7	7	14	4	14	2	2							6.455	3
To Eliminate Unnecessary Fees & Taxes	16	4	3	3	8	6	9	3	13	5	2							6.545	4
To Provide Transparency to our Residents	15	4	18	2	15	4	5	7	7	3	10	5	4					7.615	5
Centralize Village Purchasing	3	3	16	14	10	7	11	5	7	5	4	5	12	10	5			7.800	6
Create Accountability & responsibility Standards for Staff	1	11	8	1	15	5	14	14	16	6	6	4	3					8.000	7
Examine Consolidated Service Delivery	5	15	3	9	14	11	8	3	9	16	8	7	6	11	8			8.867	8
Offer More Services & Information to Residents & Businesses & Stakeholders on the Village Website	4	9	14	10	8	4	6	14	11	13	6	8						8.917	9
Offer the Residents & Businesses the Ability to Pay for Bills/Services On-Line or Through Direct Debit	7	7	8	9	10	12	2	13	9	9	16							9.273	10
More Comprehensive Training for Personnel	7	12	4	18	6	15	15	11	6	10	12	3	9					9.846	11
Improve Municipal Facilities	11	4	13	13	18	12	9	13	10	10	5	8	11	9				10.429	12
Program for General Maintenance of Village	6	15	17	12	14	11	13	12	9	18	3							11.818	13
Create Partnerships with Other Village Governments (School & Park)	14	10	6	17	15	13	10	12	15									12.444	14
Job Descriptions for Village Employees	10	15	17	13	11	18	18	12	11	10	6	12	11	12				12.571	15
Rotate Committee Assignments to Improve Knowledge Base	17	7	14	5	16	5	17	13	13	9	16	17	18					12.846	16
Continue to Secure Grants for Beautification	18	8	15	17	16	6	10	11	17	17	17	8	16					13.538	17
Citizen Police Academy	18	18	16	16	12	16	18	14	12	17								15.700	18

Long-Term Routine Goals																	Average Score	Rank	
To Gain the Trust of our Residents & Employees as a Village	3	2	2	2	1	1	1	2	2	1	2	2	1	2	2			1.750	1
Revitalize Village's Existing Business Structures	7	1	2	2	1	2	1	1	1	1	2	1	1	1	1			1.769	2
Traffic/Stop Sign Plan	2	3	3	3	3	3	3	1	3	3	3	3	3	3	3			2.786	3