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# **WHITE BEAR LAKE STRATEGIC PLAN**

**JANUARY 2024**

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# STRATEGIC PLAN

## PROCESS

On January 31, 2024, the White Bear Lake City Council and Staff Leadership Team convened a work session for the purpose of developing long-term strategies and short-term goals for the organization in 2024. The work session included the following people:

Dan Louismet, Mayor	Kerri Kindsvater, Finance Director
Bill Walsh, Ward 1 Councilmember	Jessica Saari, Assistant Finance Director
Heidi Hughes, Ward 2 Councilmember	Dale Hager, Chief of Police
Andrea West, Ward 3 Councilmember	Phil Henry, Patrol Captain
Kevin Edberg, Ward 4 Councilmember	Greg Peterson, Fire Chief
Steven Engstran, Ward 5 Councilmember	Joel Schmidt, Assistant Fire Chief
Lindy Crawford, City Manager	Paul Kauppi, Public Works Director/City Engineer
Rick Juba, Assistant City Manager	Nathan Christensen, Assistant City Engineer
Caley Longendyke, City Clerk	Jason Lindahl, Community Development Director
Phil Kern, Facilitator	

The process examined three primary levels of strategic planning - long-term vision, organizational values and expectations, and short-term goal setting. The group considered long-term vision elements and developed strategy statements that define that vision, followed by evaluating the present status of the City and organization to develop a goals list for Council and staff consistent with that vision. The participants engaged in discussion around a series of questions to consider areas of strength and weakness, along with potential impacts and opportunities on the horizon. Additionally, the group discussed and developed consensus around how the different functions of local government need to work in order to be successful, establishing organizational expectations and values.

The City Council will now consider the results of the session through the process of adopting its 2024 Strategic Plan.

## LONG TERM VISION

One of the primary outcomes of the Strategic Planning process is the development of a long-term vision. The vision is a description of the future the participants see for the community and the organization, often expressed in aspirational terms. The purpose of the vision is to establish a long-term direction that can be communicated both within the community and the organization, providing all stakeholders with an understanding of the leadership's direction. The

vision is communicated through a series of descriptive and detailed organizational strategy statements, labeled core strategies. These statements can be both the embodiment of the areas the organization values and the direction of its leadership. Accomplishing progress on the core strategies will bring the organization closer to achieving its vision and provide the areas in which more manageable, short-term goals can be derived.

Prior to the session, participants were asked to consider the characteristics and qualities they hoped would describe White Bear Lake and the organization in 2035. Participants individually shared their thoughts in writing in advance. The comments and input were collected and shared anonymously with the group in the first exercise of the session. The participants were given the opportunity to discuss the results of the pre-session work, identifying areas where they agreed or didn't agree with the ideas for the long-term vision of the City and organization.

The participants then reviewed a draft of core strategies and strategic objectives based on the input from this activity. The core strategies are action statements that identify the organization and City's long-term key areas of focus. The strategies provide consistent and stable organizational priorities for the years to come, and serve as organizational guideposts for day-to-day action, policy formation, and program decision-making. It is anticipated that the core strategies may be modified over the long-term, but generally all agreed as to the key priorities of the leadership team.

The core strategies are supported in this plan by strategic objectives. These objectives provide more specific action areas that the City's leadership team believes are integral to achieving success with the core strategies. Each objective addresses an internal or external area of action or improvement. The strategic objectives, combined with the core strategies, provide direction for all areas of leadership.

Following the presentation of draft core strategies and strategic objectives, the full group reviewed and discussed the body of work and modified the proposed statements of the Leadership Team's vision. Without objection and subject to further modification prior to adoption, the group agreed to the following draft core strategies and strategic objectives:

### **Core Strategies and Strategic Objectives**

The City of White Bear Lake is committed to leading and guiding the City towards the following long-term Core Strategies and Strategic Objectives:

#### **1. A Safe and Welcoming Community**

- a. Facilitate and encourage community connections between the City as an organization, all residents, business and civic groups.
- b. Maintain appropriate staffing levels in public safety departments, ensure adequate technology and equipment is provided.
- c. Public safety departments are engaged with the community.
- d. Maintain a welcoming presence – all feel welcome and have opportunities to participate in a wide range of community functions.

## **2. Maintain Small-Town Feel**

- a. Refresh and improve the downtown area without losing its historic character.
- b. Preserve and build on the community's lake life identity.
- c. Maintain the historic character and charm.
- d. Strategically approach change through public participation.

## **3. Engaged Community, Responsive Leadership**

- a. Create engagement opportunities for all community members.
- b. Utilize relevant communication tools to support two-way communication.
- c. Identify and encourage future leaders (public and private).
- d. Ensure services are responsive to the wants and needs of citizens at all stages of life, levels of need, and background.
- e. Foster relationships, maintain civility, and expect professionalism.

## **4. Complete Community**

- a. Support opportunities to offer a wide range of life-cycle housing.
- b. Establish new and maintain existing high-quality services and amenities.
- c. Retain and expand upon the resilient natural environment.
- d. Partner and support thriving educational systems.
- e. Create community, connectivity, and identity through a wide range of arts and events.

## **5. Support Redevelopment to Revitalize Local Economy and Business Districts**

- a. Work to attract a diverse mix of retail and commercial businesses throughout the community.
- b. Ensure business districts are attractive, walkable, and accessible.
- c. Attract and retain employment opportunities and employers.

## **6. Excellent Services and Values**

- a. Emphasize proactive budgeting vs. reactive budgeting.
- b. Maintain resources in a sustainable manner.
- c. Maintain long-range financial planning efforts (Capital Improvement Plan and Financial Management Plan).
- d. Maintain our per capita value to taxes collected and communicate with taxpayers.

## **7. Dedicated and Supported City Staff**

- a. Maintain a desirable and collaborative workplace environment with competitive pay and benefits.
- b. Ensure staffing levels are appropriate for the level of services expected from the community.

- c. Sustain employee retention through professional development opportunities, forward thinking policies, and strategic actions.

## ORGANIZATIONAL EXPECTATIONS AND VALUES

The second part of the session focused on how the organization desires to conduct its matters and how the different members of the leadership team interact with each other. Effective local governance requires respect and understanding of the difference in roles between the elected body, the City Council, and its professional staff. The City Council should focus on governance through establishing policy, providing direction, and acting on official matters before the City. Staff, through the City Manager, focus on execution of services and implementation of Council directives. Understanding those roles and what each body provides for the other is important in setting the context for a strong, working relationship and good governance.

For this exercise, the City Council and staff leadership teams respectively split into two groups to discuss two questions: what it expects of the other group and what it provides for the other group. The Council and staff leadership team then reconvened and shared with each other providing an opportunity for discussion and feedback.

The outcome of this work are the following expectations and values for the City of White Bear Lake:

<b>City Council Provides for Staff</b>	<b>Leadership Team (Staff) Provides for City Council</b>
Reasonable notice for information requests	Expertise
Respect staff expertise, professionalism, and experience	Professionalism
Respect chain of command	Commitment
Support Council decisions	Consistency
Shared vision	Timely and transparent information
Civility	Options for solving problems
Clarity	Responsiveness to constituents
	Quality customer service
	Sense of ease/peace of mind

<b>City Council Expectations of Leadership Team (Staff)</b>	<b>Leadership Team (Staff) Expectations of City Council</b>
Information and facts	Recognize organizational capacity
Anticipate challenges and opportunities	Consistent clear direction
Provides perspective and counsel	Support and trust
Provide professional recommendations	Seek to understand
Regular communication (no surprises)	Maintain civility
	Focus on the greater good of the community
	Recognize value of each department

## ENVIRONMENTAL ASSESSMENT

Moving into the short-term actions phase, the session was highlighted by the process of conducting an environmental scan of the City and organization. This activity is designed to consider the present state of the external (community) and internal (organization) from a variety of perspectives. Again, in small group settings, participants were asked to consider its strengths, challenges, and explore trends and issues that face the City in the coming years. The scan provided the basis for the group’s efforts later in the work session to develop the goals that will guide the organization in the coming years.

In its first assessment activity, the group was asked to consider all of the things that identify as strengths of White Bear Lake, both as a City and the organization itself. Participants were encouraged to think of projects, services, actions, and policies. After discussing the strengths, participants turned their attention towards reviewing City and organizational areas that need improvement. These items are areas that presently challenge the organization and City.

Following the assessment of its strengths and challenges, the group moved on to the final brainstorming activity - anticipating emerging trends or issues that may impact the City. Forecasting potential external changes or impacts is a key step in the process to help leadership anticipate pressures and opportunities that may arise. To guide this process, the participants followed a STEP model of analysis, thinking about trends and external impacts in the areas of socio-cultural, technical, economical, and political. Thinking about the ongoing opportunities and challenges in each of these areas provides a variety of important perspectives for the City in the coming years.

## SHORT TERM GOALS

The third portion of the Strategic Planning process was to develop a short-term goals platform and workplan to guide the organization in the coming years. Participants were offered the opportunity to present draft goals that addressed any of the following objectives - short-term actions that lead to a core strategy or strategic objective, goals to address weaknesses, opportunities, or potential impacts discussed during the assessment process, or other goals that individual members viewed to be important for the City. The process encouraged the brainstorming of SMART goals - specific, measurable, attainable, relevant, and time-bound (1-2 years) - and objectives that would support the core strategies and vision.

Following the brainstorming process, a prioritization process was used to develop the following list of high priority and priority goals. Participants were given the ability to choose a limited number of brainstormed goals as their top priorities. As each participant's choices were collected, the draft goals were bunched into three categories. The categories and prioritization followed these guidelines:

- High Priority Goals - goals that were identified by at least three members of the Mayor/City Council as top priority and also received support from City Staff.
- Opportunity Goals - goals that were identified as a top priority by at least two of the Mayor and City Council or a majority and received support from City Staff.
- Other Goals - goals that did not have an initial priority ranking by more than one of the Mayor and City Council. (Included as an appendix to the report.)

### **Proposed Short-Term Goals**

**High Priority** - goals that are the top priority of the organization in the coming two-year period.

1. Long-range assessment of city facilities is completed, with proposed budgets and timelines for necessary improvements within two years.
2. Consider employee recruitment and retention policy updates, including considering modifications to tuition reimbursement and parental leave policies.
3. Successful completion of downtown reconstruction.
4. Fill police roster, achieving 100% staffing, by the end of 2024.
5. Understand life-cycle housing needs, identify compatible uses for city-owned properties, and identify policy and finance tools to address community needs.
6. Execute the County Road E Corridor Action Plan.
7. Finish the street reconstruction program.
8. Execute Otter Lake Road turnback with Ramsey County following reconstruction.
9. Continue to discuss and revise redevelopment priorities based on opportunities and strategic timing.
10. Complete the Zoning Code update project.

**Opportunity** - goals that have organizational support, to be pursued when opportunity is available.

1. Complete staffing assessment, create and maintain staffing needs priority list for annual review and discussion during budgeting.
2. Conduct department specific strategic planning in 2025.
3. Complete the Public Safety Facility Renovation & Expansion Project on time and within budget.
4. Identify and solve work inefficiencies, including implementation of budgeting software and similar technologies.
5. Implement EAB management plan.
6. Seek opportunities to better tie the north and south sections of the community together.
7. Improve communications with the public, including hiring a communications employee.

## NEXT STEPS

The next step in the goal setting process is to work within each of these short-term goals to develop action plans and the establishment of benchmarks to measure progress. One of the recommended steps is the identification of measurables, or benchmarks, to effectively evaluate the City's accomplishment of each goal. Developing measurable outcomes for each goal will also help in the development of action plans to reach the desired outcome. The goals should then be revisited from time-to-time as an accountability measure for both the Council and staff.

Additionally, finding ways to integrate the goals into the organizational processes also helps to develop success. Building on the methods in which White Bear Lake has been successful in the past is recommended, along with exploring new methods of keeping the goals on the forefront of the leadership team's efforts. It was an honor to assist your team in the process of establishing its Strategic Plan for the coming years.