



2022 – 2025

# STRATEGIC PLAN

MARCH 2022





RAPP CONSULTING GROUP

March 28, 2022

RE: 2022-2025 Strategic Plan – Village of Oswego

Dear President Parlier,

I am pleased to present the 2022-2025 Strategic Plan and Summary Report to the Village of Oswego. The plan reflects the organization's priorities, commitment to measurable results and the delivery of quality services.

It has been a pleasure assisting the Village of Oswego with this important project. The Board displayed clear thinking, dedication, and focused effort.

I particularly wish to thank Dan Di Santo and Christina Burns for their leadership and the Board of Trustees for their help and support during the process.

Yours truly,

Craig R. Rapp  
President

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# EXECUTIVE SUMMARY

From August 2021 through March 2022, the Village of Oswego engaged in a strategic planning process. The process resulted in a strategic plan covering 2022-2025.

The plan consists of six **strategic priorities** — the issues of greatest importance to the Village of Oswego over the next three years. Associated with each priority is a set of **desired outcomes, key outcome indicators, and performance targets**, describing expected results and how the results will be measured. The plan also includes **strategic initiatives** that will be undertaken to achieve the targeted outcomes.

The planning effort began with an examination of the operating environment, Board interviews, Environmental Scan and a SWOT analysis. On October 21 & 27, 2021, the team held two-days of strategic planning sessions. They developed a set of priorities, key outcomes, performance targets, and confirmed the organization’s vision, mission and values.

Based upon those priorities, the Village of Oswego met in November 2021 to identify a set of strategic initiatives and develop detailed action plans. The strategic priorities, key outcome indicators, performance targets and strategic initiatives are summarized here and on the following page.



The Plan

## Six Strategic Priorities

- 1 FINANCIAL STEWARDSHIP
- 2 BALANCED DEVELOPMENT
- 3 RECRUIT & RETAIN HIGH QUALITY EMPLOYEES
- 4 WELL-MAINTAINED INFRASTRUCTURE
- 5 COMPLETE WOLF’S CROSSING
- 6 A NEW WATER SOURCE

# STRATEGIC PLAN SUMMARY 2022–2025

Strategic Priority	Desired Outcome	Key Outcome Indicator	Target	Strategic Initiatives
<b>Financial Stewardship</b> <i>A financially responsible Village</i>	Establish financial strength across all funds	- Fund Balance Compliance	- Fund Balance Compliance	a) Maintain Fund cash balances in compliance with Village policy b) Complete special census by calendar year 2024 c) Implement Program Based Budget d) Review and implement one to two new revenue sources annually e) Identify spending priorities for ARPA funds f) Identify and report annually percent of revenue growth and operation expenditure growth in all funds
	Diversify the revenue base	- # of new non-tax revenue sources	- # of new non-tax revenue sources	
	Responsibly control spending	- Revenue Growth - Operating expenditure increase	- Revenue Growth - Operating expenditure increase	
<b>Balanced Development</b> <i>A Village with something for everyone</i>	Create a destination downtown	- # 10/10/10 uses - Increase in EAV - Increase in parking demand	- Achieve 10/10/10 uses by 2025 - 15% increase in EAV - @50% parking occupancy	a) Complete Development Process Improvement Plan b) Establish key development properties marketing strategy c) Create a downtown public improvement plan d) Create Downtown Parking Plan e) Initiate comprehensive housing analysis and create a scorecard f) Complete Unified Development Ordinance
	Develop key properties	- Development plans approved - Acres developed	- #_ plans approved - 20 commercial acres developed on Orchard by 2025	
	Diversify the housing stock	- % change in housing types - Housing targets progress	- Implement housing scorecard by 2024	
<b>Recruit &amp; Retain High Quality Employees</b> <i>A high-quality workforce</i>	Create an accountable & effective workforce	- # perf evals above expectation - Community satisfaction increase	- 70% of employees exceed expectation	a) Conduct and track annual performance evaluations b) Complete level of service analysis for two departments c) Update staffing study on an annual basis d) Establish plan to meet staffing needs based on staffing analysis and level of service demands e) Complete compensation and benefits analysis in 2022 and 2024 f) Implement diversity, equity and inclusion metrics g) Create career development component to performance evaluations h) Evaluate overtime usage
	Ensure organizational capacity can meet service demands	- Staffing ratios achieved - Employee satisfaction rate	- Organization sized to meet service demands in 2 departments by 12/31/25 - Meet staffing ratios at med. level annually beginning 2024	
	Preparing for an evolving workforce	- Turnover rate - Compensation & benefit targets met	- Forward thinking career plan implemented by 2024 - Compensation & benefits consistent w/study results	
<b>Well-maintained Infrastructure</b> <i>Safe, reliable infrastructure</i>	Establish levels of service in all areas	- Response time reductions - Community satisfaction rates	- Define & establish LOS schedules-all areas by 2025	a) Conduct Asset Management Impact Study for Public Works b) Conduct a level of service study c) Secure funding for next phase of commuter rail extension d) Vehicle and equipment analysis and funding plan to ensure optimal service delivery and efficiency
	Maintain assets adequately to meet level of service	- Condition ratings - PCI ratings - Down time	- Asset assessment programs underway in all areas by 2025	
	Allocate resources to meet future demand	- 20-year CIP progress - Service demand ratios	- A 20-year all asset plan & funding strategy	
<b>Complete Wolf's Crossing</b> <i>Transportation for a growing community</i>	Complete key projects and secure future funding	- % project milestones met - Substantial completion	- Harvey Road opened by May 20, 2023 - Harvey Road let by Nov. 18, 2022 - Funding strategy for Harvey Road in place by May 1, 2022 - Funding strategy for next phases in place by May 1, 2022	a) Construction plans completed and ready for November 2022 Letting b) Construction substantially completed by Nov. 30, 2023 c) Establish funding plan for Douglas Road, including securing federal funding, by Dec. 31, 2022
<b>A New Water Source</b> <i>Water to meet future needs</i>	Secure future water source and funding	- Legislation secured - Governance agreement in place - Partnership approval - Rate structure, funding	- Agreements for preferred option approved by December 31, 2022 - Financing strategy in place by July 1, 2022	a) Legislative approval granted by December 31, 2022 b) Contracts executed by December 31, 2022 c) Establish funding plan by Dec. 31, 2024 d) Secure loan authorization by Dec. 31, 2024



## OUR VISION

Oswego is a safe, friendly, community for all generations providing a blend of city and country with a lively, diverse mix of businesses. Our high quality of life is based upon fiscally responsible growth and a respect for our heritage and the environment.



## OUR MISSION

It is our mission to responsibly grow our community and maintain the public's trust. We do this through the innovative and collaborative delivery of public services that meet the community's quality of life expectations.



## OUR VALUES

### INTEGRITY

We are honest, ethical and we honor commitments.

### ACCOUNTABILITY

We take responsibility for our actions and are transparent in the fulfillment of our public duties.

### INNOVATIVE

We value creative thinking and problem-solving in our service to the public.

### PRIDE IN WORK PERFORMED

We value a commitment to excellence and pride in the performance of our work.

### COMMUNITY

We believe in contributing to something greater than ourselves.

### COLLABORATION

We expand our impact and our service through our partnerships.

## Reviewing the Environment, Setting Strategic Priorities

An important part of the strategic planning process is a review of the current operating environment and an evaluation of the challenges confronting the community. This was accomplished via a SWOT analysis--a process that examines the organization's internal strengths and weaknesses, as well as the opportunities and threats in the external environment. The results are displayed below.

### DO WELL

- Customer service
- Transparency
- Strong workplace culture
- Strong development
- Future planning
- Costs

### IMPROVE/DO BETTER

- Revenue sources
- Build or collaborate with other agencies
- Streamline internal processes across the organization / Village-wide
- Programing of venue 1012 – making it a sustainable venue

## SWOT Analysis

- Communication
- Financial
- Internal/staff
- Business/growth
- Downtown investment
- DEI

### DO MORE

- Revenue & tax base
- Adequate staffing levels
- Infrastructure planning
- Communicating vision & goals
- Entry level housing

### CONCERNS

# STRATEGIC PRIORITY 1

## Financial Stewardship



### OUTCOME

Establish strength across all funds

### KEY OUTCOME INDICATOR

Fund balance compliance

### TARGET

Annual compliance with Village Fund Balance Policy (all funds)

### OUTCOME

Diversify the revenue base

### KEY OUTCOME INDICATOR

# of new non-tax revenue sources

### TARGET

Five new revenue sources by 2025

### OUTCOME

Responsibly control spending

### KEY OUTCOME INDICATOR

Revenue growth, operating expenditure increase

### TARGET

Operating expenditures (non-personnel) and revenue growth

## STRATEGIC INITIATIVES

- a. Maintain fund cash balances in compliance with Village policy
- b. Complete special census by calendar year 2024
- c. Implement Program Based Budget
- d. Review and implement one to two new revenue sources annually
- e. Identify spending priorities for ARPA funds
- f. Identify and report annually percent of revenue growth and operation expenditure growth in all funds



## STRATEGIC PRIORITY 2

# Balanced Development



### OUTCOME

Create a destination downtown

#### KEY OUTCOME INDICATOR

# 10/10/10 uses, increase in EA, increase in parking demand

#### TARGET

Achieve 10/10/10 by 2025, 15% increase in EAV, @50% parking occupancy

### OUTCOME

Develop key properties

#### KEY OUTCOME INDICATOR

Development plans approved, acres developed

#### TARGET

\_#\_ plans approved, 20 commercial acres developed on Orchard by 2025

### OUTCOME

Diversify the housing stock

#### KEY OUTCOME INDICATOR

% change in housing types, housing targets progress

#### TARGET

Implement housing scorecard by 2024

## STRATEGIC INITIATIVES

a. Complete Development Process Improvement Plan

b. Establish key development properties marketing strategy

c. Create a downtown public improvement plan

d. Create Downtown Parking Plan

e. Initiate a comprehensive housing analysis and create a scorecard

f. Complete Unified Development Ordinance

# STRATEGIC PRIORITY 3

## Recruit & Retain High-Quality Employees



### OUTCOME

Create an accountable & effective workforce

### KEY OUTCOME INDICATOR

\_#\_ performance evaluations above expectation, community satisfaction increase

### TARGET

70% of employees exceed expectation

### OUTCOME

Ensure organizational capacity can meet demands

### KEY OUTCOME INDICATOR

Staffing ratios achieved, employee satisfaction rate

### TARGET

Organization sized to meet service demands in 2 departments by 12/31/25, meet staffing ratios at med. level annually beginning 2024

### OUTCOME

Prepare for an evolving workforce

### KEY OUTCOME INDICATOR

Turnover rate, compensation & benefit targets met

### TARGET

Forward thinking career plan implemented by 2024, compensation & benefits consistent with study results

## STRATEGIC INITIATIVES

- a. Conduct and track annual performance evaluations
- b. Complete level of service analysis for two departments
- c. Update staffing study on an annual basis
- d. Establish plan to meet staffing needs based on staffing analysis and level of service demands
- e. Complete compensation and benefits analysis in 2022 and 2024
- f. Implement diversity, equity, and inclusion metrics
- g. Create career development component to performance evaluations
- h. Evaluate overtime usage

# STRATEGIC PRIORITY 4

## Well-maintained Infrastructure



### OUTCOME

Establish levels of service in all areas

### KEY OUTCOME INDICATOR

Response time reductions, community satisfaction rates

### TARGET

Define & establish LOS schedules-all areas by 2025

### OUTCOME

Maintain assets adequately to meet level of service

### KEY OUTCOME INDICATOR

Condition ratings, PCI ratings, down time

### TARGET

Asset management programs underway in all areas by 2025

### OUTCOME

Allocate resources to meet future demand

### KEY OUTCOME INDICATOR

20-year CIP progress, service demand ratios

### TARGET

A 20-year all asset plan & funding strategy

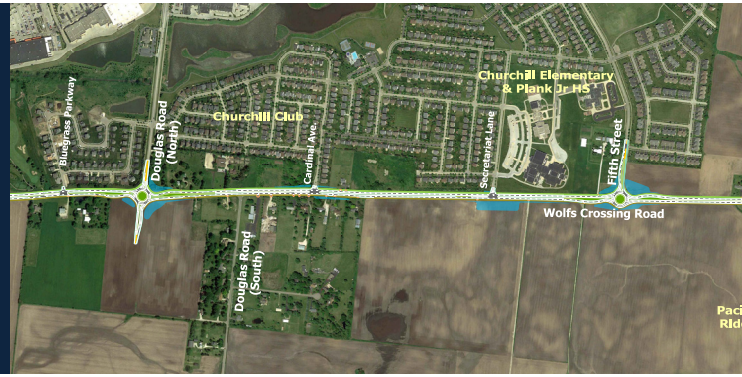
## STRATEGIC INITIATIVES

- a. Conduct Asset Management Impact Study for Public Works
- b. Conduct a level of service study

- c. Secure funding for next phase of commuter rail extension
- d. Vehicle and equipment analysis and funding plan to ensure optimal service delivery and efficiency

# STRATEGIC PRIORITY 5

## Complete Wolf's Crossing



### OUTCOME

Complete key projects and secure future funding

### KEY OUTCOME INDICATOR

% project milestones met, substantial completion

### TARGET

Harvey Road opened by May 20, 2023, Harvey Road let by November 18, 2022, funding strategy for Harvey Road in place by May 1, 2022, funding strategy for next phases in place by May 1, 2022

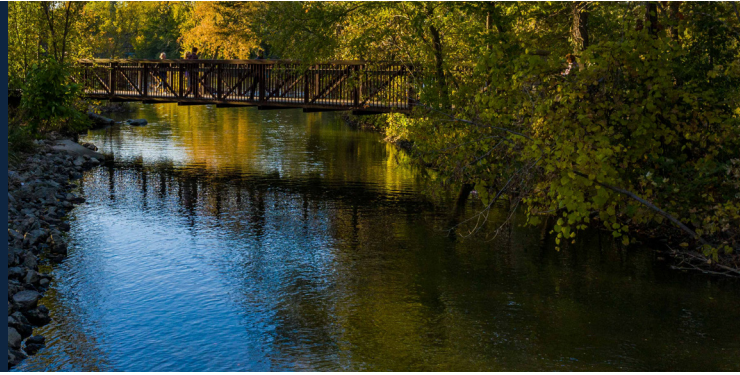
## STRATEGIC INITIATIVES

- Construction plans completed and ready for November 2022 Letting
- Construction substantially completed by November 30, 2023

- Establish funding plan for Douglas Road, including securing federal funding by December 31, 2022

# STRATEGIC PRIORITY 6

## A New Water Source



### OUTCOME

Secure future water source and funding

### KEY OUTCOME INDICATOR

Legislation secured, governance agreement in place, partnership approval, rate structure, funding

### TARGET

Agreements for preferred option approved by December 31, 2022, financing strategy in place by July 1, 2022

## STRATEGIC INITIATIVES

a. Legislative approval granted by December 31, 2022

b. Contracts executed by December 31, 2022

c. Establish funding plan by December 31, 2024

d. Secure loan authorization by December 31, 2024

## STRATEGIC PLANNING PARTICIPANTS

The strategic plan was developed with the hard work and dedication of many individuals. The Village Board led the way, taking time out their schedules to commit to long-term thinking. They defined a direction and a set of outcomes that are important to the citizens, businesses and stakeholders with whom they partner and serve.

The Village of Oswego senior staff supported the Board and offered challenges to conventional thinking.

### VILLAGE BOARD

Troy Parlier, Village President

Brian Thomas, Trustee

Tom Guist, Trustee

James Marter, Trustee

Jennifer Jones-Sinnott, Trustee

Kit Kuhrt, Trustee

Terry Olson, Trustee

### VILLAGE STAFF

Dan Di Santo, Village Administrator

Christina Burns, Deputy Village Administrator

Tina Touchette, Village Clerk

Jeff Burgner, Police Chief

Jennifer Hughes, Public Works Director

Rod Zenner, Development Services Director

Mark Horton, Finance Director

Scott McMaster, Economic Development Director

Joe Renzetti, IT Director