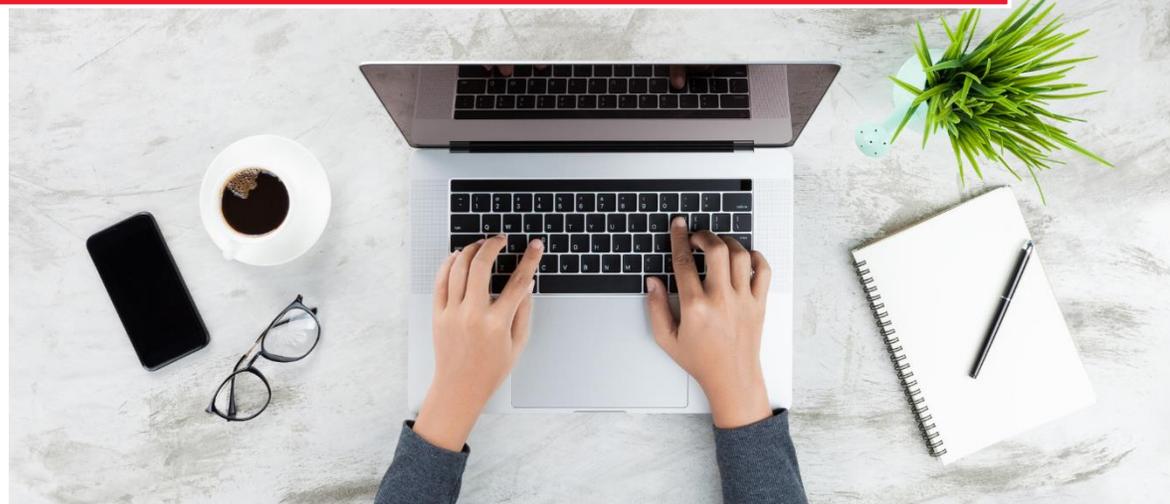




# City of Milton 2020 – 2024 Strategic Plan Project Charter & Work Plan



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# Project Charter

## Background

In 2007, the City of Milton Common Council approved a strategic plan. Since then the strategic plan has not been updated or revised. The Common Council and staff will be working together to develop a new strategic plan for the City of Milton that will span 2020 – 2024 with input from the community

## Goals

- Establish a transparent and inclusive strategic planning process that involves elected officials, employees, and community members.
- Adopt a strategic plan that serves as a guide for decision making in all areas of operation for the City of Milton.
- Provide regular communication to elected officials, staff, and the public about the strategic planning process and the implementation and use of the completed strategic plan.
- Develop a process for annual reviews of the strategic plan.

## Scope

- Establish the project charter and timeline to develop a strategic plan for the City of Milton.
- Create a mission, vision, and values for the City of Milton as a whole.
- Perform internal and external scans of the current climate in the City of Milton to determine strengths and major issues and challenges for the community and organization.
- Provide internal and external engagement and input opportunities for staff and community members.
- Develop goals, objectives, strategies, and actions based on the strengths and major issues and challenges identified through community, elected official, and staff feedback.
- Finalize a complete document that summarizes the information obtained through the strategic planning process and that showcases the finalized strengths, issues, challenges, goals, objectives, strategies, and actions to move the community forward.

## Project Team

### *Project Management*

<b>Title</b>	<b>Name</b>	<b>Phone</b>	<b>Email</b>
Project Manager / Admin. Services Director	Inga Cushman	(608) 868-6900 ext. 5	icushman@milton-wi.gov

### *Department Heads*

<b>Title</b>	<b>Name</b>	<b>Phone</b>	<b>Email</b>
City Administrator	Al Hulick	(608) 868-6900 ext. 6	ahulick@milton-wi.gov
Finance Director / Treasurer	Dan Nelson	(608) 868-6900 ext. 3	dnelson@milton-wi.gov
Police Chief	Scott Marquardt	(608) 868-6910	smarquardt@milton-wi.gov
Public Works Director	Howard Robinson	(608) 868-6914	hrobinson@milton-wi.gov
Library Director	Ashlee Kunkel	(608) 868-7462	kunkel.ashlee@als.lib.wi.us
City Clerk	Leanne Schroeder	(608) 868-6900 ext. 2	lschroeder@milton-wi.gov

***Elected Officials***

<b><i>Title</i></b>	<b><i>Name</i></b>	<b><i>Phone</i></b>	<b><i>Email</i></b>
Mayor	Anissa Welch	(608) 751-7198	awelch@milton-wi.gov
Aldersperson	Lynda Clark	(608) 290-5674	lclark@milton-wi.gov
Aldersperson	Devin Elliott	(608) 921-5105	delliott@milton-wi.gov
Aldersperson	Ryan Holbrook	(608) 577-0492	rholbrook@milton-wi.gov
Aldersperson	Larry Laehn	(920) 540-9927	llaehn@milton-wi.gov
Aldersperson	Theresa Rusch	(608) 295-5468	trusch@milton-wi.gov
Aldersperson	Bill Wilson	(608) 868-9180	bwilson@milton-wi.gov

***Employee Focus Group***

This group will convene to discuss the strengths and major issues and challenges facing the City of Milton. The Department Heads will recommend employees from their departments to the Employee Focus Group. The Employee Focus Group will consist of three representatives from the Police Department, two from the Public Works Department, one from the Milton Public Library, and one from City Hall. These allocations are based on the number of employees in each department.

***Community Workshop***

This group will convene to discuss the strengths and major issues and challenges facing the City of Milton. This group will be representative of the community. The goal is to have a representative from the following organizations (in no particular order):

Milton Area Chamber of Commerce (MACC)	Milton Historical Society / Milton House Museum	The Gathering Place Senior Activity Center
School District of Milton	Milton Area Youth Center (MAYC)	Rock County Supervisor
Milton College Preservation Society	Milton Masonic Temple	Milton Lions Club
Milton Optimist Club	United Way	Community Action
Rock County Economic Development	Milton Food Pantry / Milton Community Action	Janesville Area Convention & Visitors Bureau (JACVB)
Local Businesses (Five Representatives)	Faith Community (Three Representatives)	Citizens (Five Representatives)

Those interested in serving will be asked to complete an application. The Mayor will review the applications for the workshop, and then make a recommendation to Council.

***High School Student Focus Group***

This group will convene to discuss the major issues and challenges facing the City of Milton, and what the City of Milton is doing well. This group will be representative of the Milton High School population with three representatives from each grade level, 9-12. The City of Milton will work with the School District of Milton on promoting this community service opportunity to the students. The City of Milton will inquire whether this opportunity will qualify for Silver Cord Hours. The Mayor will review applications for the focus group, and then make a recommendation to Council.

## Key Stakeholders

	Low Support	High Support
High Impact	<ul style="list-style-type: none"> <li>• Staff and elected officials who lack “buy-in” for the strategic planning process or who don’t understand the process or need.</li> <li>• Community members who view strategic planning as a “waste of time.”</li> </ul>	<ul style="list-style-type: none"> <li>• Staff and elected officials who are motivated to complete the strategic planning process and see the value in its completion.</li> <li>• Community members who are in support of the organization spending time to complete a strategic planning process.</li> <li>• Media who are interested and supportive of the process.</li> </ul>
Low Impact	<ul style="list-style-type: none"> <li>• Individuals who don’t follow news about the City of Milton.</li> <li>• Employees who are not invested in the progress of the City of Milton as a community or organization.</li> <li>• People who live in surrounding townships.</li> </ul>	<ul style="list-style-type: none"> <li>• People from outside of the community who are interested and supportive of the process, such as other local government professionals.</li> <li>• People who live in surrounding townships.</li> </ul>

## Project Milestones

- Community Survey
- Employee Survey
- Employee Focus Group – Department Heads will determine who will serve as representatives for their departments.
- Community Workshop Group – Applications will be accepted for those interested in serving. Mayor Welch will make a final decision who will be on the workshop group.
- High School Student Focus Group – Applications will be accepted for those interested in serving. Mayor Welch will make a final decision who will be on the focus group.
- Strategic Plan Completed
  - Mission
  - Vision
  - Values
  - Major Issues / Challenges – External & Internal
  - Goals
  - Objectives
  - Strategies / Actions
  - Major Strategic Initiatives (Optional)

## Project Budget

There is not a specified budget for this process. Since the group meetings will like all be virtual due to the ongoing COVID-19 pandemic, all that is expected to be needed is a virtual platform, time, computers, and internet. Zoom will be used as the platform because the City of Milton already has a subscription.

## Constraints, Assumptions, Risks, and Dependencies

The major constraint will be time. Will elected officials, staff, and others involved in the process have enough time to dedicate to the strategic planning process? The assumption is that all involved believe this is an important process to continue to move the community and organization in a positive direction, and those involved will make time in order for the process to be successful. The assumption leads to the risk

those involved are not committed or motivated to follow through with the process. This process will be dependent upon the buy-in from elected officials, staff, and others involved. Leaders in the organization will need to educate staff members about the importance of strategic planning.

Another major constraint is the on-going COVID-19 pandemic. Due to the pandemic, much of the community engagement and discussions with Council and staff will take place virtually. The assumption is our community members will be engaged and attend the virtual meetings and that we will have valuable discussion in a virtual format. The risk is our assumptions won't be fulfilled, and it will be more difficult to gather meaningful information from our community members. In order to mitigate this constraint, the process will be dependent on providing sufficient information and opportunities to provide input to our community members in a variety of formats.

### **Project's Criteria for Success**

All deadlines will be met or adjusted as necessary to keep the project on track. The final strategic plan will be approved by Council on or before October 20, 2020 to assist in 2021 budget deliberations.

## Work Plan

### *Phase 1: Preparation*

Action	Tasks	Timeline	Lead
Meeting 1: Present an overview of the proposed strategic planning initiative to the Department Head Team.	<ul style="list-style-type: none"> <li>• Present the project charter, work plan, and timeline to the Department Head Team for feedback.</li> </ul>	<p>Initial Discussion: Monday, March 2, 2020 at 11:30 a.m.</p> <p>Update Department Heads on starting the process: Tuesday, June 30, 2020, at 10:30 a.m.</p>	Inga Cushman, Administrative Services Director
Meeting 2: Present the proposed strategic plan initiative to the Common Council	<ul style="list-style-type: none"> <li>• Present the project charter, work plan, and timeline to the Common Council.</li> </ul>	<p>Initial Discussion: Tuesday, March 3, 2020 at 6 p.m.</p> <p>Update Common Council on starting the process: Tuesday, July 7, 2020, at 6 p.m.</p>	Al Hulick, City Administrator
Establish a webpage on City of Milton’s website for the strategic planning process, and consider additional social media and other outreach options during the strategic planning process.	<ul style="list-style-type: none"> <li>• Determine what documents, links, and text to include on the webpage.</li> <li>• Determine whether subpages are necessary and create those as needed.</li> <li>• Create electronic versions of the focus group applications.</li> <li>• Explore additional ways to engage and update the community on the process.</li> </ul>	<p>Publish webpage(s) on July 9, 2020.</p> <p>Ongoing updates throughout process.</p>	Inga Cushman, Administrative Services Director
Identify members of focus groups	<ul style="list-style-type: none"> <li>• Contact potential focus group members for the Employee Focus Group, Community Focus Group, and High School Student Focus Group.</li> <li>• Open application process.</li> </ul>	<p>Begin process July 9, 2020.</p> <p>Council Review of Focus Group Members: Tuesday, July 21, 2020, at 6 p.m.</p>	Mayor Anissa Welch

Action	Tasks	Timeline	Lead
Employee Survey	<ul style="list-style-type: none"> <li>• Create paper and electronic versions of the survey.</li> </ul>	Begin Survey Distribution: Monday, July 13, 2020,	Inga Cushman, Administrative Services Director
Community Survey	<ul style="list-style-type: none"> <li>• Create paper and electronic versions of the survey.</li> </ul>	Begin Survey Distribution: Monday, July 13, 2020,	Inga Cushman, Administrative Services Director

***Phase 2: Mission, Vision, & Values***

Action	Tasks	Timeline	Lead
Meeting 1: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> <li>• Kick-off strategic planning process.</li> <li>• Review project charter.</li> <li>• Develop Mission, Vision, and Values</li> </ul>	Tuesday, July 21, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Mission, Vision, & Values Report	<ul style="list-style-type: none"> <li>• Create a document outlining the Mission, Vision, &amp; Values as discussed in the previous meeting.</li> </ul>	Final report due July 30, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 2: Presentation of completed Mission, Vision, and Values to the Common Council	<ul style="list-style-type: none"> <li>• The Mission, Vision, and Values will be presented to the Common Council based on the July 21, 2020 discussions.</li> <li>• Common Council will have the opportunity to provide feedback for modifications and approval</li> </ul>	Tuesday, August 4, 2020, at 6 p.m.	Al Hulick, City Administrator

<b>Phase 3: Major Issues / Challenges</b>			
<b>Action</b>	<b>Tasks</b>	<b>Timeline</b>	<b>Lead</b>
Meeting 1: Department Head Team	<ul style="list-style-type: none"> <li>Identify Major Issues / Challenges</li> </ul>	Monday, August 3, 2020, at 10 a.m.	Inga Cushman, Administrative Services Director
Meeting 3: Common Council	<ul style="list-style-type: none"> <li>Identify Major Issues / Challenges</li> </ul>	Tuesday, August 4, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Meeting 4: Employee Focus Group	<ul style="list-style-type: none"> <li>Identify Major Issues / Challenges</li> </ul>	Thursday, August 5, 2020, time 2:30 p.m.	Inga Cushman, Administrative Services Director
Meeting 5: Community Workshop	<ul style="list-style-type: none"> <li>Identify Major Issues / Challenges</li> </ul>	Thursday, August 6, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Meeting 2: High School Student Focus Group	<ul style="list-style-type: none"> <li>Identify Major Issues / Challenges</li> </ul>	Monday, August 10, 2020 at 10:30 a.m.	Inga Cushman, Administrative Services Director
Employee Survey	<ul style="list-style-type: none"> <li>Distribute the survey and collect responses.</li> <li>Review responses and develop a report.</li> </ul>	Distribute: July 13, 2020. Response Deadline: August 11, 2020 Report Deadline: August 13, 2020	Inga Cushman, Administrative Services Director
Community Survey	<ul style="list-style-type: none"> <li>Distribute the survey and collect responses.</li> <li>Review responses and develop a report.</li> <li>Include with Bi-Monthly Utility Bill Newsletter</li> </ul>	Distribute: July 13, 2020. Response Deadline: August 11, 2020 Report Deadline: August 13, 2020	Inga Cushman, Administrative Services Director
Major Issues / Challenges Report	<ul style="list-style-type: none"> <li>Create a document outlining the Major Issues / Challenges as discussed in the meetings and surveys for this phase.</li> </ul>	Ongoing from the first meeting in this phase until the last. Final report due August 13, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 6: Presentation of Major Issues / Challenges to Common Council	<ul style="list-style-type: none"> <li>Present information obtained from the steps above regarding Milton's major issues / challenges.</li> <li>Common Council will have an opportunity to provide feedback.</li> </ul>	Tuesday, August 18, 2020, at 6 p.m.	Al Hulick, City Administrator

**Phase 4: Goals, Objectives, Strategies, & Actions**

Action	Tasks	Timeline	Lead
Meeting 1: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> <li>Develop Goals based on identified Major Issues / Challenges determined in Phase 3.</li> </ul>	Tuesday, August 18, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Meeting 2: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> <li>Develop Objectives based on the established goals at the August 18, 2020 meeting</li> </ul>	Tuesday, September 1, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Meeting 3: Joint Meeting of the Common Council and Department Head Team	<ul style="list-style-type: none"> <li>Develop Strategies and Actions based on the established objectives at the September 1, 2020 meeting</li> </ul>	Tuesday, September 15, 2020, at 6 p.m.	Inga Cushman, Administrative Services Director
Goals, Objectives, Strategies Report	<ul style="list-style-type: none"> <li>Create a document outlining the Goals, Objectives, Strategies, and Actions as discussed in the meetings for this phase.</li> </ul>	Ongoing from the first meeting in this phase until the last.  Final report due September 22, 2020 for Council packet.	Inga Cushman, Administrative Services Director
Meeting 4: Presentation of Goals, Objectives, and Strategies to the Common Council	<ul style="list-style-type: none"> <li>Present the established Goals, Objectives, Strategies, and Actions to the Common Council.</li> <li>A draft of the Strategic Plan will be available for the Common Council to review.</li> <li>The Common Council will have the opportunity to provide feedback on the Goals, Objectives, and Strategies or other aspects of the Strategic Plan.</li> </ul>	*Special Meeting* Tuesday, September 29, 2020, at 6 p.m.	Al Hulick, City Administrator

***Phase 5: Approval***

<b>Action</b>	<b>Tasks</b>	<b>Timeline</b>	<b>Lead</b>
Meeting 1: Community Presentation of Completed Strategic Plan	<ul style="list-style-type: none"> <li>• Formal presentation of the draft strategic plan.</li> <li>• Attendees will have the opportunity to provide additional comments on the completed plan.</li> <li>• Create document outlining the feedback from the community.</li> </ul>	<p>Meeting: Thursday, October 1, 2020, at 6 p.m.</p> <p>Community Feedback Report Deadline: Friday, October 2, 2020, at 9 a.m. for Council packet</p>	Al Hulick, City Administrator
Meeting 2: Common Council review of Community Presentation	<ul style="list-style-type: none"> <li>• Common Council will review the feedback received from the community on the draft strategic plan.</li> <li>• Common Council will provide direction to staff regarding what to modify in the draft plan based on the feedback.</li> <li>• Final opportunity for the Common Council to provide their own feedback on the draft plan.</li> </ul>	Tuesday, October 6, 2020, at 6 p.m.	Al Hulick, City Administrator
Meeting 3: Common Council Approval of Strategic Plan	<ul style="list-style-type: none"> <li>• The Common Council will approve the Strategic Plan.</li> </ul>	Tuesday, October 20, 2020, at 6 p.m.	Al Hulick, City Administrator