Internal Memo

May 22, 2019

TO: Mark C. Meyers, City Administrator

FROM: Anthony Chandler, Director of Administrative Services AC

SUBJECT: Strategic Plan 2019 – 2nd Reading

City staff and Council reviewed the draft plan during the April 2019 work session. Based on that discussion and a subsequent meeting with Council member Beecham and Council member Jurkas, the following final draft is submitted for review. The draft strategic plan incorporates the changes that were discussed which include updates to the specific initiatives that are aligned to each of the five areas of focus and timelines for implementation.

I am requesting this item be included on the May 28, 2019 work session agenda to provide an opportunity for final review by City Council.

Keep in mind a strategic plan is designed to be less descriptive than an action plan. The plan should also stay in line with the overall vision, mission, and values of the organization and I feel that this draft plan accomplishes both these criteria. For reference, I have included the University of Michigan's IT strategic plan that is also five pages in length. The U-M strategic plan is a good example of being descriptive without being overly prescriptive. Each of the goal areas in the U-M plan provide a high level of overview without describing individual tasks that must be accomplished.

Once City Council is satisfied with the draft plan as presented, the item will be placed on a Council meeting agenda for formal approval. Staff will then formulate an implementation strategy to set the plan in motion over the next 3-5 years. Staff will also create a one-page pamphlet/brochure as a condensed version of the plan using more graphics much like the U-M example.

Strategic Plan 2019

Introduction

The City Council and senior staff worked with Woods Consulting Group, LLC to update the previous strategic plan from 2009. Several group sessions were conducted in the early part of 2019 and the group discussed both the internal and external environment which was formulated into a revamped version of the existing strategic plan. The final draft consisted of five key areas of focus; 1) Financial Stability, 2) Economic Development, 3) Communication and Marketing, 4) Organizational Structure, and 5) Natural Resources and Leisure. The five areas of focus were broken down into practical goals with attainable objectives. Implementation strategies will be developed as the goals and objectives evolve over the next 3-5 years.

Areas of Focus

1) **Financial Stability**

The City of Norton Shores will focus on operating with balanced budgets based on reliable sources of revenue and with a vigilant view of necessary expenditures. The City will continue to seek ways to cooperate and/or collaborate with neighboring jurisdictions for efficiencies in services provided to the public. Local millage levies provide essential funding and their continuation as a source of revenue is vital.

- Create and maintain sufficient and sustainable financial resources for the City. (City Council/Administration/Finance)
  - Timeframe: Immediate and ongoing
- Mobilize citizen and business support and create a system of stable revenue sources for local government operations. (City Council/Administration/Employees)
  - Timeframe: Immediate and ongoing
- Continue to use and enhance the development of multi-year budget forecasting and establish a fund balance policy. (City Council/Administration/Finance)
  - Timeframe: 12-24 months
  - Timeframe: Immediate and ongoing
- Renew the Public Safety millage to ensure adequate funding for providing essential services to the community. (City Council)
- Renew the Streets Improvement millage to assure sufficient funding to improve and maintain the city roadways. (City Council)
  - Timeframe: Immediate and ongoing

- Maintain a focused effort on the Debt/Unfunded Accrued Liabilities elimination plan. (City Council and Administration)
  - Timeframe: reoccurring every 12 months

High Priority: Renewal of public safety millage and streets improvement millage

2) **Economic Development**

The City continues to grow its commercial and industrial base through business friendly practices and the high quality infrastructure available. Retention of existing companies is solid, and staff will continue to explore alternative approaches to expand business attraction and retention efforts. The City will continue to evaluate tax incentive policies and other economic development tools offered through the State to attract commercial and industrial investment.

- Monitor the economic stability of the Harvey Street Corridor and neighboring properties involved directly with the changing conditions in the retail market place. The current retail environment may pose risks to current retailers. (Administration)
  - Timeframe: Immediate and ongoing
- Continue to implement the Seminole Road/Henry Street Place Plan for infrastructure improvements and mixed-use redevelopment to include medical, retail, and housing along the corridor. (Administration and Public Works)
  - Timeframe: 12-24 months
- Cooperate with the Native American tribe that is proposing the development of a casino on property north of The Lakes Mall. (City Council and Administration)
  - Timeframe: 12-24 months
- Develop "Place Plans" for the following areas of the City: Harvey Street Corridor, and East Broadway neighborhood. (Administration)
  - Timeframe: Formation of a stakeholder taskforce 6-8 months, complete the planning and design stages in 12-18 months with implementation to follow.
- Stay abreast of the commercial real-estate market locally and acquire available land for industrial development. (Administration)
  - Timeframe: Ongoing
- Achieve a mix of balanced development in the City: commercial-retail, industrial, and residential. (Administration)
  - Timeframe: Ongoing

High Priority: Seminole Road/Henry Street Corridor, Harvey Street Corridor

3) Communication and Marketing

Several advancements in technology have occurred since the 2009 strategic plan. Most notably is the advent of social media and the methods used for public outreach. Today, the public has numerous outlets available for information sharing. The City strives to engage the public and incorporate technology advancements into its process of community engagement. This plan will deliver guidance to develop a marketing strategy for the City to effectively promote the services offered and to provide local businesses and property owners with a distinctive sense of identity.

- Develop a Communications Plan on how to most effectively reach city residents and other key audiences on issues related to city prosperity and services through effective use of multiple, and targeted communication channels. Consider the addition of a new staff member titled Communications and Public Involvement Coordinator to oversee this initiative. (City Council and Administration)
  - Timeframe: 6-12 months to develop the plan including the potential of a Communications and Public Involvement Coordinator added to city staff in 12-24 months
- Develop a marketing strategy for a strong brand development to be used by the City to effectively communicate "brand promises" to multi-generational audiences; including residents, employees, local industry, business owners, etc. Integrate the marketing strategy with the Communications Plan to share the City's newly developed brand statement with key audiences within and outside of the community on a consistent basis. (City Council and Administration)
  - Timeframe: 12 months
- The City recognizes the importance of being a welcoming community that is able to attract new residents of all ages and backgrounds. The ability to attract a diverse mix of residents and business owners will be a key component to long-term growth and prosperity. Research and develop a set of strategies that effectively promote the values, activities, and benefits of living in Norton Shores. Monitor the effectiveness of these strategies and modify as needed. (City Council and Administration)
  - Timeframe: Immediate and ongoing
- Continue to develop and expand efforts to communicate with strategic audiences within the City and the metropolitan area; this includes both promotional strategies of the services offered and actively listening to the residents and property owners. (City Council/Administration/Employees)
  - Timeframe: Immediate and ongoing
- Initiate a focused effort to engage civic and various residential and business groups on a consistent basis; coordinate efforts with Police and Fire Departments for

community meetings and other public events. Cultivate Council and employees to serve as "ambassadors" regarding employee recruitment efforts. (City Council/Administration/Employees)

- Timeframe: Immediate and ongoing

High Priority: Development of a Communications Plan and marketing strategy for reaching citizens regarding key issues.

4) **Organizational Structure**

The City aspires to maintain the status of being a great place to be employed and build a career, up to and through retirement. This initiative has become more challenging due to the tightening of the labor market and the leveling-out of benefit packages being offered.

- Continue to make the City of Norton Shores an "Employer of Choice" and a great place to work by offering competitive compensation, a positive employment culture, timely access to important training, and the City's investment in first-rate facilities and equipment. (City Council and Administration)
  - Timeframe: Immediate and ongoing
- City Administration will actively evaluate the current management framework with an emphasis on the employee positions that combine two or more sets of responsibilities and review the need for positions to continue in this manner. (Administration)
  - Timeframe: 6-12 months
- Conduct a staffing analysis to provide a data driven report to identify actual workload and appropriate staffing/deployment levels for operational efficiency. (All Departments)
  - Timeframe: 12 months
- Develop a formal succession plan to identify internal candidates with the skills and aspirations to advance professionally within the organization. Create a structure for training and professional development to effectively prepare the candidates. Implementation of a succession plan will assist the City with maintaining continuity and providing future stability. (City Council and Administration)
  - Timeframe: 6-12 months to establish and ongoing from then on

High Priority: Seek creative ways to preserve the City of Norton Shores as an "Employer of Choice"

5) Natural Resources and Leisure

The City recently updated the Bicycle and Pedestrian Plan in 2019. The Plan incorporates the forecasting of future projects for development to enhance the connectivity for pedestrian travel. This particular initiative coincides with the main goal of connecting existing public parks via non-motorized pathways.

- Develop and implement (over time schedule) the City's Bicycle and Pedestrian Plan to ensure that the City cultivates a more walk-able and bicycle friendly environment. (Administration and Public Works)
  - Timeframe: 6-12 months
- Develop a schedule for generating funding support toward implementation of the City's Park and Recreation Plan. (Administration and Parks/Recreation)
  - Timeframe: 12-24 months
- Continue the City's goal to protect its unique access to Mona Lake and the Lake Michigan shoreline. (City Council and Administration)
  - Timeframe: Immediate and ongoing
- Make every effort to apply for and secure grant funding for future sidewalk/trail networks and park projects. (Administration)
  - Timeframe: 6-12 months
- Pursue opportunities for improved recreation and leisure with the addition of "pocket parks", dog parks, and additional ball fields when viable land becomes available. (Administration and Parks/Recreation)
  - Timeframe: 12-24 months

High Priority: Implement Bicycle and Pedestrian Plan

City of Norton Shores

Demographic Projections: 2018-2023

Source: ESRI

- **Population forecast to increase from 24,691 to 25,218 residents**
- **# of Households forecast to increase from 10,284 to 10,494 (+200)**
- **Average household size to remain at 2.39 persons**
- **% of owner-occupied households to increase from 75.7% to 76.3%**
- **% of renter-occupied households to remain at 17.1%**
- **% of vacant households to decline from 7.1% to 6.6%**
- **# of housing units (all) to increase from 11,075 to 11.241 (up 180)**
- **Median Household Income forecast to increase from $55,292 to $63,226 (increase of $8,000)**
- **Median Home Value forecast to increase from $142,256 to $172,003 (increase of $29,250)**
- **Median age of residents forecast to increase from 44.4 years to 44.6 years**

Household Income Distribution:

Household Income	2018	2023	
<$15,000	7.5%	5.8%	
$15,000 - $24,999	10.4%	8.4%	
$25,000 - $34,999	11.4%	9.8%	
$35,000 - $49,999	14.8%	13.4%	
$50,000 - $74,999	20.5%	20.1%	
$75,000 - $99,999	13.8%	14.8%	
$100,000 - $149,999	13.4%	16.7%	
$150,000 – plus	8.3%	11.0%	

- **2018 Average HH Income: $73,750**
- **Forecast 2023 Average HH Income: $86,908**
- **Median Home Value: increase from $142,258 to $172,000**
- **Median Age: 44.4 - 44.6 years**

Value of Owner-Occupied Housing:

Mean Value forecast to Increase from $188,309 in 2018 to $226,131 by 2023

Population Ethnicity

	2010	2018	2023
White	91.8%	90.4%	90.4%
Black	3.2%	3.2%	3.4%
Asian	1.2%	1.7%	1.7%
Hispanic	3.8%	4.8%	4.8%
Native American	0.8%	0.8%	0.8%

- Racial group is predominantly White with Black and Hispanic as the largest racial minorities in City

Education Level Attained by Adults Ages 25+

Education Level Completed	% of Population Age 25+
Did not finish High School	**6.0%**
Completed 9^{th}-12^{th} No Diploma	**4.4%**
High School graduate	**23.7%**
High School GED	**3.4%**
Some college – no degree	**23.9%**
Associate Degree	**11.5%**
Bachelor's Degree	**20.6%**
Graduate/Professional Degree	**10.7%**

- 10.4% did not complete high school
- 27.3% completed high school or a GED
- 35.4% completed some college (no degree) or earned an Associate Degree
- 20.6% completed a Bachelor's Degree
- 10.7% earned a graduate or professional degree

Employment by Industry

Employment Sector	% of Residents Employed
Agriculture/Mining	0.7%
Construction	3.7%
Manufacturing	20.9%
Wholesale & Retail Trade	15.7%
Transportation & Utilities	3.2%
Finance/Insurance/Real Estate	4.0%
Public Administration	5.0%
Services	45.5%

- 80%-plus of city residents age 25 plus are employed in manufacturing, retail/wholesale trade, or services
- 59.3% of jobs are classified as "white collar"; 21.6% are classed as "blue collar" and 19.1% are classed as "services"

Size of Households

1-person	**27.6%**
2-persons	**37.9%**
3-persons	**14.3%**
4-persons	**12.1%**
5+ persons	**8.1%**

- 65.5% of all households in the City contain 1 or 2 persons
- 26.4% of all households contain 3 or 4 persons

Mortgage Status/Tenure

% of Owner-Occupied Housing	**81.6%**
Housing with mortgage	**51.2%**
Owned Free & Clear	**30.4%**
Renter-Occupied Housing	**18.4%**

Household Spending (% of National Average) on Goods and Services

Category	% of National Average
Health-Care	93%
Entertainment & Recreation	89%
Food at Home	89%
Household Furnishings & Equipment	88%
Personal Care Products	87%
Support Payments	88%
Vehicle Maintenance & Repairs	87%
Shelter	87%
Food Away from Home	87%

Source of Information: US Consumer Expenditure Survey

University of Michigan

INFORMATION TECHNOLOGY STRATEGIC PLAN

U-M MISSION

The mission of the University of Michigan is to serve the people of Michigan and the world through preeminence in creating, communicating, preserving and applying knowledge, art and academic values, and in developing leaders and citizens who will challenge the present and enrich the future.

U-M IT VISION

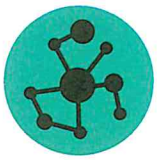
Technology empowers the leaders and best. We enrich the U-M experience with technology that inspires all people to do amazing things.

IT GUIDING PRINCIPLES

The following principles guide the pursuit of the strategy:

- Technology will support and encourage learning, research, and interdisciplinary collaboration.
- Systems will make their data available for other processes whenever possible, while respecting limits required for personal privacy, regulatory compliance, and IT security and accessibility.
- Technology choices will favor solutions offered as external cloud services.
- Services will consist of all elements required for the adoption and best use of the service, including training, support, appropriate funding, and accessibility for all.
- IT providers will work together to limit redundant or outdated services so that investments can be redirected toward new technology service needs.

U-M IT STRATEGIC GOALS



An environment where information is easily leveraged to strengthen U-M's leadership in collaborative research and learning, with appropriate levels of security and privacy

The continued growth of data-based research, learning analytics, and interdisciplinary collaboration requires data to be more available and accessible. At the same time, security, privacy, and regulatory compliance are critical and increasingly difficult to achieve. U-M will be a global leader in creating an environment that balances these often competing needs.

A U-M-wide unified research computing and data science ecosystem to accelerate the pace of research and innovation, cultivate interdisciplinary and inter-university collaboration, and drive economic development

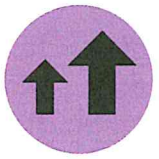
U-M will spur growth in the computational and data sciences by creating a unified university-wide research IT ecosystem that enables cost-effective and at-scale provisioning of on-premise and cloud-based computing, storage, networking, and visualization services and tools. U-M will engage its University Research Corridor partners and other Michigan universities to promote these infrastructures as drivers for statewide economic and urban development.

The university as a learning laboratory geared towards discovery and positioned to change how the world teaches and learns

U-M will support an experience unmatched at any other university by capturing information about the university environment and using this information to advance research in the learning sciences. The learning laboratory will support the development of new applications and innovations in teaching and learning. Application areas go well beyond the university classroom, to include diverse collaborations in industry and government such as K-12 education, transportation, health, social sciences and international partnerships. The full experience of the student will be personalized to each individual, both inside and outside the classroom, increasing access, affordability, and inclusion.

A learning health system enabled through integrated healthcare, biomedical research data, and information computing platforms that focuses on improving health and advancing collaborations throughout U-M and with external partnerships.

U-M will be a leader in providing healthcare and biomedical research data in an open yet appropriately secure fashion to enable innovations in patient care, population health, research, and education. This environment will foster collaborations within the university and its partners due to easy and secure access to a great range of varied information. These efforts will take advantage of the unique breadth of advanced computational, informatics, social science, education, and data science expertise throughout U-M.



An environment with minimal administrative burden for mission related work

Increasing compliance requirements combined with complex business processes consume time and resources that would be better directed to teaching students, conducting research, or providing healthcare. U-M IT will take an end-to-end approach to service design and development to eliminate waste and apply technology that makes administrative processes and adherence to compliance requirements less burdensome.

U-M IT STRATEGIC INITIATIVES

The following list contains the most important initiatives needed to achieve the strategic goals. These initiatives are not strictly ordered, but those at the top are generally higher priority than those at the bottom. The lettered tactics are shorter term projects and may change over time.

1. Implement a simplified and consistent cost and funding model for services.

Fewer and more consistent funding models that work within the constraints of unit budgets and grants, incentivize adoption and retirement of services, provide transparency to costs, and support interdisciplinary work are crucial to supporting the goals in this strategic plan.

a. Create and adopt a consistent decision framework and simpler funding models to guide funding decisions for existing and new services.

b. Create the ability to procure subscription-based services aligned to the frequency and speed at which new services enter the technology market.

c. Utilize advisory groups composed of members from throughout campus to recommend, and advocate for, appropriate service investment management decisions, such as subsidization and retirement.

2. Move to a single identity access management (IAM) platform.

Adopting one strategy and a central, integrated system will simplify the user experience, increase the ability to share data, and help avoid barriers, such as the need for users to manage an unwieldy number of security tokens and passwords. It will also reduce overall cost and strengthen U-M's identity and assurance postures.

a. Establish a single, university-wide governance structure to set direction, provide guidance, and make strategic IAM process decisions.

b. Establish a central program office to manage the IAM roadmap, establish metrics, coordinate projects, and communicate program status.

c. Enable role-based access control for the entire university.

d. Improve the onboarding and offboarding experience for employees and nonemployees by optimizing existing processes and systems.

3. Condense the current network infrastructures into two unified infrastructures for all U-M campuses and the immediate area.

One data network will provide for all academic, research, clinical and administrative needs. A radio frequency (RF) network will provide for emergency and redundancy needs. Other existing network infrastructures will be eliminated. This will offer consistent security and performance no matter where the user is, fostering innovative research, teaching, and health care within the U-M community. It will also simplify joint projects, decrease overall network cost, and enable service in more locations.

a. Create a unified network infrastructure for data and information needs common to all users as well as specific needs for regulated environments.

b. Create a unified RF network. This will provide a robust wireless network to meet emergency and backup network needs, including radio support for first responders and cellular services for the entire community. This network will be completely separate from the data network.

c. Remove other existing network infrastructures. Transition both the legacy telephone service and cable TV content to the data network.

d. Promote possible partnerships to bring fiber connectivity to the Ann Arbor community.

4. Create a unified, proactive strategy to address the most serious threats to the university for information assurance, and security, privacy, and compliance.

A single, unified strategy will enable university success and ensure appropriate access to data, no matter who uses it or where it is processed or stored.

a. Make it easier to keep sensitive information secure and meet compliance requirements by providing guidelines, tools, and services to the entire community, based on data or system sensitivity, not unit.

b. Create security enclaves for the most sensitive data by focusing resources and control to proactively mitigate the most damaging threats in a way that provides both security and recovery.

c. Consolidate physical servers throughout campus into the MiServer and MiDatabase virtual services.

d. Encourage collaboration between faculty and IT to contribute to this initiative. Support research with data, pilots, and seed funding.

5. Investigate using computing and big data analytics as a driver for economic development throughout the state of Michigan.

Investment in regional research collaboration, with public and private stakeholders, will drive the economy by creating opportunities that attract and retain top researchers, academic leaders and students. This will increase U-Ms research capacity and position U-M as a leader in the emerging world of interconnected and sensor-rich environments.

a. Open and advance conversations with the state of Michigan and other higher education partners to develop a strategy for advancing the State as a national hub for computational and data science innovation.

b. Seek the development of an "open cloud infrastructure" that enables universities, government, and the business community to conduct collaborative research through sharing computational and data analytics technologies.

6. Provide a unified U-M research computing and data environment to enable collaboration and innovation.

By bridging the "health to campus" research computing and data divide, U-M will accelerate the development of cross-campus and cross-agency interdisciplinary research initiatives, attract nationally recognized leaders in computational and data science, and realize a return on investment in computational and data science exceeding our peers.

a. Coordinate and expand the research support community across the university, providing support that goes beyond narrow technical issues and complements domain-specific expertise with knowledge of best practices and available resources.

b. Transform areas that provide technology support for research into a unified, national leader in research computing, supporting a full-university research infrastructure.

c. Coordinate with the initiative #1 above (funding model) to ensure research services are compatible with researcher funding.

d. Create useful and intuitive workflows, along with supporting technology, that cover the life cycle of research data from creation to publication and preservation.

7. Provide a common data access service that the entire university can use for learning, research, and medical analytics.

This infrastructure, along with supporting tools and training, is needed for U-M to continue to be a leader in personalized learning at scale and transforming decision support in the teaching and learning domain. A common data access interface will increase research efficiency and encourage innovation and experimentation by allowing users to get to the data they need, yet ensure that access is done in a safe and secure fashion. Information collected via sensors and smart objects throughout campus will benefit various forms of research, the student experience, faculty/staff engagement, health care, and the U-M community and society at large.

a. Implement a university-wide common data interface (middleware) service.

b. Capture information from sensors and other computing devices embedded across the Ann Arbor campus and the city, building in appropriate privacy and approvals.

c. Create learning and patient record stores that are central clearinghouses to store and retrieve common data used for learning and patient analytics.

d. Scale departmental tools and interfaces for learning analytics so they are available for use by the entire university.

8. Continue to be a leader in learning analytics and content management, both at U-M and through the Unizin consortium.

U-M's engagement in the development of the Unizin digital learning ecosystem is predicated on a strategy of leveraging shared content and data at the combined scale of many universities, while maintaining ownership of U-M learning content and data. As a founding member of Unizin, U-M is collaborating with other research institutions to build and influence the evolving digital learning landscape of higher education. With 11 large public research universities operating on the same set of services, U-M has the opportunity to create the world's largest learning laboratory.

a. Evaluate, and where appropriate, implement services as they become available from Unizin and meet institutional needs (e.g., Canvas Learning Management System, Unizin Content Relay, Unizin Analytics Relay).

b. Build on the partnership between Information and Technology Services (ITS), Library, Center for Research on Learning and Teaching (CRLT), and Digital Education & Innovation (DEI) to rapidly move teaching innovation from creation to scale.

c. Improve equity, inclusion, and retention for the university community by applying data analytics and customer relations systems to personalize learning at scale.

d. Use data analytics to build the case on the value of diversity for campus, the local community, and the broader society.

9. Aggressively streamline the administrative systems in order to reduce administration and compliance burden on users.

This initiative will increase the amount of time people in the U-M community spend working on their mission and improve the user experience when using technology. It will also help prepare the systems for an eventual move to a cloud-based provider, which will reduce the total cost of ownership, and expand the capacity for value-added initiatives to further the university's mission.

a. Optimize and standardize current end-to-end business processes to use industry best practices that are provided by our administration systems.

b. Standardize management reports for university units, in order to increase consistency in reporting while decreasing the total number of reports.

c. Review current administrative system customizations and remove or streamline changes that are unused or increase complexity for users.

d. Eliminate shadow and supplemental administrative systems and reports when it is possible to combine multiple systems into a common solution.

10. Nurture a university-wide IT community that delivers services and solutions in partnership, as a single team, regardless of organizational lines.

Many initiatives in this strategy require IT cooperation across the university. A collaborative IT community that crosses the organizational boundaries, and has a diverse set of viewpoints, will provide consistently timely and effective support to faculty, students, and staff, in order to improve their productivity and retention.

a. Demonstrate cooperation among many units by successfully implementing complex, multi-unit services.

b. Continue to build the Michigan IT community in order to improve innovation, collaboration, diversity, and inclusion through initiatives such as ongoing communities of practices, an annual Michigan IT Symposium, Hackathons, mentoring and coaching, and university-wide awards and recognition.

c. Identify and implement a common service and support philosophy, including the use of IT management tools and processes where it will improve the service and support experience for faculty, students, and staff.

d. Build common leadership language, strengths and a culture of inclusion by investing in a continuing leadership development program and ongoing activities that bring IT leaders at all levels together.