

**City of Adel, Iowa
Strategic Planning Review and Goal
Setting Session
Summary Report***
2016

Mayor

Jim Peters

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**Annotated by City staff – October 2017*

CITY OF ADEL, IOWA
STRATEGIC PLANNING REVIEW AND GOAL
SETTING SESSION
2016

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CITY OF ADEL, IOWA SUMMARY REPORT STRATEGIC PLANNING REVIEW AND GOAL SETTING SESSION 2016

Introduction

The City of Adel requested the Institute of Public Affairs (IPA) to assist the City with review of their strategic plan and goal setting. IPA agreed to organize and facilitate a process that involved the following steps:

1. Prepare a questionnaire to identify recent accomplishments, issues/trends/concerns, potential new initiatives/programs/policies, and suggestions to improve organizational effectiveness.
2. Conduct a review of the City's current strategic plan with the elected officials and department heads.
3. Conduct a goal-setting session with the elected officials and department heads.
4. Preparation of a final report.

Strategic Planning Review and Goal Setting Work Session

City elected officials and department heads held a work session conducted by the IPA on Tuesday, February 23, 2016. In attendance and participating at this meeting were Mayor Jim Peters and City Council members Mike Haynes, Shirley McAdon, Bob Ockerman, and Rebecca Hillmer.

Also in attendance and participating in this session were City Administrator Anthony Brown, City Clerk Jackie Steele, Public Works Director Kip Overton, Treasurer Kathy Barger, Parks and Recreation Director Nick Schenck, and Library Director Paula James.

Strategic Plan Review

The participants reviewed and confirmed the strategies and goals in the City's current strategic plan, with the following revisions as indicated:

Financial Security

- Educate and lobby our legislators on possible legislative action for property tax reform, in particular commercial/industrial property taxes, and any further changes proposed to TIF/Urban Renewal laws.
- Prepare a capital improvements plan (CIP) for Sewer, Street, Storm Water and General Fund; expand Water Fund CIP.
- Identify existing and create new business and retention strategies.

Distinctive Character – Vibrant, Energetic, and Passionate Small Town

- Implement city branding strategy. ~~Create a brand for the City.~~
- Upgrade current technology and enhance the use of technology for customer service purposes.
- Expand and enhance recreational opportunities for all citizens.
- Formulate a plan for reconstructing the brick streets.

Community and Economic Vitality – Quality Growth through economic and community development

- Formalize a plan regarding ~~to extend~~ the residential tax abatement program.
- Develop a commercial/industrial tax abatement program.
- Update Comprehensive Plan.
- Implement the ~~Develop an overall~~ Economic Development Plan.
- Stay actively involved in the discussions on moving the Dallas County offices.

City Services – Effective use and application of best practices

- Identify opportunities for collaboration and shared services.
- Begin a succession plan for key positions.
- Consider and prioritize ideas in the citizen surveys.
- Begin to explore a community center.
- Explore/pursue methods for expanding high speed broadband access for business and residents.

Community Connections – Open communication and active citizen engagement

- Utilize social media tools for citizen communication and engagement.
- Highlight ~~Schedule an event which highlights~~ our recreational amenities including canoe, bike trail and run challenge.
- Provide information for new residents and businesses. Identify opportunities for collaboration and shared services.

The participants also discussed the City's Future Land Use Plan and timing for updating the Comprehensive Plan

Major Accomplishments

The following were identified as major City accomplishments during the past two years:

Infrastructure

- Water tower painting projects
- Main Street reconstruction project engineering completed
- Began water and sewer studies to plan for improvements

Economic Development

- CDBG Downtown Revitalization Façade Project
- Establishment of Economic Development Commission
- Developed and implemented economic development plan
- New growth with residential tax abatement
- Attracting interest in a hotel project
- New commercial growth
- Completion of the Brownfields project
- Land swap with T & L Enterprises

City Operations/Facilities

- Created new City brand
- Update of future land use plan
- Update to City website (in progress)
- Good relationship with the school
- Implemented monthly department head meetings
- More cooperation and coordination amongst departments
- Purchased new fire truck and new vehicles for public works and police
- New City staff hired: City Administrator, City Clerk, Police Chief, and City Treasurer

Finance/Budget

- Moving towards more accurate budget forecasting
- Health insurance was able to remain the same with minimal cost increase
- Adopted Local Option Sales tax –successful referendum

Parks & Rec

- Purchased 10 acres of land near the Adel Family Aquatic Center for parks & recreation
- Completed Adel Family Aquatic Center with successful referendum
- Purchase and implementation of online registration for Parks & Recreation
- New archery range
- New dog park in the planning stages in collaboration with the Girl Scouts

Issues, Concerns, Trends, and Opportunities

The participants identified and discussed the following issues, concerns, trends, and opportunities that may affect future City services, policies, finances or operations:

Economic Development

- Reevaluation of residential tax abatement program
- Need to balance growth with need to remain small town atmosphere
- Use of TIF to develop east of the river
- Potential of a hotel in Adel
- Need to increase commercial tax base; attract more businesses
- Need to support local businesses
- Potential for other commercial projects
- Need to increase availability of affordable housing

Infrastructure

- Plan for future water plant and sewer lagoons needs
- Extension of sewer service east of the river
- Updating sanitary and storm sewer capacities in older areas of the City
- Starting the Main Street reconstruction project before the summer of 2017 to recoup the engineering fees

Budget/Finance

- Revenue from residential tax abatement homes will start coming onto the tax rolls in a few years
 - Managing City services with available dollars until new valuations come on the tax rolls in FY21
- Reduce the City's reliance on TIF
- Develop and implement a policy to set a maximum debt percentage of the City's bonding capacity for general obligation bonds
- Maintain or lower the City's current tax levy rate
- Increasing funding needs without increasing revenues
- Lack of street repair / replacement funding
- Funding shortfalls

City Operations/Facilities

- Entering into projects (e.g., Dallas County 28E agreement, fire truck bond, etc.) without looking at the long term consequences or impacts
- Find a way to gracefully withdraw from the Dallas County 28E agreement
- Improve maternity/family leave policy (e.g., offer short-term disability) and/or offer short-term disability
- Need to update Subdivision Ordinance

Parks and Open Space

- Concern with operations at Island Park Campground
- Need to develop Comprehensive Parks & Trails Master Plan
- Expansion of recreational ballfields

Public Safety

- Dallas County is looking to relocate its jail and administrative offices

On-Going Commitments

The Mayor and City Council identified the following on-going City commitments for the upcoming 24 month period:

(Parentheses refer to applicable Goal/Strategy from current Strategic Plan)

- Conduct nutrient reduction study for waste water plant (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)
- Main Street paving project plant (Distinctive Character - Formulate a plan for reconstructing the brick streets)
- Construct Well #5 plant (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)
- Nile Kinnick Museum addition (Community and Economic Vitality – Implement the Economic Development Plan)
- Fulfill obligations under Dallas County 28E Agreement (City Services – Identify opportunities for collaboration and shared services)
- Sanitary and storm sewer improvements (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)
- Implement City’s new brand (Distinctive Character – Create a brand for the City)
- Review and update Strategic Plan

New Priority Projects, Programs, Policies and Initiatives

The participants reviewed potential projects, programs, policies and initiatives for consideration as priorities for the upcoming 24 month period. After discussion, the Mayor and City Council selected the following as priorities for the upcoming 24 month period (listed in order of priority):

(Parentheses refer to applicable Goal/Strategy from current Strategic Plan)

1 Develop five year plans for City departments and boards (including capital projects, maintenance and staffing needs, and other large projects) (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)

- *The Street Committee expects to present a final version of a Five Year Street CIP to council before the end of 2017.*
- *The Parks & Trails Master Plan was finalized in January 2017.*
- *The Parks & Recreation Board met in March 2017 to set their goals and priorities. Their main priority is expanding trails.*
- *The Public Safety Committee has had several meetings since 2016 about the future of the Police & Fire Departments, including planning for future buildings, equipment, and personnel.*
- *The Water & Sewer Committee has held a number of meetings with McClure Engineering on upcoming water, sewer, and storm water projects, including a new water plant and sewer plant.*
- *The Personnel Committee has discussed succession planning for several departments, including Public Works and Parks & Recreation.*

2 (Tie) Hire financial advisor to help with reviewing water/sewer rates, more effective use of TIF, best ways to fund items such as the capital improvement plan, and recommend financial policies (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)

- *PFM was hired in the summer of 2016 and has been extensively involved with the City's finances and utility projects.*

2 (Tie) Develop a specific street repair / replacement schedule (Financial Security – Prepare a Capital Improvements Plan for Sewer, Streets, Storm Water and General Fund)

- *The Street Committee has discussed a Five Year Street CIP at several meetings in the past year and **expects to present a final version to council before the end of 2017.***

4 (Tie) Review residential tax abatement program, including an evaluation of when we will exceed our current infrastructure (Community and Economic Vitality – Formalize a plan to extend the residential tax abatement program)

- *The City has conducted a thorough review of the residential tax abatement program since the fall of 2016. This review has included McClure Engineering’s Utility Capacity Study and PFM’s revenue analysis. **The program was revised and modified at the October 10, 2017 council meeting.***

4 (Tie) Update Subdivision Ordinance

- *Over the past year, City staff and members of the City’s Planning & Zoning Commission, along with MSA Professional Services, conducted a lengthy review of the City’s subdivision ordinance. **In September 2017, the council approved a number of updates to the ordinance.***

4 (Tie) Establish commercial tax abatement program (Community and Economic Vitality – Develop a commercial/industrial tax abatement program)

- *This program was discussed and recommended by the City’s Economic Development Commission in the fall of 2016. **In January 2017, the council approved a commercial tax abatement program that mirrors the five-year sliding scale program for industrial projects.***

4 (Tie) Create a Master Plan for the City’s parks and trails (Distinctive Character – Expand and enhance recreational opportunities for all citizens)

- *The Parks & Recreation Department, along with the Parks & Recreation Board and Synder & Associates, conducted the master planning process second half of 2016. **In January 2017, the council approved a Parks & Trails Master Plan.***

A complete list of all programs and initiatives considered by the Mayor and City Council members is attached as **Exhibit A.**

Organizational Effectiveness Initiatives

The Mayor and City Council reviewed a variety of ideas relating to improving organizational effectiveness to accomplish the selected goals and priorities. After review and discussion, the Mayor and City Council selected the following steps to improve organizational effectiveness:

- Revisit City’s Strategic Plan on a regular basis; possibly set it up in a spreadsheet or project management software to manage tasks to implement or complete the strategic plan *Discussed*
- Recruit new residents to serve on more boards and commissions *Some progress; partnership with Chamber to promote*
- Enhance financial reporting to the City Council so that the council has a better idea of the financial condition of the City *Discussed, some progress*
- Review frequency of council committees meetings *Discussed*
- Communicate the goals and objectives so that we know what we are trying to accomplish *Discussed, some progress*
- Implement City Council liaisons for the Parks & Recreation and other Boards *Parks & Recreation Board liaison implemented*
- Review job descriptions and update as necessary *Some progress*
- Conduct employee performance reviews *Completed June 2017 and will be completed on an annual basis going forward*

Final Comments

It was a pleasure to assist the City of Adel with this strategic plan review and goal setting process. I was very impressed with the level of cooperation and positive attitudes of the elected officials and staff.

It is important to note that the prioritization of projects and initiatives is not “cast in stone.” They can be modified as new circumstances may occur.

It is recommended that staff prepare an “action plan” for accomplishing the planning goals. The action plan would define the steps that would be needed to accomplish each goal, identify who is responsible for implementation, and establish a timeline for accomplishment. The action plan should then be presented to the City Council for review and approval. It is also recommended that staff review with the City Council the status of implementing the goals on a quarterly basis.

Exhibit A

CITY OF ADEL
Strategic Planning Review and Goal Setting Session – 2016

SIGNIFICANT NEW INITIATIVES OR PROGRAMS CONSIDERED

Parentheses indicate votes received for each item at the Planning Session.

- Establish commercial tax abatement program (3) *Completed January 2017*
- Rates for all City services should be reviewed and updated annually (2)
Completed on an annual basis
- Develop five year plans for City departments and boards (including capital projects, maintenance and staffing needs, and other large projects) (5) *In progress*
- Hire financial advisor to help with reviewing water/sewer rates, more effective use of TIF, best ways to fund items such as the capital improvement plan, and recommend financial policies (4) *Completed summer of 2016*
- Develop a specific street repair / replacement schedule (4) *In progress*
- Update the City's Comprehensive Plan (1) *Discussed; Cost is the main factor*
- Create a master plan for the City's parks and trails (3) *Completed January 2017*
- Use TIF to develop east of the river (0) *A sewer extension project is being actively pursued, though TIF would not be involved.*
- Review residential tax abatement program, including an evaluation of when we will exceed our current infrastructure (3) *Completed October 2017*
- Develop plan to replace infrastructure as necessary (0) *In progress with McClure & PFM*
- Develop plan to respond to requests for large incentive packages for commercial projects (e.g., how much will we offer the hotel?) (0) *Discussed*
- Update Subdivision Ordinance (3) *Completed September 2017*
- Consider developing a maternity/family leave policy (0) *Discussed*
- Consider short-term disability policy (0) *Discussed*
- Adopt Hotel-Motel Tax (1) *Completed December 2016*