

The Village of  
**SHOREWOOD  
HILLS**

# STRATEGIC PLAN

SUMMARY REPORT

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January 8, 2025

Dear President Imes and Administrator Mooney:

I am pleased to present the 2025-2028 Strategic Plan and Summary Report to the Village of Shorewood Hills. This plan embodies the organization's goals, commitment to measurable outcomes, and dedication to delivering high-quality services to the community.

While maintaining the focus on core public services, the Strategic Plan places special emphasis on key organizational objectives and provides a framework for proactive decision-making.

Arriving at the updated Vision, Mission, and Values and organizational goals required months of diligent work, including gathering data from the community, interviewing stakeholders, and distilling the wealth of information collected. It has been an honor to support Shorewood Hills in this significant endeavor. I would like to extend my sincere gratitude to the Board and staff members who contributed their time and effort to this process.

Yours truly,

Cory Poris Plasch

President/CEO

CP2 Consulting



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# Executive Summary

Beginning in May of 2024, Shorewood Hills engaged in a strategic planning process. The process generated strategic goals covering 2025-2028.

The plan consists of four strategic goals, identified as the issues of greatest importance to the Village over the next four years. Each goal has an associated outcome, key outcome indicator, and performance target. These were determined through a facilitated process including the Board and staff and incorporating stakeholder feedback from focus groups and an internal stakeholder survey.

As part of the strategic planning process, the Vision, Mission and Values were evaluated. The Village chose to update their Vision, Mission and Values.

A cross functional team of staff helped to further develop the Strategic Plan by identifying initiatives to achieve the Strategic Goals. This team will continue to work to develop and implement project plans for each initiative and create a communication plan to ensure that staff understand the overall goals, as well as being able to meaningfully incorporate action steps to achieve those goals into their overall responsibilities.





# Vision, Mission, Values

## VISION

Forward-thinking and welcoming, Shorewood Hills is a desirable, thriving community.

## MISSION

We deliver fiscally responsible services that successfully balance our high quality of life with a safe and sustainable future.

## VALUES

### Safety

We prioritize the well-being and security of all in our community.

### Welcoming

We are friendly and approachable, valuing individuals for their different backgrounds and experiences.

### Integrity

We are trustworthy, accountable and follow through on what we will say we will do.

### Resourceful

We are flexible and creative in how we approach obstacles.

### Best for Community

We are transparent, well-intentioned, and thoughtfully engage our community.

### Resilient

We are focused on sustainability reinforced by an environment of continuous improvement.



# The Strategic Planning Process

**The Strategic Planning Process seeks to answer five questions:**

1. Where are we right now? (Plan Development)
2. Where do we want to be? (Plan Development)
3. How do we get there from here? (Plan Implementation)
4. How will we know when we get there? (Plan Implementation)
5. Are there changes in the future external environment that we need to consider?

## DEVELOPMENT

### Where are we now?

Scan the Environment  
Conduct Internal and External Analysis  
(SWOT)  
Develop a Strategic Profile  
Identify Strategic Challenges

### Where are we going?

Define Our Mission  
Articulate Core Values  
Set a Vision  
Identify Key Intended Outcomes

## IMPLEMENTATION

### How will we get there?

Develop Initiatives  
Define Performance Measures  
Set Targets and Thresholds  
Spread Throughout Organization

### How will we know?

Create Detailed Action Plans  
Establish Accountability:  
Who, What, When  
Identify Success Indicators



## Assessing the Current Environment

The Strategic Planning Process began with a meeting with the consultant and Village staff. The meeting included a review of strategic planning principles, a discussion of organizational value proposition, the status of vision and mission statements, and a tutorial on preparing an Environmental Scan. The session concluded with a timeline for the planning process, assignments for preparation of the Environmental Scan, and a process for conducting the stakeholder outreach.





# Stakeholder Engagement

To answer the question “**Where are we now?**,” the Strategic Planning Process began with gaining an understanding of the operating environment. This is the first activity in developing a Strategic Plan as internal and external forces, dynamics, and constraints must be considered to arrive at the most effective strategy.

## Assessing the environment included:

- A community survey
- Focus groups

As environmental factors change over time, they need to be evaluated and incorporated into the strategic thinking and planning process using current data. As a result, the focus groups were limited in scope and consisted of businesses, nonprofits, residents, students, and employees of the Village. Each Focus Group discussed what participants saw as strengths of Shorewood Hills along with opportunities for change.

The results of these efforts were presented to the Shorewood Hills Board at the first Strategic Planning Session on October 15, 2024. They are summarized below.



## Environmental Scan

The Village of Shorewood Hills has been an important entity in the development of the west side of the Madison area. In addition to the ancient Native American presence along the shores of Lake Mendota, the Village's character and its unusual layout is a response to its unique natural setting. Accented by woods, rolling hills, and a dramatic shoreline from which the Village takes its name, portions of the Village's "organic" street-plan were laid out by the noted landscape architect O.C. Simonds.

The Village is recognized for its unique location on Lake Mendota and proximity to the University of Wisconsin-Madison, and offers many of the most highly-sought after amenities and qualities that make it a highly desirable location for residents to call home. Like many municipalities within Wisconsin, Shorewood Hills also faces budgetary challenges inherent to the dynamic of Levy Limit growth constraints tied to net new construction increases.

### Some of the pressing considerations facing the Village in the coming years include:

- Managing staff turnover to other Municipalities/Retirement is a challenge to continuity of services.
- Recruitment and retention needs. How do you build Village stability with growing demands and limited new revenue streams?
- Determining how to enhance employee benefits (current and post-employment) to best-align with neighboring communities, while maintaining financial responsibility.
- How do you prepare to stay ahead of aging utilities and needed infrastructure improvements?
- Future Village growth vision when constrained by municipal borders and Net New Construction metrics for Levy expansion.
- Maintaining responsible tax increases that deliver stable Village service and infrastructure needs.
- The full Environmental Scan can be found online.



# External Stakeholder (Community) Survey Results

An External Stakeholder (Community) Survey was September 9th through October 10th, 2024. External Stakeholders refers to individuals or groups who are outside the organization but are affected by the actions of the organization and the quality of life in the community. These include, but are not limited to, businesses, neighborhoods, residents of all ages, historically excluded populations, special interest groups, educational facilities including K-12 schools and higher ed, and other taxing jurisdictions.

## Key Takeaways

- The survey had 277 responses, with 95% indicating they are a resident of Shorewood Hills, 55% are homeowners in Shorewood Hills, and 13% own property other than their home in Shorewood Hills.
- When asked what they liked best about living in Shorewood Hills, the top three answers were location (81%), a peaceful community (48%) and a sense of community (47%).
- Respondents indicated that the four most essential or somewhat important areas for quality of life in Shorewood Hills are Parks and Recreation areas (96%), Public safety (93%), Neighborhood appearance (88%), and Housing (79%).
- More than 80% of respondents said that they were very satisfied or satisfied with the following services/features in Shorewood Hills: Quality of life (96%), Neighborhood appearance (91%), Parks and park facilities (89%), and Multiple transportation options (82%).
- When asked the most important things for a strong and healthy community the top four responses were A sense of safety and security (62%), High-quality Village services (57%), High-quality schools (46%), and Plenty of green space (36%).
- More than 90% of respondents said the following were Essential or Somewhat important to the future of Shorewood Hills: A safe community (95%), Green space preservation (95%), A good place to raise a family (94%), A well-maintained community (93%), and High-quality schools (90%).
- 91% of respondents strongly or somewhat agreed with the statement "A high-quality school system is an important factor in the success of the community." 90% of respondents strongly or somewhat agreed with the statement "The Village of Shorewood Hills has a good reputation." 86% of respondents strongly or somewhat agreed with the statement "Shorewood Hills is a good place to live for those of all ages." 86% of respondents strongly or somewhat agreed with the statement "Providing a safe and healthy environment is the highest priority of the Village's government."



## Focus Group Results

As part of the Village's strategic planning process, focus groups were conducted on October 9th and 10th, 2024. Focus Groups included businesses, residents, nonprofits, and employees.

A Focus Group is a small-group discussion, guided by a trained facilitator, used to gather in-depth information about a community's thoughts and opinions about a designated topic. The interaction enables participants to ask questions of each other, as well as to re-evaluate and reconsider their own understandings of their specific experiences. The facilitator's role is to gather information in an impartial and confidential manner, manage the pace of the discussion, and ensure that everyone has a chance to participate. The process included a set of questions and follow-up discussion within the small group.

### Key Takeaways

- Focus group participants described a community that had a feeling of connectedness. Shorewood Hills is also described as a great place to live and especially to raise kids.
- The amenities, particularly for recreational activities, were especially appreciated.
- Staff are responsive to residents and participants noted that they are a big part of what makes Shorewood Hills special. Employee focus groups described the general atmosphere as overall "pro-employee" and they are appreciative of the support that they receive from many residents.
- Staff capacity is an ongoing concern because there are so few people who can execute the plans. The employee focus groups also noted that employee retention issues caused a lack of institutional knowledge. The groups discussed the need to be competitive with wages and that the pace of decision making from the current committee and commission structure is a challenge for recruitment.
- Transparency about the Village's finances is important, as is an understanding about the financial environment for the Village that may cause the need for a referendum.
- Focus group participants saw value in keeping a separate police department. They noted that the police are invested in the community and provide exceptional services that are not found in most communities.



# Focus Group Results

## Key Takeaways (cont.)

- There is a high bar to entry into Shorewood Hills, as the community has few opportunities to build. The market has limited the opportunities to live here, although university housing and the Lodge apartments are affordable and allow people to live in the community. Housing options at a variety of price points are few and far between in the community, resulting in less income diversity.
- When looking at growth, there was a desire to determine in advance what was to be accomplished with the growth and how the needs of those who come would be met.
- Traffic can be a challenge, as is parking on the street. The community has good bikeways, but they could be better. It is difficult for residents to navigate their way through the Village if they have a wheelchair or walker since most roads in Shorewood Hills are not in suitable condition for wheelchairs.
- A consistent theme was change. There is a perception that a minority of residents can make it difficult to enact needed change at times. Others noted a small number of residents can also advocate for substantial change but that too much change too quickly could impact the great things about the community.
- The groups noted the tension inherent in commissions and committees in a small community. The sheer number of commissions, committees, and ad hoc committees are putting tremendous strain on staff.

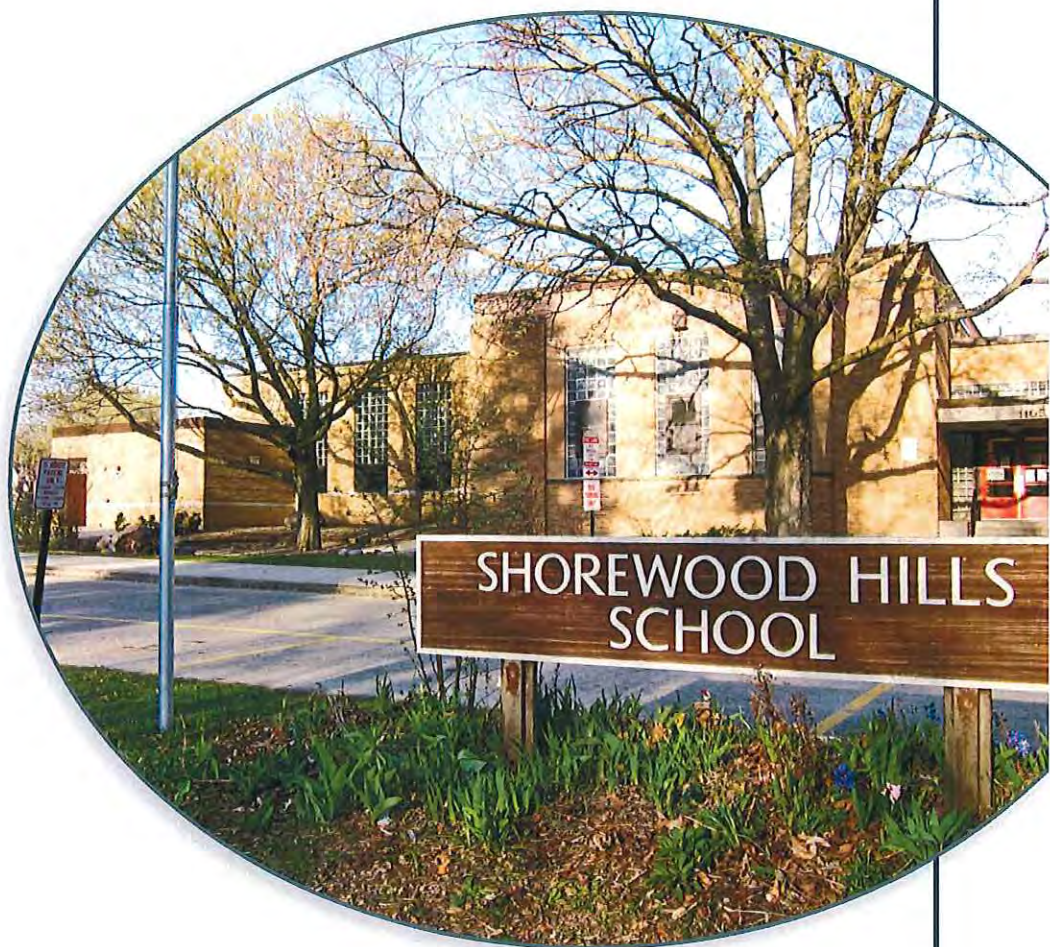




## Understanding the Environment

An integral part of the Strategic Planning Process is a SWOT Analysis, which stands for strengths, weaknesses, opportunities, and threats. It provides a situational overview of the environment in which strategic planning takes place and allows a systematic examination of factors impacting the community. **Strengths and Weaknesses** examine the internal operating environment, while **Opportunities and Threats** evaluate the external operating environment.

To provide ample opportunity for reflection, a SWOT survey was distributed to the Board Members and staff prior to the Strategic Planning session. During the Strategic Planning Retreat, the SWOT data was reviewed to determine key themes and strategic issues.





# SWOT Analysis

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Active and engaged residents</li> <li>• Dedicated, experienced, responsive staff</li> <li>• Strong financial health and management</li> <li>• Location</li> <li>• Natural areas and parks</li> <li>• Safety</li> <li>• Engaged and committed elected officials</li> <li>• Amenities and services</li> <li>• Close knit community</li> <li>• Good work environment for staff</li> </ul>	<ul style="list-style-type: none"> <li>• Aging facilities and public works</li> <li>• Sustainability of police department</li> <li>• Staff turnover, competition from other areas for wages and benefits</li> <li>• Outdated codes and regulations</li> <li>• Affordability, limited ability to expand tax base</li> <li>• Outdated policies and regulations</li> <li>• Too many committees</li> </ul>	<ul style="list-style-type: none"> <li>• Modernize and improve facilities, add new buildings</li> <li>• Diversify housing options</li> <li>• Grow tax base along the University Ave Corridor</li> <li>• Commercial redevelopment</li> <li>• Plan for multi-modal transportation</li> <li>• Use of new/improved technology</li> <li>• Engagement of community and organizations</li> <li>• Communication strategy, website update</li> </ul>	<ul style="list-style-type: none"> <li>• Rising costs and property values</li> <li>• Lack of diverse housing options</li> <li>• Staff retention, pay, and competition from surrounding areas</li> <li>• Tax levy mandates and limits</li> <li>• Traffic</li> <li>• External dependence for essential services</li> <li>• Limited tax base</li> </ul>

The **Strengths** and **Opportunities** groups combined to discuss how internal strength coupled with external opportunities could be enablers of success.

The **Weaknesses** and **Threats** groups combined to discuss how internal weaknesses coupled with external threats could be challenges to success.

Then, the groups combined, and all participants reviewed the key themes. A list of strategic issues was determined, and included economic development, partnerships, staffing, infrastructure, water, diverse revenue streams needed, public safety, technology, commercial development and housing.

Finally, the most important organizational priorities were finalized taking into account information gathered throughout the process, including the Environmental Scan.

Through this analysis, four Strategic Goals were identified: Financial Sustainability, Effective Operations, Quality of Life, and Workforce Development.

Participants then were divided into cross-functional groups. They determined desired Outcomes (what success looks like), Key Outcome Indicators (how to measure progress towards success), and Performance Targets (a measurable goal achieved by a defined date) for each Strategic Goal.



# Targets by Strategic Goal

STRATEGIC GOAL	OUTCOME	KEY OUTCOME INDICATOR	TARGET
Financial Sustainability	Sustainable Fund Balance	% Fund Balance to Operating budget	15-25% Fund Balance to Operating Budget Ratio on an annual basis
	Self-supporting Enterprise Funds	Level of General Fund Subsidy; % of reserves	0% Subsidy by ____ [date]; Build reserves of \$ ____ by ____ [date]* (Benchmark data to follow)
	Increase Tax Base	Assessed value of underutilized properties	Fully explore tax base options; recommendation from finance committee by ____ [date]
	Modern Efficient Facilities	Square feet new space; Reduced operating expenses	Pending facilities study
Effective Operations	Modernized Governance Structure	Governance structure adopted	Adoption of updated governance structure by ____ [date]
	Optimize Technology	# of Website milestones reached; # core processes automated	Website updated by 3/2026; 1 core process automated annually
	Enhanced Stakeholder Communications	# of improved communications channels established	YouTube Channel established by 12/2025 Formalized Village Administrator open-door hours by 6/2025 Project/Development meeting process formalized by ____ [date]
Quality of Life	Modernized streets	# of feet of pedestrian/bike infrastructure; # of utilities replaced	__ # of feet resurfaced annually in compliance with Complete Street Resolution
	Recreation Program updated	# of formal structuring milestones achieved; % of programming needs analysis complete	Formalized recreation structure by ____ [date] Stakeholder programming needs understood by ____ [date]
	Housing affordability	% of density increase	Housing density increased by __% by ____ [date]
Workforce Development	Timely hire of quality staff	Time to fill	Reduce time to fill by 25% by 12/2028
	Retention of staff that advance the mission of VOSH	# of average years of tenure by department	Determine baseline data by 12/24 Increase years of tenure by __% by 12/2028 (dependent on baseline data)
	Clear Policy Guidance	% of policies complete	Internal policies inventory complete by 12/2028 25% of policies completed annually



# Strategic Plan Implementation

Implementation is the final step in the Strategic Planning Process and consists of staff developing Initiatives to support the Strategic Goals determined during the Strategic Planning Process. The following Initiatives will be reported on regularly, showing the measurable progress the Village of Shorewood Hills is making towards their Strategic Goals and associated Performance Targets.

## Financial Sustainability

- Financial Modeling Program implemented
- Create an Enterprise Fund reserve program
- Execute a Facilities study
- Develop a Tax Base Research and Recommendation Strategy with the Finance Committee

## Effective Operations

- Implement Governance Structure Strategy
- Create an updated website plan
- Develop a core process review strategy
- Establish YouTube Channel implementation process with policies
- Create a Public Village Administrator Open Door Schedule
- Develop a Project/Development Meeting Process

## Quality of Life

- Create a Complete Street Resurfacing Strategy
- Perform a Recreation Program Structure Analysis
- Perform a Recreation Programming Needs Analysis
- Establish a Housing Density Strategy

## Workforce Development

- Update a hiring practices and procedures
- Create a staff retention strategy
- Establish an internal policy Inventory
- Create an internal policy formulation strategy



## Strategic Plan Participants

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

### Shorewood Hills Board of Trustees

**President**

John Imes

**Trustee**

Shabnam Lotfi

**Trustee**

Mark Lederer

**Trustee**

Robb Stankey

**Trustee**

Dietmar Bassuner

**Trustee**

Carol Barford

**Trustee**

Bob Falk

### Shorewood Hills Staff

**Village Administrator**

Brian Mooney

**Police Chief**

Jamie Weitzel

**Police Lt.**

Nick Dodsworth

**Forester**

Patrick Finnegan

**Public Works Director**

Tary Handschke

**Treasurer/Clerk**

Julie Fitzgerald

**Admin Staff**

David Sykes

**Pool Manager**

Dane Sheehan

**Consultant**

Cory Poris Plasch, President, CP2 Consulting





# Focus Group Report

## **Focus Group Overview**

As part of the Village of Shorewood Hills' strategic planning process, focus groups were conducted on October 9 and 10, 2024. Summaries of the major themes discussed by the focus groups are contained on the following pages. The participants were recruited by the Village of Shorewood Hills and consisted of businesses, residents, students, nonprofits, and employees of the Village of Shorewood Hills. There were a total of 29 participants, 14 of whom were employees.

## **Focus Group Process**

A focus group is a small-group discussion guided by a trained facilitator. It is used to gather in-depth information about a community's thoughts and opinions on a specific topic. The interaction enables participants to ask questions of each other, as well as to reevaluate and reconsider their own understanding of their specific experiences. The facilitator, whose role is to gather information in an impartial and confidential manner, manages the pace of the discussion, and ensures that everyone has a chance to participate. The group meets for a limited duration, and all participants were recruited by Village leadership. The process typically includes a set of questions and a follow-up discussion within the small group.

In the case of Shorewood Hills's focus groups, the discussion topics were strengths and challenges for the Village. At the conclusion of each focus group, each participant was asked to identify three areas for the Village to focus efforts and resources on over the next five years. This structure requires participants to prioritize their thoughts in a succinct manner and may provide a summary of key strategic issues to be considered using the qualitative data from the rest of the report.

## **Focus Group Context within the Strategic Planning Process**

The main purpose of focus group research is to draw upon respondents' attitudes, feelings, beliefs, experiences, and reactions in a way that complements other data collection methods, such as surveys or one-to-one interviews. These attitudes, feelings, and beliefs may be partially independent of a group or its social setting. However, they are more likely to be revealed via the social gathering and the interaction which being in a focus group entail. Focus groups help to generate qualitative data that identify general themes of importance to the community.



### **Focus Group Questions/Areas of Exploration**

A broad set of questions were developed to guide the focus group discussions. The questions provided areas to explore rather than a strict outline to follow. Follow-up questions were asked during each session based upon the answers given to explore the answer or issue more deeply. The questions are listed below:

1. When you think of what you like best about Shorewood Hills, what comes to mind?
2. When you think about Shorewood Hills, as compared to other nearby suburban communities, what comes to mind about the challenges of this community?
3. What are the advantages of living in Shorewood Hills as compared to other places?
4. If you could change things about Shorewood Hills, what would they be?
5. When you think about all of the services the Village provides, what are the most important to you?
6. Of the important roles that the Village plays in helping to create a good quality of life, what are the most important to creating a high-quality future?
7. If you could choose three things for Shorewood Hills to focus efforts and resources on over the next five years, what would they be?

### **Summary of Major Themes**

#### **A Connected and Vibrant Community**

Focus group participants described a community that had a feeling of connectedness. Residents make lifelong friends and even if people move away, the connections remain. It seems cliquey to outsiders but it's because of the strong relationships that form within the Village.

Shorewood Hills is also described as a great place to live and especially to raise kids. It is walkable, with great schools and attractive houses. The community is safe, and residents can walk to school and bike to the pool. The residents come from a variety of different educational backgrounds, are achievement-oriented and truly care about the community. Residents were described as "charitable with their time and energy". All this combined with great dining options, a movie theater, and events such as the 4<sup>th</sup> of July activities, group gardening days and neighborhood progressive dinners, make the community a unique and desirable place to live.

The amenities, particularly for recreational activities, were especially appreciated. Pools, tennis courts, docks for boats, and other infrastructure are an attractive part of the Shorewood Hills experience. One group noted that among the amenities Shorewood Hills provides is tree maintenance and other care for the environment that maintains the integrity of nature in the community.

#### **Responsive and Invested staff**

Staff are responsive to residents and participants noted that they are a big part of what makes Shorewood Hills special. One group described a lack of bureaucracy by noting that if a problem is brought to Village Hall someone will address it. Staff attempt to solve the problem and don't just push you off onto another department. Services are high level, and as one resident noted, brush pick up "never stops." There were no complaints about any of the services provided, and instead

participants praised that snow is cleared well, all departments are responsive, and residents receive services such as an arborist on staff and having the Village Engineer come to present on drainage issues. This attention to quality service delivery adds to the high quality of life residents enjoy.

Employees noted that while expectations are high, staff feel that they can earn the trust and respect of the residents. Residents have great ideas and want to improve the community, but staff capacity is an ongoing concern because there are so few people who can execute the plans. For example, there is a desire for a more comprehensive outbound communications structure, but there are inadequate financial resources to dedicate to a communications position and a lack of capacity for current staff to expand on the communications structure in place.

Employee focus groups described the general atmosphere as overall “pro-employee” and they are appreciative of the support that they receive from many residents. Staff appreciate the culture within the Village that provides support for them on a personal level. They have the flexibility to take a few hours off for an appointment, and if you need to take time off for your kids or for a vacation, that’s OK.

### **Employee Recruitment and Retention**

There was a consistent theme among all focus groups (not just the employee focus groups) that employee retention and attraction was a key area of concern for the community. One group noted that unlike in other communities, in Shorewood Hills, you “don’t fight city hall” and they want staff to be treated with dignity and respect in return. Another group noted the time and money spent recruiting and training. There was a desire to ensure that employees feel appreciated for their contributions to the Village.

The employee focus groups noted that employee retention issues caused a lack of institutional knowledge. All but one person in the office has been there for two years or less, and there is lost history with turnover. Roles and responsibilities are unclear in part because of the turnover and significant functions such as HR do not have clear delineation of who is responsible for what duties. Retention impacts service levels, and a new employee must learn the job first, which takes time and impacts the speed and quality of work.

The groups discussed the need to be competitive with wages, not only with the village administration but also police and Department of Public Works (DPW). They noted that Shorewood Hills has lost multiple police officers to other communities because of wage disparity. Staff are seen as working above and beyond, and if the Village wants to maintain high services, then wages need to be competitive. Additionally, the supply is reduced for law enforcement personnel, and we must be proactive to get and keep qualified personnel. Benefits should also be looked at, especially since employees that work here can’t live in the community. How does that impact our ability to keep them? With staff forced to commute, wages and benefits need to be attractive.

The employee focus groups noted that pay is the biggest reason given as to why people leave. Pay parity is a challenge as the Village often uses similarly sized communities as comparables, but staff leave to go work in Waunakee or Middleton.



Focus group participants were well informed about the impact of levy limits on municipal spending. They noted that costs continue to rise, and that the money needs to come from somewhere to maintain high quality services provided by experienced staff. Transparency about the Village's finances is important, as is an understanding about the financial environment for the Village that may cause the need for a referendum. Although regular audits are helpful as an external check, residents need to have confidence that budgets are being used well. The employee group noted that there should be another educational initiative to help refresh residents' understanding of the impact of rising costs, quality of services, and consequences of the levy.

The pace of decision making from the current committee and commission structure was discussed as a challenge for recruitment. One employee mentioned that he had tentatively offered a job, but needed to wait 3.5 weeks for approval from the Board before a formal job offer could be made. The employee focus groups noted that positions are often open for months as they work their way through the hiring process of the Personnel Committee and then the Board. Local government is struggling to recruit, and good candidates are hired by other communities that have a streamlined and therefore faster process. There are fewer and fewer quality candidates, and a faster process helps to secure good quality candidates. Police has been successfully streamlined, as has the pool hiring for part time people, and it's made a difference.

### **Shorewood Hills Police Department**

The focus groups discussed the conversations about whether to keep a separate police department. Overall, focus group participants saw value in keeping the Shorewood Hills police separate. They noted that the police are invested in the community and provide exceptional services that are not found in most communities. Participants stated that even minor issues such as a suspicious person are handled promptly, leading to a feeling of safety for the community. Several focus groups discussed the concern that the police department would cease to be independent and become absorbed into the Madison Police Department. Among those participants, there was concern about the impact it would have on services. One focus group was more ambivalent about maintaining services due to the cost, because of the amount of the budget dedicated to the police department and concerns about ongoing recruitment and retention challenges if they are not well compensated. An increase in response times and a decline in the quality of service were some of the most cited concerns. The employee focus group noted that the issues from Madison sometimes come over to Shorewood Hills, and that the police department responds to more serious calls than some residents realize.

### **Housing**

There is a high bar to entry into Shorewood Hills, as the community has few opportunities to build. The market has limited the opportunities to live here, although university housing and the Lodge apartments are affordable and allow people to live in the community. Some participants noted the diversity of ages and backgrounds at the Lodge and that it adds needed housing to the community both as a point of entry and a way to downsize from home ownership while still providing a way to stay in the community. Participants noted the change in housing stock as houses are snapped up as soon as they come on the market and small houses are torn down to build larger ones or ones with a more modern layout.

Housing options at a variety of price points are few and far between in the community, resulting in less income diversity. However, the cost of land in the community and then to build on it is a significant challenge. Aging in place is a challenge for the community, with some seniors in larger houses than they want or need, but unable to find housing with a smaller footprint that is still in the community. Some participants urged the Village to consider TIF districts that could be used proactively in some locations to incentivize development of condos and other higher density housing that would also expand the tax base.

## **Growth**

When looking at growth, there was a desire to determine in advance what was to be accomplished with the growth and how the needs of those who come would be met. Are there appropriate services such as childcare available? Shorewood Hills needs to be thoughtful about resource constraints and how to maintain the current level of services. Resource needs will become even more extreme in the future, and stress on staff will become greater if we can't retain staff.

Commercial landowners cannot vote unless they are also residents but may bear a disproportionate burden because they have commercial real estate. The business group noted that there was a restrictive mentality that impacted the way development happened in the past, although they noted that Administrator Brian Mooney has been great to work with. However, there is not a planning or engineering department, making it difficult to work out issues before going to the zoning commission.

Participants noted that discussions often get bogged down over whether the front facing façade should be brick or another material, and as a result the important issues such as how to encourage growth in a strategic way are never fully examined. Growth can require some trade-offs, and several people expressed the desire to look at the overall good for the community rather than the impact on a small number of people. An example given was that as demographics change and families have less children, higher density housing is one change that could help guarantee enough children to appropriately utilize the elementary school.

As one participant noted, in Shorewood Hills, "It's a built environment so inches matter."

## **Mobility**

Traffic can be a challenge as is parking on the street. The community has good bikeways, but they could be better. It is difficult for residents to navigate their way through the Village if they have a wheelchair or walker since most roads in Shorewood Hills are not in suitable condition for wheelchairs. If we want the roads to be used for bikes, pedestrians and cars, they need to be set up to do so. If sidewalks are installed, they need to be wider to accommodate a greater variety of uses. A Village speed limit of 15 mph could discourage commuter traffic and encourage more pedestrian uses.

## **Change**

A consistent theme was change. There is a perception that a minority of residents can make it difficult to enact needed change at times. Others noted a small number of residents can also advocate for substantial change but that too much change too quickly could impact the great



things about the community. Residents noted that they have an identity that is unique and important to maintain, but that change is not only inevitable, but some is needed. One participant noted that overall people are happy in Shorewood Hills, so change should be proportional and not expansive. Several participants noted that they were hopeful the strategic planning process would provide some direction for change in the next few years for the Village.

Some focus group participants noted that the Village facilities need to be updated, and this could be an opportunity to change them to better accommodate the Village resident of today. The employee focus group also noted that facilities are set up for what the needs used to be, not what they are today. The facilities themselves need to be reimagined.

### **Commissions and Committees**

The groups noted the tension inherent in commissions and committees in a small community. Shorewood Hills has a population that is well educated and there appears to be a sense of pride with some regarding the hands-on way that residents are engaged with their Village. However, at times it functions as a result as a participatory form of government, where a small number of voices have disproportionate influence and impact. Several groups discussed that as the world has gotten more sophisticated, processes should be updated to be more consistent with other local governments. Several individuals noted there is an opportunity to streamline meetings and processes and they hoped that could be realized as part of the strategic planning process.

The employee focus group discussed challenges with the current number of commissions and committees and the lack of clarity on roles. It's unclear to staff what priority items are for the commissions and committees and what are secondary, leading to pressure to do all tasks on the same timeline. Committee/Commission members often direct staff, leading to inconsistencies in direction and multiple people asking for dissimilar research into issues or to have unrelated tasks accomplished before the next meeting. Staff struggle with the amount of work generated and the lack of overall prioritization within the organization makes it difficult to focus on what is most important because of conflicting ideas about what items are the highest priorities.

Additionally, the sheer number of commissions, committees, and ad hoc committees are putting tremendous strain on staff. Each meeting requires set-up including public notices to be prepared, someone to be present at the meeting to take notes, and then follow up work after the meeting ends. Most of the meetings are at night, and because of their commutes staff are unable to go home to have dinner with their families before the night meetings begin. Lengthy evening meetings leave many staff working long hours on a regular basis with no opportunity to recharge.

It's also unclear to staff how decisions that originate in commissions or committees and then go to the Board are to be implemented. Because staff are not included in the formulation of processes and procedures that originate from the committee structure, they are unable to give information about how these processes can be executed successfully.

### **Employee Focus Groups**

The employee focus groups had similar themes to the other focus groups, but often felt disproportionate impacts due to their role with the community. In some areas, that was a benefit. Employees noted that the small organization size allowed them to have a variety of jobs and

develop multiple skill sets that might not be possible in a larger organization. The small community size also allows staff to get to know residents and develop relationships.

HR is an area of specific concern for staff. They noted that without a specific point of contact for the role, the onboarding process can be cumbersome. Additionally, the confusion about the status of an HR manual is a challenge for staff. It's unclear what the difference is between a DP1 and DP2 role, and how one progresses from one role to the next. A lot of time is spent trying to research and understand what was done in the past since there is no policy to guide current HR questions or concerns.

### Employee Check in

Employees were asked to respond to the following questions with yes, maybe, or no, to gauge their overall employment satisfaction.

Question	Yes	Maybe	No
I would recommend working at Shorewood Hills to friends	7	7	0
I would apply to this position again	6	6	2
I am likely to stay with Shorewood Hills for another year	7	5	2

### Three Priorities for Shorewood Hills

At the conclusion of the focus groups, participants were asked, "If you could choose three things for the Village to focus efforts and resources on over the next five years, what would they be?" After an hour of sharing ideas, perspectives, and suggestions about a variety of topics, this question encourages participants to narrow the number of priorities to just the three that they feel are most important. Responses are tallied into the following categories, with each bullet representing one response, except for those ending with a number in parentheses, indicating the number of participants who said this was a priority. The top five responses are highlighted in yellow. Those priorities contributed by the employee group are marked with an asterisk as this may help to better understand the priorities associated with their unique, internal perspective.

#### Staff

- Wages/Benefits for staff/pay parity with surrounding communities (3) (9\*)
- Maintain staff culture/connection to community
- Employee retention/recruitment (2) (3\*)
- Increase tax base to retain employees
- Staff development and making the best use of staff skills\*
- Clear roles and responsibilities for staff (2\*)

Maintain/sustainable infrastructure (marina, roads, parks, pool, tree canopy) (5) (3\*)



- Maintain the parks/amenities already here (2)
- Maintain and enhance amenities including Blackhawk
- Pedestrian and bicycle infrastructure (2)
- Swimming pool with community center
- Update west side infrastructure\*
- Update facilities (12\*)
- Maintenance and equipment budgets increase with inflation\*

#### Development (2\*)

- Housing at a lower price point/diversification of housing stock (3)
- Tax base with more housing development as a growth strategy (4)
- University Avenue- plan for how to develop to increase tax base
- Balance small town feel and growth

#### Operations

- Due diligence on cost vs value on expenses such as regular vendors
- Maintain level of services with consistent staff (2)
- Strategic plan is a guiding/holistic document that is implemented (2)
- Realign roles and responsibilities in the office\*
- Standardization/modernization of outbound communications\*
- Keep up with technology maintenance\*
- Operational efficiency for organization
- Continued transparency

#### Governance

- Formalize the Village decision making infrastructure and how meetings are run (3) (1\*)
- Clear understanding of what staff can do/their role
- Making sure that the priorities are set, and it is clear who has authority to direct staff\*
- Streamlining of governance process between committee and department heads\*
- Broader resident input on decisions

#### Other

- Improve Shorewood's reputation
- Community engagement and outreach to create welcoming space
- Keep referendums at a minimum
- Term limits on some commissions to encourage change
- Card readers for payment\*

#### Change

- Amenable to change and growth
- Balance the small town historic with common sense change (2)

# Shorewood Hills Stakeholder Results

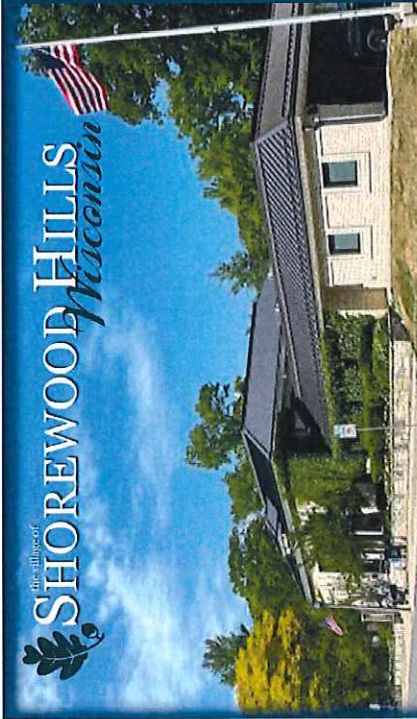
Cory Poris Plasch  
CP2 Consulting  
October 15, 2024





# Cory's Background

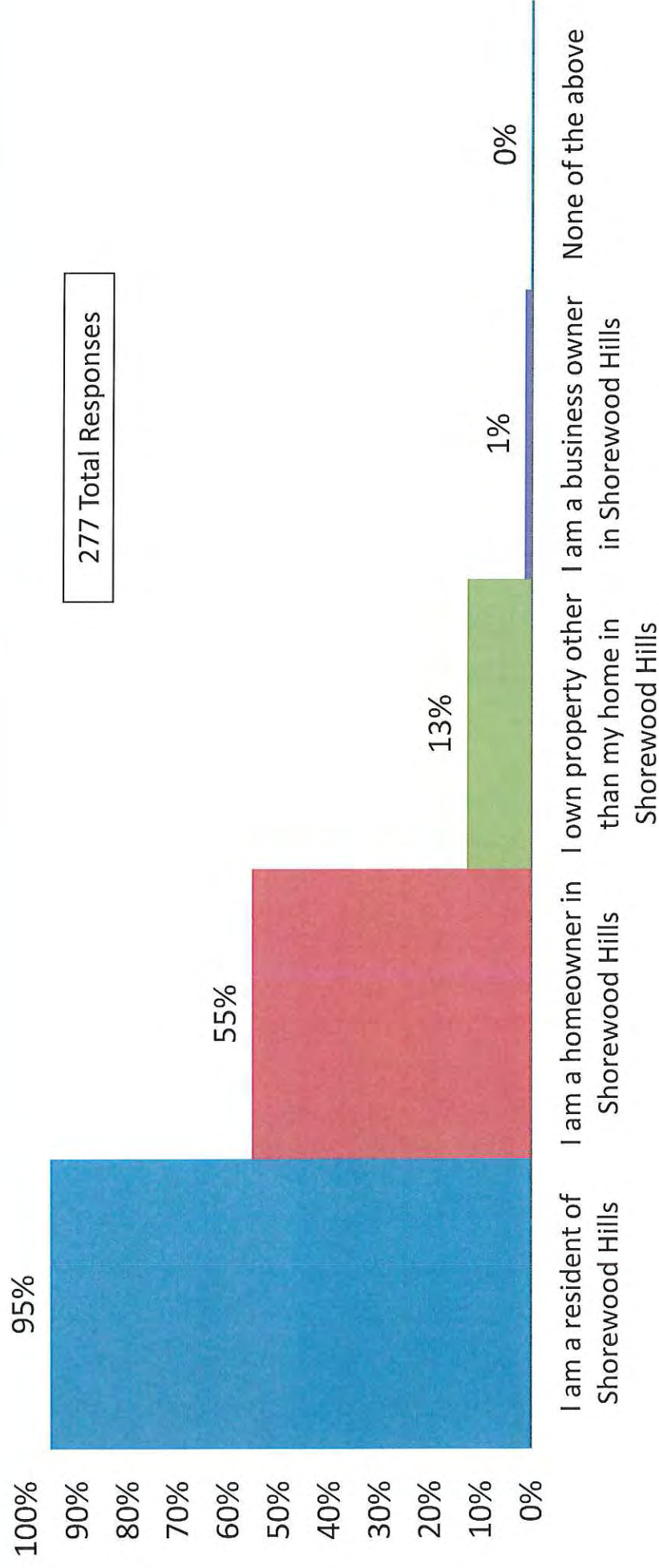
- Ten years in local government, with six as a 911 Dispatcher.
- Four years as a VP at a mission-driven tech startup company that focused on community engagement (Polco/National Research Center).
- Leadership roles in the Alliance for Innovation and the Wisconsin City/County Management Association.
- Presents at conferences nationally on strategic planning, innovation, use of data, and engaging historically marginalized populations.



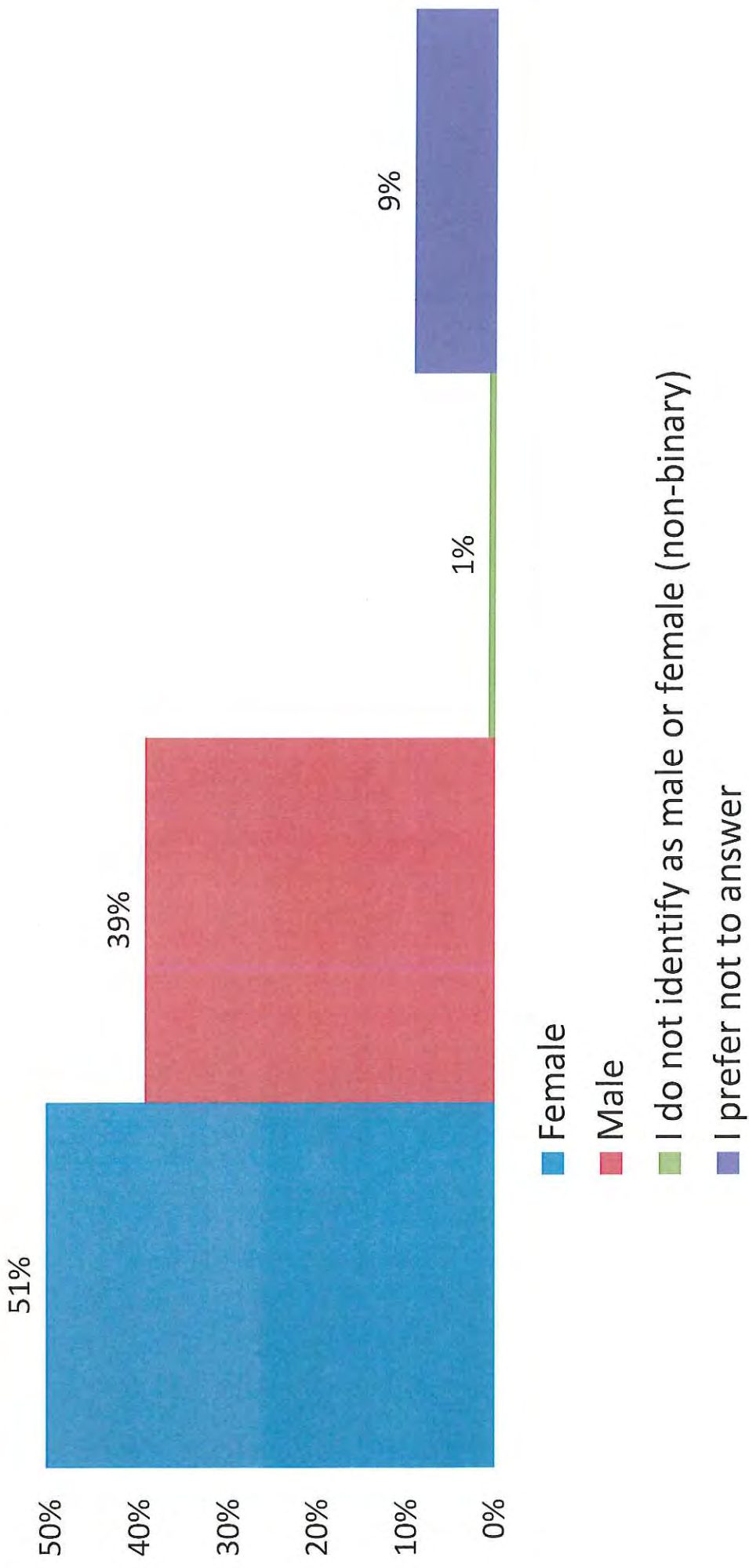
# Strategic Plan Community Survey Results



# Strategic Plan Survey Respondents

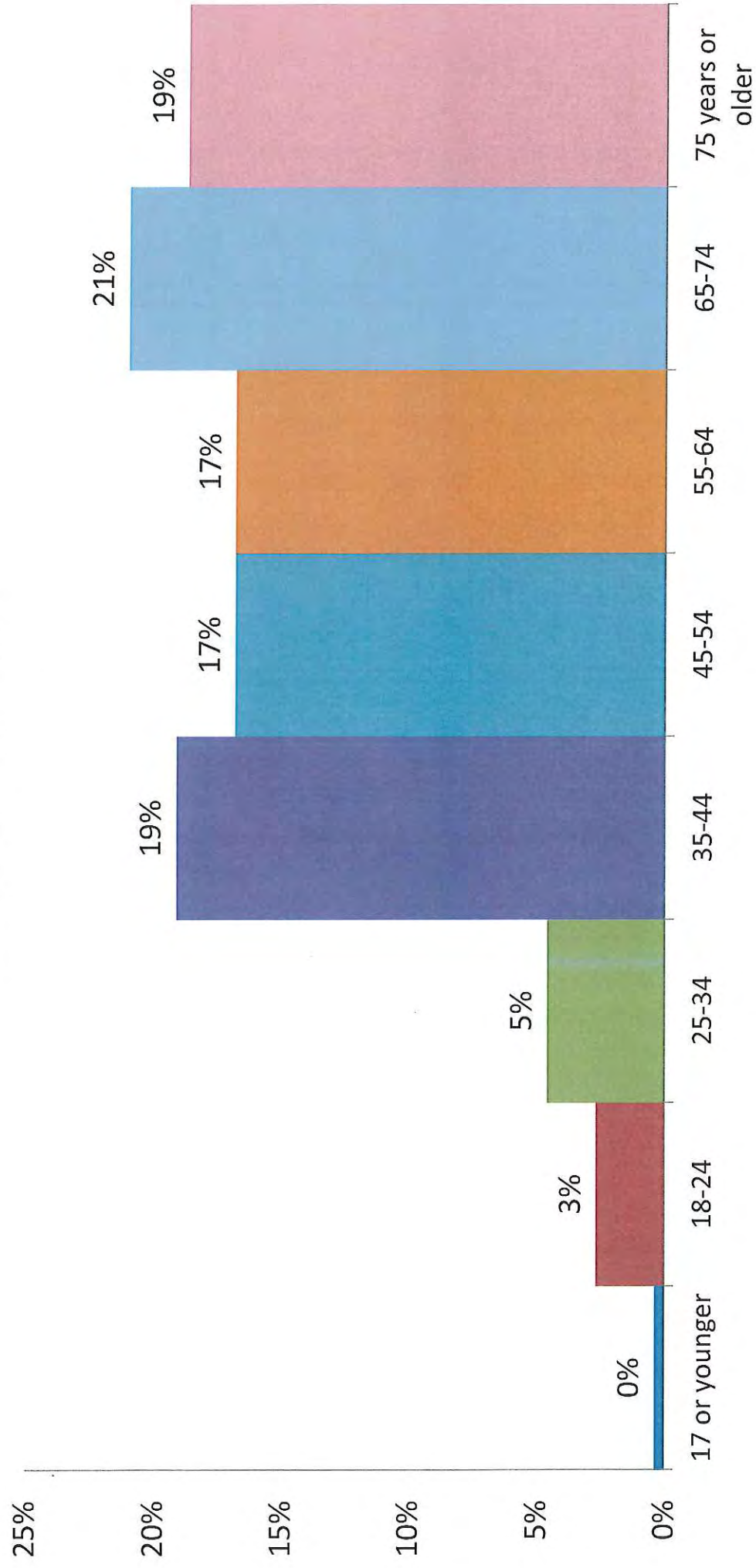


## What is your gender?

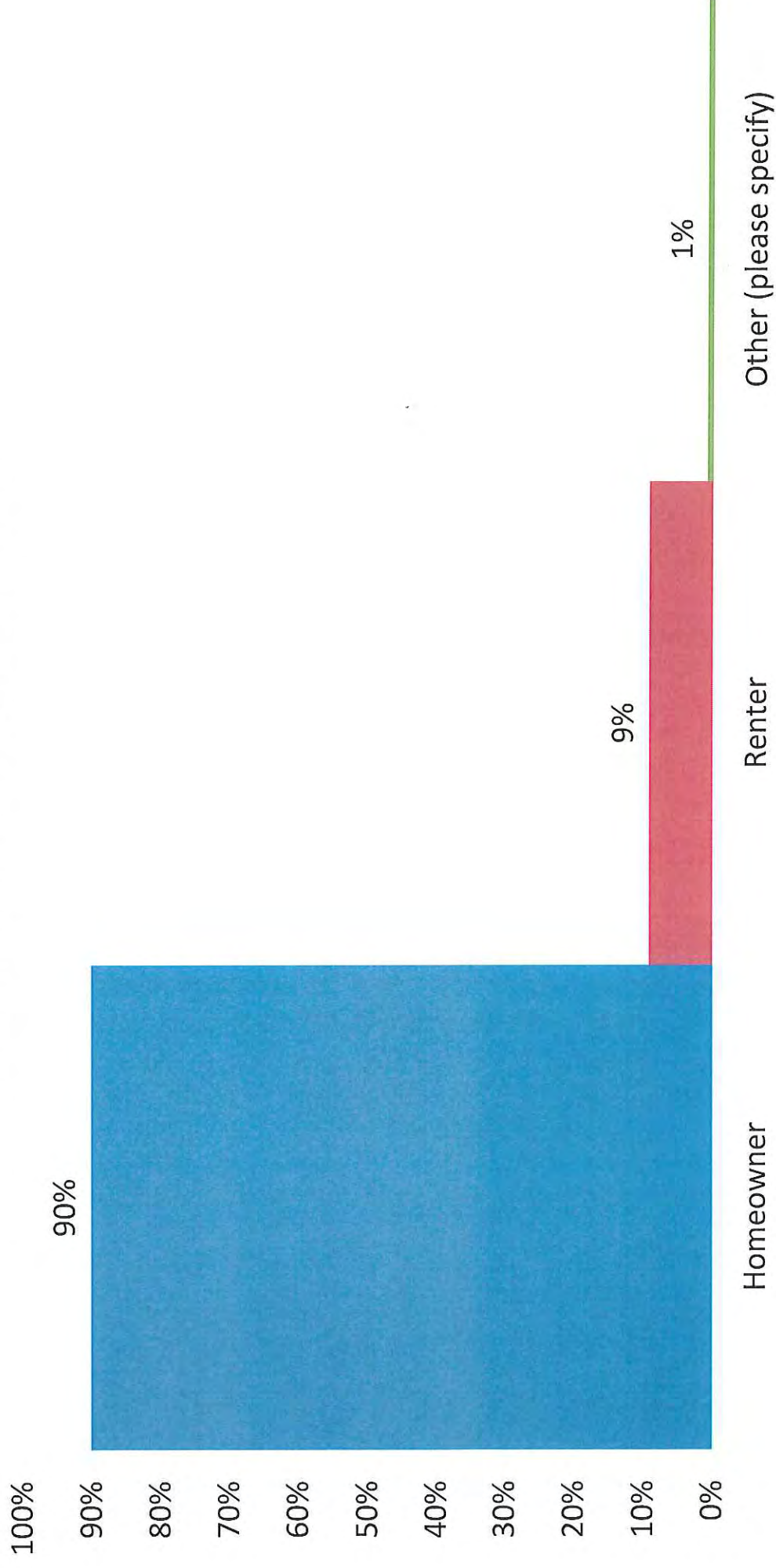




## What is your age?



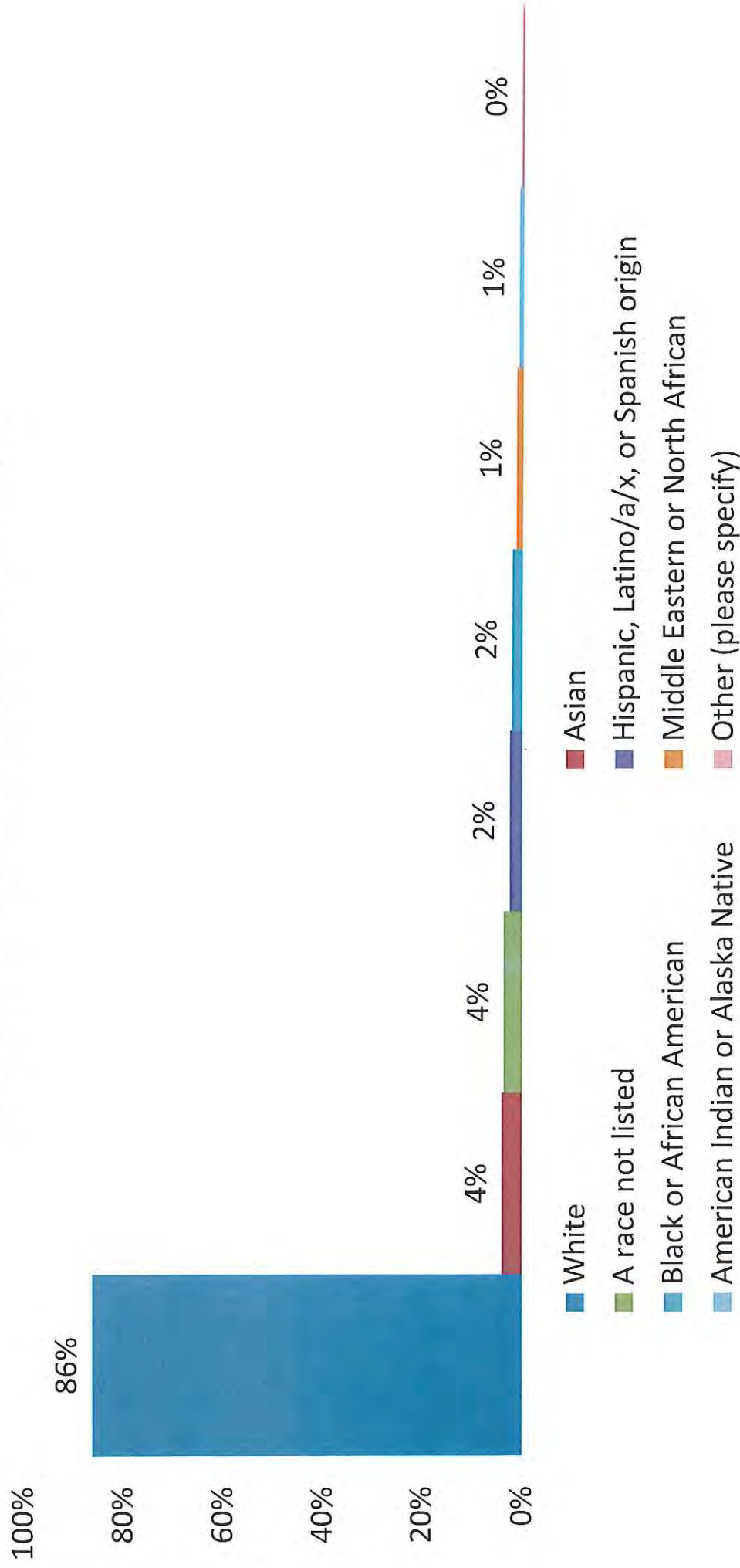
## What is your living situation?



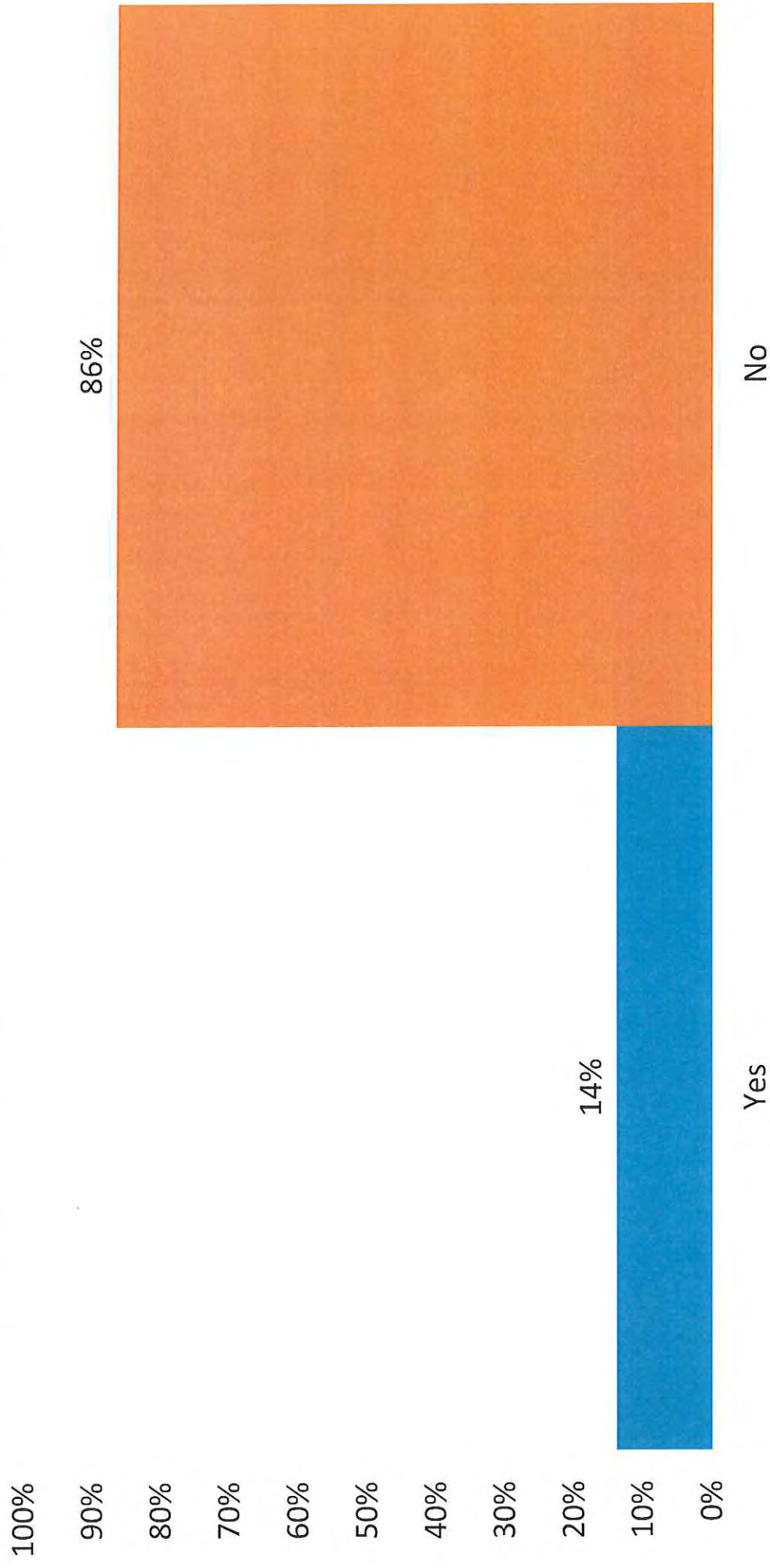


# What is your race/ethnicity?

(Mark one or more races to indicate what race you consider yourself to be.)

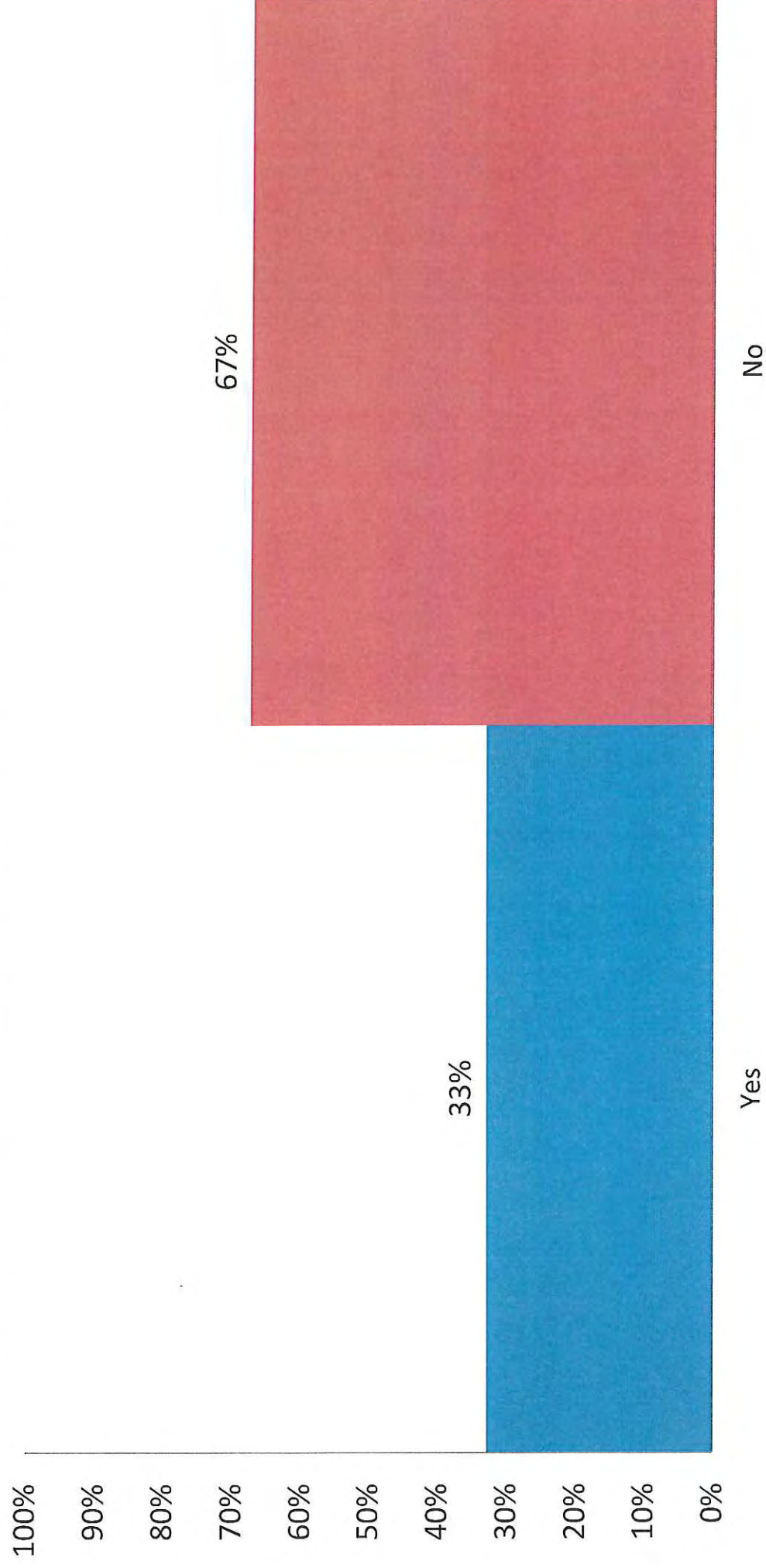


## Does a member of your household have a disability?

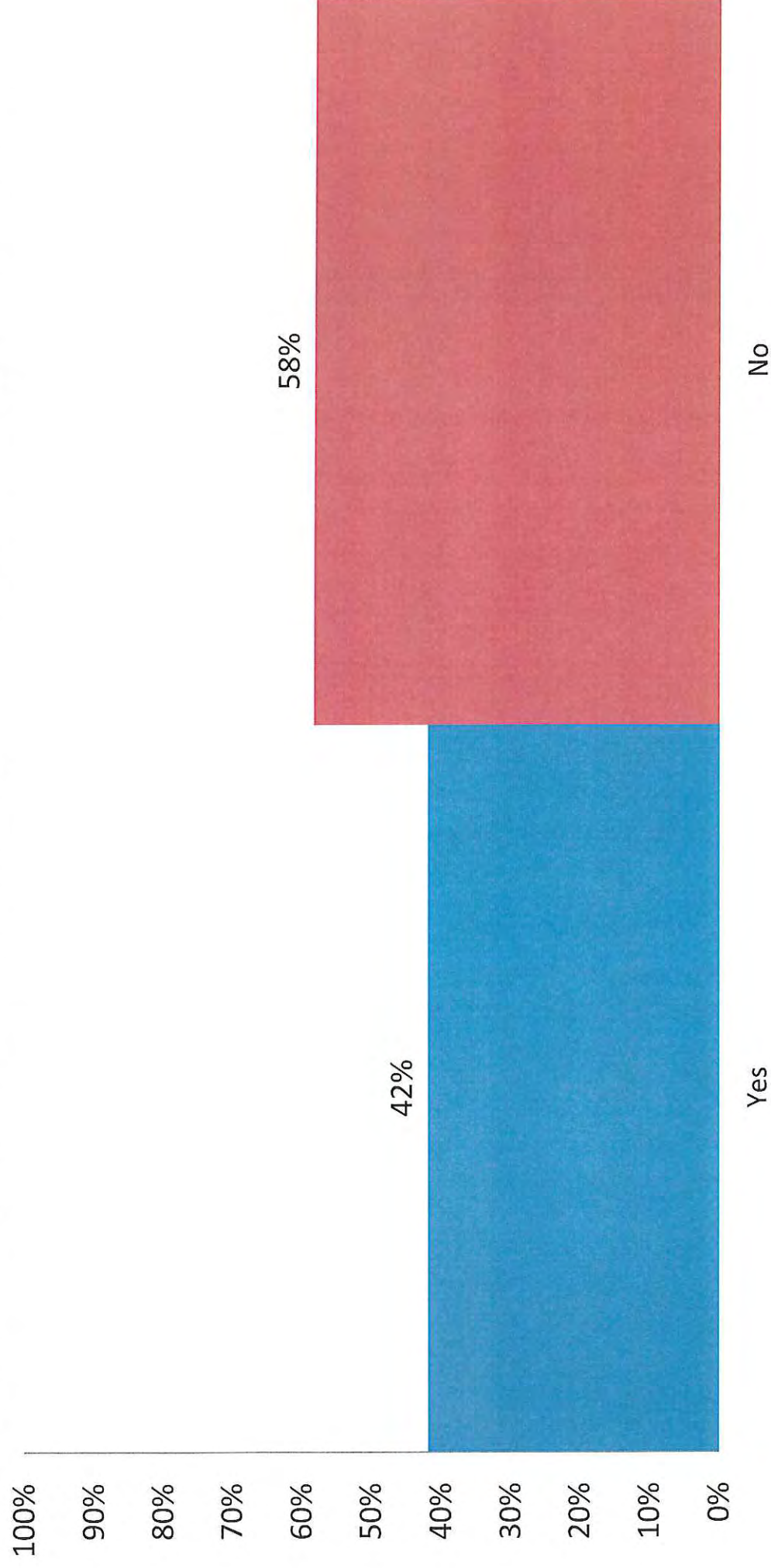




## Do you have children 17 or under in your household?



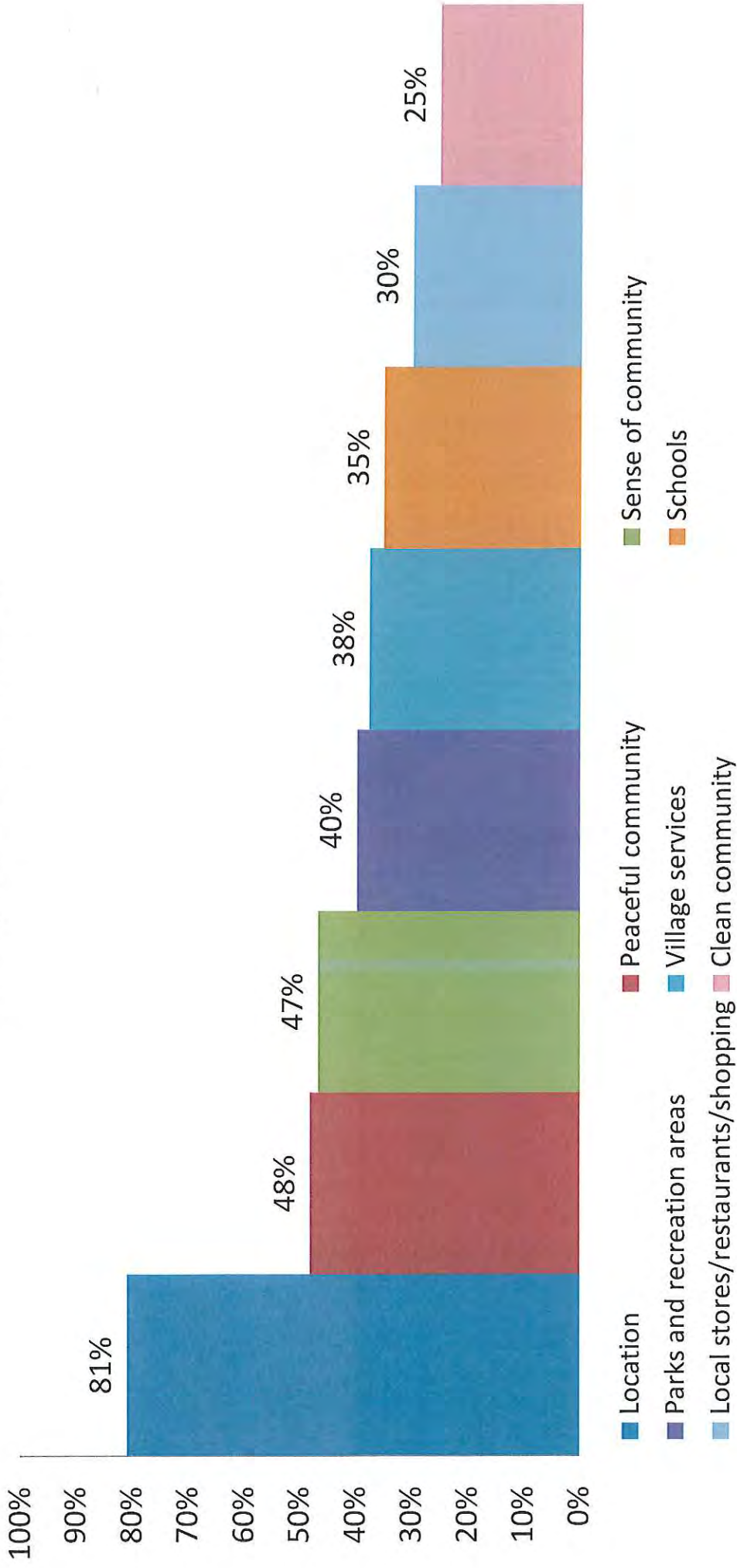
# Are you or any other members of your household aged 65 or older?





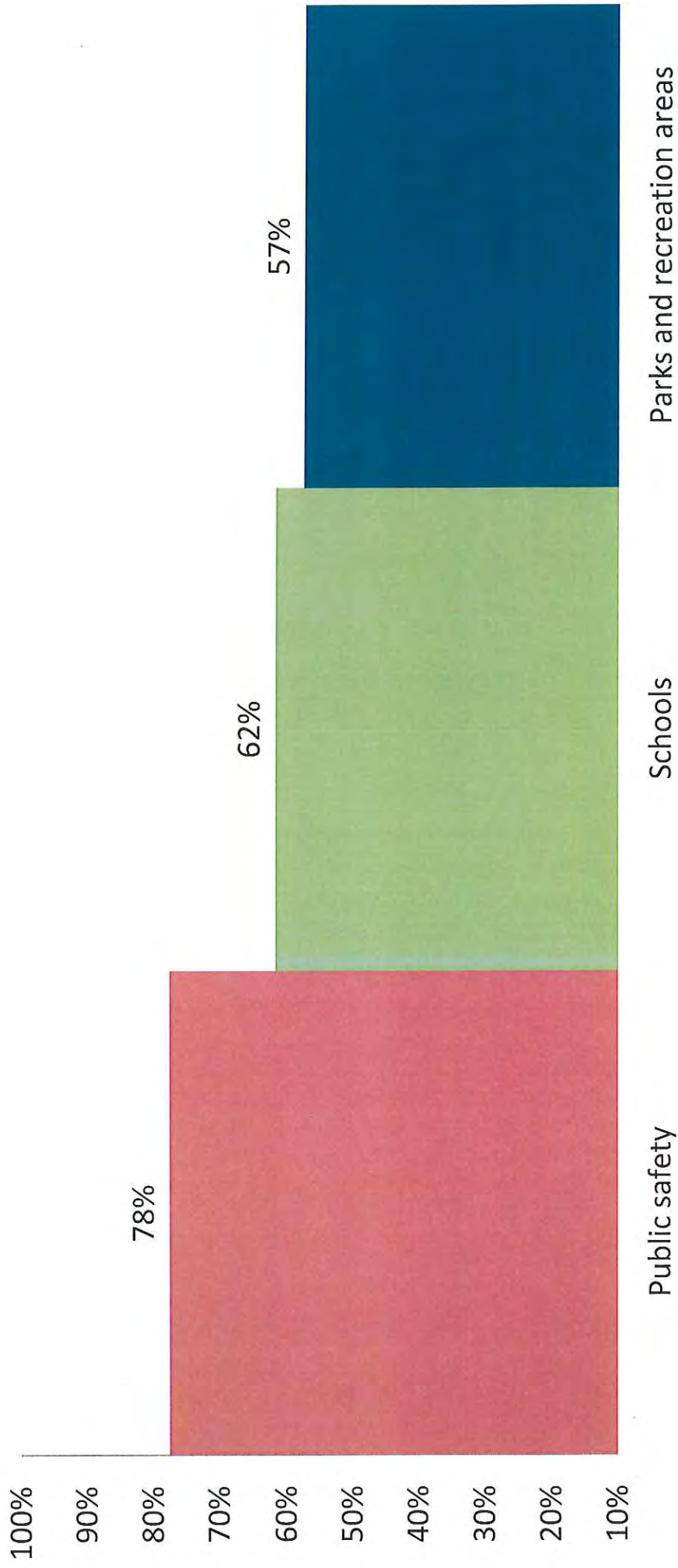
# What do you like best about living in Shorewood Hills?

(Participants could choose up to three options.)



**Please rate how important the following are to your  
quality of life in Shorewood Hills.**

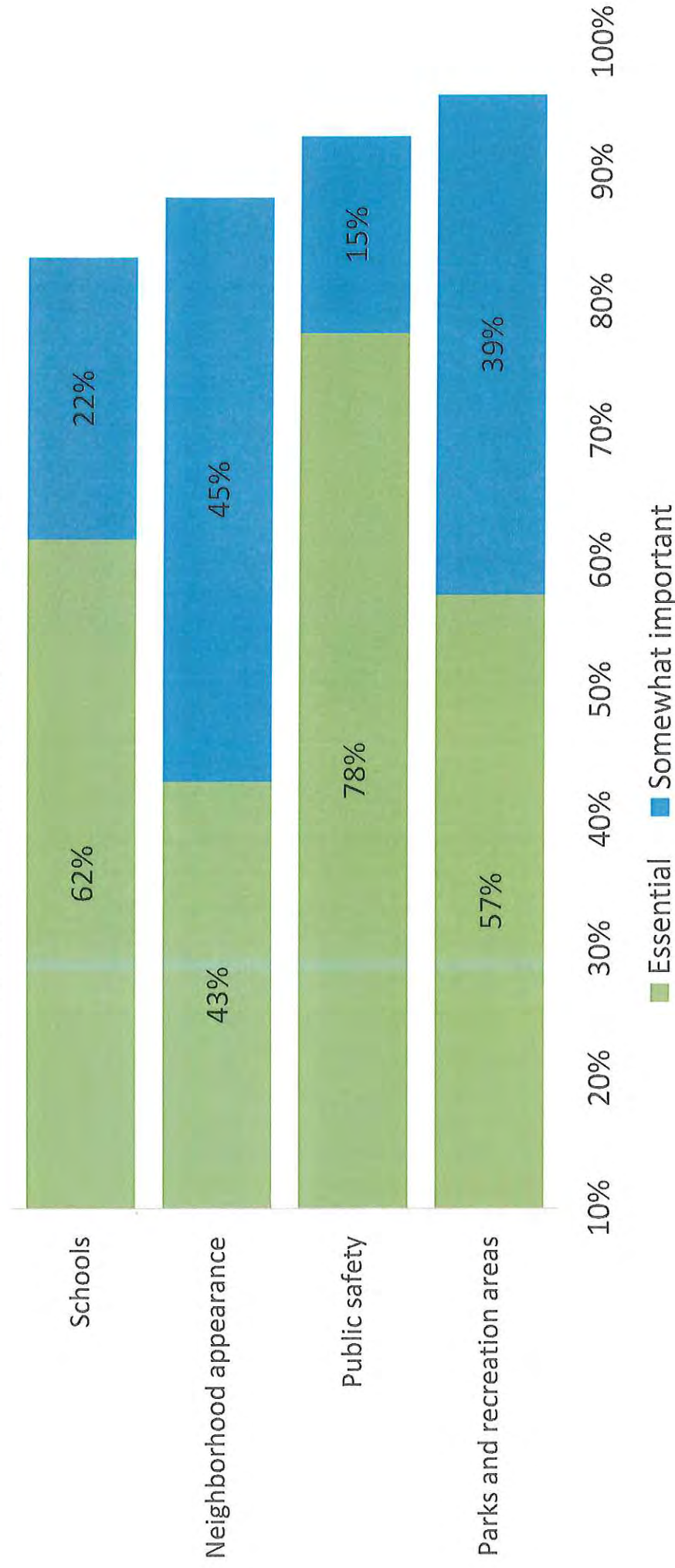
Essential ≥ 55%





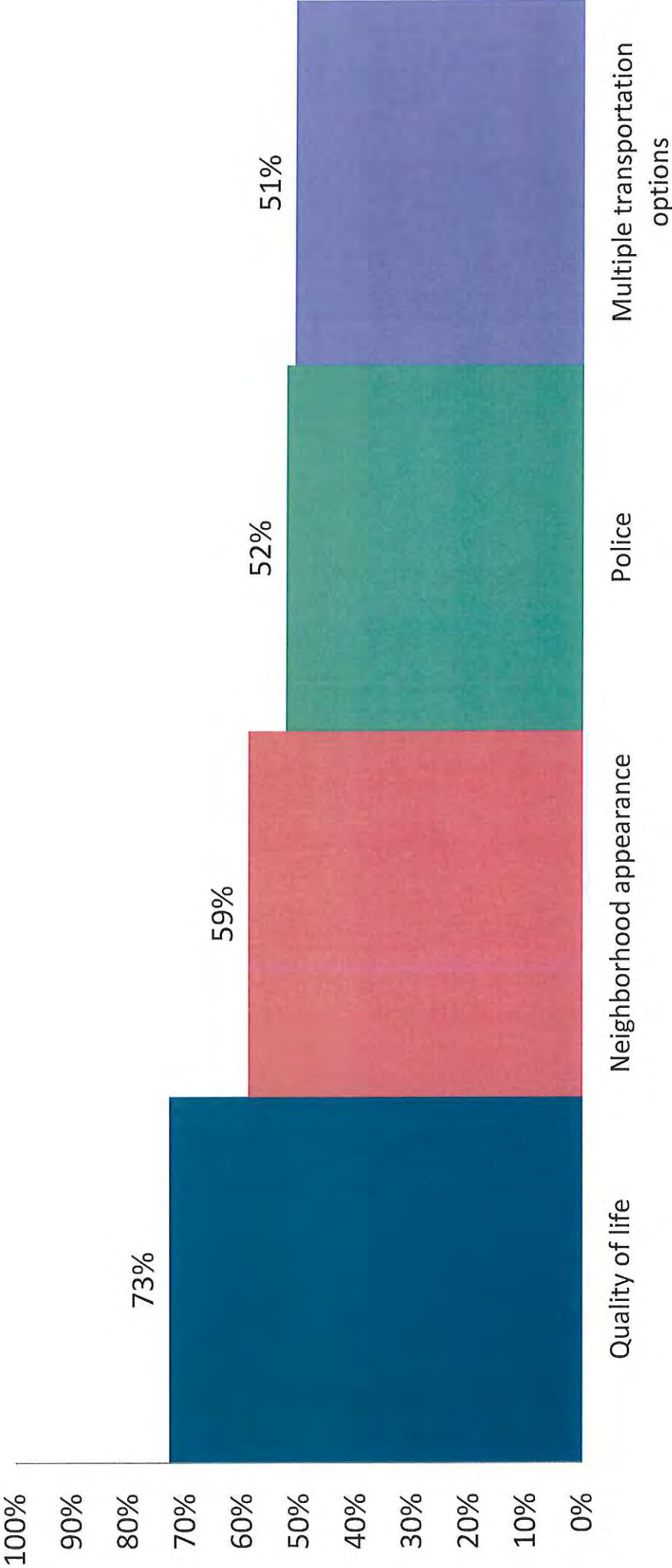
## Please rate how important the following are to your quality of life in Shorewood Hills.

Essential or Somewhat Important > 80%



**Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.**

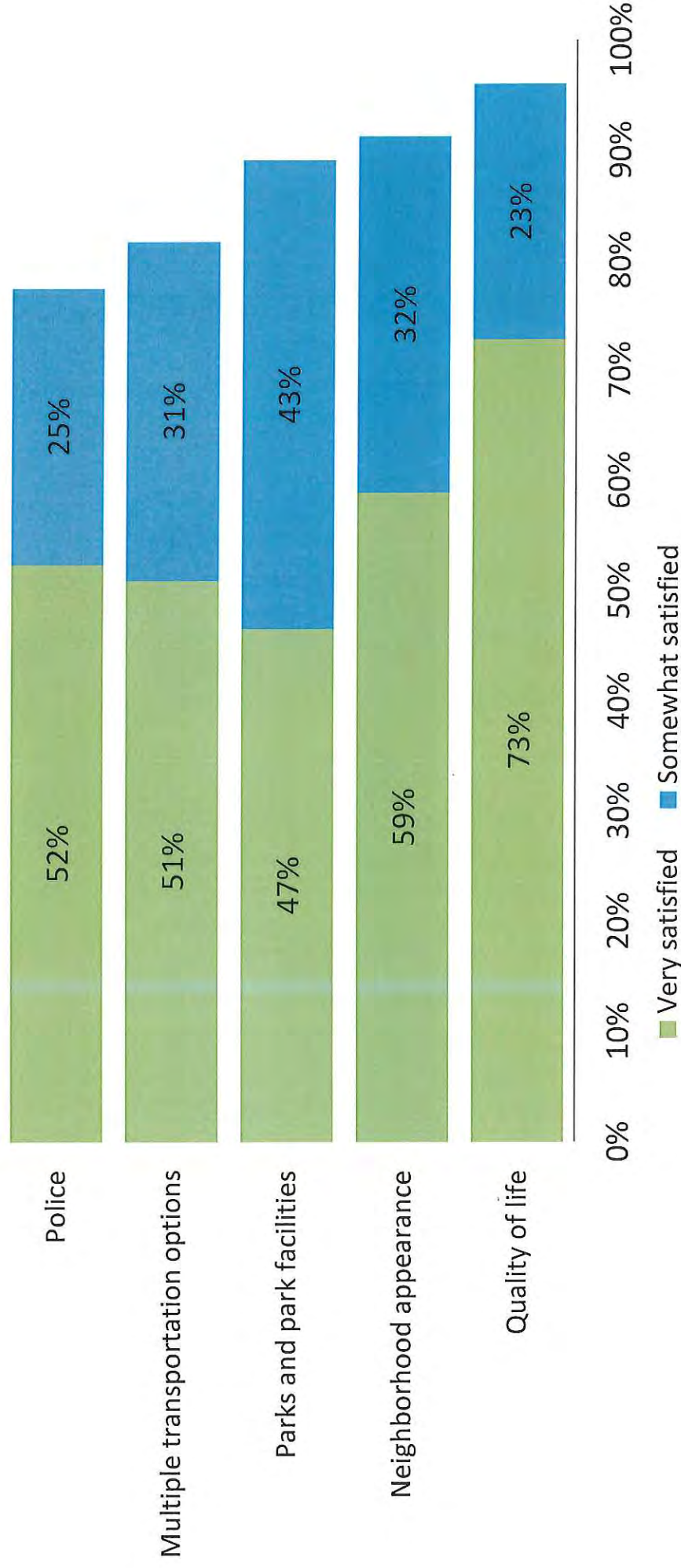
Very Satisfied > 50%





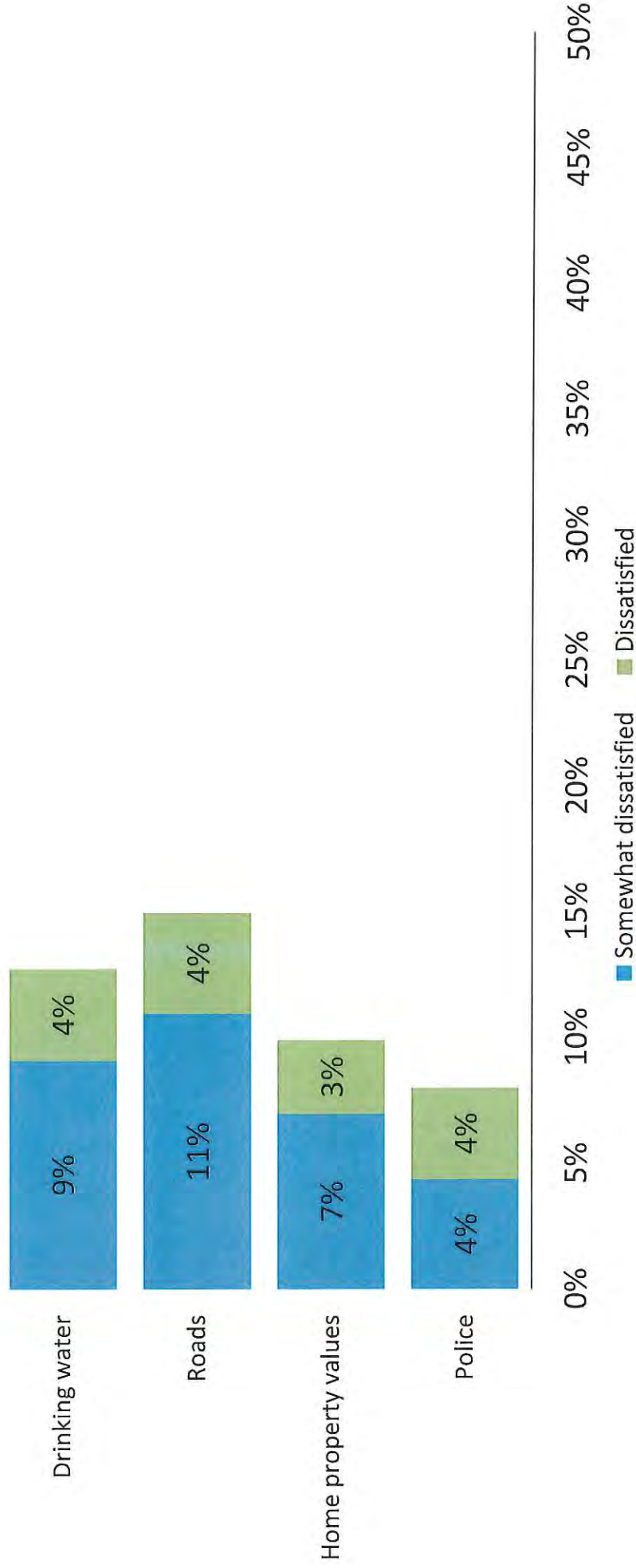
# Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.

Very Satisfied & Somewhat Satisfied > 75%



# Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.

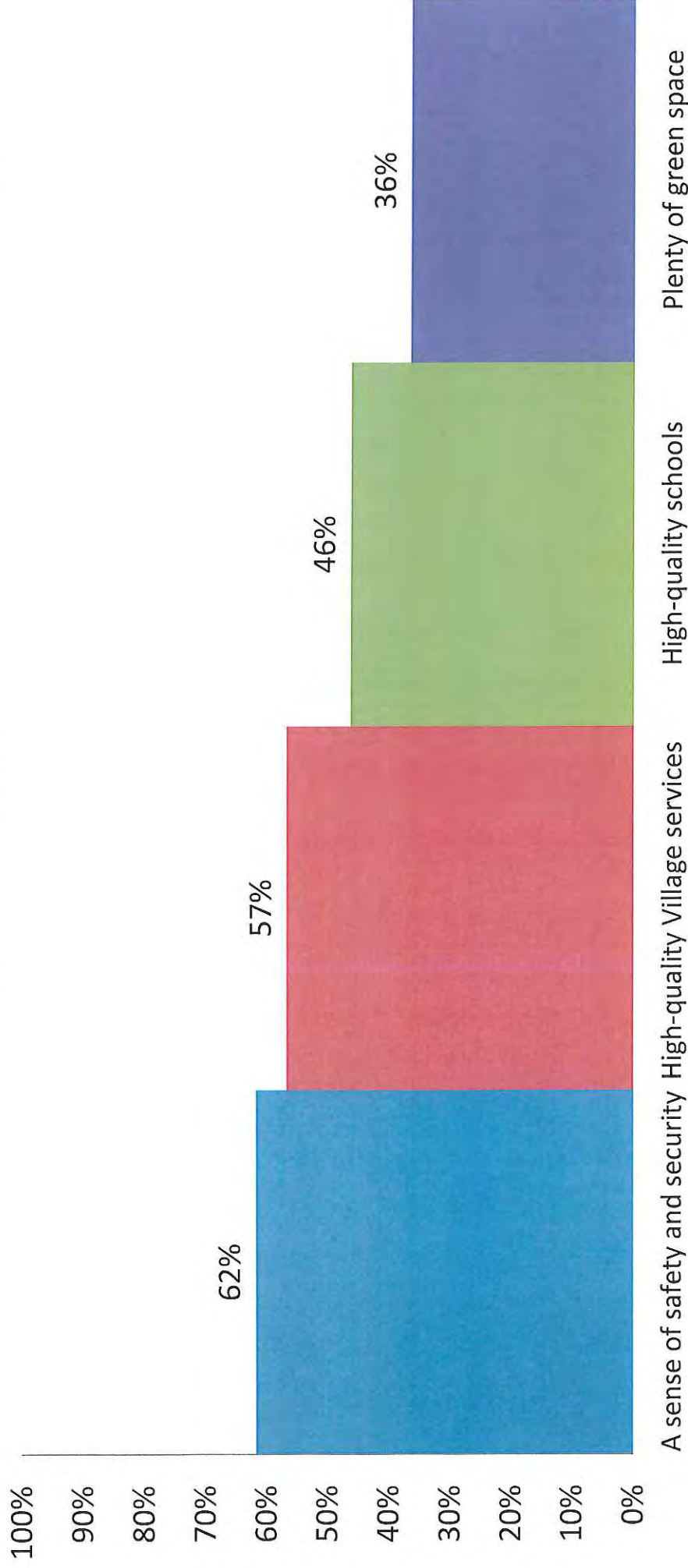
Somewhat Dissatisfied & Dissatisfied  $\geq 8\%$





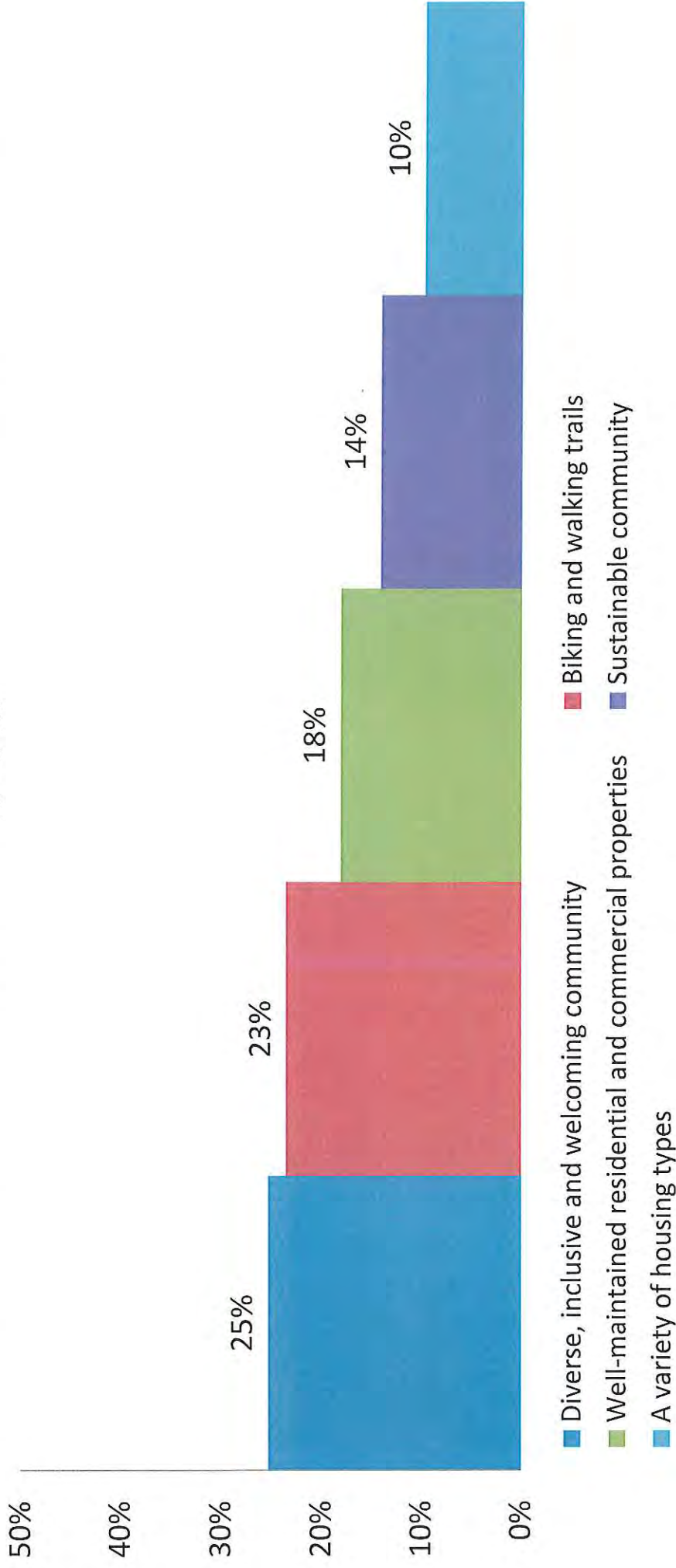
# Thinking about the future of Shorewood Hills, what are the three most important things for a strong and healthy community?

> 35%



# Thinking about the future of Shorewood Hills, what are the three most important things for a strong and healthy community?

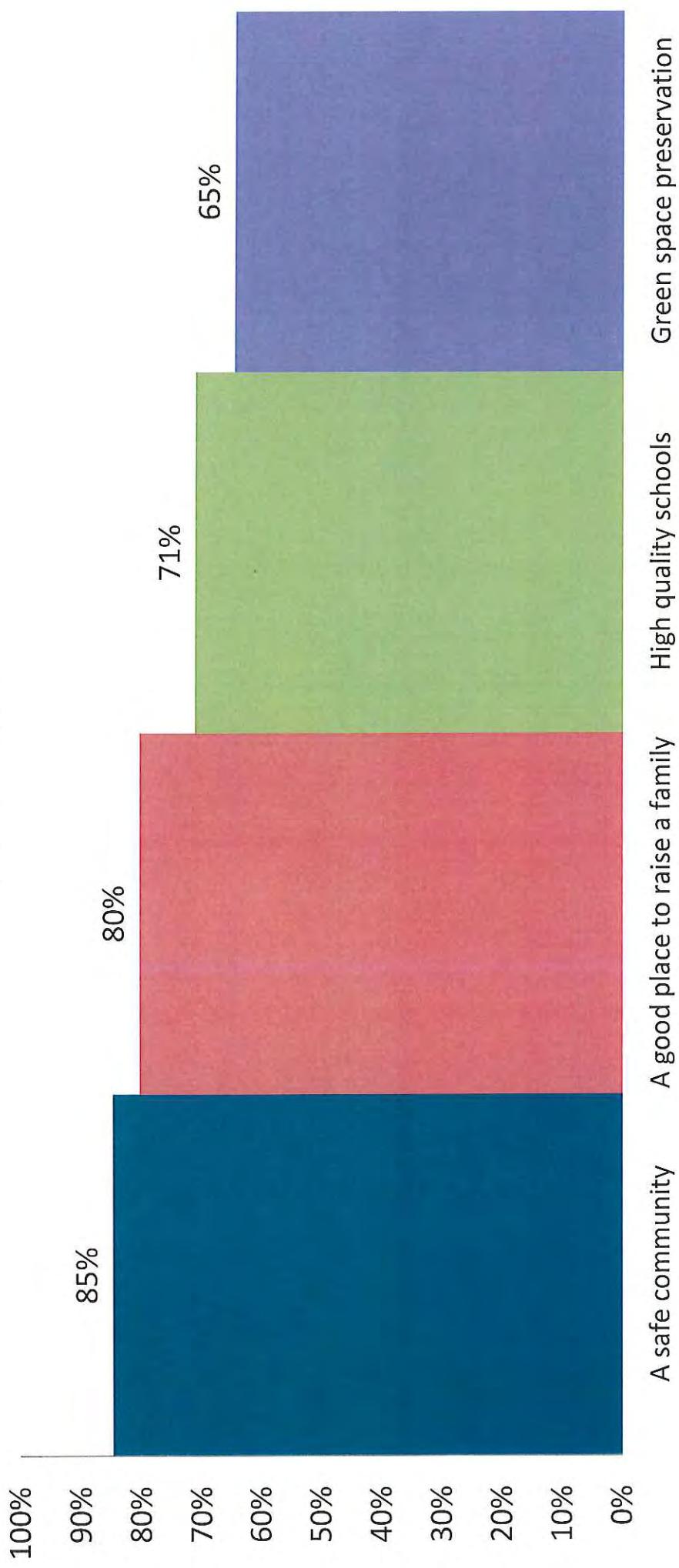
10 - 34%





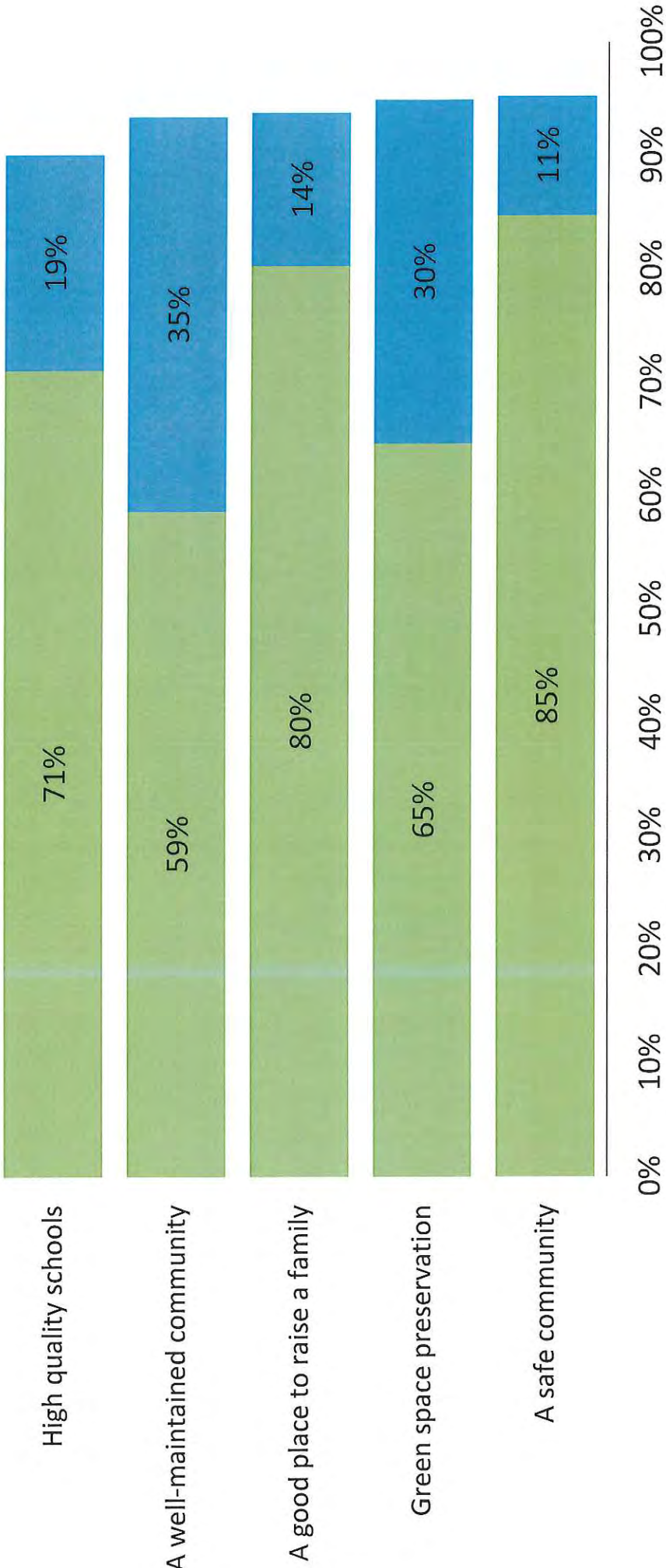
# How important are the following to the future of Shorewood Hills?

Essential > 60%



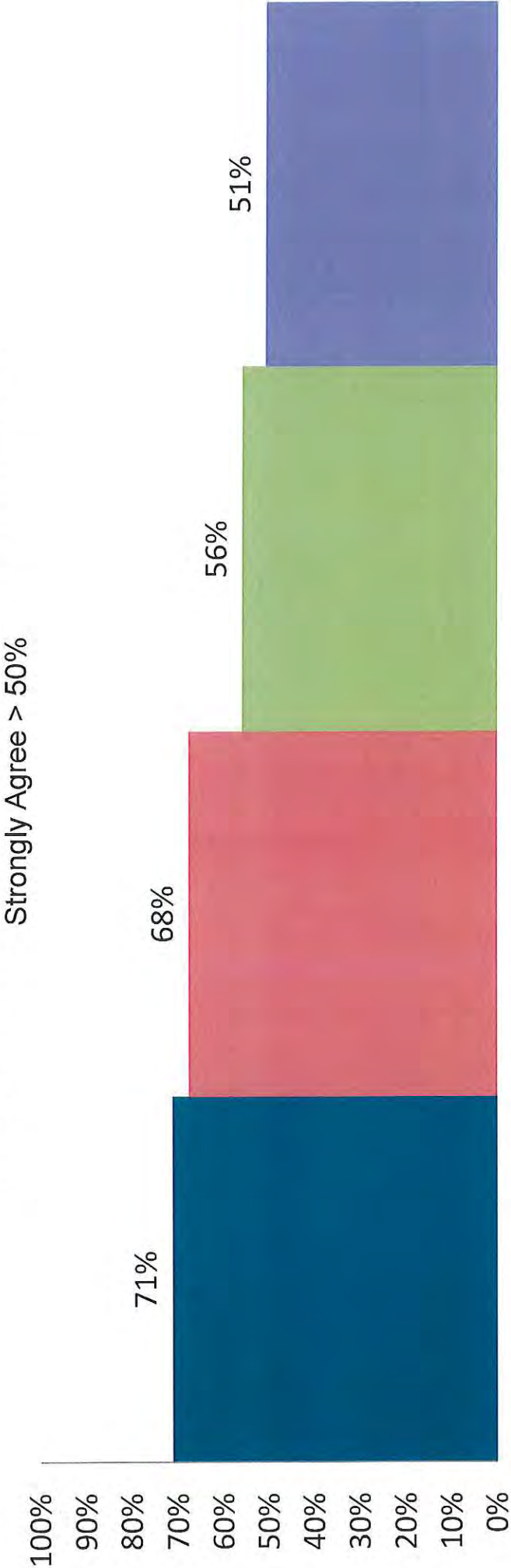
# How important are the following to the future of Shorewood Hills?

Essential + Somewhat Important > 90%





**Please indicate the extent to which you agree or disagree with the following statements.**



- A high-quality school system is an important factor in the success of the community.
- The Village of Shorewood Hills has a good reputation.
- Shorewood Hills is a good place to live for those of all ages.
- Providing a safe and healthy environment is the highest priority of the Village's government.

## Please indicate the extent to which you agree or disagree with the following statements.

Strongly Agree & Somewhat Agree > 80%

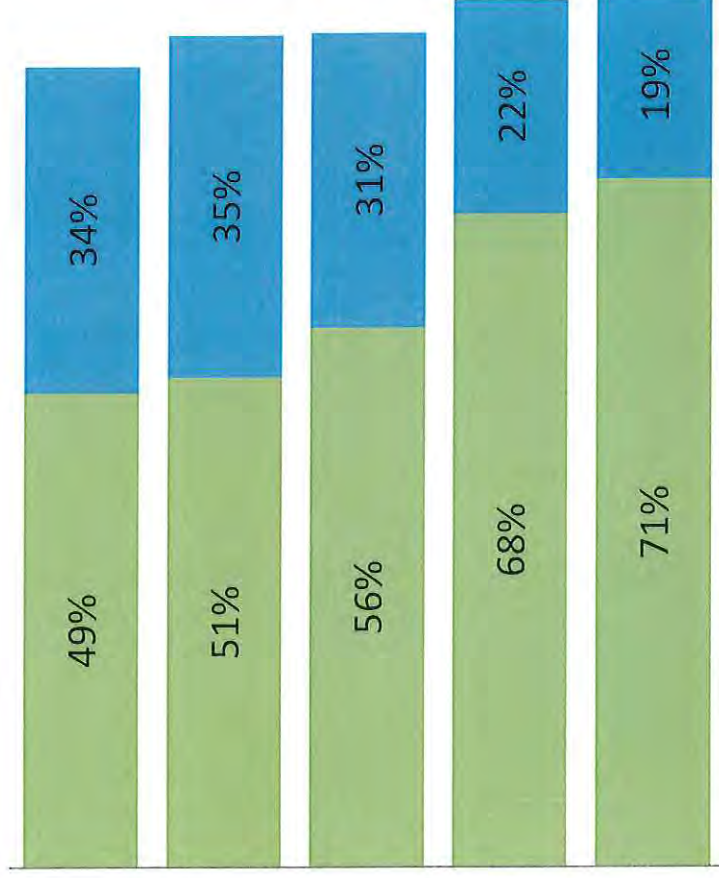
The Village should invest in projects and programs that enhance the quality of life for all community members.

Providing a safe and healthy environment is the highest priority of the Village's government.

Shorewood Hills is a good place to live for those of all ages.

The Village of Shorewood Hills has a good reputation.

A high-quality school system is an important factor in the success of the community.



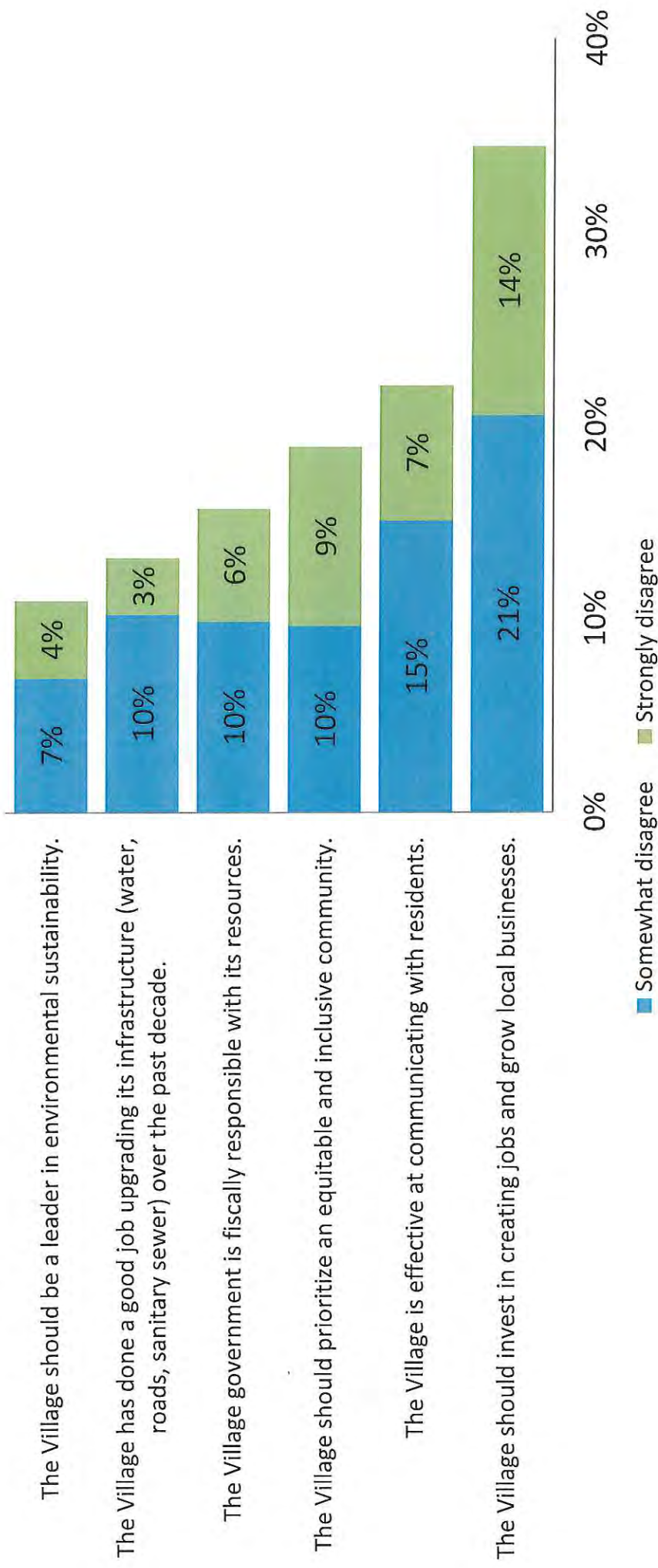
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Strongly agree ■ Somewhat agree



## Please indicate the extent to which you agree or disagree with the following statements.

Somewhat Disagree & Disagree > 10%



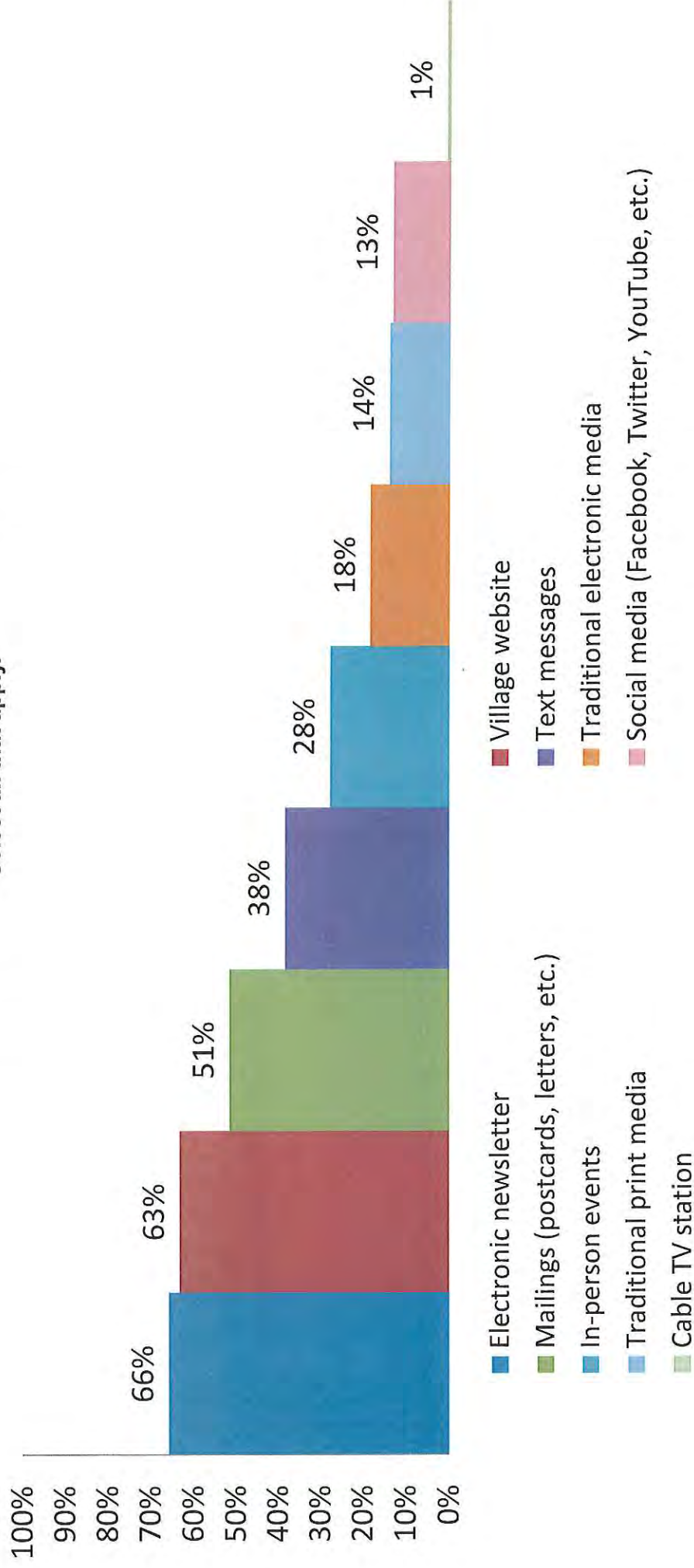
# Any Additional Comments You Wish to Share?





# How do you prefer to get your information from the Village of Shorewood Hills?

Select all that apply.



Questions?





# Focus Group Results



## Focus Group Overview

- As part of Shorewood Hill's strategic planning process, Focus Groups were conducted on October 9<sup>th</sup> and 10<sup>th</sup>, 2024. Summaries of the major themes discussed by the Focus Groups are contained on the following pages.
- Participants were primarily recruited by Shorewood Hills staff and the Village President and consisted of businesses, nonprofits, residents, and employees of Shorewood Hills.
- 29 total participants including 14 staff



# Focus Group Process

- A focus group is a small-group discussion guided by a trained facilitator. Clarifying questions are used if needed to better understand thoughts and opinions.
- It is used to gather in-depth information about a community's thoughts and opinions about a designated topic.
- In the case of Shorewood Hill's Focus Groups, the subject was strengths and challenges for Shorewood Hills.
- The meetings ran for approximately 90 minutes.

## Some General Information on Data

- The data is best understood when grouped into larger themes. However, some topics can go under multiple thematic categories. Closely related topics may be combined into one or one topic may be separated into subtopics based on the amount of time spent on the topic.
- An idea of scale is indicated by words such as some, most, one group, etc.
- Much of the data is general and as a result is aggregated. However, in some instances it is important to note the specific group that shared the feedback.
- All participants were told the information would be anonymous unless permission was obtained to share data that could be identifying.



# Focus Group Questions/ Areas of Exploration

1. When you think of what you like best about Shorewood Hills, what comes to mind?
2. When you think about Shorewood Hills as compared to other area communities, what comes to mind about the challenges of this community?
3. What are the advantages of living in Shorewood Hills as compared to other places?
4. If you could change things about Shorewood Hills what would you change?
5. When you think about all of the services the Village provides, what are the most important to you?
6. Of the important roles that the Village plays in helping to create a good quality of life, what are the most important to maintaining or creating a high-quality future?
7. If you could choose three things for the Village to focus efforts and resources on over the next five years, what would they be?

# A Connected and Vibrant Community

- Residents make lifelong friendships
- Great place to live and especially to raise kids
- Walkable, with great schools and attractive houses
- Great dining options and events such as the 4<sup>th</sup> of July celebration make the community a desirable place to live
- Amenities such as the pool, tennis courts, docks for boats, etc., are an important part of the Shorewood Hills experience



# Responsive and Invested staff

- Staff are responsive to residents and attempt to solve the problem
- Services are high level, brush pick up “never stops”
- Employees note that expectations are high, but they can earn the respect and trust of residents
- Staff capacity is a concern because there are so few people to execute the plans (desire for comprehensive outbound communications, but inadequate financial resources for a position)
- Staff appreciate that the Village is “pro-employee” and there is flexibility in work hours when possible

# Employee Recruitment and Retention

- Recruitment and retention a concern among all focus groups
- External focus groups noted the time and money spent on recruitment and training
- Employees noted a loss of historical knowledge and it takes a while to get a new employee up to speed
- Roles and responsibilities can be unclear because of turnover
- Wage parity is a significant issue, comparables should be adjusted



# Employee Recruitment and Retention

- Staff is forced to commute, wages and benefits must be attractive
- High service level is tied to knowledgeable, fully trained employees
- Focus group participants were knowledgeable about municipal levy limits, understand that the money must come from somewhere.  
Financial transparency is important.
- Pace of HR in current structure is seen as a challenge for recruitment
- Police has been streamlined as has part-time pool staff and it's made a difference

# Shorewood Hills Police Department

- Focus group participants generally believe Police should be maintained in the community
- Police are seen as invested in community and provide exceptional services
- Minor issues such as suspicious behavior handled promptly
- Increase in response time and a decline in services were most cited concerns if the police department were to be combined with another department
- Cost was discussed in one focus group as a concern, along with ongoing recruitment and retention challenges if wages are not high
- Employee focus group noted Madison issues come to Shorewood Hills



# Housing

- High financial bar to entry into the community
- The Lodge apartments adds diversity of ages and backgrounds to the community along with a more affordable price point for housing
- Change in housing stock- houses sell quickly, more tear downs
- Aging in place is a community challenge
- Could TIF districts be used to incentivize condos and expand tax base?

# Growth

- Know in advance: What will be accomplished with growth and how will needs of incoming residents be met?
- Commercial land owners may have a disproportional burden
- No engineering or planning department makes it difficult to work out issues before zoning commission (but Brian is great!)
- Discussions can get bogged down
- Overall good of the community should be priority over individual
- “It’s a built environment so inches matter”



# Transportation/Mobility

- Traffic is a challenge
- Difficult for wheelchairs or walkers to navigate Shorewood Hills
- If roads are to be used for cars, bikes and pedestrians the roads need to be set up to do so
- Sidewalks should be wider to accommodate a greater variety of uses
- Village speed limit of 15 mph?

# Change

- Consistent theme
- A perception that a minority of residents can make it difficult to enact needed change
- Some change is not only inevitable but needed
- People are generally happy in Shorewood Hills, change should be proportional and not expansive
- Strategic planning process can provide direction for change
- Facilities need to be changed to accommodate current needs



# Commissions and Committees- External

- Tensions with current structure
- Seems to be participatory form of government, where a small number of voices have disproportionate influence and impact
- Processes should be updated to be more consistent with other local governments
- Opportunity to streamline meetings and processes

# Commissions and Committees- Staff

- Staff struggle with the number of commissions and committees
- Unclear to staff what are priority items and what are secondary
- Committee/Commission members direct staff, and they can receive inconsistent direction
- Workload generated after each meeting is a strain
- Each meeting requires set up, someone present at meeting, and then follow up (minutes, research, etc)
- Lengthy evening meetings cause staff to work long hours, miss dinners with family and no opportunity to recharge
- Who implements policy? Staff not involved in discussions about execution.



# Employee Focus Groups

- Employees appreciated variety of jobs because of small organizational size
- Staff get to know residents and develop relationships
- HR is an area of specific concern
  - Is there a current HR manual? Unclear
  - What is the difference between DP1 and DP2?
  - Time spent researching to understand past policy because no current policy

# Employee Check in

Question	Yes	Maybe	No
I would recommend working at Shorewood Hills to friends	7	7	0
I would apply to this position again	6	6	2
I am likely to stay with Shorewood Hills for another year	7	5	2



# Three Priorities for Shorewood Hills?

At the conclusion of the Focus Groups, participants were asked, “If you could choose three things for Shorewood Hills to focus efforts and resources on over the next five years, what would they be?”

This question encourages participants to narrow the number of priorities to just the three that they feel are most important.

An \* indicates an item identified by staff.

The top three responses are highlighted in yellow.

# Three Priorities for Shorewood Hills?

## Staff

- Wages/Benefits for staff/pay parity with surrounding communities (3) (9\*)
- Maintain staff culture/connection to community
- Employee retention/recruitment (2) (3\*)
- Increase tax base to retain employees
- Staff development and making the best use of staff skills\*
- Clear roles and responsibilities for staff (2\*)



# Three Priorities for Shorewood Hills?

## **Maintain/sustainable infrastructure (marina, roads, parks, pool, tree canopy) (5) (3\*)**

- Maintain the parks/amenities already here (2)
- Maintain and enhance amenities including Blackhawk
- Pedestrian and bicycle infrastructure (2)
- Swimming pool with community center
- Update west side infrastructure\*
- **Update facilities (12\*)**
- Maintenance and equipment budgets increase with inflation\*

# Three Priorities for Shorewood Hills?

## Development (2\*)

- Housing at a lower price point/diversification of housing stock (3)
- Tax base with more housing development as a growth strategy (4)
- University Avenue- plan for how to develop to increase tax base
- Balance small town feel and growth



# Three Priorities for Shorewood Hills?

## Operations

- Due diligence on cost vs value on expenses such as regular vendors
- Maintain level of services with consistent staff (2)
- Strategic plan is a guiding/holistic document that is implemented (2)
- Realign roles and responsibilities in the office\*
- Standardization/modernization of outbound communications\*
- Keep up with technology maintenance\*
- Operational efficiency for organization
- Continued transparency

# Three Priorities for Shorewood Hills?

## **Governance**

- Formalize the Village decision making infrastructure and how meetings are run (3) (1\*)
- Clear understanding of what staff can do/their role
- Making sure that the priorities are set and it is clear who has authority to direct staff\*
- Streamlining of governance process between committee and department heads\*
- Broader resident input on decisions

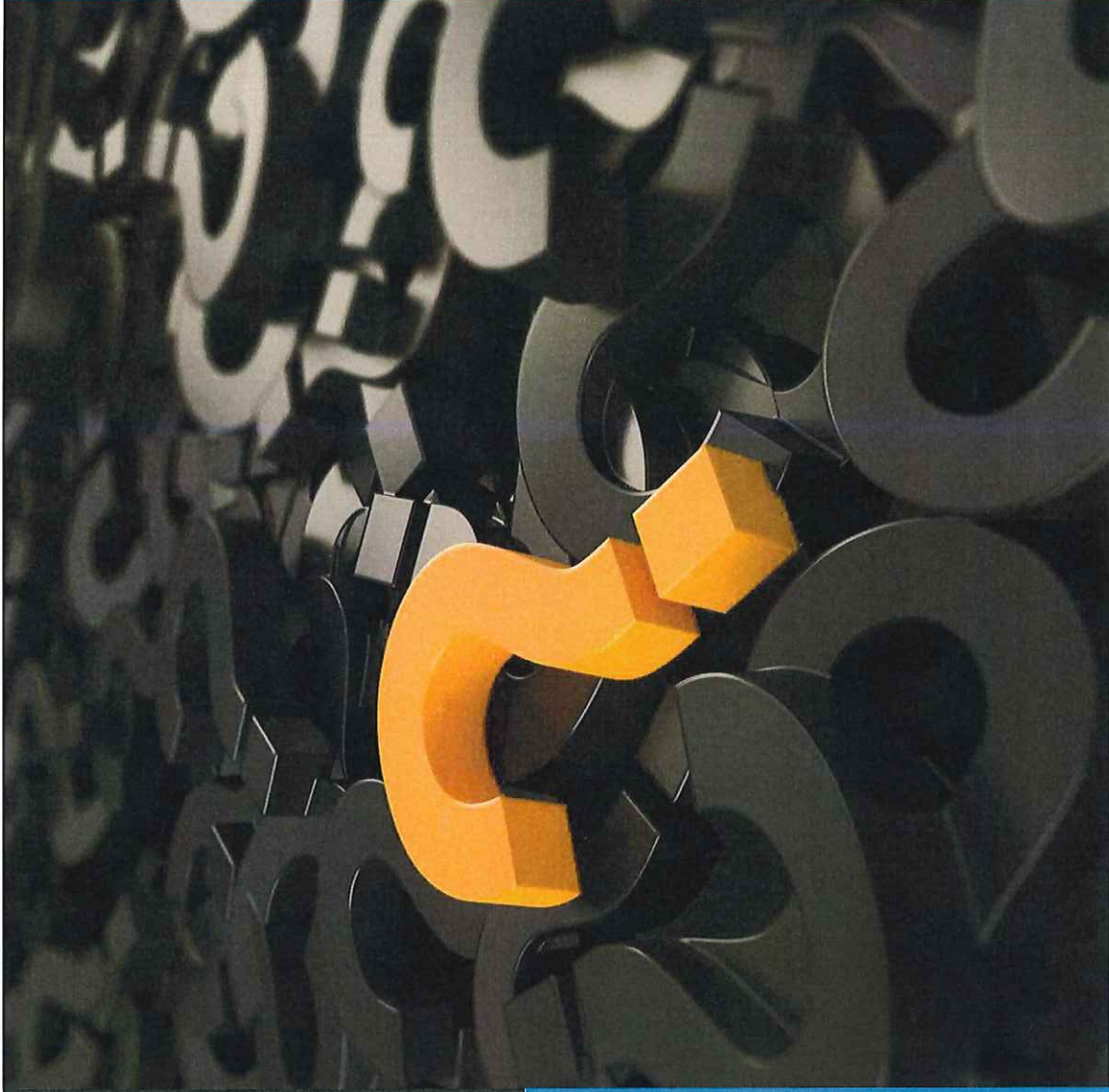


# Three Priorities for Shorewood Hills?

## Other

- Improve Shorewood's reputation
- Community engagement and outreach to create welcoming space
- Keep referendums at a minimum
- Term limits on some commissions to encourage change
- Card readers for payment\*
- Amenable to change and growth
- Balance the small town historic with common sense change (2)

Questions?





- Board Interviews
- SWOT Survey
- Retreat

## Next Steps

Thank you!

