

Do You Really Need A Strategic Plan

WCMA Summer Conference

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Presented by

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Mukwonago: The Initial Situation

- Lack of consensus
- Trustees pursuing personal initiatives
- Staff receiving conflicting direction
- Lack of trust between staff and elected officials
- Development activity stalling
- Developers viewed approvals as difficult
- Healthcare costs increasing 40%
- Employee frustration - Morale
- Excessive staff turnover
- No clear direction for board decisions
- Long board meetings with overrun comments from the public.



A Common Concern

“How can we
build
consensus?”

**Would a
strategic plan
actually help?**

What Mukwonago Needed



Photo by: TMJ4

Katie Kemp speaking at Mukwonago public meeting.

- Stability
- Create clarity
- Build consensus
- Establish priorities
- Improve trust
- Provide direction
- Create accountability

Why Bring in an Outside Facilitator?

Challenges:

- Staff were too close to the situation
- New trustees lacked trust
- Administrator was viewed as an “insider”
- Existing tensions made internal facilitation difficult

Needs:

- Neutral facilitation
- Strategic planning expertise
- An objective process
- Implementation

The Strategic Planning Process

- Understanding the operating environment
 - Stakeholder engagement
 - Baseline Surveys
 - Focus groups (business owners, residents, nonprofits, employees)
 - Board interviews
 - Environmental scan
 - Information presented at a public meeting
- Strategic Planning Retreat
- Implementation sessions with staff



The Retreat

- Large group work to discuss strategic planning foundations, vision and mission
- Small groups of staff and elected officials to uncover strategic issues
- Regular check-ins with the entire group to ensure all were invested in process



The Four Strategic Goals

The resulting goals:

- Energized Workforce
- Responsible Finances
- Balanced Development
- Quality of Life

STRATEGIC INITIATIVES



Balanced Development

Maintain "Small Town Feel" - unable to define

Balanced Development was the group all of the elected officials wanted to be in, and the topic most needed consensus

Board members chose the two board members who would work on that goal (opposing viewpoints)

Energized Workforce

Only 67% would
recommend
working here

Only 62% of our
employees
expected to stay
another year

*Focus Group Baseline Results

Adoption Was Not the Finish Line

- Strategic plans fail when they remain documents
- The Village committed to implementation
- Set goals and track results
- Report regularly - [Interactive Web Page](#)
- Involve your entire Leadership Team
- Live – Eat - Breathe

Click on each Pillar of our Strategic Plan below to review the highlights and accomplishments.

RESPONSIBLE FINANCES

QUALITY OF LIFE

ENERGIZED WORKFORCE

BALANCED DEVELOPMENT

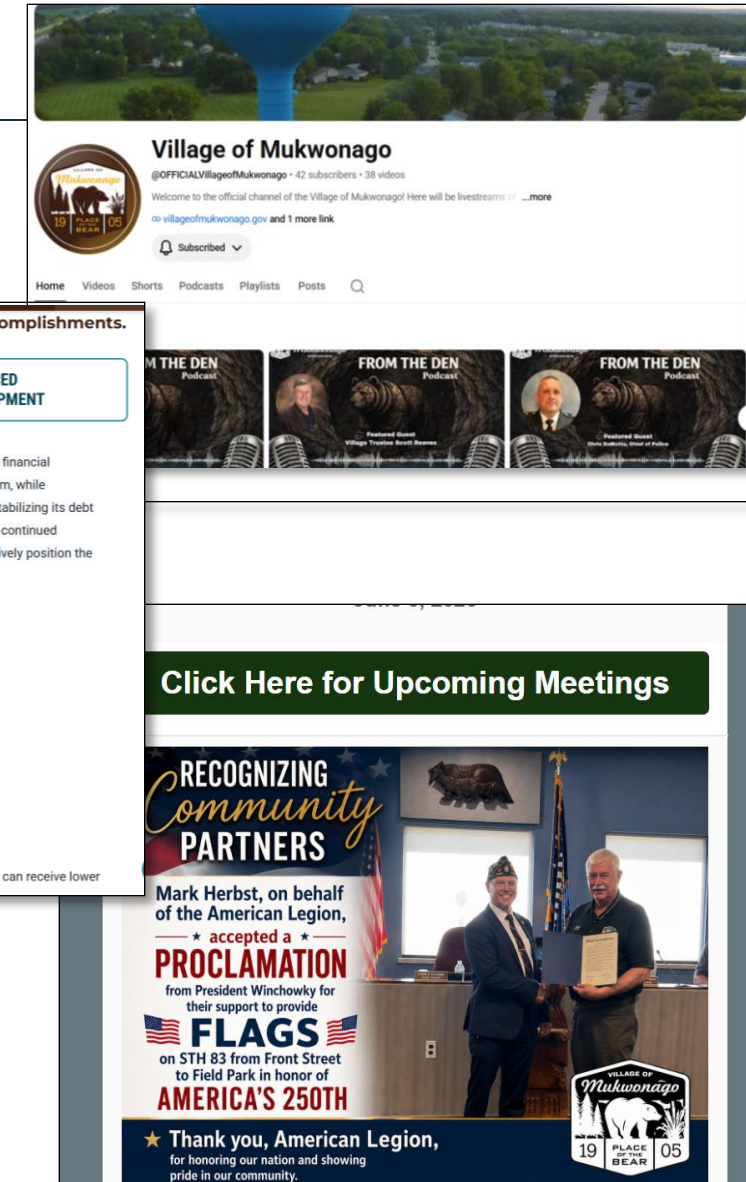
The Village continues to advance the **Responsible Finances** initiative through a deliberate and disciplined approach to financial sustainability. Key efforts have focused on diversifying revenue sources to reduce reliance on any single funding stream, while strategically leveraging new construction growth to strengthen the tax base. At the same time, the Village is actively stabilizing its debt repayment structure to ensure predictable and manageable obligations over time. These actions are supported by the continued refinement of fiscal policies, including capital funding strategies and Tax Increment Financing practices, which collectively position the Village to maintain long-term financial stability while responsibly supporting community growth and service delivery.

Goals Include:

- Diversify Funding for Operating Costs
- Maximize New Construction to increase Tax Base
- Stabilize Capital Funding
- Develop Tax Increment Policy
- Stabilize Debt Repayment Schedule

Highlights & Accomplishments

The Village was able to maintain a **AA Bond Rating** in 2026. This ensures we have a strong financial health outlook and can receive lower borrowing costs.



Village of Mukwonago
@OFFICIALVillageofMukwonago • 42 subscribers • 38 videos
Welcome to the official channel of the Village of Mukwonago! Here will be livestreams of ...more
villageofmukwonago.gov and 1 more link
Subscribed

Home Videos Shorts Podcasts Playlists Posts

RECOGNIZING Community PARTNERS
Mark Herbst, on behalf of the American Legion, accepted a PROCLAMATION from President Winchowsky for their support to provide **FLAGS** on STH 83 from Front Street to Field Park in honor of **AMERICA'S 250TH**
★ Thank you, American Legion, for honoring our nation and showing pride in our community.

Click Here for Upcoming Meetings

Implementation

Cory worked with:

- Leadership
- Supervisors
- Front-line employees

Focus:

- Developing initiatives
- Creating ownership
- Building implementation plans

Goal: Balanced Development			
Objective	Recommended Action	Responsible Party/Committee	Progress
CREATE USER FRIENDLY & BUSINESS FRIENDLY ZONING CODE UPDATE	Assess Current Code Define Objectives Engage Stakeholders Research Best Practices Draft Preliminary Code Solicit Feedback Revise Draft Legal Review & Adoption Implement and Monitor	Building -Planning/Zoning	
UPDATE EXPANDED DOWNTOWN DISTRICT TO ENHANCE A BUSINESS FRIENDLY ENVIRONMENT	Review of the Current Overlay District Set Clear Objectives Engage Stakeholders - Survey Business Leaders Research Best Practices Draft Proposed Changes to Plan Solicit Feedback - Meetings/Surveys/Open House Revise Draft Conduct Legal Review Adopt Updated Overlay District Implement and Monitor	Community Economic Development Dept/DDC	
BUSINESS MARKETING, ATTRACTION & EXPANDED RETENTION PLAN	Assess the Current Marketing Plan Define Objectives Identify Target Audience Research Best Practices Develop Marketing Strategies Create Marketing Materials & Retention Visit Materials Implement Marketing Plan, Video/Social Media/Print Support Business Community with Grand Openings, Ribbon Cuttings, Celebrations of Milestones, and follow up Monitor and Evaluate	Community Economic Development	

Implementation: Making the Plan Visible

- Goal banners displayed publicly
- Strategic goals integrated into daily operations
- Constant reminders of priorities
- Visual storytelling and educating on social media.
- Using these initiatives for annual department budget operating and capital requests



Implementation: Agenda Cover Sheets

VILLAGE OF MUKWONAGO			
REPORTS AND PRESENTATIONS TO THE VILLAGE BOARD			
Topic:			
Date:			
Presenter:		Department:	
Conformance with Strategic Plan			
Approval of this action would conform to the following strategic goal:			
☐ Energized Workforce			
☐ Balanced Development			
☐ Responsible Finances			
☐ Quality of Life			
☐ Other _____			
Overview/Background Information			
Key Issues (if necessary)			
Fiscal Note/Budget Impact			
Action Required/Recommendation			
Attachments			

Every board report now identifies:

- Which strategic goal it supports
- How the recommendation aligns with the plan
- Keeps the plan in front of the Residents and Board.

The strategic plan became part of decision-making

Implementation: The SPARK Committee

SPARK = **S**upport, **P**ositive, **A**ppreciation, **R**elationships, **K**nowledge

Purpose:

- Employee input
- Healthcare discussions & Education (Plan Changes)
- Wellness initiatives (YMCA)
- Retention efforts
- Communication between staff and administration

S-P-A-R-K

Support | Positive | Appreciation | Relationships | Knowledge

An employee team partnering with management to ignite ideas, strengthen workplace culture, and help create an environment where people feel valued, supported, and motivated to stay and grow.

Overview

The Village Strategic Plan identifies employee engagement as essential to organizational success. Building strong relationships and open communication will foster the support and appreciation necessary to provide stability and trust. By listening to employees and encouraging shared problem-solving, the Village can make meaningful improvements that promote a positive, professional workplace where employees can prosper and succeed.

Purpose

The SPARK Committee serves as an advisory group to:

- Provide employee insight on policies, benefits, and workplace initiatives
- Strengthen communication between staff and management
- Encourage ideas that enhance morale, retention, and organizational effectiveness
- Promote a culture of appreciation, respect, and collaboration

Subject Matters to Address

- Current Assessment – identifying strengths and opportunities within our workplace
- Employee Roadmaps & Evaluations – feedback on a roadmap for success with feedback on our performance processes.
- Stay Interviews – understanding what helps employees remain engaged
- Benefit Reviews & Assessments – gathering employee perspective on benefit changes
- Education & Awareness – supporting training and communication initiatives
- Talent Retention – recommending strategies to attract and retain quality staff

This is a partnership advisory group not a grievance committee. Information gathered within this group is meant to align with the Strategic Goal of energized workforce.

Implementation: Stay Interviews

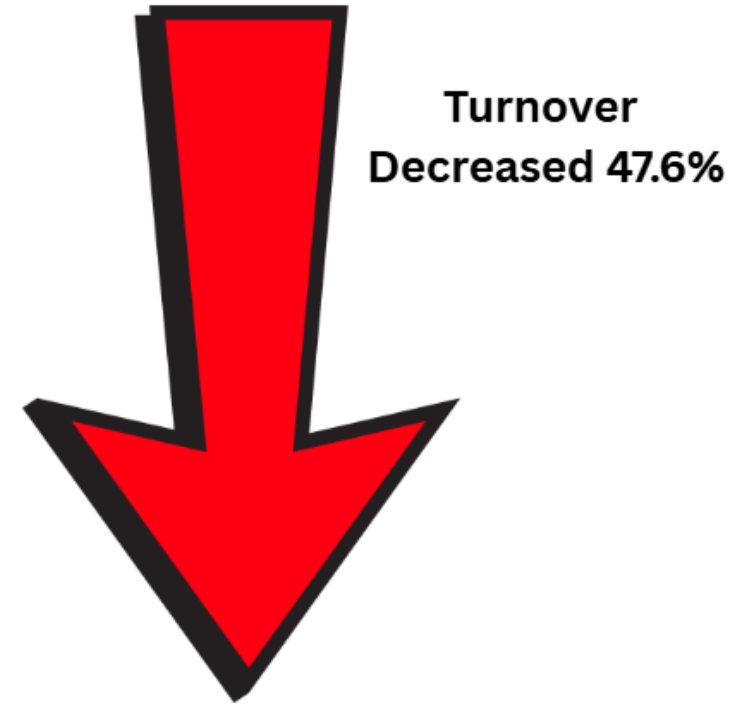
Conducted stay interviews for the first time- Through the Spark Committee to promote honest feedback

Purpose:

- Understand why employees stay
- Identify concerns early
- Improve retention

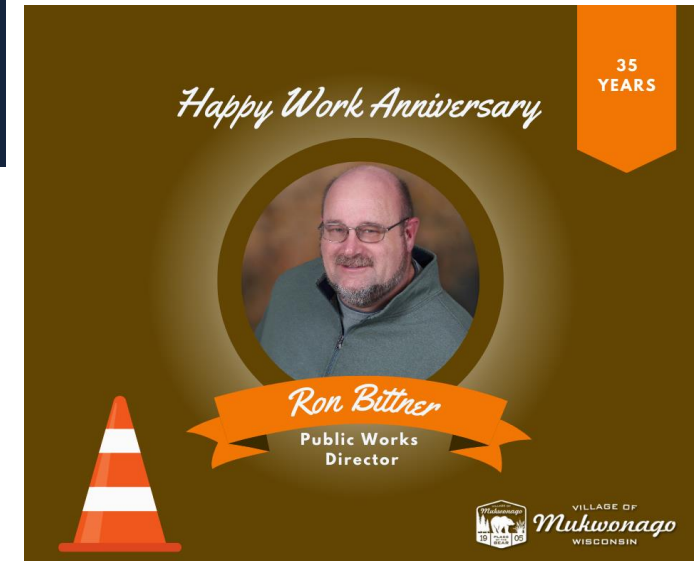
Result:

- Turnover has dropped
- Healthier Environment – More Collaboration
- Elected Body is more informed and sensitive to issues.



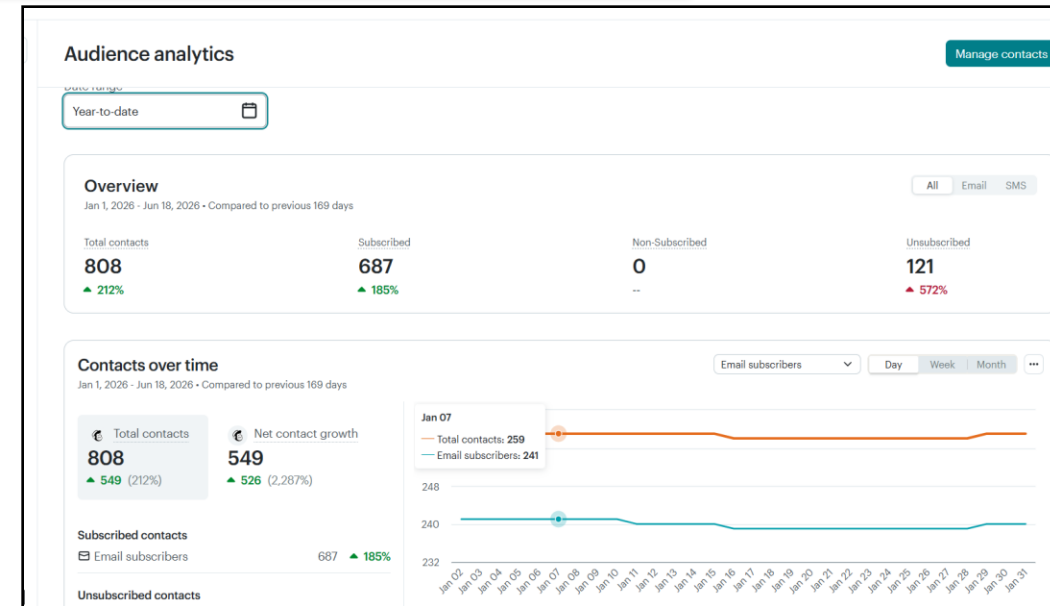
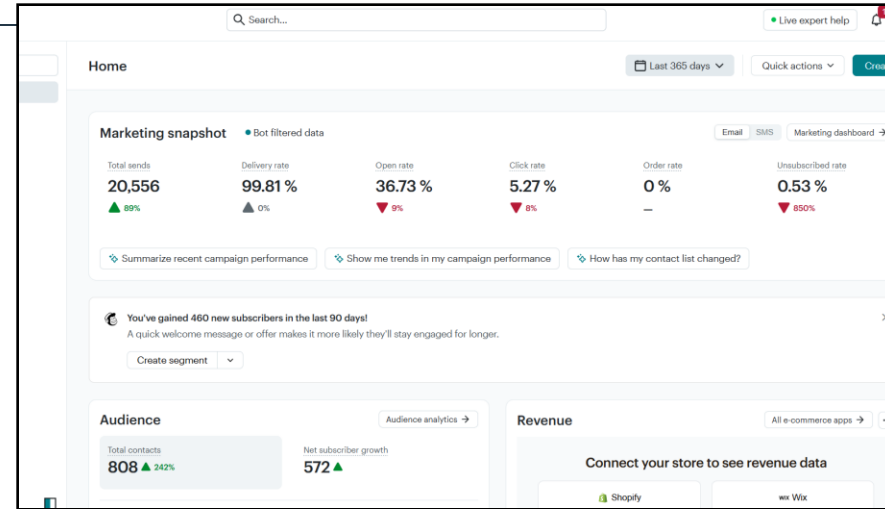
Implementation: Employee Recognition

- Employee Recognition Dinner
- Recognition Awards
- Certificates
- Mugs – Embroidered Shirt
- Anniversary Celebrations
- Ongoing Employee Engagement Committee



Implementation: Reporting and Accountability

- Quarterly reporting to the Board
- Progress tracking: Analytics available from any application used
- Ongoing updates & accomplishments on web site
- Strategic goals incorporated into discussions



Implementation: Community Buy In, Communication & Marketing

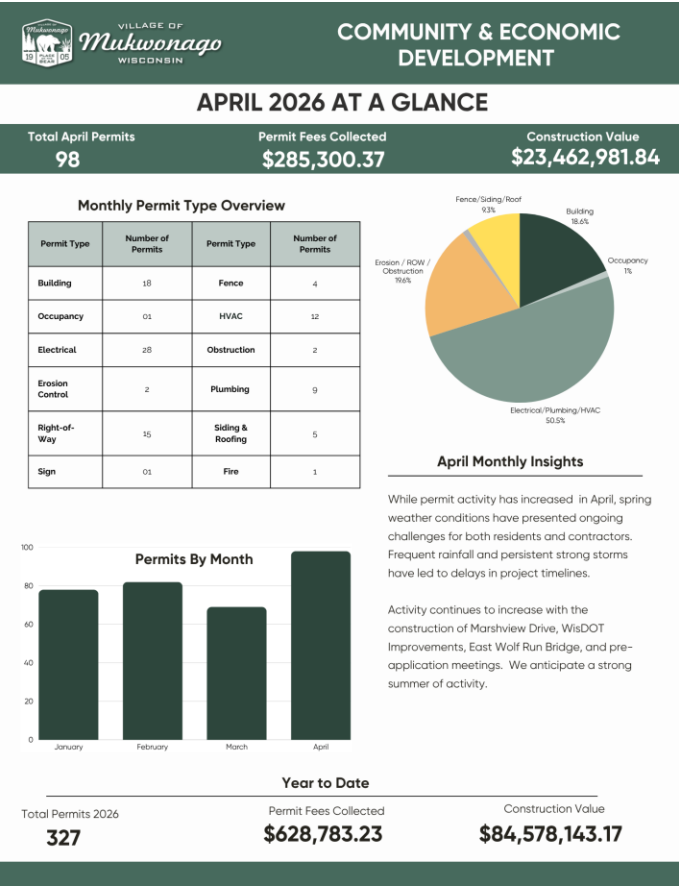
- Interactive [website page](#)
- [Podcast](#) "From the Den"
- Rotary Presentation to the Business Community
- Outbound communication showcasing our history and community driven events
- Videos for marketing showcasing [quality of life](#), [balanced development](#)



Tagline Was Born:

Rooted in History. Driven by Community. Focused on the Future.

Development Activity: Results



Development activity is now tracked and reported regularly.

Highlights

- Record # of Permits two years in a row
- New Permitting Software Investment/Experience
- Completed a Hotel Feasibility Study (in negotiations)
- 30M Development Agreement – Nostalgic Park Property turned Commercial
- 675 Apartment Complex
- 95 SF Homes Year 1 (tracking 120 approved next year)
- 120,000sf Industrial Development (on land previously rejected)
- Annexed 30 Acres to that Industrial Development for Future Growth
- Pre-application development meetings (Free)
- Passed a Tax Increment Finance District #7 (Unanimously)
- Sending customer experience emails to permit holders

What Did It Cost?

Initiative	Cost
Banners	\$78
Agenda Cover Sheet	Free
Rotary Presentations	Free
Interactive Website	Free
Weekly Wrap-Up (Mail Chimp)	\$45/month
Podcast Equipment	\$2,000
Marketing Videos	\$6,000

So... Do You Really Need a Strategic Plan?

The impact:

- Increased consensus
- Improved employee culture
- Increased development activity
- Healthcare changes supported by unions



Board votes on development items are now often 7-0 instead of 3-4 or 4-3

The Future of Strategic Planning in Local Government

- AI- A helpful tool
- GFOA
 - Linkage between community priorities, the budget and the Strategic Plan/Goals
 - A Guide co-authored by GFOA and Cory will be published at the GFOA conference next week
 - cory@cp2-consulting.com
- Strategic plans are required for accreditation for fire, public works, and other departments
- ICMA
 - Strategic plans, well executed, help build trust
 - <https://icma.org/articles/pm-magazine/confronting-local-government-trust-dilemma-part-1>



Final Thoughts



A strategic plan is a document to guide the organization



It's a guidebook so you don't have to get input on every decision



Priorities have been established



It doesn't have to cost a lot of money, but helps to prioritize where money is being spent

Questions



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