



2023 – 2026

STRATEGIC PLAN

JULY 2022



NEW LENOX



RAPP CONSULTING GROUP

July 14, 2022

RE: 2023-2026 Strategic Plan – Village of New Lenox

Dear Mayor Baldermann,

On behalf of Cory Poris Plasch and the entire Rapp Consulting Group, I am pleased to present the 2023-2026 Strategic Plan and Summary Report to the Village of New Lenox. The plan reflects the organization's priorities, commitment to measurable results and the delivery of quality services.

It has been a pleasure assisting the Village of New Lenox with this important project. The Board of Trustees displayed clear thinking, dedication, and focused effort.

We particularly wish to thank Village Administrator Kurt Carroll and his team for their help and support during the process.

Yours truly,

Craig R. Rapp
President

TABLE OF CONTENTS

Transmittal Letter	
Executive Summary	01
Strategic Plan Summary FY 2023-2026	02
Vision, Mission, Values	03
The Current Environment, SWOT Analysis	04
Strategic Priority 1: Financial Stability	05
Strategic Priority 2: Focused Development & Redevelopment	06
Strategic Priority 3: Stable Leadership	07
Strategic Priority 4: Infrastructure Maintenance & Improvement	08
Strategic Planning Participants	09

EXECUTIVE SUMMARY

From April 2022 through June 2022, the Village of New Lenox engaged in a strategic planning process. The process yielded a strategic plan covering 2023-2026.

The plan consists of four **strategic priorities** — the issues of greatest importance to the Village of New Lenox over the next three years. Associated with each priority is a set of **desired outcomes, key outcome indicators, and performance targets**, describing expected results and how the results will be measured. The plan also includes **strategic initiatives** that will be undertaken to achieve the targeted outcomes.

The planning effort began with an examination of the operating environment, consisting of Board of Trustee interviews, and a SWOT analysis. On June 20, 2022, the Village’s leadership team held a full day strategic planning session. They identified a set of priorities, key outcomes, performance targets, and specified concepts for draft vision, mission, and values statements.

Based upon those priorities, the Village’s management team met on June 28, 2022, to determine a set of strategic initiatives and begin the process of developing detailed action plans. The strategic priorities, key outcome indicators, performance targets and strategic initiatives are summarized here and on the following page.



strategy

The Plan

Four Strategic Priorities

- 1 FINANCIAL STABILITY
- 2 FOCUSED DEVELOPMENT AND REDEVELOPMENT
- 3 STABLE LEADERSHIP
- 4 INFRASTRUCTURE MAINTENANCE AND IMPROVEMENT

STRATEGIC PLAN SUMMARY 2023–2026

Village of New Lenox

Strategic Priority	Desired Outcome	Key Outcome Indicator	Target	Strategic Initiatives
FINANCIAL STABILITY <i>A financially responsible organization</i>	Strong financial system	- Reserve balances - Bond rating	- Maintain 25% fund balance reserve annually - Maintain AA+ bond rating	a) Assess current fee structure and sufficiency b) Develop a strategy to increase non-resident revenue c) Update plan to demonstrate strong Village financial conditions d) Establish strategy for revenue diversity and stabilization
	Moderate local tax rates	- % of tax rebate - Property tax rate	- Rebate 100% of residential property taxes annually	
	Diverse revenue sources	- C/I- Residential EAV ratio - Non-tax revenue	- Less than 20% of General Fund Revenue from tax sources (excluding sales tax) by 2028 - C/I-Residential EAV ratio increased by \$25,000,000 by 2028	
FOCUSED DEVELOPMENT & REDEVELOPMENT <i>Development that meets community needs</i>	Downtown area developed	- Land acquired - Permits issued	- Cedar & Church block 50% developed by 2027	a) Develop incentives for redevelopment b) Implement Downtown Sub-Area portion of 2018 Comprehensive Plan c) Create Industrial Development Strategy d) Create Residential Development Strategy
	Growing industrial base	- EAV - Permits	- Increase in industrial EAV by \$10,000,000 by 2028	
	Expanded residential capacity	- Land annexed - Plats approved	- Add 300 of lots by 2026	
STABLE LEADERSHIP <i>A well-trained, experienced workforce</i>	Continuity of leadership	- Succession plans completed - Internal promotions	- Succession plans by July 2024 in all departments	a) Develop retention strategy b) Create department specific Succession Plan c) Update Compensation and Benefit Study d) Create Recruitment Plan e) Develop Core Competency Training Plan for each department
	Well trained workforce	- Evaluations - Certifications	- 100% of staff complete minimum training requirements by 2024 - 100% of staff achieves minimum job requirements by 2024	
	Retention of qualified staff	- Turnover rate - Retention rate	- Turnover rate @ or below 5% annually exclusive of retirements	
INFRASTRUCTURE MAINTENANCE & IMPROVEMENT <i>Reliable, quality infrastructure</i>	State of the art Wastewater treatment system	- Plant bid 2023 - Conveyance bid 2024	- Regional plant & conveyance complete by 2026 - Update Wastewater Master Plan by 2025	a) Complete Plant 3 Conversion and Conveyance Plan b) Create Water System Master Plan c) Create Project Plan for Commons Improvements d) Update 5-year CIP
	Reliable water system	- Oaklawn progress - Phase I engineering - Linear feet of water main updated	- Route identified by 2028 - Land acquisition underway by 2028 - Create replacement plan for existing water mains by 2024	
	Updated Village Commons infrastructure	- Design progress - Improvements installed	- All Village Commons infrastructure updated by 2026	



OUR VISION

New Lenox will be a premier destination in which to live, work, and play, and a place where businesses choose to operate because we provide a safe, friendly, fiscally responsible and thriving community.



OUR MISSION

To enhance the quality of life and community pride through progressive municipal service and active leadership.



OUR VALUES

TRANSPARENCY

EMPATHY

ACCOUNTABILITY

COMPASSION

INTEGRITY

FUN

Reviewing the Environment, Setting Strategic Priorities

An important part of the strategic planning process is a review of the current operating environment and an evaluation of the challenges confronting the community. This was accomplished via a SWOT analysis—a process that examines the organization’s internal strengths and weaknesses, as well as the opportunities and threats in the external environment. The results are displayed below.

STRENGTHS

- Financial stability
- Customer service
- Mayor & Board working together
- Facilities & equipment
- Great reputation
- Economic growth

WEAKNESSES

- Succession planning
- Infrastructure
- Costs of water/sewer

SWOT Analysis

- Land development
- Attracting new business
- Residential housing (apartment, condo, townhome)
- Hospital
- Redevelopment
- Collaboration with other government entities
- Collaboration with other taxing bodies
- Collaboration with external organizations (Lions, LWSRA etc)

OPPORTUNITIES

- Inflation/economy/cost of supplies
- Recruitment of employees
- Elected officials up for re-election
- Redevelopment of Route 30

THREATS

STRATEGIC PRIORITY 1

Financial Stability



OUTCOME

Strong financial system

KEY OUTCOME INDICATOR

Reserve balances, bond rating

TARGET

Maintain 25% fund balance reserve annually
Maintain AA+ bond rating

OUTCOME

Moderate local tax rates

KEY OUTCOME INDICATOR

% of tax rebate, property tax rate

TARGET

Rebate 100% of residential property taxes annually

OUTCOME

Diverse revenue sources

KEY OUTCOME INDICATOR

C/I Residential EAV ratio, non-tax revenue

TARGET

Less than 20% of General Fund Revenue from tax sources (excluding sales tax) by 2028
C/I Residential EAV increased by \$25,000,000 by 2028

STRATEGIC INITIATIVES

a. Assess current fee structure and sufficiency

b. Develop a strategy to increase non-resident revenue

c. Update plan to demonstrate strong Village financial conditions

d. Establish strategy for revenue diversity and stabilization

STRATEGIC PRIORITY 2

Focused Development & Redevelopment



OUTCOME

Downtown area developed

KEY OUTCOME INDICATOR

Land acquired, permits issued

TARGET

Cedar & Church block 50% developed by 2027

OUTCOME

Growing industrial base

KEY OUTCOME INDICATOR

EAV, permits

TARGET

Increase in industrial EAV by \$10,000,000 by 2028

OUTCOME

Expanded residential capacity

KEY OUTCOME INDICATOR

Land annexed, plats approved

TARGET

Add 300 lots by 2026

STRATEGIC INITIATIVES

- a. Develop incentives for redevelopment
- b. Implement downtown sub-area portion of 2018 Comprehensive Plan

- c. Develop Industrial Development Strategy
- d. Create Residential Development Strategy

STRATEGIC PRIORITY 3

Stable Leadership



OUTCOME

Continuity of leadership

KEY OUTCOME INDICATOR

Succession plans completed, internal promotions

TARGET

Succession plans by July 2024 in all departments

OUTCOME

Well trained workforce

KEY OUTCOME INDICATOR

Evaluations, certifications

TARGET

100% of staff complete minimum training requirements by 2024

100% of staff achieves minimum job requirements by 2024

OUTCOME

Retention of qualified staff

KEY OUTCOME INDICATOR

Turnover rate, retention rate

TARGET

Turnover rate @ or below 5% annually exclusive of retirements

STRATEGIC INITIATIVES

a. Develop retention strategy

b. Create department specific Succession Plan

c. Update Compensation and Benefit Study

d. Create Recruitment Plan

e. Develop Core Competency Training Plan for each department

STRATEGIC PRIORITY 4

Infrastructure Maintenance & Improvement



OUTCOME

State of the art Wastewater treatment system

KEY OUTCOME INDICATOR

Plant bid 2023, conveyance bid 2024

TARGET

Regional plant & conveyance complete by 2026

Update Wastewater Master Plan by 2025

OUTCOME

Reliable water system

KEY OUTCOME INDICATOR

Oaklawn progress, Phase I engineering, linear feet of water main updated

TARGET

Route identified by 2028

Land acquisition underway by 2028

Create replacement plan for existing water mains by 2024

OUTCOME

Updated Village Commons infrastructure

KEY OUTCOME INDICATOR

Design progress, improvements installed

TARGET

All Village Commons infrastructure updated by 2026

STRATEGIC INITIATIVES

a. Complete Plant 3 Conversion and Conveyance Plan

b. Create Water System Master Plan

c. Create Project Plan for Commons Improvements

d. Update 5-year CIP

STRATEGIC PLANNING PARTICIPANTS

The strategic plan was developed with the hard work and dedication of many individuals. The Village Board of Trustees 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.

The Village's senior staff supported the Board of Trustees and offered an operations perspective as well as challenges to conventional thinking.

BOARD OF TRUSTEES

Tim Baldermann, Mayor
David Butterfield, Trustee
Doug Finnegan, Trustee
Tara Kenny, Trustee
Keith Madsen, Trustee
Lindsay Scalise, Trustee
David Smith, Trustee

DEPARTMENT HEADS & STAFF

Kurt Carroll, Village Administrator
Lou Alessandrini, Police Chief
Kim Auchsetter, Finance Director
Robin Ellis, Assistant Village Administrator/Director of Community Development
David Myers, Chief Building Inspector
Will Nash, Village Engineer
Deb Smetana, HR Director
Brian Williams, Director of Public Works
Laura Zilinskas, Village Clerk

CONSULTANTS

Rapp Consulting Group
Craig Rapp
Cory Poris Plasch