



**BURLINGTON | IOWA**

# **STRATEGIC PLAN**

**SUMMARY REPORT**

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December XX, 2024

Dear Chad Bird,

I am pleased to present the 2025-2028 Strategic Plan and Summary Report to the City of Burlington. This plan embodies the organization's goals, commitment to measurable outcomes, and dedication to delivering high-quality services to the community. While maintaining our 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 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 Burlington in this significant endeavor. I would like to extend my sincere gratitude to the City Council 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 September of 2024, the City of Burlington 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 City 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 council 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 City 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

A vibrant and welcoming community, Burlington is where a forward-thinking mindset and collaboration meet to advance a high quality of life.

## MISSION

The City of Burlington provides cost-effective, high-quality services by being community-focused and building valuable partnerships that benefit our community and our region.

## VALUES

### Integrity

We are honest and accountable, ethical in our words and actions.

### Enthusiasm

We have fun and enjoy the work we do on behalf of the community.

### Dedication

We respect all individuals and believe in delivering exemplary service to our community.

### Safety

We are dedicated to the well-being and security of our community.

### Responsible

We are stewards of community resources and will manage fiscal resources in a trustworthy manner.



# 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 City 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
- An internal stakeholder survey of employees and Commission members
- 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 City. Each Focus Group discussed what participants saw as strengths of Burlington, along with opportunities for change.

The results of these efforts were presented to the City Council at the first Strategic Planning Session on October 28, 2024. They are summarized below along with links to the complete results.



# Environmental Scan

Burlington has a long, storied history and is known for amazing scenery and historic buildings. It is the county seat of Des Moines County and is the center of a micropolitan area, which includes West Burlington and Middletown.

## Statistics to Consider

The following statistics have been extracted from the detailed analysis in this report to provide a foundation for discussion. They highlight both key findings, which include trends the City is already aware of as well as some unexpected insights – learn more about each take-away by referring to the corresponding page numbers listed below.

- Burlington's population has been in decline since its peak in 1960. The current population is 24,018 in the 2020 census, a decline from the 26,839 population in 2000. The 1998 Burlington Comprehensive Plan predicted that the population of Burlington would begin to grow at a rate of 3% per decade, reaching approximately 29,000 in 2000. However, Burlington has continued to lose its population, falling 7.5% below predicted levels.
- The median age has increased from 30.5 years of age in 1970 to 43.5 years of age in 2020.
- The city is tasked with ensuring superior service to citizens in a labor market with various challenges. The city remains highly competitive with benefits and accrued and flexible time off; however, the city positions are falling behind market conditions for pay competitiveness.
- The full Environmental Scan can be found on the City's website.

# External Stakeholder (Community) Survey Results

An External Stakeholder (Community) Survey was conducted September 9th to October 31st, 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 613 responses, with 92% indicating they are a resident of Burlington, and 10% said they are a business owner in the City.
- When asked what they liked best about living in Burlington, the top three answers were that they grew up here or have family in the area, the parks and recreation areas, and affordability/cost of living.
- Respondents indicated that the four most important areas for quality of life in Burlington are Fire/EMS (88%), Police (83%), affordability/cost of living (77%), and Employment opportunities (73%).
- More than 70% of respondents said that they were very satisfied or satisfied with the following services/features in Burlington: parks and park facilities (85%), library services and programs (84%), police (79%), and quality of life (71%).
- When asked the most important things for a strong and healthy community the top four responses were a sense of safety and security (63%), employment opportunities (46%), high-quality schools (42%), and high-quality City services (36%).
- The following were deemed "essential" to the future of Burlington: a safe community (88%), a good place to raise a family (75%), a broad range of employment opportunities (75%), and affordable City services (73%).
- 86% of respondents strongly or somewhat agreed with the statement "The City should invest in projects and programs that enhance the quality of life for all community members". 86% of respondents strongly or somewhat agreed with the statement "The City should invest in creating jobs and grow local businesses". 83% of respondents strongly or somewhat agreed with the statement "A high-quality school system is an important factor in the success of the community".

# Internal Stakeholder Survey Results

A survey of internal stakeholders was conducted September 9th to October 31st, as part of the strategic planning process. Internal stakeholders are individuals or groups who are within the organization by virtue of being elected to or employed/appointed by the organization. They are essential to the successful implementation of the strategic plan, so their input is ideally incorporated into the process. Additionally, they often have key information based upon their interaction with the community and can identify emerging community themes.

## Key Takeaways

- There were 106 respondents including staff (59%), appointed Board or Commission members (31%), volunteers (6%), and elected officials (3%).
- Most respondents rate the overall quality of services in Burlington as Excellent (21%) or Good (70%).
- When asked what city services need improvement, street maintenance/repairs, park and trail maintenance, and police/public safety came up often in open text responses.
- When asked what Burlington does well, parks, public safety, trash collection, the library and downtown were most often mentioned.
- Over 23% of respondents rate the overall quality of life as Excellent, and over 60% as Good.
- When asked what improvement could have the greatest positive impact on quality of life in Burlington, there were many comments about street maintenance, cleaning up vacant homes and buildings, increasing safety, affordable housing and addressing homelessness.
- Respondents identified the following as a High or Medium priority for the city over the next 3-5 years: financial sustainability (97%), public safety (97%), economic development (96%), and infrastructure (94%).
- 85% of respondents somewhat or strongly agreed with the statement "I would recommend Burlington as a place to live". 78% of respondents somewhat or strongly agreed with the statement "Burlington operates with openness and transparency". 75% of respondents somewhat or strongly agreed with the statement "Burlington does a good job of communicating with residents". 61% somewhat or strongly agreed with the statement "Burlington is open to new ideas and ways of doing things".
- Among employees who responded, 89% strongly or somewhat agreed they are likely to stay with Burlington for another year, 84% strongly or somewhat agreed they would recommend working at Burlington to friends, and 79% strongly or somewhat agreed they would apply for the position again.



# Focus Group Results

As part of Burlington's strategic planning process, focus groups were conducted on October 16 & 17, 2024. Focus Groups included businesses, residents, students, nonprofits, and employees. There was a total of 64 participants, 15 of whom were staff and 25 of whom were students.

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

- Burlington has a small-town feel. There is a good quality of life, a sense of community, and easy access to larger cities. The library is "great", snow removal is done well, parks are well regarded, and recycling is a positive.
- Downtown improvements were noted and there are many things to do in the community. There is more investment needed to revitalize the city and bring in new growth.
- Vacant and run-down homes and buildings are a concern and impact the look of the city. More affordable housing is needed, especially for workers. High construction costs are an issue, and participants would like to see incentives or tax abatements considered.
- Participants would like to see more restaurants and activities in the city, both downtown and in other areas of the city. The waterfront area is seen as an opportunity for economic development.
- A lack of high-paying jobs is a concern and job creation should be a priority.
- Police have taken steps to correct past issues of distrust, including training. Response times have improved but there is concern over open positions and the pay/benefits as not being competitive.

# Focus Group Results

## Key Takeaways (cont.)

- The City's budget was a concern for both internal and external focus groups. There was the acknowledgement that levy limits and other state legislation have impacted the revenues Burlington has available to provide services and desired amenities.
- Homelessness is an ongoing concern, with a perception that the unhoused population is growing. Mental health and addiction are seen as contributing to this and a gap in getting care was noted.
- Participants would like to see better outbound communication from the city celebrating wins, addressing concerns and delivering a clear message about events and initiatives.





# 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>• Dedicated staff (including leadership team)</li> <li>• Fiscally responsible</li> <li>• Partnerships</li> <li>• Facilities investment</li> <li>• Elected leadership</li> <li>• Experienced staff</li> <li>• Tenured staff</li> <li>• Citizen focus and involvement</li> <li>• Redevelopment and future focused</li> </ul>	<ul style="list-style-type: none"> <li>• Infrastructure</li> <li>• Built Environment</li> <li>• Housing</li> <li>• Staff/Wages (Recruitment and Retention)</li> <li>• Finances</li> <li>• Property taxes/ Economy</li> <li>• Communication</li> </ul>	<ul style="list-style-type: none"> <li>• Internal collaboration</li> <li>• Community collaboration</li> <li>• Collaborating with other organizations</li> <li>• Telling our story</li> <li>• Building pride</li> <li>• Celebrating our successes</li> <li>• Economic development</li> <li>• Housing</li> <li>• Projects</li> <li>• Tech/fiber</li> </ul>	<ul style="list-style-type: none"> <li>• Distrust</li> <li>• Economic Conditions, budget</li> <li>• Legislative change</li> <li>• Staff recruitment/ retention and dissatisfaction</li> <li>• Decline in population</li> <li>• Resistance to change</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.

Finally, 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: Staff and Leadership Development, Improved Community Housing and Infrastructure, Enhanced Community Image, and Economic Vitality.

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
Staff and Leadership Development	Increased Retention	# years of tenure	Increase of ____% in employees with 5 years or more at the City** <i>**Metrics determined by 1/2026</i>
	Recruitment of high-quality staff	Time to fill; % of fully trained public safety officers; % of staffing city-wide	Of X employees; ____% have 0-5, ____% have 6 - 10, ____% have 11 - 15, ____% have 16 - 20, ____% have 21 - 25, ____% have 26 - 30, ____% have 31 - 35 and ____% have more than 36 years of service.
	Leadership Development	# of departments with succession needs determined; # of committees/commissions with leadership pipeline needs determined	On an annual basis, 90% of funded positions for public safety held by fully trained officers starting 1/2027 For funded positions, staffing at 95% city-wide on an annual basis starting 1/2026 Decrease time to fill by ____% by ____ (date)** <i>Baseline data available 1/2026</i>
			Succession needs determined for 1/3 departments annually <i>Leadership pipeline needs determined for 1/3 of committees/commissions annually</i>
Improved Community Housing and Infrastructure	Improved Street Quality	Pavement Condition Rating	Pavement Condition Rating increased by ____% by ____ (date)
	Improved Housing Quality	# of houses rated poor	Reduce the # of homes rated poor by ____ % by ____ (date)** <i>**Metrics determined by 1/2026</i>
	Improved Community Trails	# trail connections; # trail miles	Add ____ # of trail connections by ____ (date)** Add ____ # miles of trail by ____ (date)** <i>**Metrics determined by 1/2027</i>
Enhanced Community Image	Increased Feeling of Safety	Positive Survey results	Increase reported feeling of safety by ____% by ____ (date) <i>**Metrics determined by 1/2027</i>
	Better Communication of the Burlington Story	# Council reports; # Outbound City Staff communications	Quarterly State of the City Report starting 7/2025 Monthly Community Communication from staff starting 6/2025
	Increased Community Pride	% of distressed properties improved; # community improvement opportunities	____% of exteriors of distressed properties improved by ____ (date)** ____ # community improvement opportunities organized annually** <i>**Metrics determined by 1/2026</i>
Economic Vitality	Sufficient Revenues	Balanced Budget; # alternative revenue sources	Budget balanced annually One alternative revenue source incorporated by ____ (date)** <i>**Metrics determined by 7/2025</i>
	Increased Economic Development	% adjusted tax base increase; % building permit increase; % community broadband	3% adjusted tax base increase by ____ (date); 10% increase in building permits by 1/2028 90% of community covered by broadband by ____ (date)
	Fiscal Resilience Through Sharing of Services or Equipment	Reduced Expenses; Increased Revenues	One Memorandum of Understanding signed annually for shared services or equipment with another local government or non-profit agency

# 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 Whitefish Bay is making towards their Strategic Goals and associated Performance Targets.

## Staff and Leadership Development

- Review and make recommendations for compensation packages
- Create Continuing Education and Training Plan
- Create Stay Interview Strategy
- Develop and Implement an Employee Social Initiatives Program
- Perform an analysis of future City staff needs
- Perform an analysis of future City Committee/Commission needs

## Improved Community Housing and Infrastructure

- Implement a Pavement Condition Improvement Strategy
- Reestablish Highway 61 Coalition
- Implement Housing Improvement Program
- Develop Vacant Building Plan
- Develop Exterior Condition Inspection Plan
- Develop Trail Grant Application Strategy

## Enhanced Community Image

- Create Inter-Department Community Engagement Plan
- Develop a Neighbor-to-Neighbor Initiative
- Create and implement a department-wide Burlington Marketing Plan
- Develop a Community-Wide Beautification Strategy

## Economic Vitality

- Implement Fund Balance Stabilization Plan
- Implement Franchise Fee Referendum by March 2025
- Create a "Quality of Life in Burlington" Marketing Plan
- Develop / Nurture / facilitate a Cultural Vitality and Arts Strategy for Marketing Plan
- Create an equipment and resources optimization strategy



# Strategic Plan Participants

The strategic plan was developed with the hard work and dedication of many individuals. The Burlington Council 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.

## City Council

### Mayor

Jon D. Billups

### Mayor Pro-tem

Lynda Graham-Murray

### Council Member

Kay Weiss

### City Manager

Chad Bird

### Council Member

Antonio Bailey

### Council Member

Tim Scott

## City Staff

### Chief of Police

Adam Schaefer

### Recreation Coordinator

Brad Selby

### Library Director

Brittany Jacobs

### Information Technology and Collections Manager

Lois Blythe

### Street Superintendent

Chris Clements

### Wastewater Plant Manager

Dan Fitting

### Development & Parks Director

Eric Tysland

### City Clerk

Katie Music

### Deputy Fire Chief

Nathan Toops

### Assistant City Manager

Nick MacGregor

### Parks Superintendent

Ryan Gourley

### Director of Administrative Services

Stephanie Stuecker

### Fire Chief

Matt Trexel

### Wastewater Maintenance Supervisor

Tim Myatt

### Deputy Police Chief

Wayne Thomson

### City Planner

Angela Andon

### Consultant

Cory Poris Plasch, President, CP2 Consulting

