



CITY OF SWEENY ANNUAL STRATEGIC PLANNING SESSION REPORT

This report concerns the annual review of City Council's strategic vision and goals to bridge gap between community expectations and limited resources to maximize service delivery at the least impact to taxpayers and to transition to performance-based budgeting to proactively approach replacement of aged infrastructure and align goals with performance metrics.

Strategic Planning Session: April 23, 2024

With the participation of the Mayor, the City Council, and the
Sweeny Executive Leadership Team

Prepared by Lindsay Koskiniemi, City Manager

What is a Strategic Plan and Why is it Important?

In local government, strategic planning is a tool governing bodies use in a council-manager form of local government to adopt a large encompassing goals that set priorities for the city's governance and give the city manager guidelines for how to carry out Council's strategic vision. Strategic planning serves as the foundation for implementing a series of performance-based budget cycles to deliver the vision of the City Council, better serve the city's residents and customers, and bridge the gap between expectations and resources. Performance based budgeting is the process of aligning available resources (revenues) with available funding (expenditures) and expected outcomes, such as the types and services to be delivered by the local government, and measuring how those services meet the organization's policies and values. Performance based budgeting simplifies budget discussion by clearly defining outcomes and resources, which is why we chose to conduct the annual strategic planning session ahead of the annual budget process.

Effective strategic plans, for this purpose, begin with the collaboration of ideas from city department leaders and the elected officials and are consolidated to the highest priority needs of the city as the focus of the plan. Often, a well-defined strategic plan contains an agreed upon overarching vision for the comprehensive outcome desired supported by 5-6 broad goals. Each goal is supported by action steps for how to achieve each goal. The plan is recommended to be adopted by resolution and reviewed periodically for completion of project milestones and review of need to adopt new goals with the completion of goals or shift of priorities.

Consistency is paramount to execute and complete strategic goals, therefore adoption of a resolution stating Council's adopted strategic goals helps solidify what tasks need to be completed to achieve council's vision.

City of Sweeny Strategic Plan Background

Sweeny City Council and the Executive Leadership Team (SELT), which consists of the city manager and department heads, met in June 2023 and conducted Sweeny's first-ever strategic planning session, facilitated by retired local government administrator, Brian McDougal of McDougal & Associates in partnership with City Hall Essentials, LLC. With Mr. McDougal's guidance, Council members and SELT covered a substantial amount of ground discussing the city's needs and ranking needs according to most immediate priority.

McDougal began the planning session with conducting a SWOT analysis, or, an assessment of strengths, weaknesses, opportunities, and threats. After a SWOT chart was created,

participants drilled down and categorized each component of the analysis into departmental goals for Public Works, Human Resources, Finance, Economic Development, Facilities, Parks, Development Services, Administration, and Public Safety.

A copy of the materials prepared by Mr. McDougal is included with this report. Several of the individual dimensional goals among the departments have been completed since last year, while other items have not been fully closed out. The 2023 draft strategic plan was not officially approved by City Council by resolution; however, the materials were distributed to City Council and SELT to consider ahead of the 2024 Strategic Planning Session that was conducted on April 23, 2024. These materials served the baseline and gave the team a starting point. McDougal's document stated, "This is not a comprehensive or long-range document," which conveyed the need for continuous review and provided foundational elements for City Council to eventually adopt a policy to give direction to City staff on short- and long-term needs.

2024 Strategic Planning Session

In addition to the 2023 Strategic Planning Session materials, several other cities' strategic visions and goals were distributed to Council and SELT ahead of the annual planning session. The idea was to review several other plans and take applicable information to begin the planning discussion. The 2024 Planning Session was held on April 23, 2024 in a 90-minute meeting ahead of a special council meeting. The 2024 Planning Session was facilitated by Lindsay Koskiniemi, City Manager. Council and staff were able to hit the ground running. The team reviewed Brian McDougal's SWOT analysis and briefly discussed applicable strategic plans from other cities reviewed in preparation for the meeting.

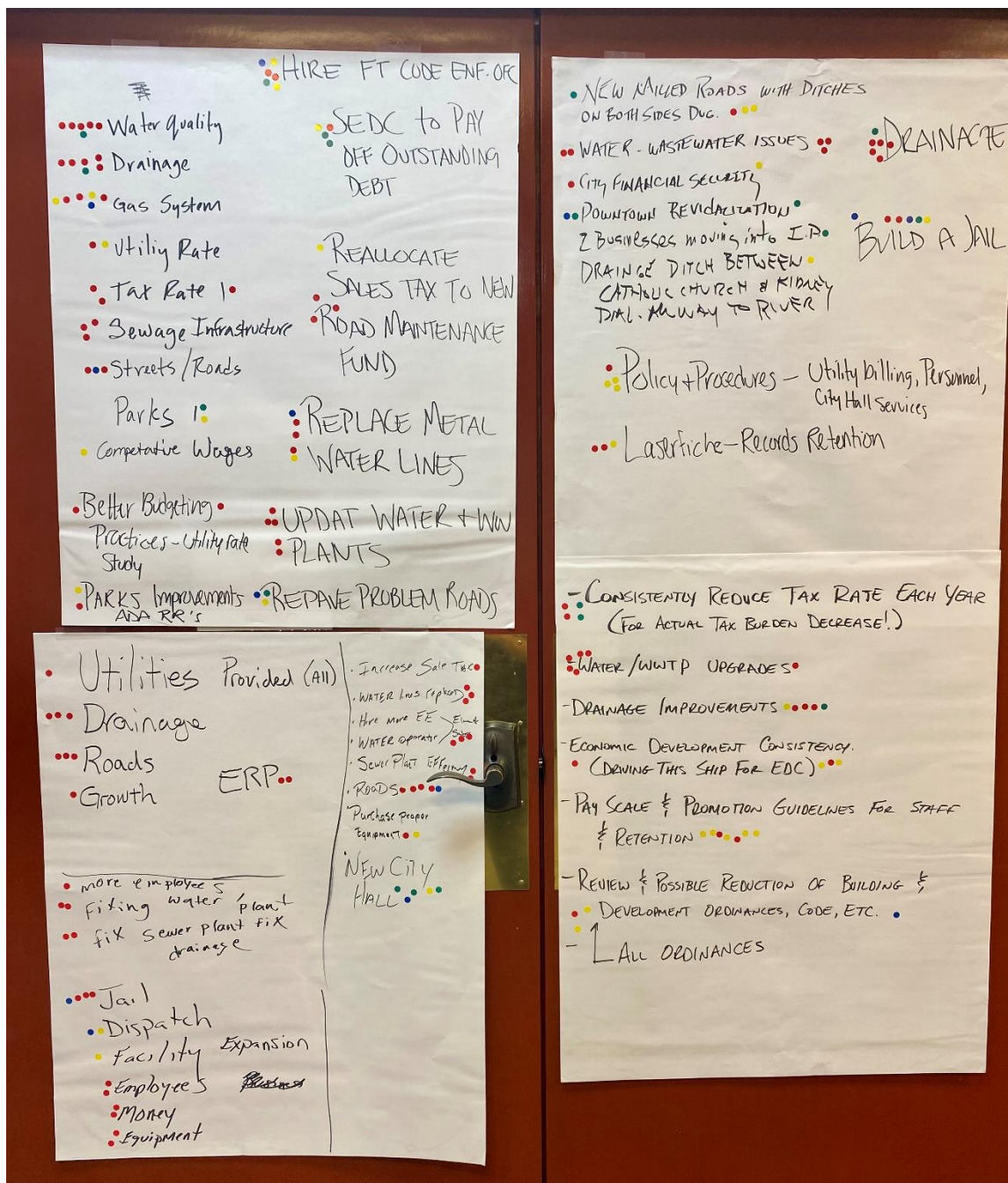
City Council agreed that the City of Irving Organizational Strategy document reflected several of Sweeny's priorities, and Council favored the Irving's consolidated strategic plan summary, a one-page document that provides five pillars of priorities with individual dimensional goals for accomplishing each strategic goal, a strategic vision, values, and acronym that encompasses the organizational mission.

After Leadership and Council reviewed the work that has been done in the 2023 Strategic Planning Session, participants were instructed to write on large poster sheets, supported by easels, what hot button topics the city should prioritize. Diverse responses were provided by all participants, yet most participants' ideas paralleled each other. Several of the ideas participants contributed as priorities overlapped, therefore the group felt confident these ideas were mutually supported.

While the image of the written responses by the group participants may be difficult to read, the responses included the following (not listed in order or precedence):

Responses Provided (image on next page)

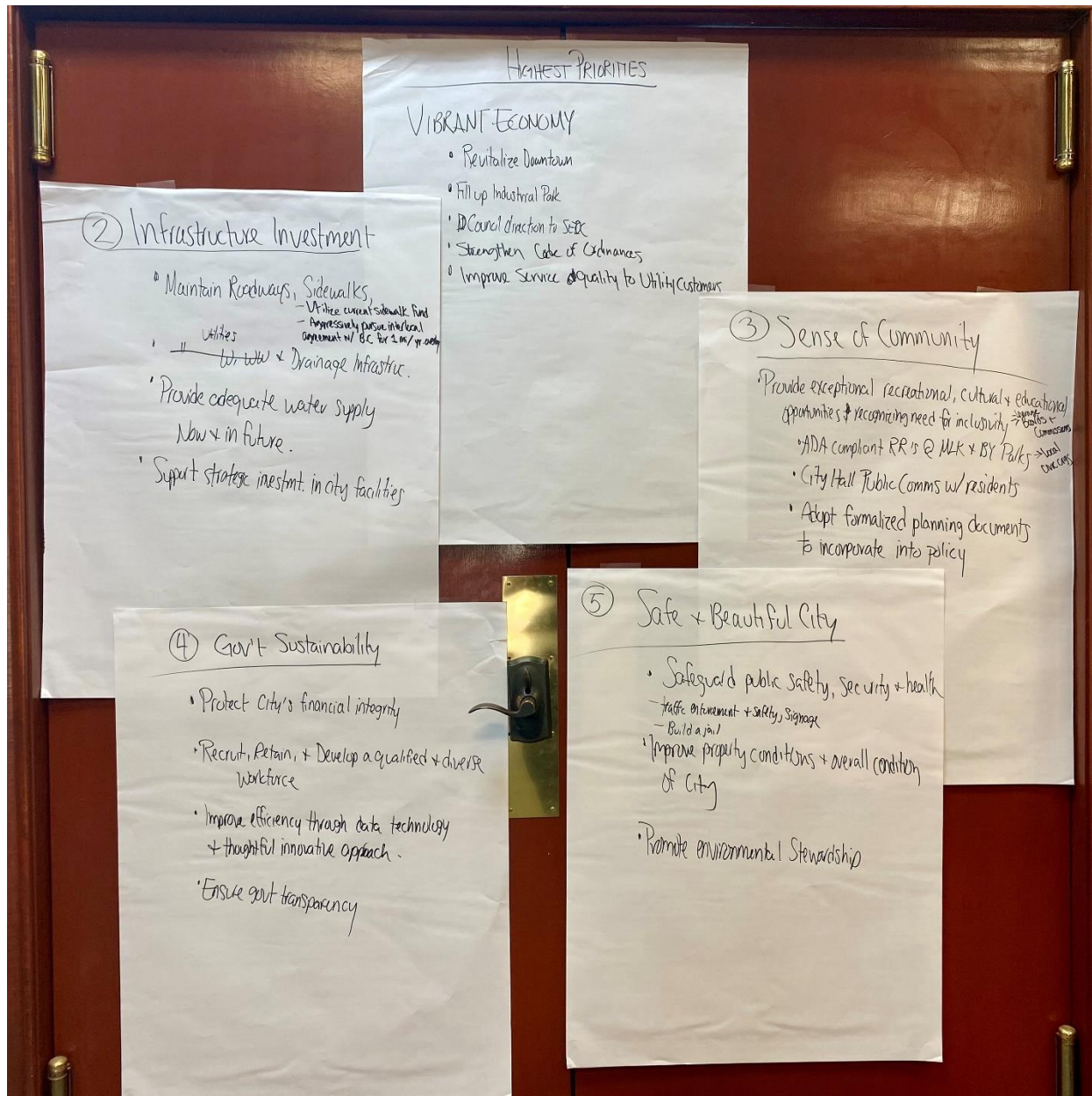
- Water quality
- Gas System
- Tax Rate
- Streets / Roads
- Parks Improvements, ADA restrooms
- Competitive wages
- SEDC to pay off outstanding debt
- Replace metal waterlines
- Water/wastewater issues
- City financial security
- Build a jail
- Drainage ditch repair along McKinney St.
- Digital records retention
- Fix water and sewer plants
- Roads
- Purchase proper equipment
- Reduce property tax rate
- Drainage improvements
- Pay scale & promotion guidelines for staff and retention
- Drainage
- Utility Rate
- Sewage Infrastructure
- Parks
- Better budgeting practices, utility rate study
- Hire FT Code Enforcement officer
- Reallocate sales tax to road fund
- New milled roads and ditches
- Drainage
- Downtown revitalization
- Fill up Industrial Park with new businesses
- Put policies and procedures in place for Utility Billing and City Hall services, update Personnel Guidelines
- ERP
- In-house dispatch system
- New City Hall
- Hire water & wastewater operators
- Water & sewer upgrades
- Provide consistent instruction to SEDC
- Review of building and development Codes and ordinances



Strategic Planning session participant responses concerning city priorities.

After providing responses, the strategic planning project team was instructed to place colored dots next to all of the responses on the sheets. Dot color indicated project priority, where red was highest priority, yellow represented second-highest priority, green was less of a priority matter, and blue carried the least priority. After each participant placed their colored dots next to the responses, the group was able to deduce which goals carried the highest needs, and those needs were categorized into 5 Strategic Goals.

The five strategic goals determined by City Council with associated action steps taken from the priority determination exercise included:



Consolidated strategic goals and actions steps.

Sweeny City Council Strategic Goals:

1. Vibrant Economy

- Revitalize downtown.
- Build out Industrial Park with businesses.
- City Council to give direction to Sweeny Economic Development Corporation.
- Strengthen Code of Ordinances.
- Improve service quality to utility customers.

2. Infrastructure Investment

- Maintain roadways and sidewalks utilizing current Sidewalk Fund and aggressively pursuing interlocal agreements with Brazoria County for road maintenance and repair.
- Drainage infrastructure improvements.
- Provide adequate water supply now and in the future.
- Support strategic investment in city facilities.

3. Sense of Community

- Provide exceptional recreational, cultural, and educational opportunities and promoting inclusivity and leveraging relationships with Boards and Commissions and local civic groups.
- Construct ADA-compliant public restrooms at MLK and Back Yard Parks.
- Maintain communications between City Hall and the public.
- Adopt formalized planning documents to incorporate into city policy.

4. Government Sustainability

- Protect city's financial integrity.
- Recruit, retain, and develop a qualified and diverse workforce.
- Improve efficiency through data technology with thoughtful & innovative approach.
- Ensure government transparency.

5. Safe & Beautiful City

- Enhance public safety through traffic enforcement, better street signage, and construct a holding facility.
- Improve conditions of public spaces.
- Promote environmental stewardship.

The five strategic goals selected by City Council are summarized in a one-page reference document that provides vision, mission, and values statements.

City of Sweeny Strategic Vision: “Sweeny will be a model for revitalization and sustainability through investment in infrastructure, promotion of health and safety through quality parks and a safe community.”

City of Sweeny Mission: “Deliver exceptional services and promote a high quality of life for residents, visitors, and businesses.”

City of Sweeny Values: “We have PRIDE in all that we do.”

Conclusion and Recommended Action

A city’s strategic plan is a living, evolving, document to be reviewed annually in tandem with the adopted Capital Improvement Projects (CIP) program document to ensure consistency and compatible planning reflective of the city’s needs. It is recommended that annual strategic planning take place ahead of the annual budget process to capture budgetary needs to meet the City’s goals.

Strategic Plans give staff guidance on how what actions the elected officials want to see and also provide the foundation for performance budgeting and measuring performance to promote continuous improvement. This strategic plan should be used when assessing the City Manager’s performance, and the City Manager should be using this plan to measure staff performance.

Requested agenda items should describe how the item meets Council’s strategic vision, so that city businesses remains focused on completing the goals set by Council.

This plan was approved to be adopted by Council resolution on April 23, 2024, and the report will be submitted to Council on May 9th, 2024 for review and approval to incorporate with the adopted resolution naming the five Council strategic priorities of: Vibrant Economy, Infrastructure Investment, Sense of Community, Government Sustainability, and Safe & Beautiful City.

Additional and consistent action will need to be taken to progress this plan and standardize the plan as procedure.

1. Annual reviews should be conducted as an all-hands retreat off site and include City Council, Sweeny Executive Leadership Team, and voting or officer members of key Boards and Commissions such as Sweeny Economic Development Corporation and Sweeny Beautification with the understanding that the governing body sets the vision and goals of the city’s operational expectations with input from city staff and

members of boards and commissions and the community the Council members represent at large.

2. Adopt a measurement system to link completion of strategic goal milestones and tasks to staff performance.
3. As part of the SELT quarterly updates to Council, Department Heads should be reporting metrics on how Council's strategic priorities are being met and include all departments.
4. Implement a requirement to describe how council agenda items meet Council's strategic plan by the agenda item requestor providing how the item meets at least one of the 5 adopted goals.
5. Incorporate into the city's financial policy a set minimum percentage or fixed amount to budget for funding CIP projects funds.

Attachments:

1. City of Sweeny Organizational Strategy summary page (2024).
2. Sweeny strategic planning notes from 2023 session.

CITY OF SWEENY ORGANIZATIONAL STRATEGY

Sweeny's operational strategic plan framework for all city services working in tandem with CIP, annual budget, and City Council's priorities.

VISION:

Sweeny will be a model for revitalization and sustainability through investment in infrastructure, promotion of health and safety through quality parks amenities, and a safe community.

MISSION:

Deliver exceptional services and promote a high quality of life for residents, visitors, and businesses.



VIBRANT ECONOMY

Revitalize Downtown and Recruit new businesses – strategic development & re-development.

Recruit new businesses to build out Industrial Park.

City Council direction to SEDC.

Strengthen Code of Ordinances.

Improve service quality to utility customers.



INFRASTRUCTURE INVESTMENT

Maintain roadways and sidewalks using Sidewalk Fund.

Drainage infrastructure improvement.

Provide adequate water supply now and in the future.

Support strategic investment in city facilities.



SENSE OF COMMUNITY

Provide exceptional recreation cultural, and educational opportunities with focus on inclusivity by leveraging help of boards and commissions.

ADA compliant restrooms at MLK & Back Yard Parks.

Adopt formalized planning documents to incorporate into city policy.



GOVERNMENT SUSTAINABILITY

Protect City's financial integrity.

Recruit, retain, and develop a qualified and diverse workforce.

Improve efficiency through data technology and thoughtful, innovative approach.

Ensure government transparency.



SAFE & BEAUTIFUL CITY

Improve conditions of public spaces.

Promote environmental stewardship.

Enhance public safety and health through traffic enforcement, better street signage, and construct a holding facility.

VALUES: We have PRIDE in all that we do. We are:

PROFESSIONAL

PRESILIENT

INNOVATIVE

DEPENDABLE

ETHICAL



CITY OF SWEENY, TEXAS

Leadership Retreat Summary & Work Plan

Sweeny Community Center

June 10, 2023



Adopted:

Prepared by: City Hall Essentials / McDougal & Associates

Introduction & OVERVIEW

Purpose & Introduction

The City of Sweeny is preparing the budget for FYE 24 and, as part of that process, recognized the need for visioning and strategic planning to provide support and direction to the staff. To this end, the City engaged City Hall Essentials (CHE) / McDougal & Associates, LLC. (MDA) to assist in the development of a shared vision and near-term strategies for the Council and staff.

On June 10, 2023, CHE/MDA facilitated a day-long retreat where City Council and Key Leadership came together at the Sweeny Community Center to discuss what is working, and not working, at the City.

This is the inaugural planning session for the City. The intent is to continue this process annually as part of developing the annual budget and planning for the future success of the community. Future sessions should include community partners such as the EDC and Planning Commission. Working together to adopt a shared vision will ensure success for all involved.

RECENT WINS: Incentive pay and earning interest on savings.

Community Snapshot

Situated just twenty miles from the Gulf of Mexico and approximately 65 miles from the Houston Metropolitan Area, Sweeny is the westernmost city in Brazoria County. Sweeny is a charming community of approximately 3,591 with a walkable downtown. Brazoria County and the Upper Texas Coast are growing, and, with visioning and planning, Sweeny will be ideally positioned to benefit from that growth.

Location and existing community assets are working in Sweeny's favor. At a time when many small hospitals are closing, Sweeny Hospital is expanding. With approximately 1,900 students, Sweeny ISD is ranked as an above-average public school district. These assets, coupled with strong local leadership and a community-wide commitment to community pride provide a strong foundation upon which to grow.

Sweeny should be proud of its past and embrace the many opportunities for the future. Coming together and developing a vision for the future- crafted through dialogue and compromise – will provide a path toward future success.

Key Takeaways

This is not a comprehensive or long-range document. This strategy provides a way for City Council to adopt a policy and give direction to City staff for immediate needs while beginning conversations about long-term needs. A robust comprehensive planning process is needed and should be a near-term project. The following projects are summarized in the Work Plan and are of such significance they warrant additional attention here:

1. Start today. Plan for long-term, big-picture projects while implementing short-term, attainable projects.
 - a. Quick downtown beautification project – select an alley to redevelop into a destination using string lights, murals, and plants.
 - b. HR – Pride / Initiative Program
 - c. Policies / Procedures / Technical Specifications
 - a. Charter Review: The City Charter was revised and readopted in 20***. It is recommended that the City engage a municipal attorney with expertise in city charters to review the charter for compliance with state and federal laws. Furthermore, it is recommended that charter review ensure that it does not conflict with or contradict the tenets of a Council / Manager form of government. To this end, reviewing all codes, ordinances, policies, and procedures is

recommended to ensure documents do not contradict or conflict with one another or with state and federal law.

2. Comprehensive Plan
 - a. Adopt a shared vision
 - b. Adopt a citywide Comprehensive Plan to address land use and development, transportation and connectivity, infrastructure, parks and recreation, economic development,
3. Capital Improvements Plan (CIP)
4. Economic Development
 - a. The City will have to think creatively about economic development and craft a strategy that recognizes the community's place in the region and builds upon its strengths and attributes.
 - i. Water Quality: fix the problem then brag about it
 - ii. Alcohol sales: Revise local ordinances
 - iii. Beautification – start with the petunias
 - iv. Walkability/ Quality of life
 - v. Infill development and redevelopment commercial and residential

SWOT Analysis

INTRODUCTION

A SWOT analysis assesses a community's major strengths, weaknesses, opportunities, and threats. This exercise can also provide a framework for identifying local action items and priorities, and for creating a legislative "to do" list for the locally elected officials. Action items under each category help decision-makers: build on community strengths; address weaknesses; take advantage of opportunities; and prepare for threats.

The SWOT analysis was used as the starting point for identifying needs and priorities for City staff and

Internal - Strengths

Strengths are existing features, amenities, and characteristics that lead to a community's success. These include intangible attributes as well as physical assets. Successful communities reinforce, protect, and build on all their strengths.

When looking into the strengths of your organization, ask yourself the following questions:

- What do we do well? Or, even better: What do we do best?
- What's working well? How do we know?
- What do our citizens like about our organization?
- What sets us apart from other cities?

External - Opportunities

Strengths are unique to the inner workings of the organization. These are the things the City of Sweeny – public officials and staff – do well. Unlike strengths and weaknesses, opportunities are more forward-looking and deal with larger forces. These are future prospects that could help a community realize its goals. A community should consider ways to strategically take advantage these opportunities.

Internal - Weaknesses

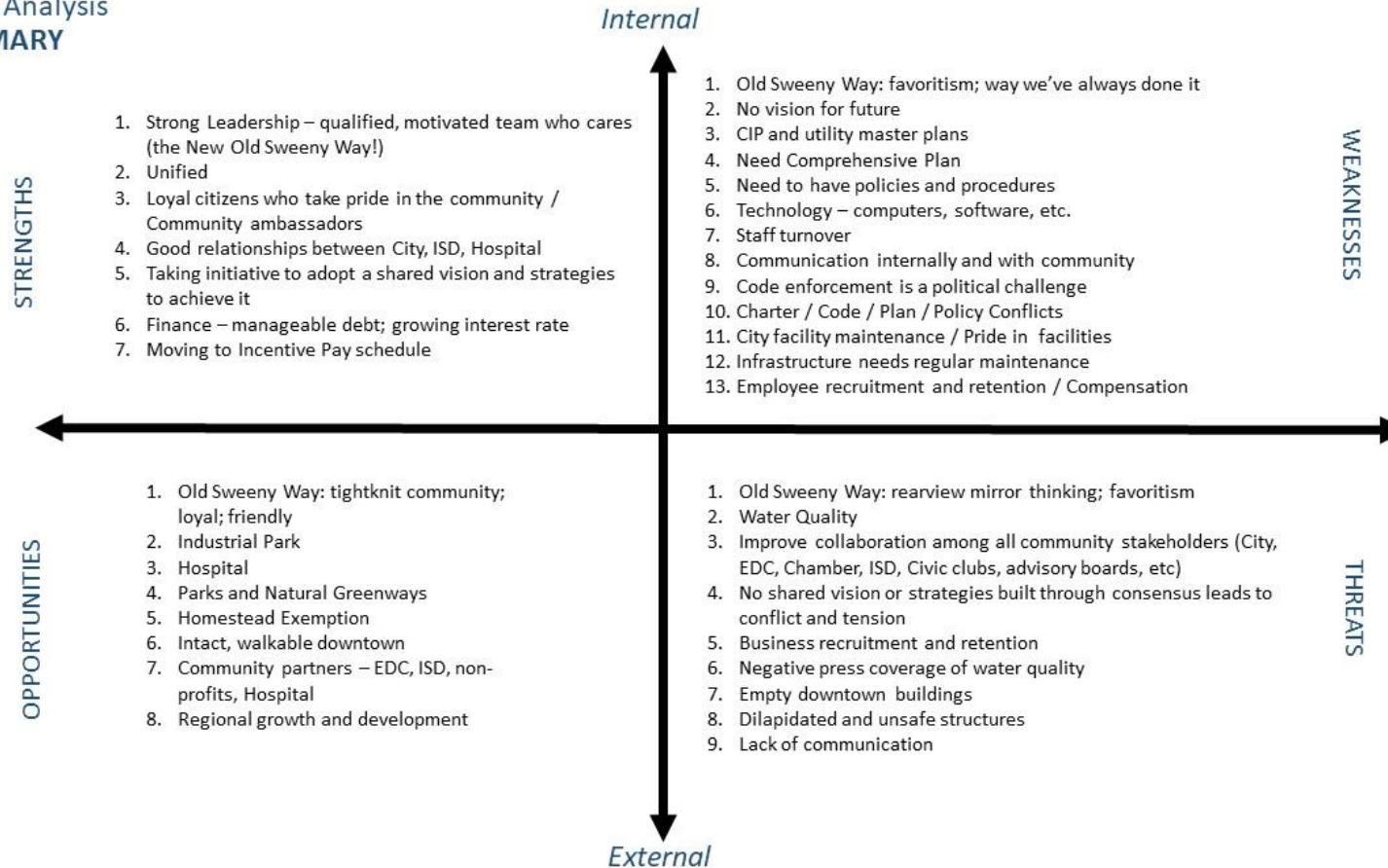
No organization is perfect. Weaknesses are existing features, conditions or problems that hinder a community from realizing its goals. A community should consider ways to address or overcome these obstacles.

In this step, the group identified those internal characteristics or conditions that hinder staff and keep the organization from operating to its full potential.

External - Threats

Like opportunities, threats are more forward looking than strengths and weaknesses. These future challenges could hinder the community from realizing its goals. A community should consider ways to avoid or mitigate threats.

SWOT Analysis SUMMARY



Resource Guide & **WORK PLAN**

***SEE ATTACHED SPREADSHEET – FINAL WORK PLAN TO BE
INSERTED IN REPORT***

City of Sweeny -- 5 Year Work Plan & Resource Guide

June 2023 - June 2028

		Short-term		Mid-term		Long-term
		Next 6 Months		1-2 Years		3-5 Years
Dept	PRIORITY PROJECTS					
Public Works	PW 1	Drainage: Pull ditches; Document repeat complaint / flooding areas	PW 4	Brine System	PW 9	Implement Master Plans
	PW 2	Water: Implement water line flushing program	PW 5	SCADA		
	PW 3	Clean up area around water tower	PW 6	SOPs and Maintenance Plans with training		
			PW 7	Streets - Flashing street sign by hospital		
			PW 8	Water and Sewer Master Plan		
Human Resources	HR 1	Develop an Employee Pride Program	HR 3	Classification and Compensation Study	HR 6	
	HR 2	Revise Personnel Policy for compliance with state law and City Charter	HR 4	Standardized pay / Step plan		
			HR 5	Targeted recruitment strategy to minimize turnover		
Finance	F1	Adopt FYE 24 Budget	F2	Begin planning and budgeting for new Accounting software / ERB	F4	Transition to new accounting software
			F3	Adopt Financial Policies - Purchasing, Investment, Fund Balance		

		Short-term		Mid-term		Long-term
		Next 6 Months		1-2 Years		3-5 Years
Economic Development	ED 1	Install Downtown art project / Host Pop-up Beautification Day	ED 4	Develop a plan to demolish and redevelop unsafe structures (Community Revitalization Plan)	ED 7	
	ED 2	Hold joint visioning and strategy session between City, EDC, and Board of Commissioners)	ED 5	Evaluate the possibility of offering a homestead exemption		
	ED 3	Revise ordinances to allow sale of beer, wine, and liquor in commercial districts. Match to state law of at least 300' from school, church, etc.	ED 6	Adopt a Joint City/EDC Economic Development Strategy to include, but not limited to: Business recruitment and retention, Downtow revitalization, Neighborhood revitalization through infill development		
Facilities	F1	Sell EDC building	F5	Refresh Community Center		
	F2	Repurpose Public Works "back shop"	F6	Rebuild Animal Shelter		
	F3	Clean up and freshen up Wastewater and Water Treatment Plants	F7	Install cameras at Wastewater Treatment Plan and Water Treatment Plant		
	F4	Develop a Pride Program for City facilities including a maintenance schedule	F8	Install key card access at all City facilities		

		Short-term		Mid-term		Long-term
		Next 6 Months		1-2 Years		3-5 Years
			F9	Develop a Facilities Master Plan		
Parks	P1	Disc golf tee boxes	P3	Install shade over playground equipment at both parks	P5	Sports Complex
	P2	Revise signage to change traffic flow and improve safety	P4	Develop a Parks Master Plan to include, but not limited to: restrooms at both parks, an interconnected trail network, tree planting, etc.)	P6	
Development Services	DS 1	Develop user-friendly forms, applications, and checklists	DS 2	Comprehensive Plan	DS 5	Initiate a "Code of the Month" program to educate citizens about code compliance
			DS 3	Revise land use regulations (zoning, subdivision regulations, etc) to implement Comprehensive Plan		
			DS 4	Develop FAQ Fact Sheets		
	AD 1	Records Room	AD 1	Develop a plan to digitize records	AD 4	Codification
	AD 2	Work with Special Counsel to revise charter to come into compliance with state law	AD 2	Develop a plan to rotate / replace computers (citywide)		

		Short-term		Mid-term		Long-term
		Next 6 Months		1-2 Years		3-5 Years
Administration			AD 3	Adopt policies and procedures: Purchasing, Safety, Personnel, Investment, Development review, Fund balance, Fleet, IT		
			AD 4	Review all ordinances, policies, for conflict among documents and conflict with state and federal laws. Revise accordingly.		
			ES 2	Create clear avenues to access community information and education opportunities.		
Public Safety			PD 1	Establish reserve fund for new radios		
			PD 2	Software		