

JADE Strategies

Leadership Coaching | Team Building | Organization Development

November 20, 2023

Matthew Baumgarten
City Manager
City of Berkley
3338 Coolidge Hwy.
Berkley, MI 48072

Dear Matt:

It has been a pleasure working with you, your staff, and City Council in developing a comprehensive, three-year strategic plan for the City of Berkley. I feel confident that we have set the foundation for efficient and effective operations, organizational growth, and productive partnerships.

In the following pages, please find the organization's Strategic Framework, Action Plan, and a summary of the process and outcomes from our development work, during which time we combined strategic planning with leadership development for the City's staff and City Council.

I understand that it is not always easy to hand the reins to a consultant and trust the process. I appreciate your confidence and look forward to working with you in the future to maximize the established momentum.

Please feel free to contact me with any questions about this Outcome Report or any other matter. I can be reached at (248) 860-8858 or Joscelyn@JADEstrategies.com.

Sincerely,

Joscelyn A. Davis
President & CEO
JADE Strategies, Inc.



Strategic Plan FY2023 – FY2026

OUTCOME REPORT

Facilitated by





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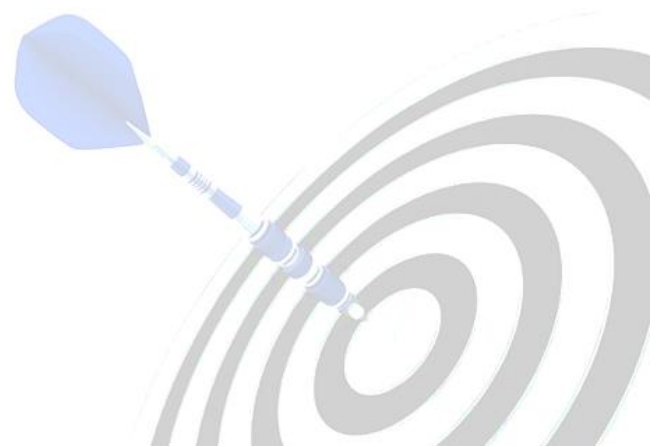
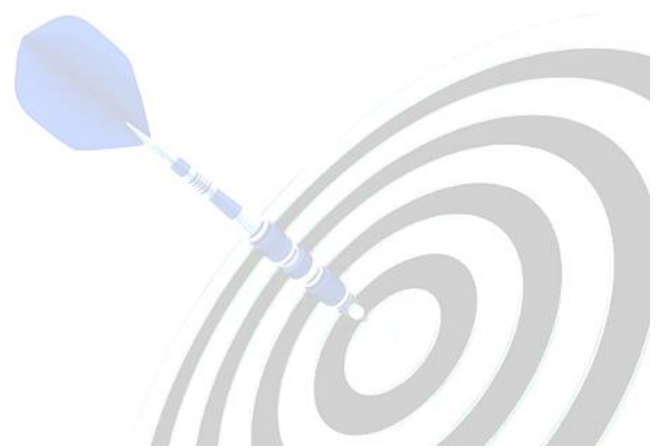
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Defining Goals and Reinforcing Identity through Strategic Planning

GOAL

The purpose of this project was to develop a comprehensive, three-year strategic plan that provides clear direction, improves process efficiencies, reinforces a collaborative culture, and aligns with the organization’s brand.

STRATEGIES

- Identify priorities, objectives, strategies and evaluation process
- Develop efficient timeline with clear accountability & benchmarks
- Improve stakeholder communication & engagement

PROCESS CALENDAR

#	Session	Focus	Participant(s)	Date
1	ANALYSIS	Strategic Process & Objectives	City Manager	1/5/23
2	STRATEGY	Culture & Environment Assessment	City Council	2/8/23
3		Governance Best Practices & Priorities		3/13/23
4		Action Plan: Effective Governance		4/10/23
5		Team Building, Culture & Strategic Content		6/1/23
6		Action Plan: Objectives	Director Team	6/13/23
7		Action Plan: Assignments		6/13/23 – 10/10/23
8		IMPACT	Strategic Plan Presentation	City Council
9	Engagement	Culture Survey	Admin Staff	TBD
10		Community Conversation	Focus Group	TBD





Why is strategic planning important?

A comprehensive strategic plan strengthens the organization's culture. It engages multiple audiences and invites collaboration, creating unity around a common goal. It allows for the blending of ideas and insights, resulting in ownership. It reveals opportunities for shared resources and relationships, maximizing the organization's ability to operate with effectiveness and efficiency.

In other words, the Strategic Plan and the collaborative process of creating it become the standard vehicles through which the organization functions as a competent system.





Strategic Framework: Organization Identity*

Mission, Vision, and Core Values statements shape and support the organization's identity and assist in establishing the organization's brand – the memorable image of competence and leadership the community trusts.

Mission

Berkley will strive to enhance economic vitality, preserve neighborhoods, and foster progress to implement the City's vision and values.

Vision

Berkley will be a thriving 21st Century municipality, rooted in strong neighborhoods and a walkable design, supported by a caring community that helps every resident, business, and visitor to flourish.

Core Values

Berkley is Caring.

Berkley is Innovative.

Berkley is Welcoming.

Berkley is Active.

** Berkley's Mission, Vision, and Values were established through the Master Plan process prior to Strategic Planning.*





Strategic Framework: Priority Outcome Statements

Administrative Operations

Berkley's government implements business best practices and continuous improvements that result in accountability, transparency, innovation, cost-effectiveness and operational efficiency.

Community Amenities

Berkley implements both long- and short-term plans that maximize use of current spaces, address growth needs, maintain infrastructures, and provide opportunities for regional partnerships.

Economic Development

In response to changing community needs, the City of Berkley establishes diverse and proactive initiatives that result in sustainability and growth within a culture that supports divergent business functions and initiatives.

Effective Governance

As a trusted community steward, Berkley's City Council practices standards of excellence in government leadership and actively engages in strategies that realize priorities and achieve the City's vision.

Fiscal Responsibility

Berkley maintains operations, advances growth, and supports development by actively managing the City's financial resources and proactively pursuing alternative funding options.

Marketing & Brand Management

Berkley executes a research-based communication strategy that increases stakeholder awareness, attracts critical partnerships, and positions the City as a respected and visionary thought leader.





Strategic Framework: Objectives

ADMINISTRATIVE OPERATIONS

Berkley's government implements business best practices and continuous improvements that result in accountability, transparency, innovation, cost-effectiveness and operational efficiency.

- I. Maintain employee performance excellence.
- II. Ensure program and service efficacy and efficiency.

COMMUNITY AMENITIES

Berkley implements both long- and short-term plans that maximize use of current spaces, address growth needs, maintain infrastructures, and provide opportunities for regional partnerships.

- I. Implement building and facility assessments.
- II. Develop facilities maintenance budget.
- III. Identify regional partners that inspire community will.
- IV. Determine resident and business owner priorities.

ECONOMIC DEVELOPMENT

In response to changing community needs, the City of Berkley establishes diverse and proactive initiatives that result in sustainability and growth within a culture that supports divergent business functions and initiatives

- I. Attract new and continued investment for each distinct major corridor.
- II. Encourage commercial parcel consolidation.
- III. Identify marketable properties.
- IV. Enhance effectiveness and benefits of the DDA funding model.
- V. Secure Planning Commission and City Council support for Master Plan.
- VI. Facilitate expanded and diverse housing options for each district/corridor.





Strategic Framework: Objectives

EFFECTIVE GOVERNANCE

As a trusted community steward, Berkley’s City Council practices standards of excellence in government leadership and actively engages in strategies that realize priorities and achieve the City’s vision.

- I. Implement a strategic performance evaluation process.
- II. Build public will.
- III. Mitigate challenges and risks.
- IV. Realize a “Think Regional” strategy.
- V. Promote culture of leadership excellence and collaboration.

FISCAL RESPONSIBILITY

Berkley maintains operations, advances growth, and supports development by actively managing the City’s financial resources and proactively pursuing alternative funding options.

- I. Execute best practices in fiscal management.
- II. Implement long-term forecasting.
- III. Secure grant funding.

MARKETING & BRAND MANAGEMENT

Berkley executes a research-based communication strategy that increases stakeholder awareness, attracts critical partnerships, and positions the City as a respected and visionary thought leader.

- I. Develop a comprehensive communication strategy for the City.
- II. Promote the City’s organization identity and brand.
- III. Maximize stakeholders’ interests in and commitment to City initiatives.
- IV. Develop/update communication policies and procedures.





The Process becomes the cultural norm.

While a strategic planning document outlines the path to growth and development, the *process* of generating such a document produces a cultural model. As a result, decisions made at every level of the organization reflect a thorough assessment of the environment, the organization's vision and values, and the blended ideas and insights of multiple stakeholders.

A thorough planning process includes leadership development at every level, designed to equip key stakeholders with performance tools. Through the strategic process, stakeholders learn and practice collaboration, analysis, and engagement techniques proven to maximize the success of organizational development.





Environment Assessment

Why does Berkley government exist?

CITY COUNCIL

- To create rules and regulations
- To provide public welfare & safety
- To provide services
- To provide infrastructure
- To improve lives and well-being
- To invest collective resources
- To look past self-interests now and in the future
- To invest in future resources
- To create community
- To steward resources
- To bring joy
- To serve as a “Tiny Destination”
- To be an attraction for entertainment
- To support local business growth
- To attract potential customers
- To provide stability for family and businesses
- To differentiate from other communities due to our mission and quality services

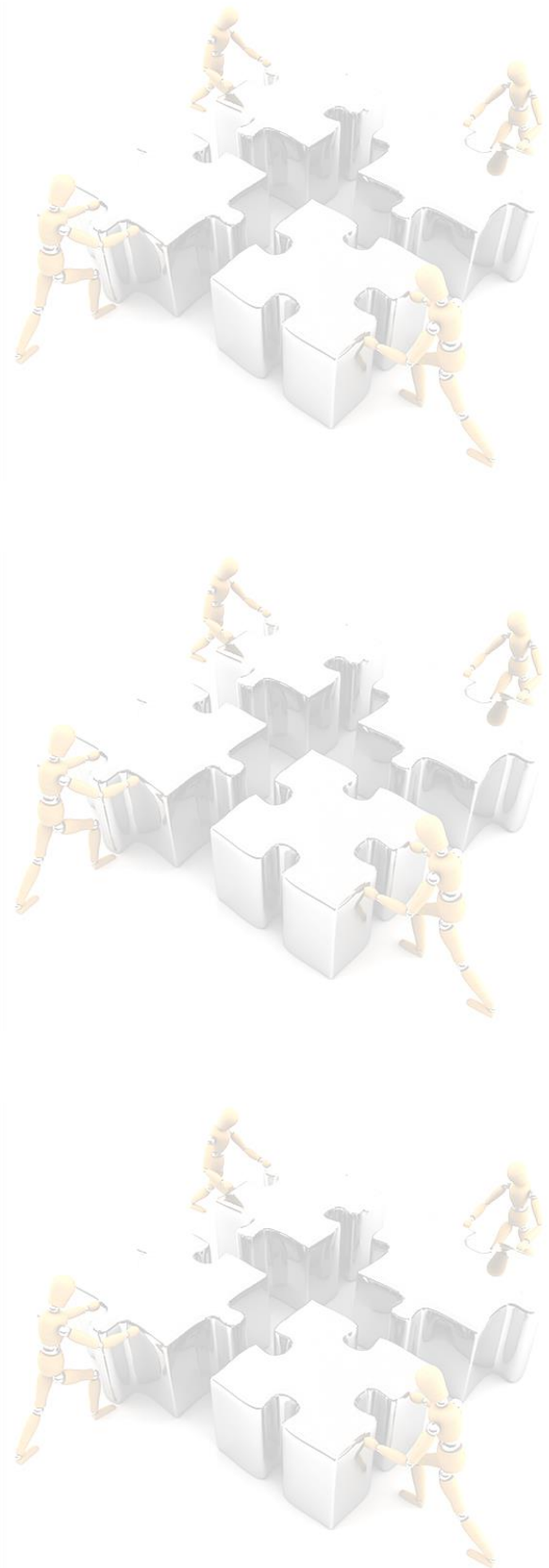




Key Stakeholders & Priority Partnerships

- Citizens/residents
- Community organizations
- School district
- Administration/staff
- Council members
- Berkley's boards/commissions
- Business community (local, regional)
- Contractors/consultants
- Volunteers
- Nonprofits
- MML/NLC
- Neighboring governments
- County/state/federal
- Foundations
- Academies
- Legal team
- Neighboring communities
- County/state/federal
- Service organizations
- Visitors
- Nonprofits
- Think tanks
- Future generations
- DDA
- Social forums
- Chamber of Commerce

Highest ranked by participants



**Key Stakeholder & Partnership list combines input from all participants in the planning process.*





Environmental Assessment

Positive Community Trends

CITY COUNCIL

- Investment in parks/public spaces
- Younger families moving in
- Changing neighborhood demographics/more diversity
- Growing downtown/new businesses choosing COB
- Excellent schools
- Investment in EV/electrification
- Cooperation/respect for council, boards, employees
- Communication & outreach
- DDA engagement=Destination (e.g., murals, skeletons)
- Collaboration w/neighboring cities, businesses, etc.
- Excellent bond rating
- Efforts to increase state & fed funding
- Rankings on “Top Ten” lists
- Road infrastructure millage
- ZBA/ordinance updates

DIRECTORS

- Inclusion
- Community engagement
- Houses selling
- High community investment
- Staff/leadership team
- New ideas/expectations
- New businesses (choosing Berkley)
- Walkability/access
- Capital investments
- Investments in planning
- Investments in staff training
- DDA energy (farmers market)
- Quality of new businesses
- More community events
- Destination for residents
- Apartment options

Perceived Opportunities

CITY COUNCIL

- New staff and leadership
- More equity and inclusion
- Death of the “Good enough for Berkley” attitude
- Embrace the City’s diversity (council, staff, employees, volunteers)
- Align Strategic Plan and Master Plan
- Unencumbered federal Covid funding
- Think regionally (e.g., shared/connected bike paths, transit)
- Rethink zoning
- New revenue possibilities (e.g., I13A, IRA)
- Increase efficiency
- Higher quality staff
- Complete Master Plan
- Increased resident/volunteer engagement
- Grow downtown (e.g., social district, business diversification)
- Increased staff to get more done
- Infrastructure improvements

DIRECTORS

- Engaged citizens
- Committed staff
- New staff
- Location
- New resident mindset
- New millage vote
- City has positive image
- New business in previously empty shops
- Review of cost benefit analysis for programs and services
- Safety
- Affordable business market



Highest ranked by participants





Negative Community Trends

CITY COUNCIL

- Lack of respect for differing views
- Distrust in government
- Unfunded mandates
- Persistent remnants of Old Berkley (racism, misogyny)
- Budget restrictions
- Neighborhood changes and diversity (sometimes) leads to conflict/fear of change
- Other neighboring communities moving forward while Berkley treads water
- Toxic political climate
- Potential recession
- Silo mentalities
- Leadership burnout in the face of challenges

DIRECTORS

- Lack of funding
- Social media/Communication expectations
- Negative vocal minority
- Low staff levels
- Increased requirements from state and feds
- Service reductions
- Lack of community support/understanding
- Council/public lack of understanding re: day-to-day operations
- Disjointed Council priorities/pet projects
- Increased cost of living
- Compact streetscape limits on 12 Mile (western)

Perceived Challenges

CITY COUNCIL

- Decaying infrastructure (roads, sewers, bldgs.)
- Staff turnover/retention/attraction
- Negative attitudes in general
- \$2M Budget cut
- Erosion of local control & MILEG
- Lack of leadership alignment
- Same small core group of residents most vocal/involved
- Role confusion/reach of local government
- Confusion re: public service vs. "politics"
- Pension obligations
- Headlee Override vote
- Lack of interest in public service
- Climate change

DIRECTORS

- Engaged citizens
- Social media (Facebook, Next Door)
- Negative community feelings
- Not enough staff/Staff recruitment
- Lack of state/federal funding
- High service expectations
- Land scarcity
- Parking space
- Unfunded mandates
- Aging infrastructure
- Internal retirements (knowledge leaving)
- Lack of natural spaces



Highest ranked by participants





Visioning

What do stakeholders value about Berkley?

CITY COUNCIL

- Reliability (plow, pick up, safety, library)
- More services than other communities
- Stability/comfort in absence of drama
- Competence (staff)
- Accessibility to leaders, staff
- Personable attitudes
- Small town (size)
- We care. We're helpful, accommodating.

DIRECTORS

- School system
- Small town environment
- Location
- Walkability
- Park access
- Small businesses
- Resources
- Proximity to Beaumont
- Access to highways
- Services
- Safety
- Sense of community
- Inclusion
- Generational longevity
- Active involvement
- Proximity to retailers
- Community events
- Young families
- Peer networks





Visioning

How should Berkley government be described in 10 years?

CITY COUNCIL

- Vibrant, responsive culture
- Progressive
- Innovative thought leader
- Diverse, representative
- Improved
- Hyper customer-focused
- Rivals private companies in being one of the best places to work
- Good-to-great
- Wise risk-takers
- Nimble
- Efficient, out of the way
- Expected awesomeness
- Business advocate
- Aligned leadership
- Innovative sustainability practices
- Demonstrated shared vision; cohesion
- Financial sustainability
- Infrastructure sustainability
- Has heart

DIRECTORS

- Realized its potential
- Inclusive
- Great services
- Sustained positive elements
- Affordable
- New services for seniors
- Flexible, innovative, open
- Financially sustainable
- Nice people on social media
- Safest community
- Appropriate staffing levels
- New City facilities (City Hall, Public Safety)
- State-of-the-art recreation center
- Dog park
- Downtown grocery store
- Public transportation to Detroit
- Destination to shop, live & work
- Late-hour events/restaurant options
- Diverse, upgraded housing stock
- Mixed-use buildings
- New, safe walking paths
- New/green infrastructure
- Age-in-place destination





Accountable Governance

“Organization health will one day surpass all other disciplines in business as the greatest opportunity for improvement and competitive advantage.” - Patrick Lencioni

Members of Berkley City Council participated in three retreats during the Strategic Planning process, where they engaged in visioning, team building and leadership development. Members reached consensus on the qualities required for organizational excellence; the body’s Rules of Engagement, designed to maximize meeting productivity; and the tenets of their roles as elected leaders and community stewards.

Characteristics of a Successful Organization

- Shared vision
- Ongoing assessment/improvements
- Transparency
- Sustainable Vision, Expertise, Motivation, Planning, Resources, and Evaluation
- Continuing education/development
- Effective marketing (e.g., “cool logo”)
- Stable finances
- Recognition
- People feel valued
- Energy/efforts align with vision
- Growth
- Personal mental health

City Council’s Rules of Engagement

- | | |
|--|--|
| <ul style="list-style-type: none"> ❖ Authenticity ❖ Honesty ❖ Speaking your mind ❖ Open-mindedness ❖ Listening to understand (not just to respond) ❖ Assuming everyone has good intentions | <ul style="list-style-type: none"> ❖ Transparency ❖ Inclusion ❖ Respect ❖ Not talking over each other ❖ Coming prepared ❖ Operating from shared set of facts |
|--|--|

Best Practices in Leadership Engagement

- ❖ Partner with the City Manager
- ❖ Oversee business, affairs, and properties
- ❖ Ensure alignment with mission and purpose
- ❖ Honor fiduciary responsibility re: financial standing
- ❖ Review organizational framework
- ❖ Approve Strategic Plan, Operating Budget, and Master Plan
- ❖ Actively participate on at least one board and/or commission
- ❖ Regularly communicate with constituents and engage stakeholders





Berkley Director Team

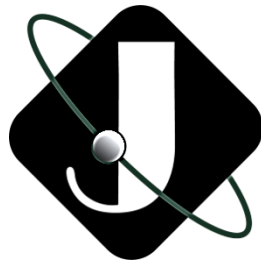
Performance Excellence

Berkley's department directors participated in two retreats during the Strategic Planning process, in which they collaborated on a community needs assessment framework; aligned strategies with priorities established by City Council; and engaged in leadership development and team building activities focused on maximizing team performance.

Recommendations for sustaining a high-functioning team:

- Implement a comprehensive performance evaluation process for individual employees, departments, and the organization based on Strategic Plan priorities and objectives.
- Facilitate routine, disciplined meetings:
 - Establish consistent meeting rhythms at all levels of the organization.
 - Utilize online project management tools.
 - Develop and distribute specific agendas and timely meeting summaries.
 - Adopt Rules of Engagement to maximize meeting productivity.
- Explore ways to maintain trust throughout the organization, e.g., consistent communication, bi-annual retreats for training and team building, prize-awarding contests, staff projects related to culture-branding.
- Engage experts in planning and coaching.
- Perform annual culture assessment.





JADE Strategies

Leadership Coaching | Team Building | Organization Development

Master the Formula for Extraordinary Leadership,

ANALYSIS. STRATEGY. IMPACT.

High-Performing Teams and Sustainable Transformation.

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