

Shorewood Hills Stakeholder Results

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CP2 Consulting

October 15, 2024



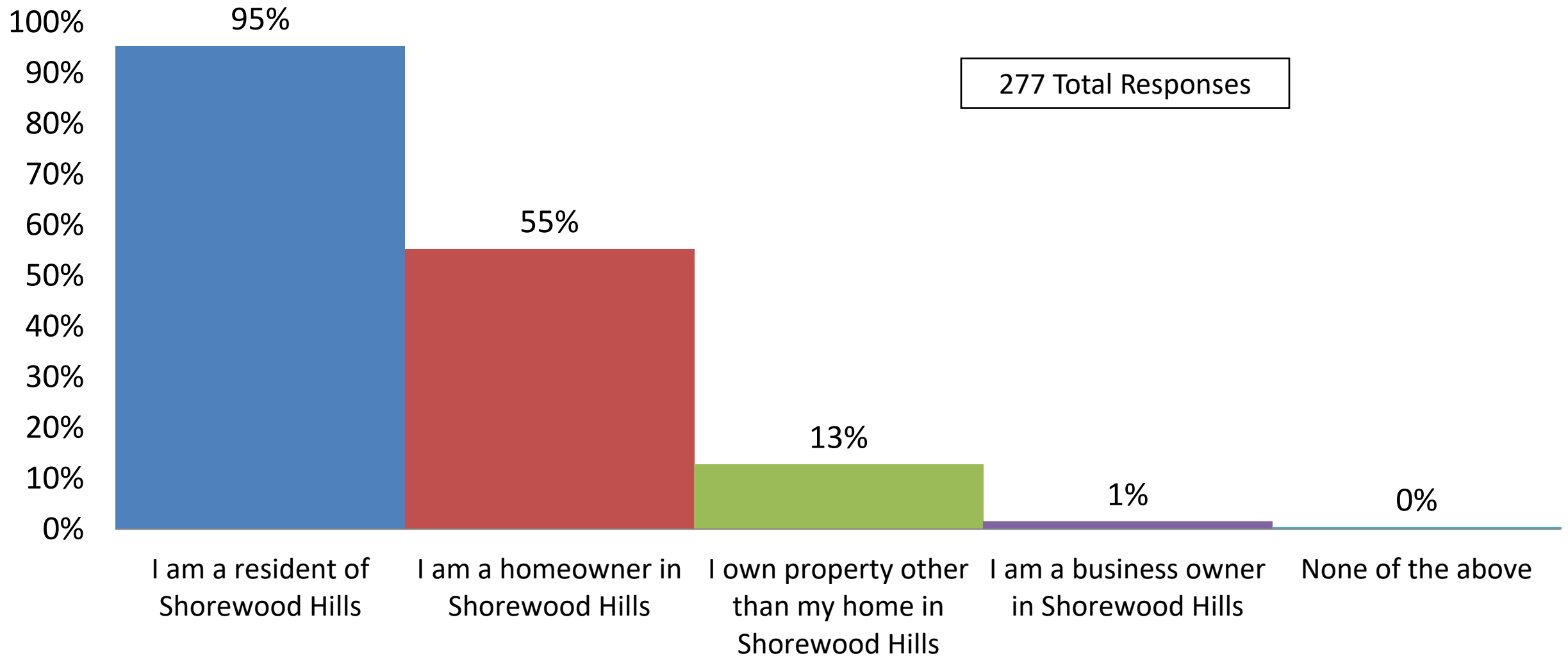
Cory's Background

- Ten years in local government, with six as a 911 Dispatcher.
- Four years as a VP at a mission-driven tech startup company that focused on community engagement (Polco/National Research Center).
- Leadership roles in the Alliance for Innovation and the Wisconsin City/County Management Association.
- Presents at conferences nationally on strategic planning, innovation, use of data, and engaging historically marginalized populations.

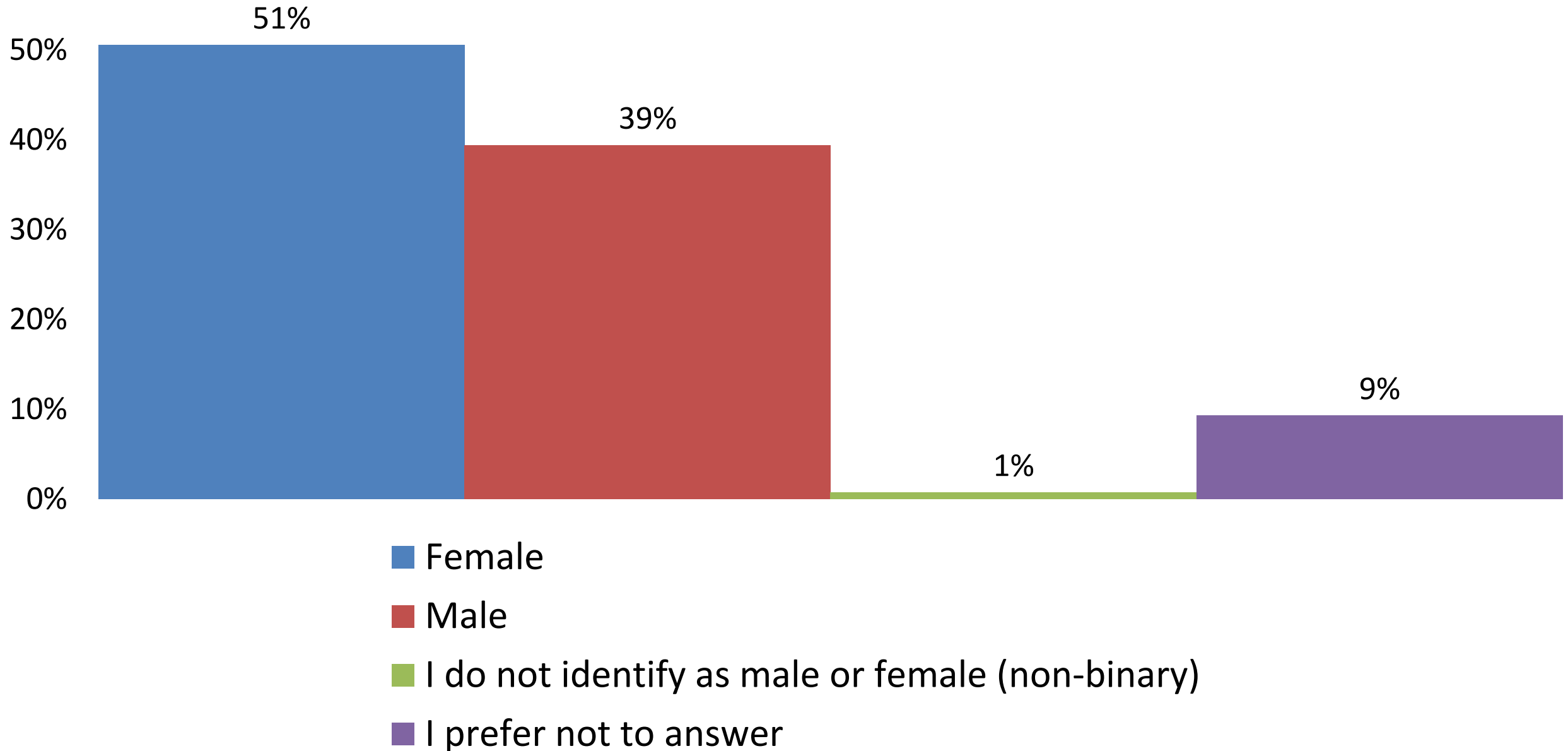


Strategic Plan Community Survey Results

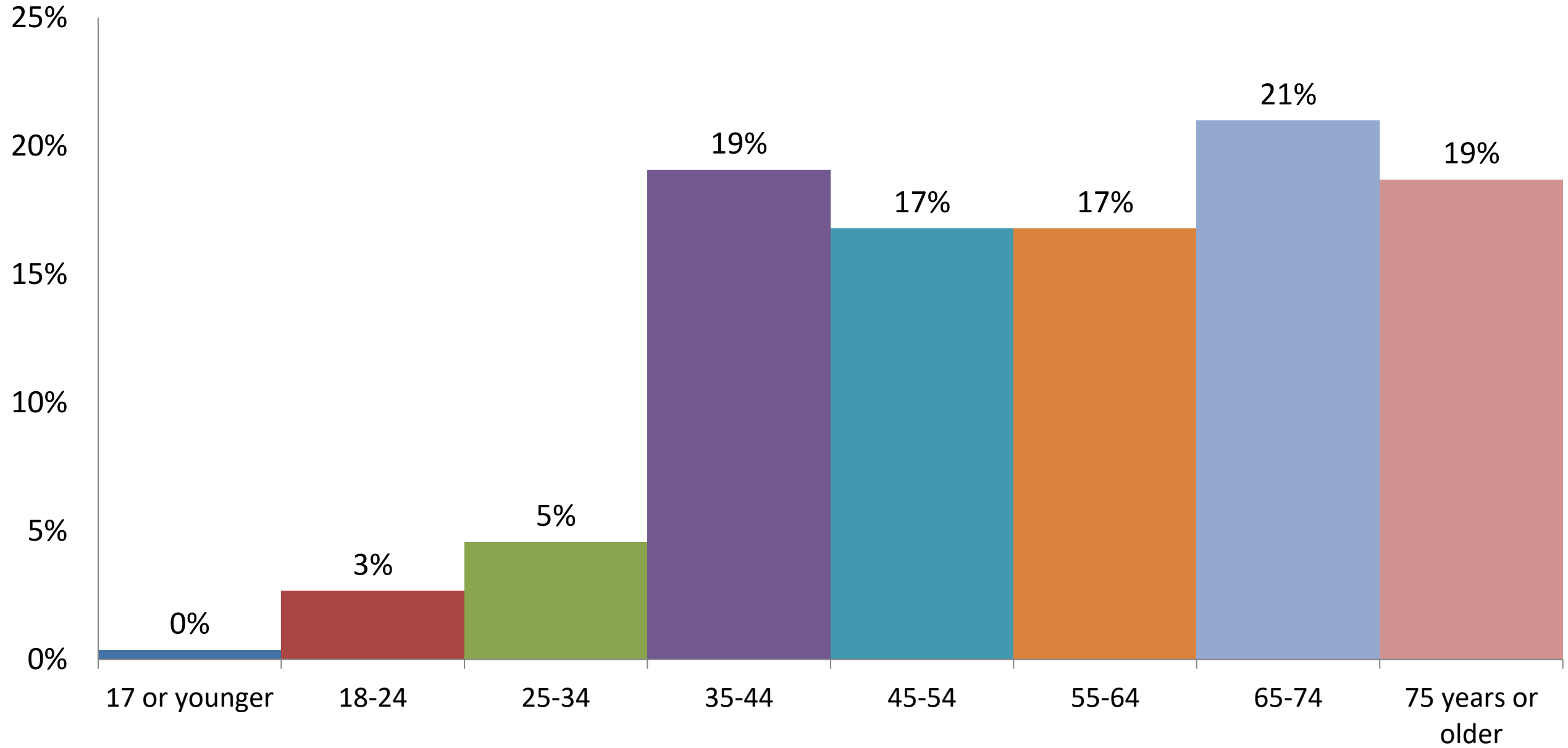
Strategic Plan Survey Respondents



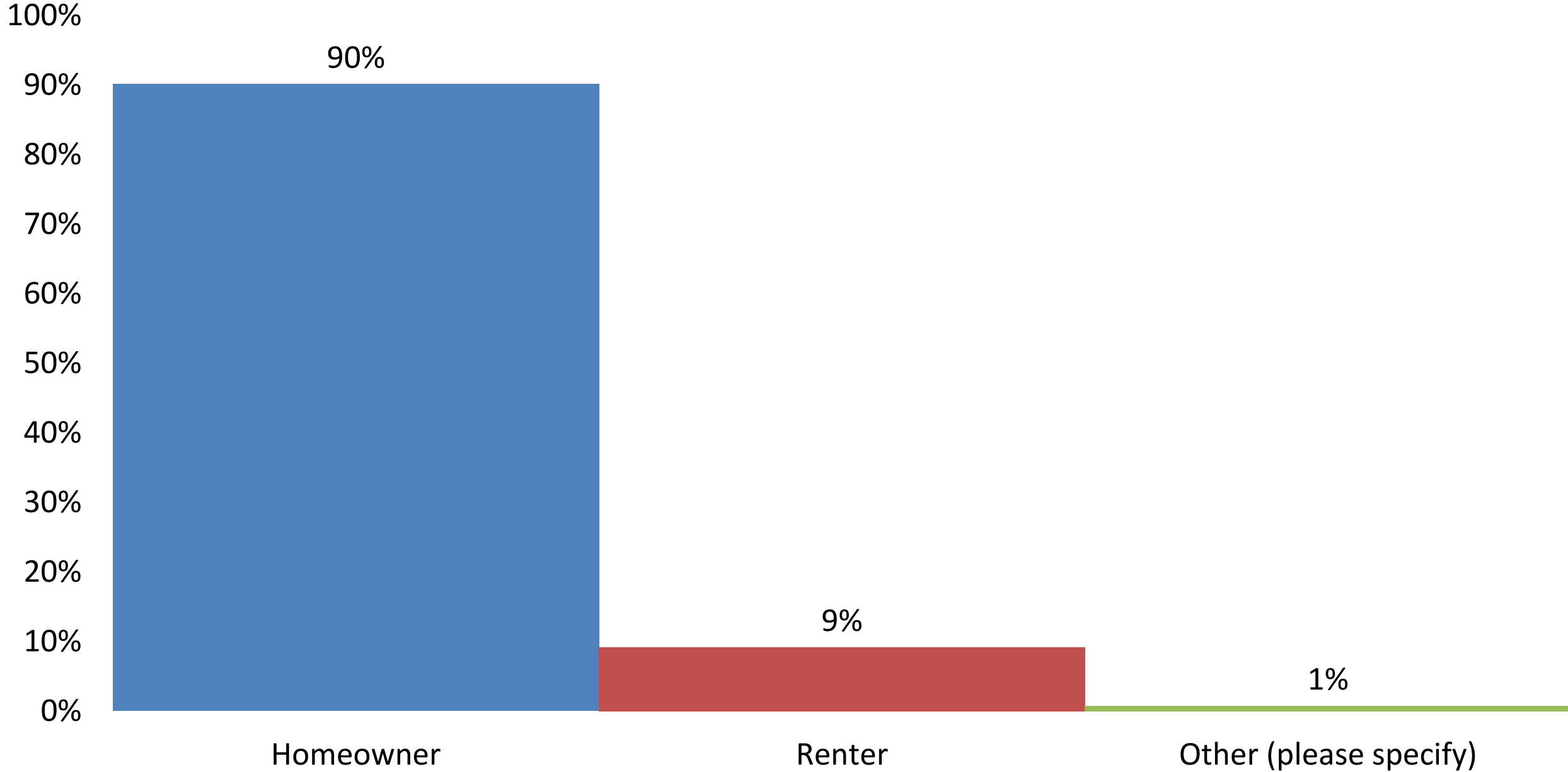
What is your gender?



What is your age?

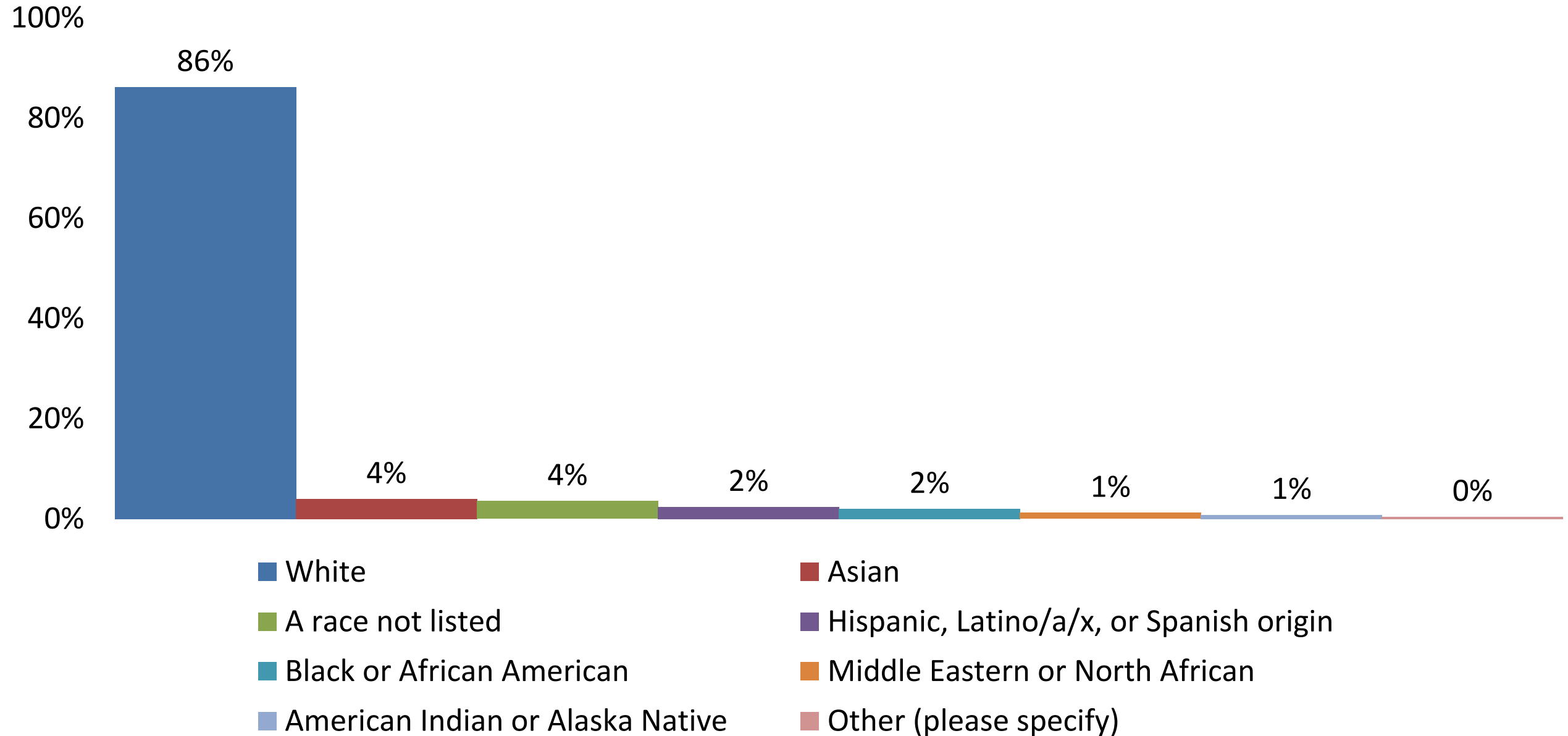


What is your living situation?

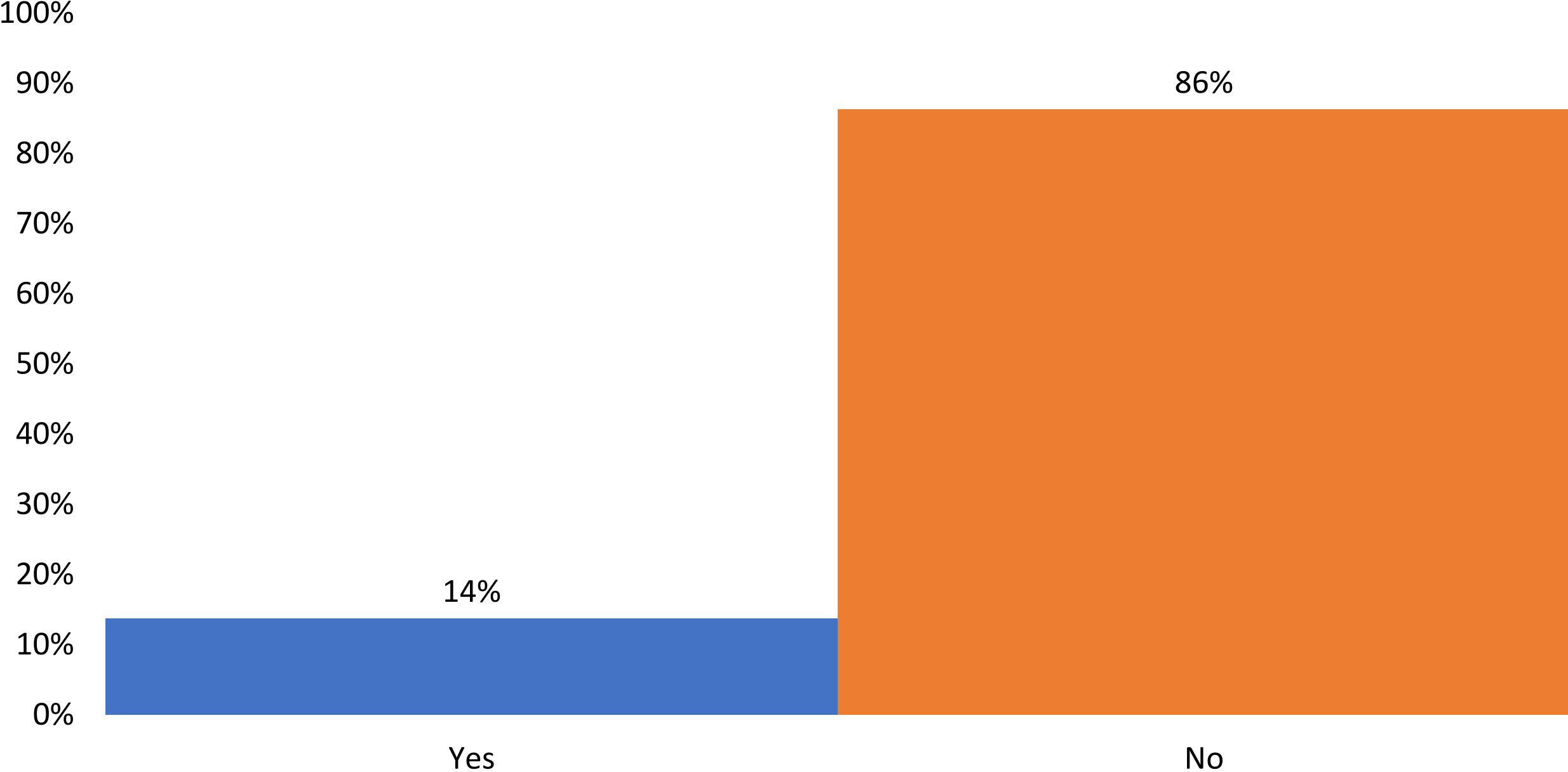


What is your race/ethnicity?

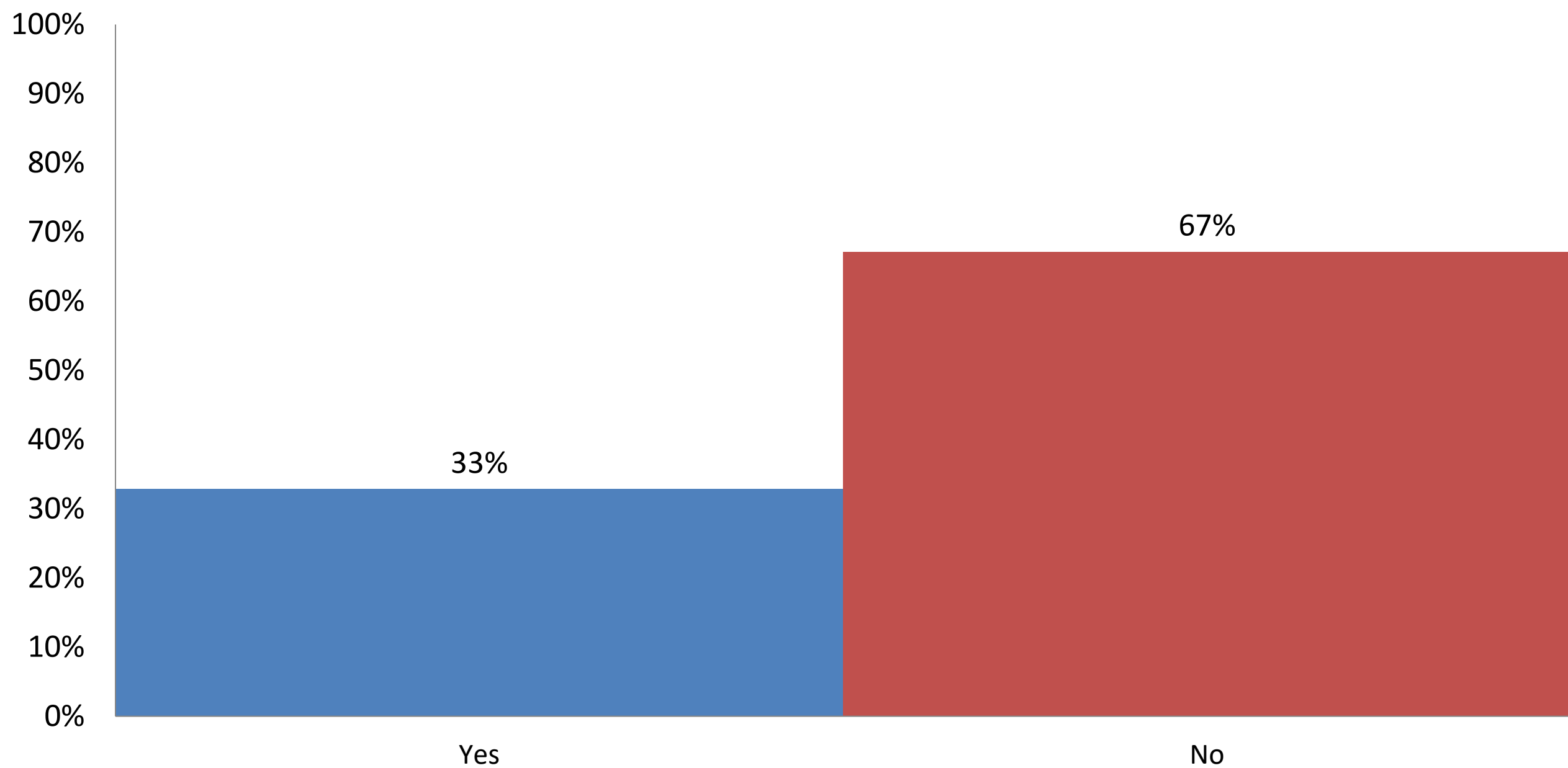
(Mark one or more races to indicate what race you consider yourself to be.)



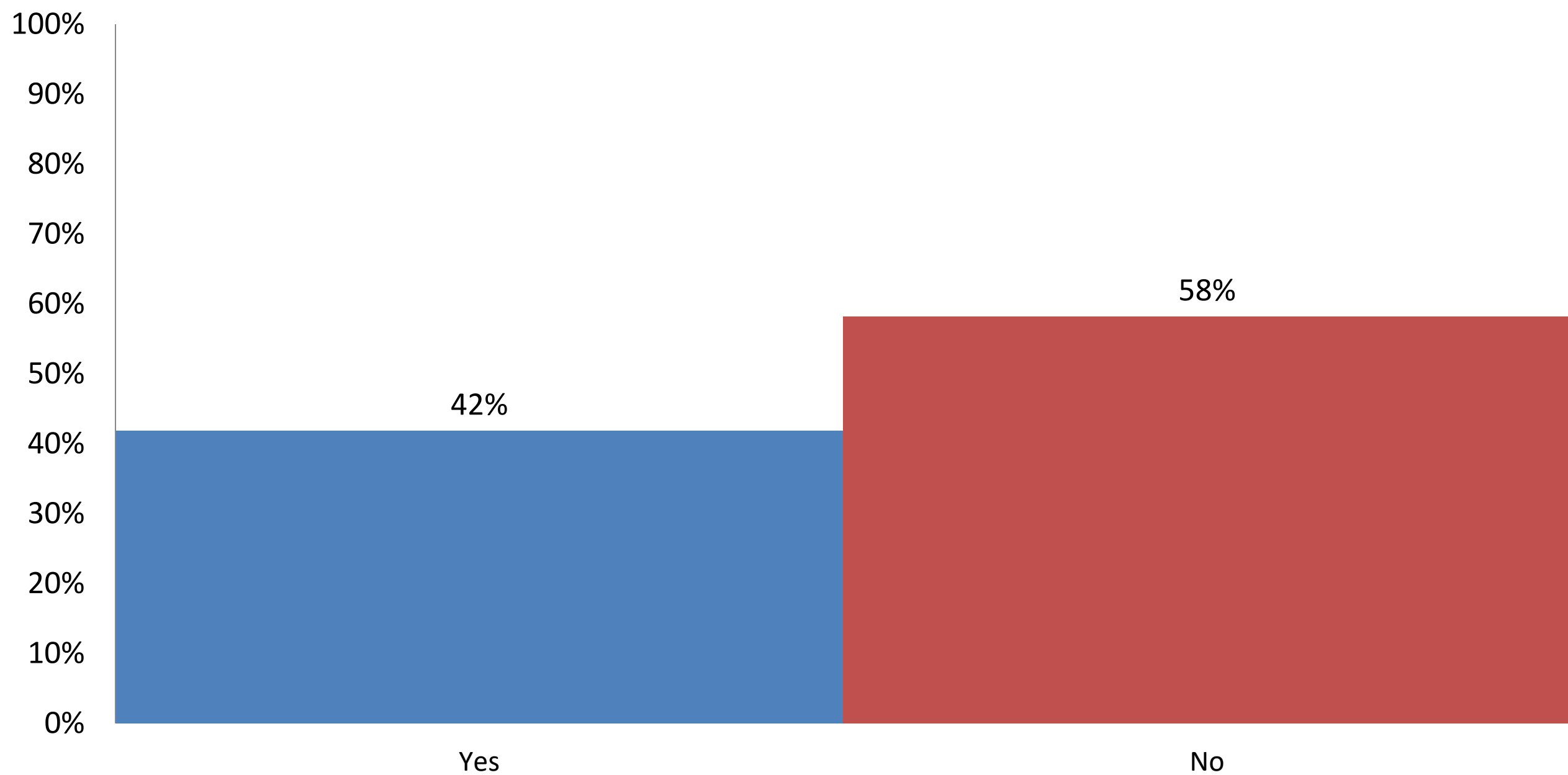
Does a member of your household have a disability?



Do you have children 17 or under in your household?

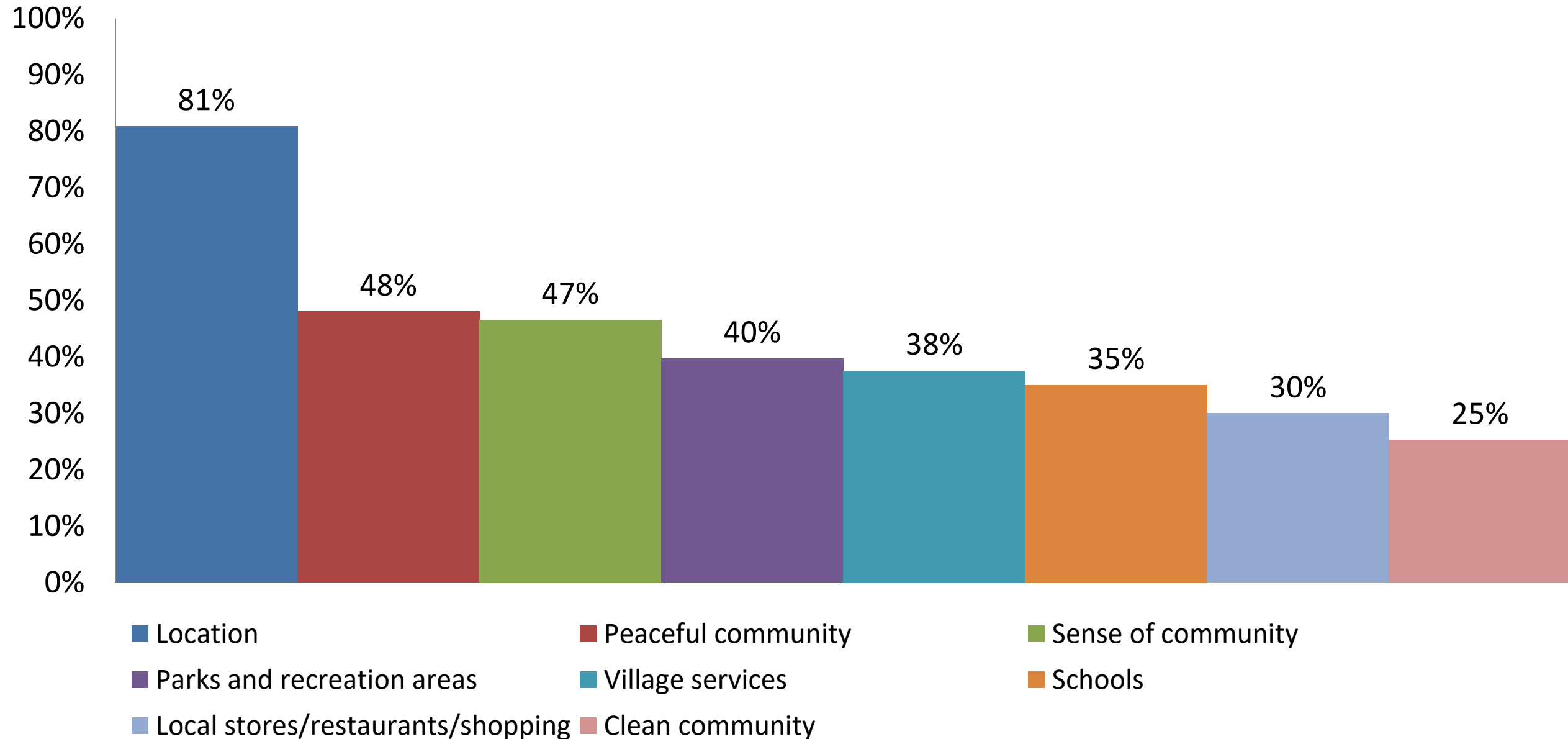


Are you or any other members of your household aged 65 or older?



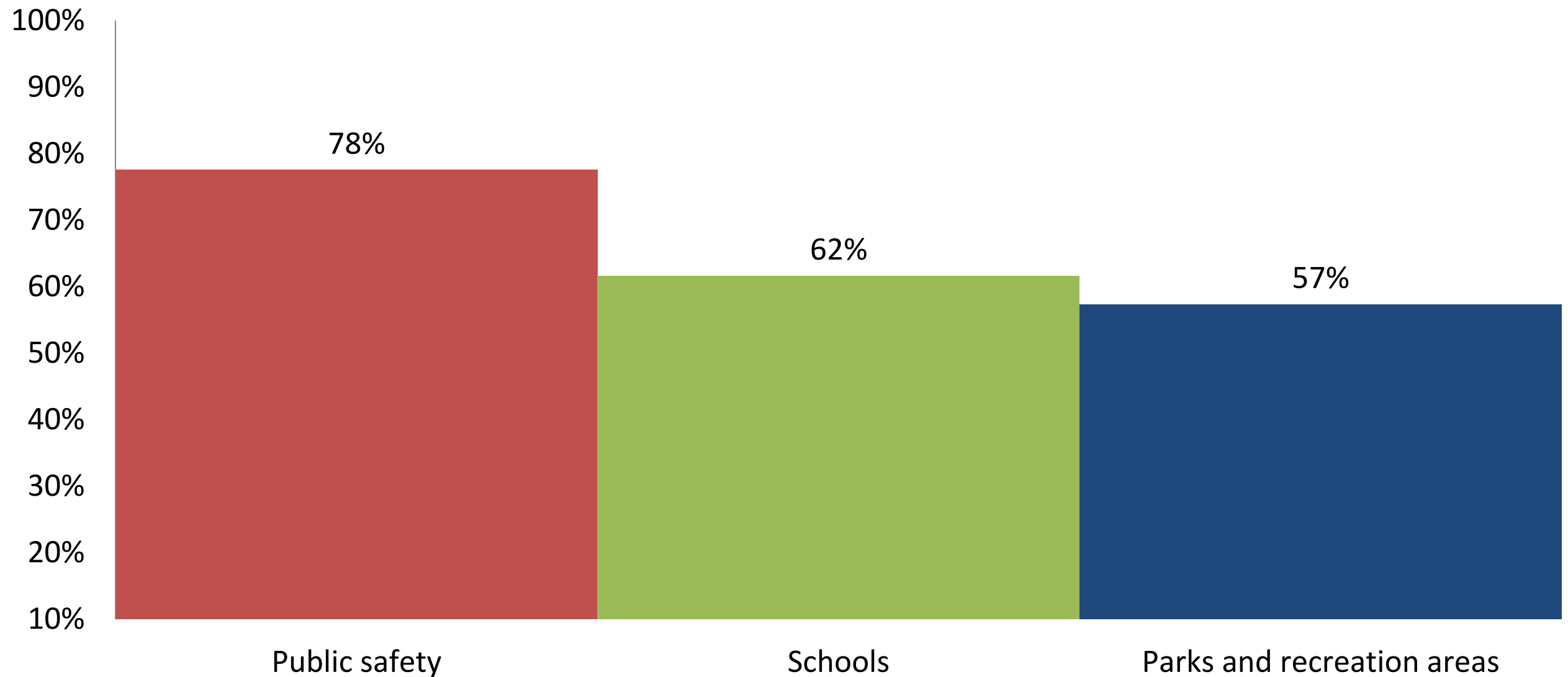
What do you like best about living in Shorewood Hills?

(Participants could choose up to three options.)



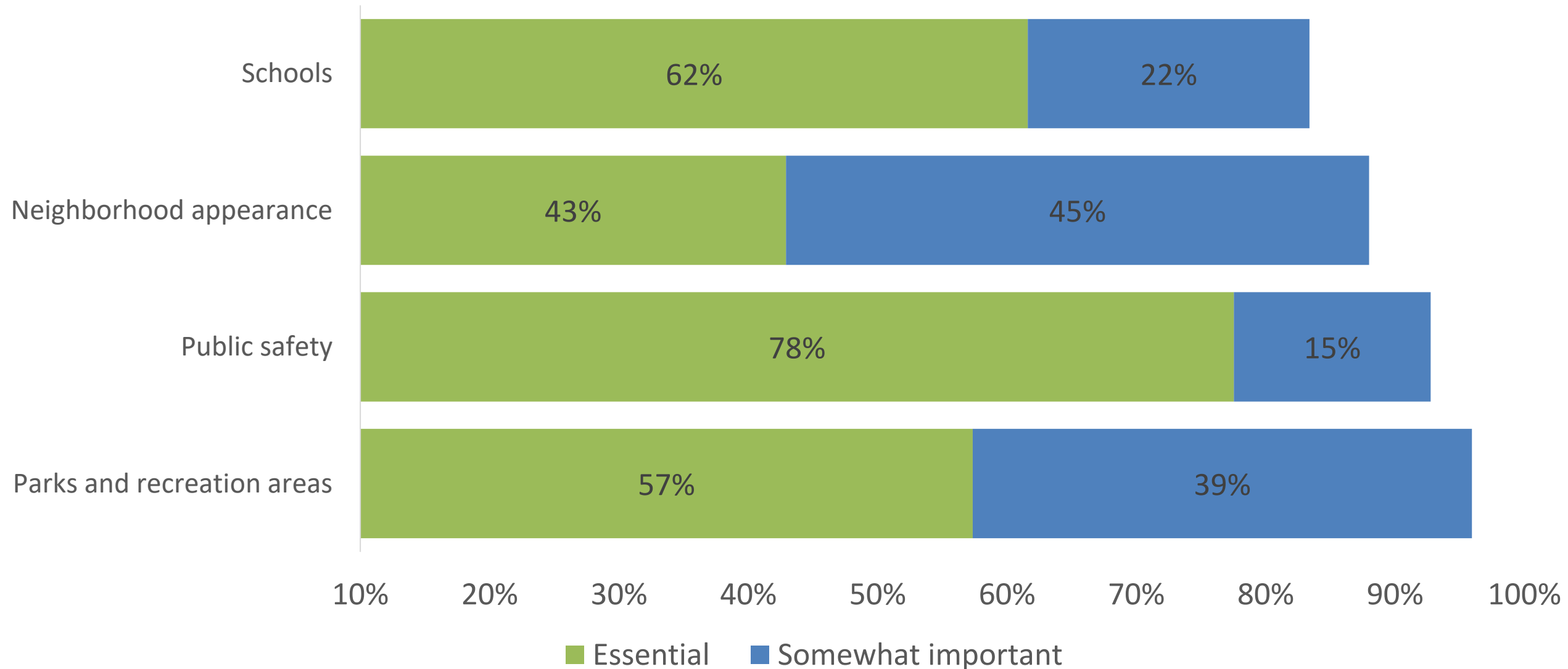
Please rate how important the following are to your quality of life in Shorewood Hills.

Essential \geq 55%



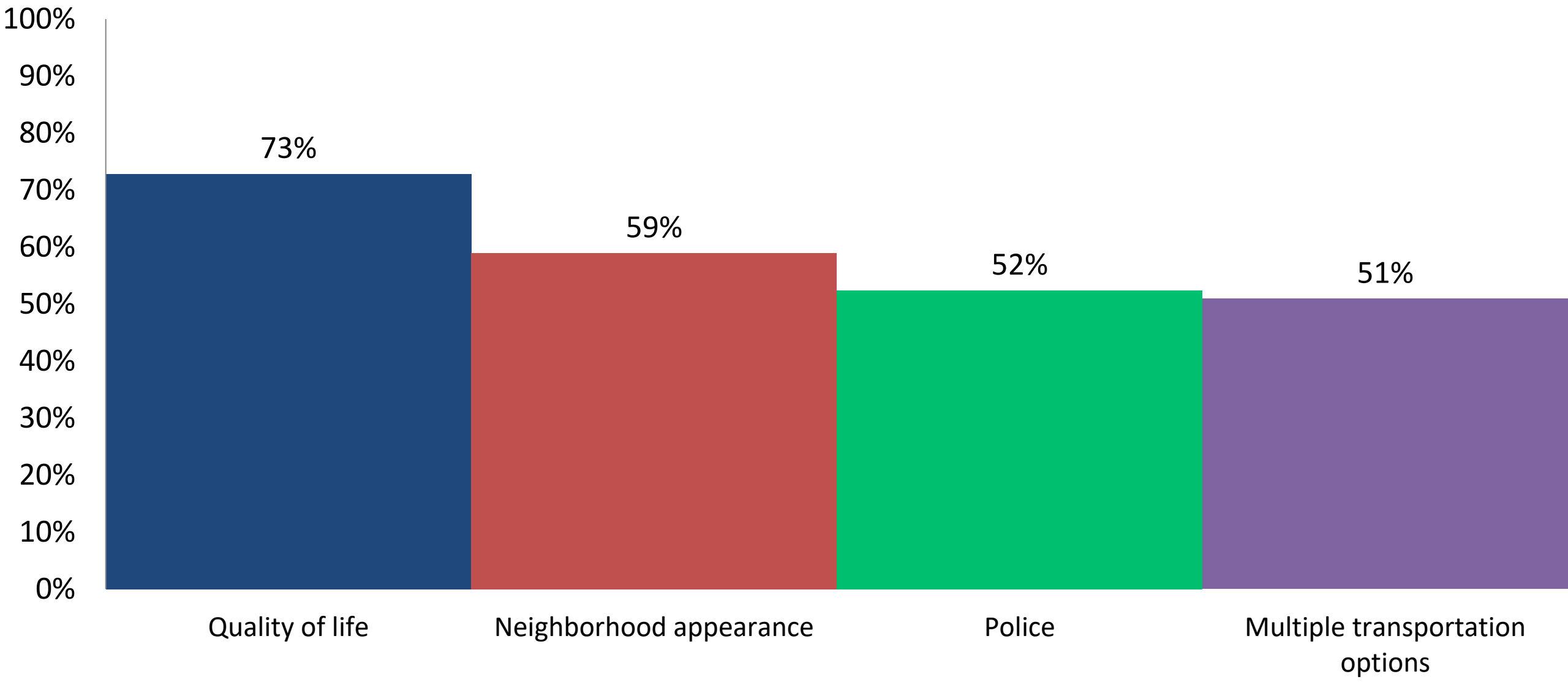
Please rate how important the following are to your quality of life in Shorewood Hills.

Essential or Somewhat Important > 80%



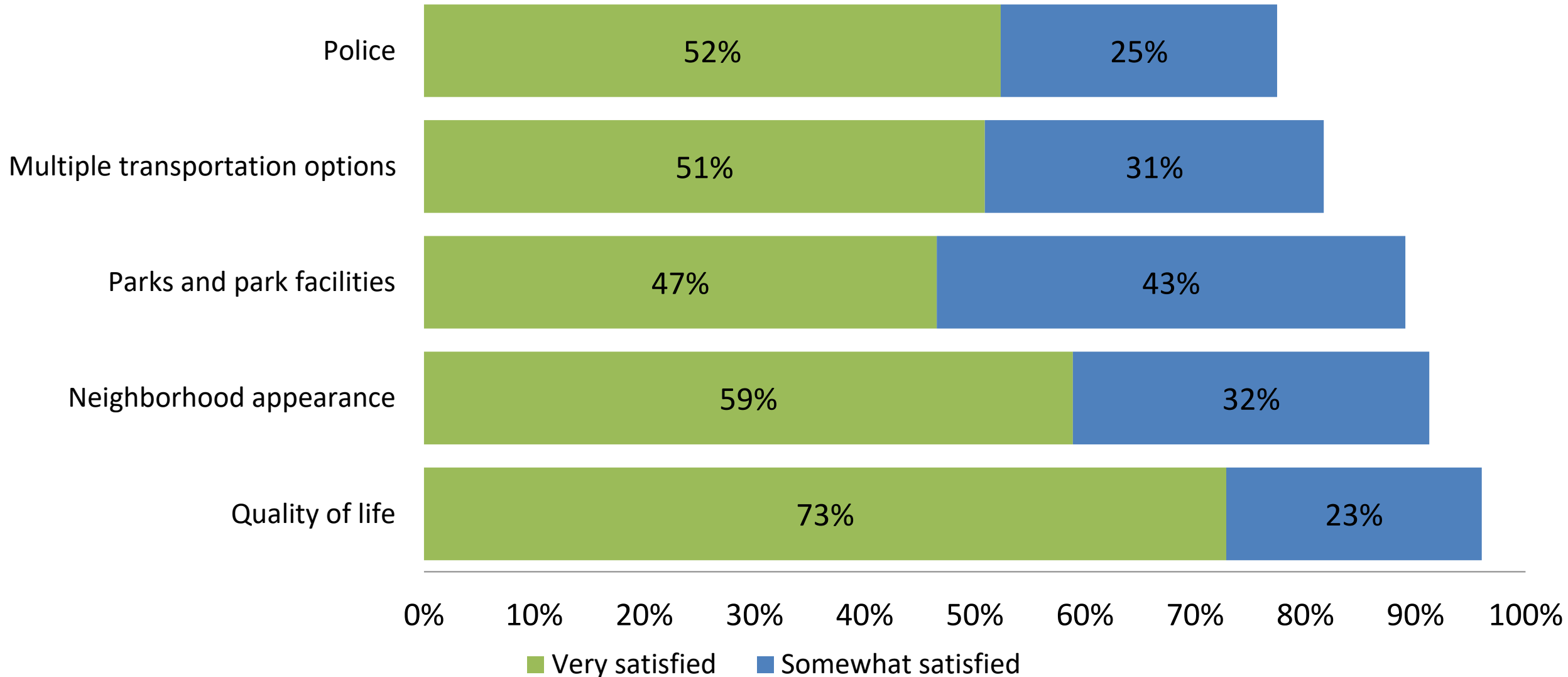
Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.

Very Satisfied > 50%



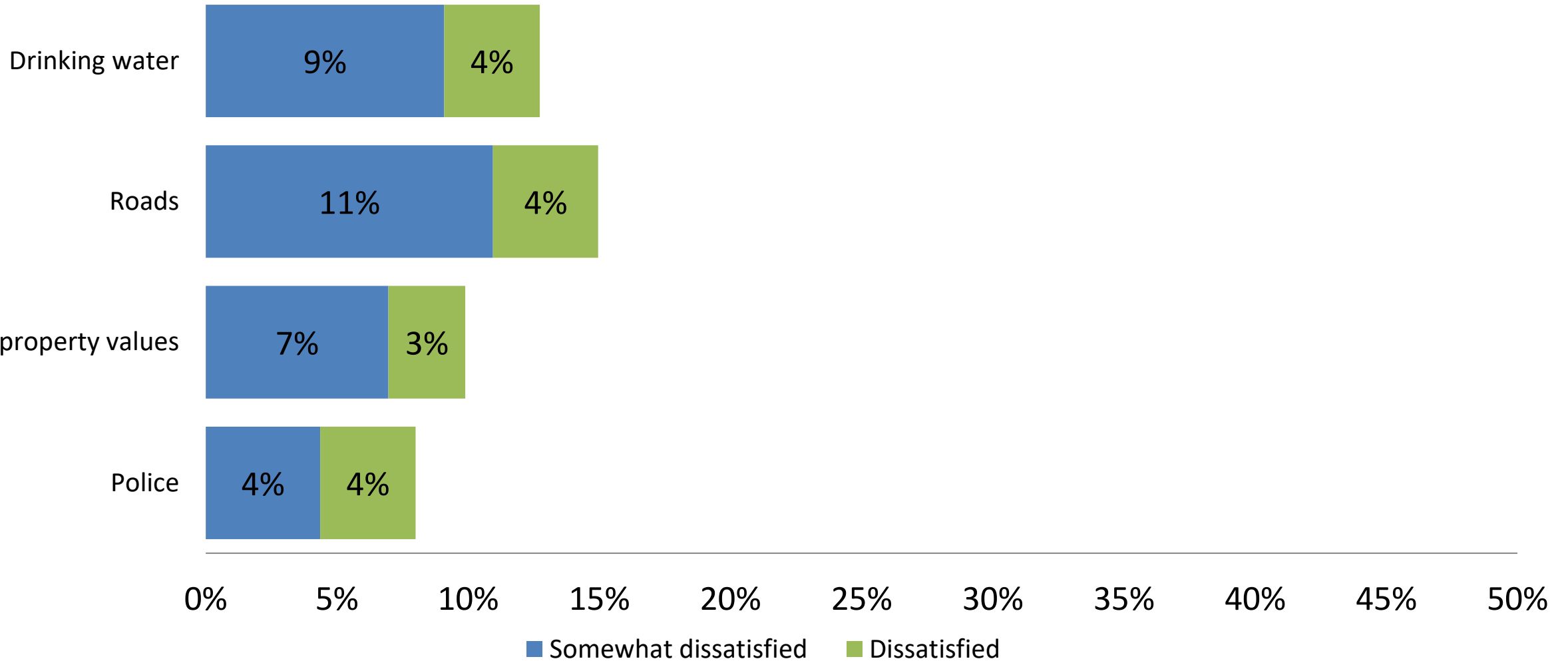
Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.

Very Satisfied & Somewhat Satisfied > 75%



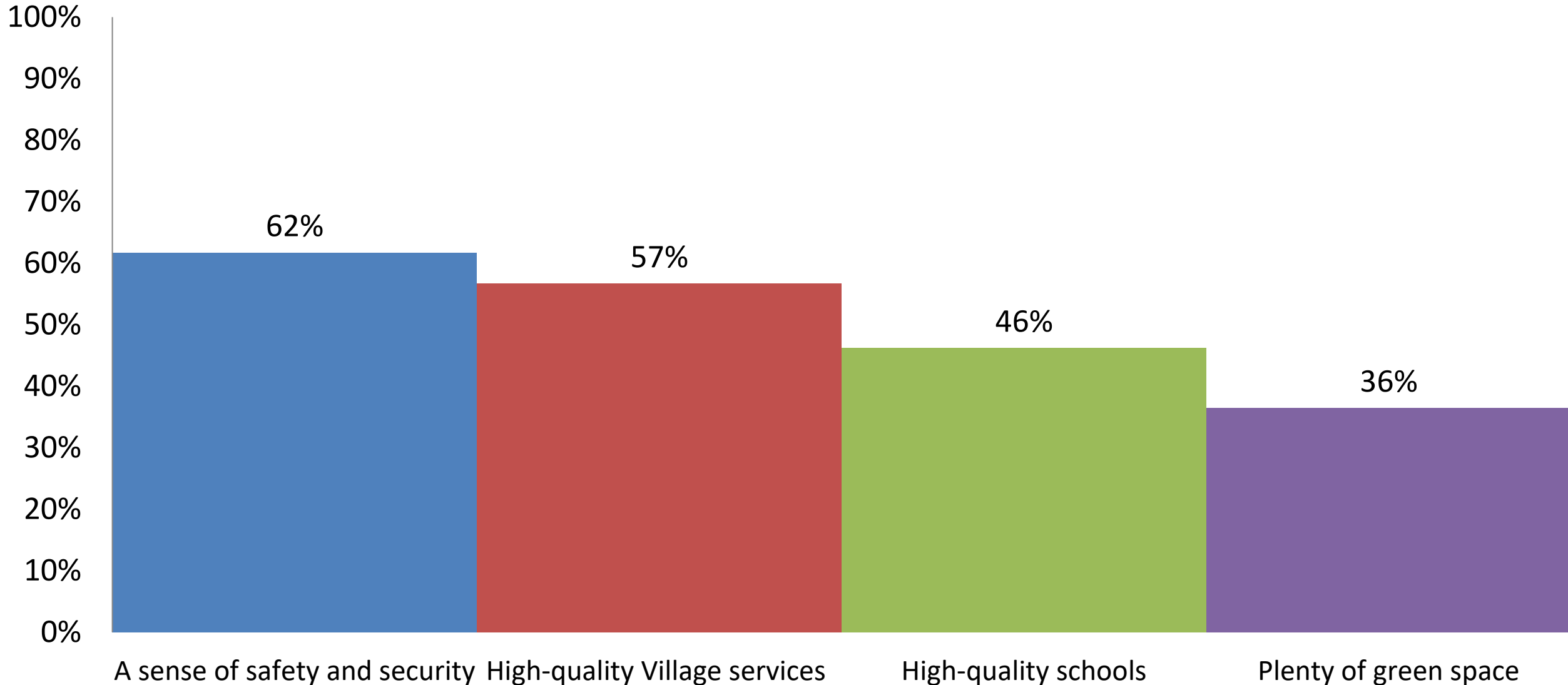
Please rate how satisfied you are with the quality of the following services/features in Shorewood Hills.

Somewhat Dissatisfied & Dissatisfied \geq 8%



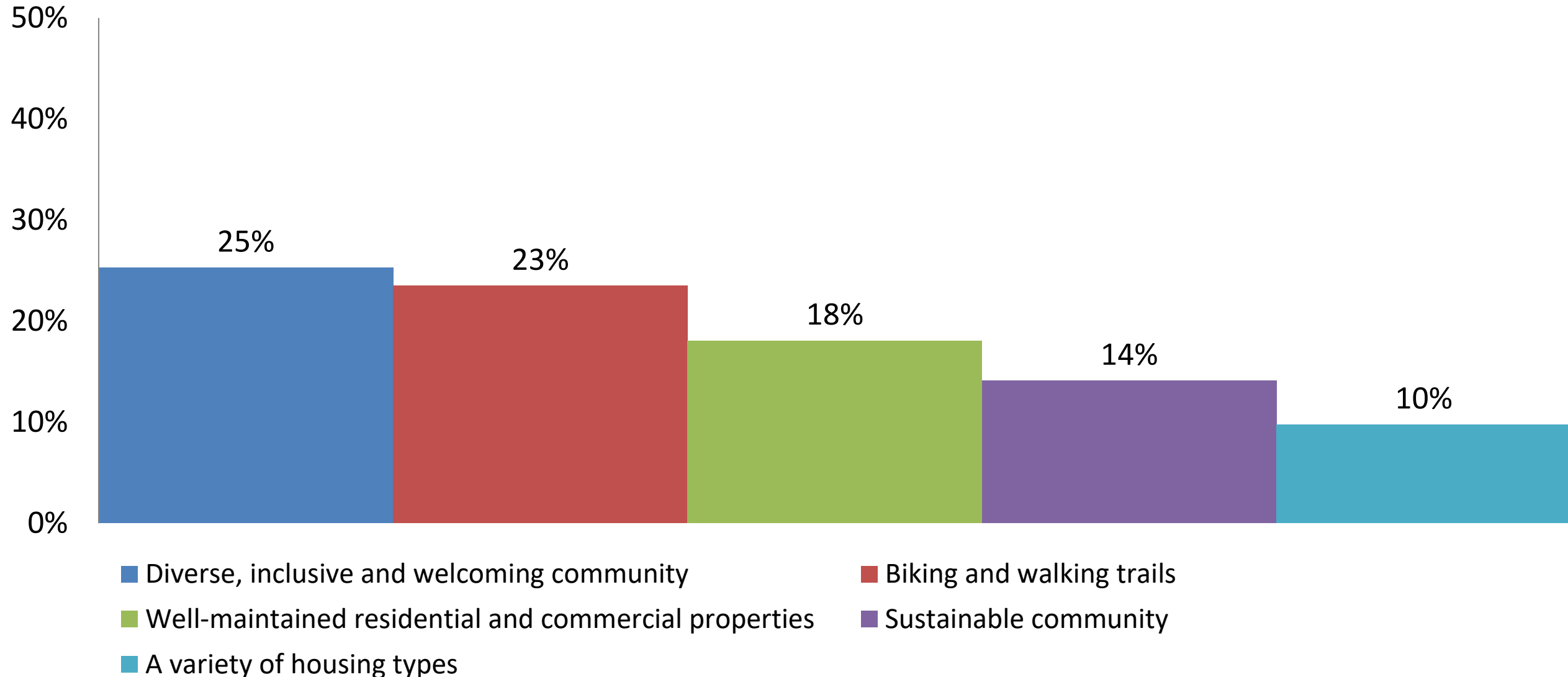
Thinking about the future of Shorewood Hills, what are the three most important things for a strong and healthy community?

> 35%



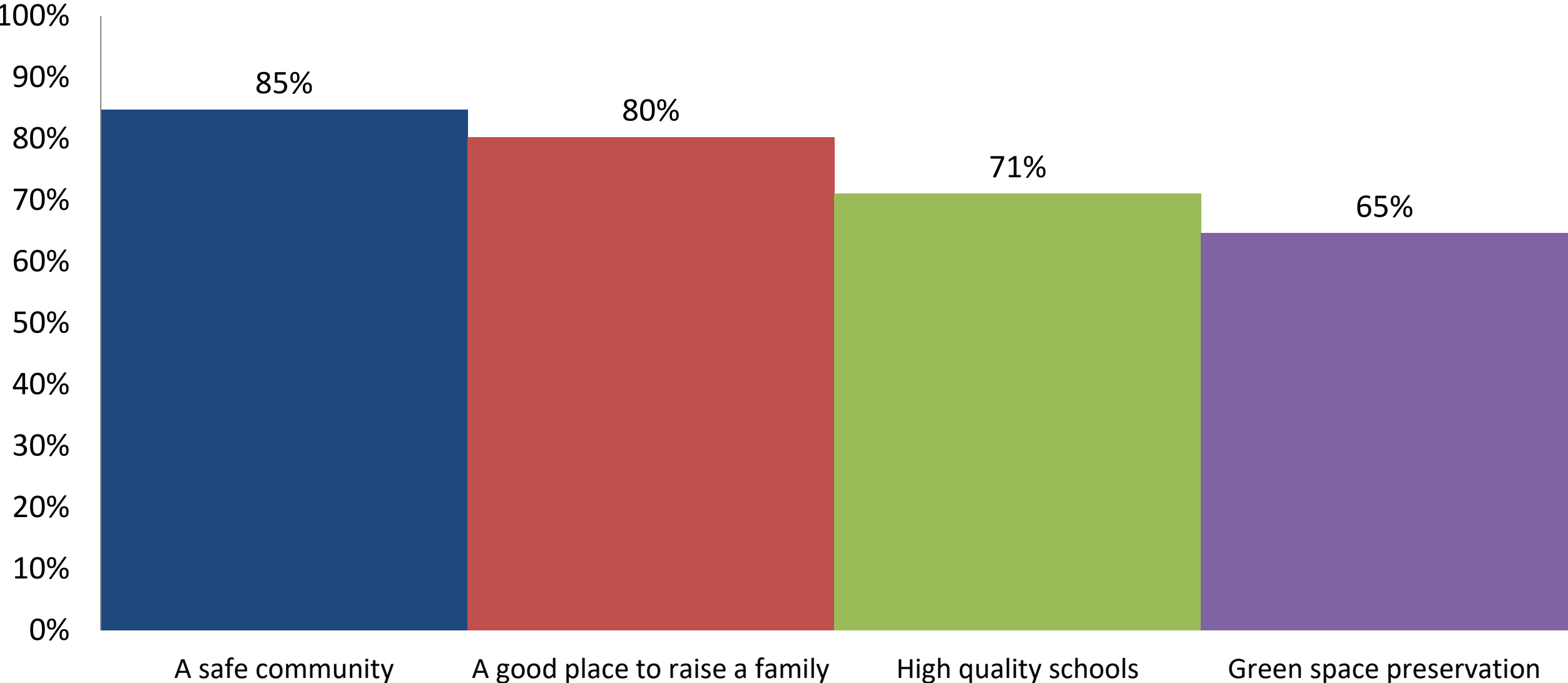
Thinking about the future of Shorewood Hills, what are the three most important things for a strong and healthy community?

10 - 34%



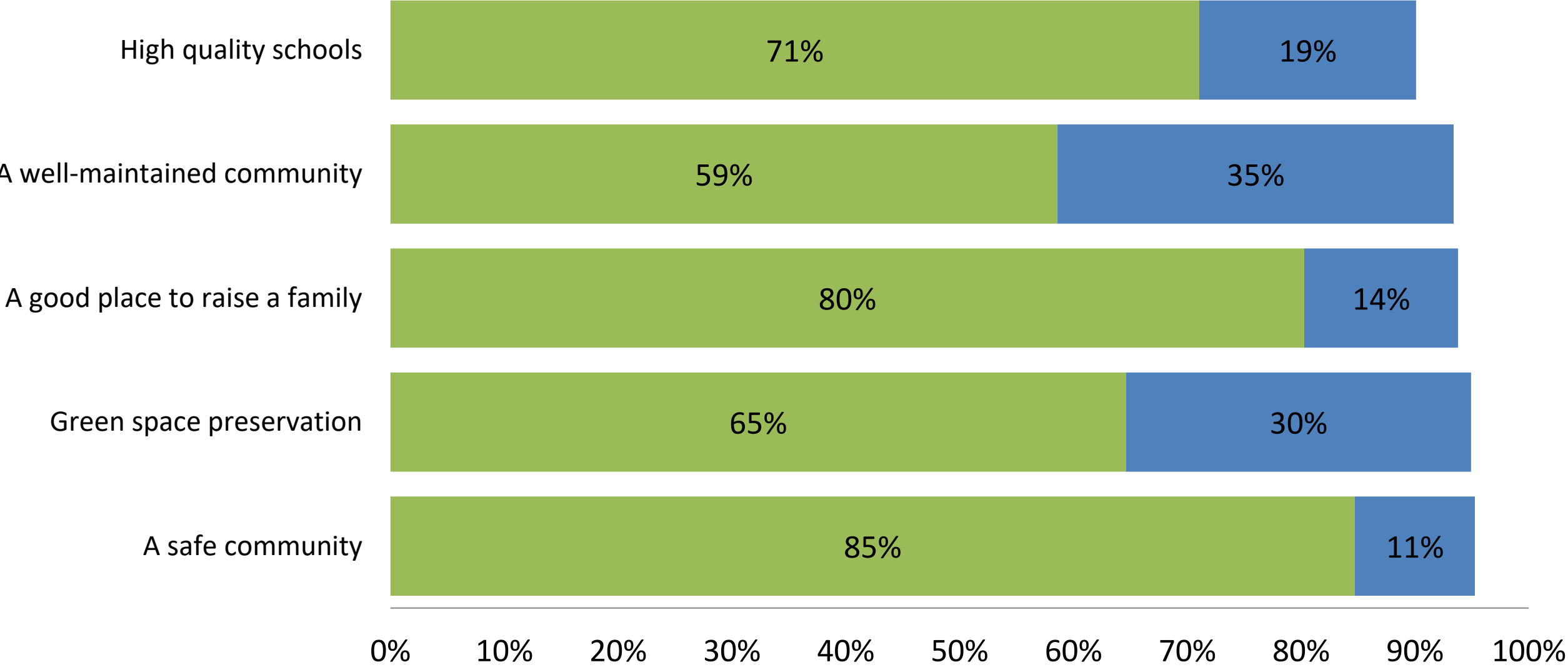
How important are the following to the future of Shorewood Hills?

Essential > 60%



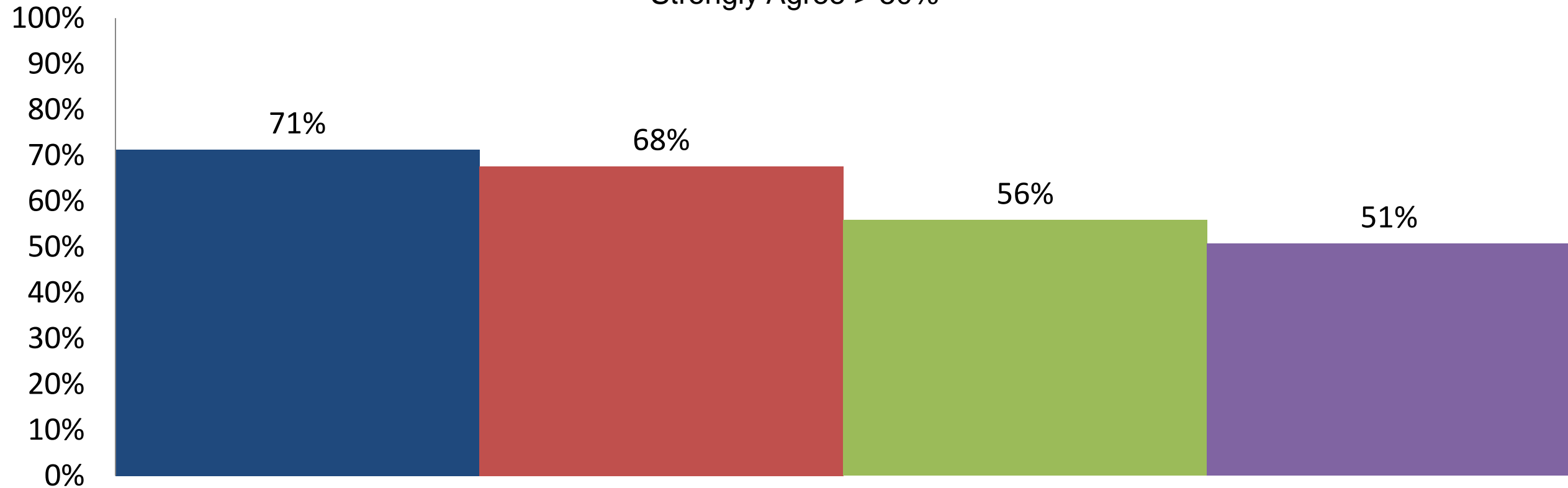
How important are the following to the future of Shorewood Hills?

Essential + Somewhat Important > 90%



Please indicate the extent to which you agree or disagree with the following statements.

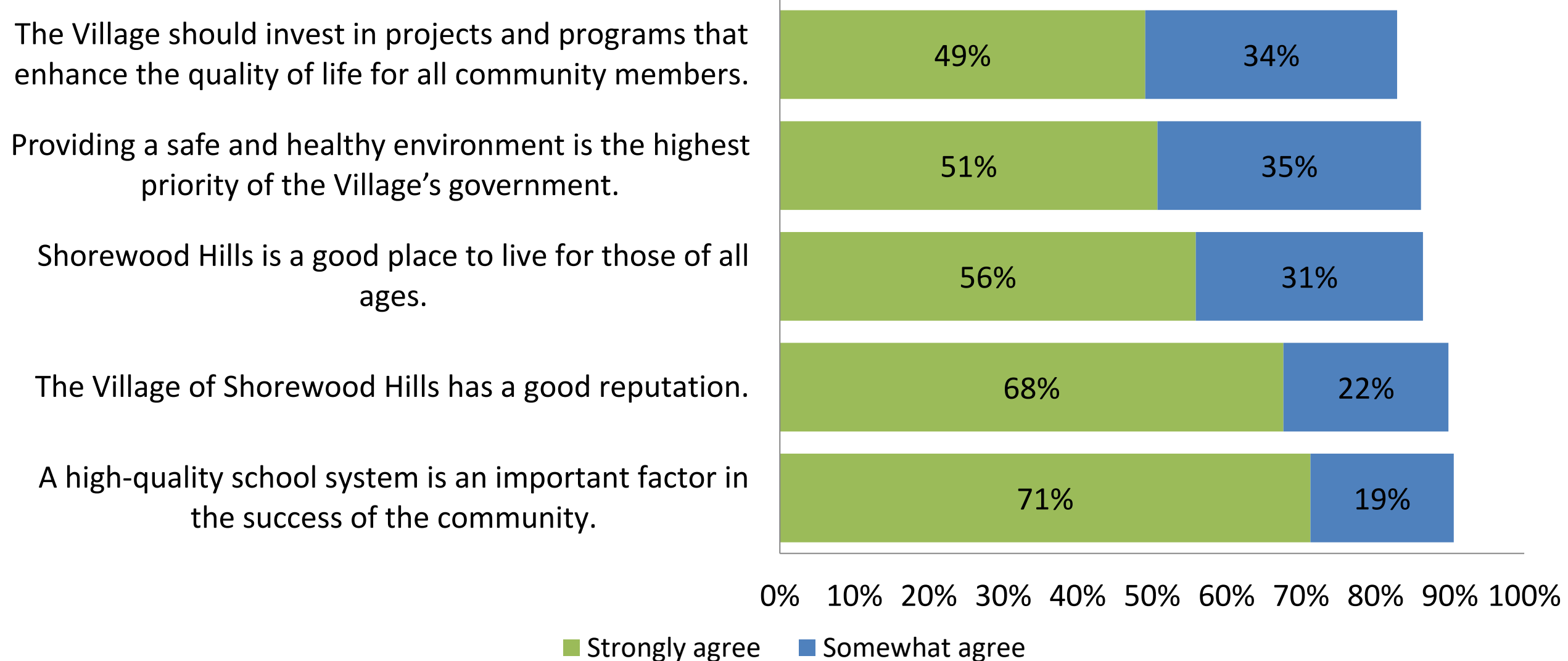
Strongly Agree > 50%



- A high-quality school system is an important factor in the success of the community.
- The Village of Shorewood Hills has a good reputation.
- Shorewood Hills is a good place to live for those of all ages.
- Providing a safe and healthy environment is the highest priority of the Village's government.

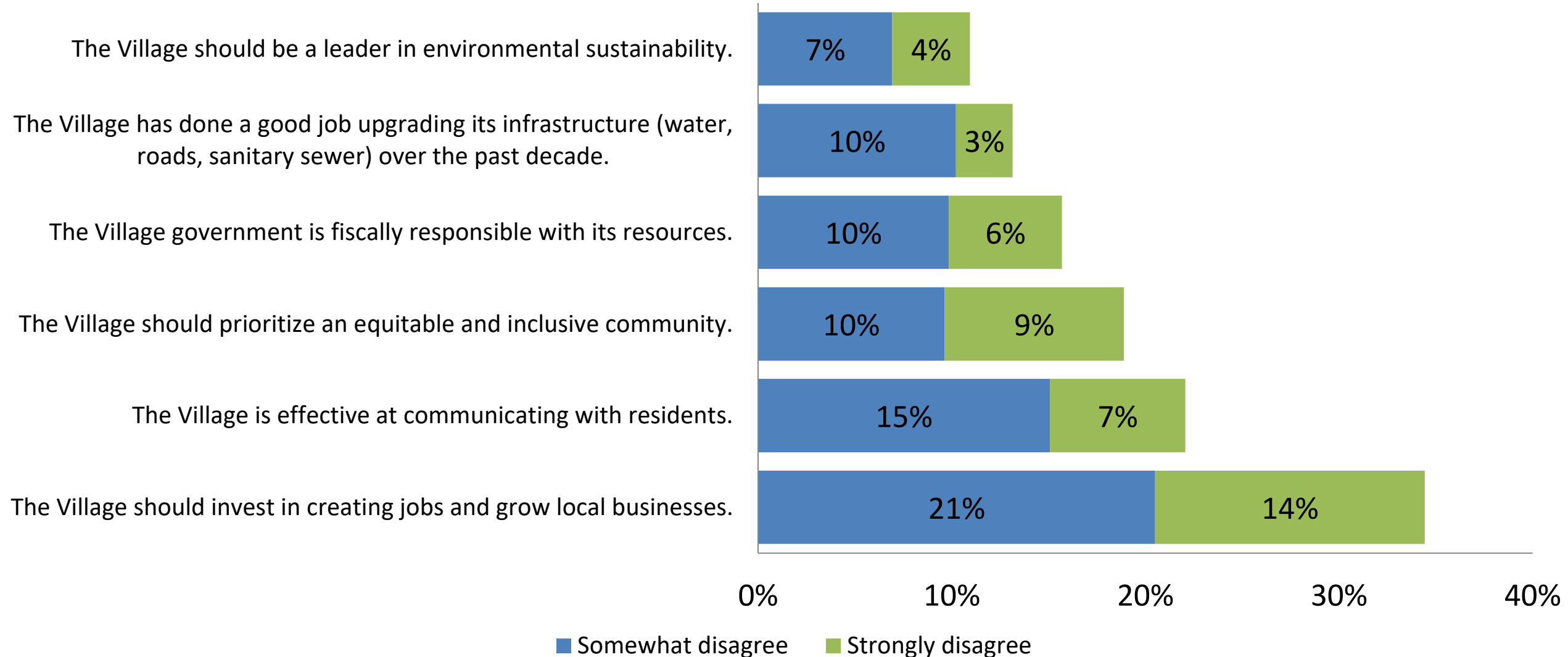
Please indicate the extent to which you agree or disagree with the following statements.

Strongly Agree & Somewhat Agree > 80%



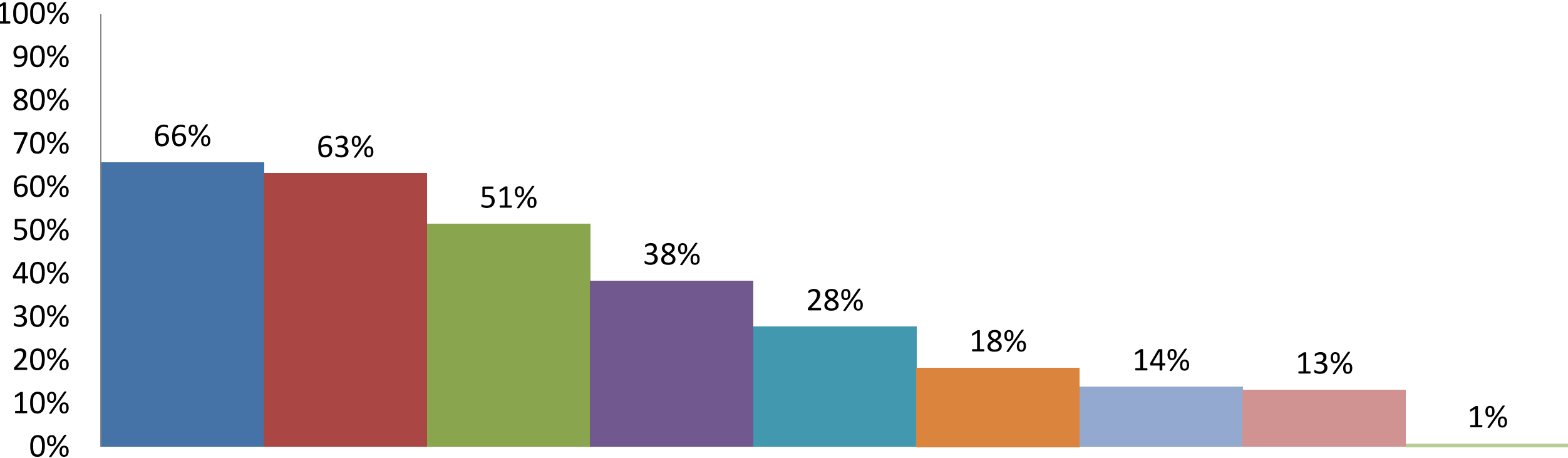
Please indicate the extent to which you agree or disagree with the following statements.

Somewhat Disagree & Disagree > 10%



How do you prefer to get your information from the Village of Shorewood Hills?

Select all that apply.



Electronic newsletter

Mailings (postcards, letters, etc.)

In-person events

Traditional print media

Cable TV station

Village website

Text messages

Traditional electronic media

Social media (Facebook, Twitter, YouTube, etc.)



Questions?



Focus Group Results

Focus Group Overview

- As part of Shorewood Hill's strategic planning process, Focus Groups were conducted on October 9th and 10th, 2024. Summaries of the major themes discussed by the Focus Groups are contained on the following pages.
- Participants were primarily recruited by Shorewood Hills staff and the Village President and consisted of businesses, nonprofits, residents, and employees of Shorewood Hills.
- 29 total participants including 14 staff

Focus Group Process

- A focus group is a small-group discussion guided by a trained facilitator. Clarifying questions are used if needed to better understand thoughts and opinions.
- It is used to gather in-depth information about a community's thoughts and opinions about a designated topic.
- In the case of Shorewood Hill's Focus Groups, the subject was strengths and challenges for Shorewood Hills.
- The meetings ran for approximately 90 minutes.

Some General Information on Data

- The data is best understood when grouped into larger themes. However, some topics can go under multiple thematic categories. Closely related topics may be combined into one or one topic may be separated into subtopics based on the amount of time spent on the topic.
- An idea of scale is indicated by words such as some, most, one group, etc.
- Much of the data is general and as a result is aggregated. However, in some instances it is important to note the specific group that shared the feedback.
- All participants were told the information would be anonymous unless permission was obtained to share data that could be identifying.

Focus Group Questions/ Areas of Exploration

1. When you think of what you like best about Shorewood Hills, what comes to mind?
2. When you think about Shorewood Hills as compared to other area communities, what comes to mind about the challenges of this community?
3. What are the advantages of living in Shorewood Hills as compared to other places?
4. If you could change things about Shorewood Hills what would you change?
5. When you think about all of the services the Village provides, what are the most important to you?
6. Of the important roles that the Village plays in helping to create a good quality of life, what are the most important to maintaining or creating a high-quality future?
7. If you could choose three things for the Village to focus efforts and resources on over the next five years, what would they be?

A Connected and Vibrant Community

- Residents make lifelong friendships
- Great place to live and especially to raise kids
- Walkable, with great schools and attractive houses
- Great dining options and events such as the 4th of July celebration make the community a desirable place to live
- Amenities such as the pool, tennis courts, docks for boats, etc., are an important part of the Shorewood Hills experience

Responsive and Invested staff

- Staff are responsive to residents and attempt to solve the problem
- Services are high level, brush pick up “never stops”
- Employees note that expectations are high, but they can earn the respect and trust of residents
- Staff capacity is a concern because there are so few people to execute the plans (desire for comprehensive outbound communications, but inadequate financial resources for a position)
- Staff appreciate that the Village is “pro-employee” and there is flexibility in work hours when possible

Employee Recruitment and Retention

- Recruitment and retention a concern among all focus groups
- External focus groups noted the time and money spent on recruitment and training
- Employees noted a loss of historical knowledge and it takes a while to get a new employee up to speed
- Roles and responsibilities can be unclear because of turnover
- Wage parity is a significant issue, comparables should be adjusted

Employee Recruitment and Retention

- Staff is forced to commute, wages and benefits must be attractive
- High service level is tied to knowledgeable, fully trained employees
- Focus group participants were knowledgeable about municipal levy limits, understand that the money must come from somewhere. Financial transparency is important.
- Pace of HR in current structure is seen as a challenge for recruitment
- Police has been streamlined as has part-time pool staff and it's made a difference

Shorewood Hills Police Department

- Focus group participants generally believe Police should be maintained in the community
- Police are seen as invested in community and provide exceptional services
- Minor issues such as suspicious behavior handled promptly
- Increase in response time and a decline in services were most cited concerns if the police department were to be combined with another department
- Cost was discussed in one focus group as a concern, along with ongoing recruitment and retention challenges if wages are not high
- Employee focus group noted Madison issues come to Shorewood Hills

Housing

- High financial bar to entry into the community
- The Lodge apartments adds diversity of ages and backgrounds to the community along with a more affordable price point for housing
- Change in housing stock- houses sell quickly, more tear downs
- Aging in place is a community challenge
- Could TIF districts be used to incentivize condos and expand tax base?

Growth

- Know in advance: What will be accomplished with growth and how will needs of incoming residents be met?
- Commercial land owners may have a disproportional burden
- No engineering or planning department makes it difficult to work out issues before zoning commission (but Brian is great!)
- Discussions can get bogged down
- Overall good of the community should be priority over individual
- “It’s a built environment so inches matter”

Transportation/Mobility

- Traffic is a challenge
- Difficult for wheelchairs or walkers to navigate Shorewood Hills
- If roads are to be used for cars, bikes and pedestrians the roads need to be set up to do so
- Sidewalks should be wider to accommodate a greater variety of uses
- Village speed limit of 15 mph?

Change

- Consistent theme
- A perception that a minority of residents can make it difficult to enact needed change
- Some change is not only inevitable but needed
- People are generally happy in Shorewood Hills, change should be proportional and not expansive
- Strategic planning process can provide direction for change
- Facilities need to be changed to accommodate current needs

Commissions and Committees- External

- Tensions with current structure
- Seems to be participatory form of government, where a small number of voices have disproportionate influence and impact
- Processes should be updated to be more consistent with other local governments
- Opportunity to streamline meetings and processes

Commissions and Committees- Staff

- Staff struggle with the number of commissions and committees
- Unclear to staff what are priority items and what are secondary
- Committee/Commission members direct staff, and they can receive inconsistent direction
- Workload generated after each meeting is a strain
- Each meeting requires set up, someone present at meeting, and then follow up (minutes, research, etc)
- Lengthy evening meetings cause staff to work long hours, miss dinners with family and no opportunity to recharge
- Who implements policy? Staff not involved in discussions about execution.

Employee Focus Groups

- Employees appreciated variety of jobs because of small organizational size
- Staff get to know residents and develop relationships
- HR is an area of specific concern
 - Is there a current HR manual? Unclear
 - What is the difference between DP1 and DP2?
 - Time spent researching to understand past policy because no current policy

Employee Check in

Question	Yes	Maybe	No
I would recommend working at Shorewood Hills to friends	7	7	0
I would apply to this position again	6	6	2
I am likely to stay with Shorewood Hills for another year	7	5	2

Three Priorities for Shorewood Hills?

At the conclusion of the Focus Groups, participants were asked, “If you could choose three things for Shorewood Hills to focus efforts and resources on over the next five years, what would they be?”

This question encourages participants to narrow the number of priorities to just the three that they feel are most important.

An * indicates an item identified by staff.

The top three responses are highlighted in **yellow**.

Three Priorities for Shorewood Hills?

Staff

- Wages/Benefits for staff/pay parity with surrounding communities (3) (9*)
- Maintain staff culture/connection to community
- Employee retention/recruitment (2) (3*)
- Increase tax base to retain employees
- Staff development and making the best use of staff skills*
- Clear roles and responsibilities for staff (2*)

Three Priorities for Shorewood Hills?

Maintain/sustainable infrastructure (marina, roads, parks, pool, tree canopy) (5) (3*)

- Maintain the parks/amenities already here (2)
- Maintain and enhance amenities including Blackhawk
- Pedestrian and bicycle infrastructure (2)
- Swimming pool with community center
- Update west side infrastructure*
- **Update facilities (12*)**
- Maintenance and equipment budgets increase with inflation*

Three Priorities for Shorewood Hills?

Development (2*)

- Housing at a lower price point/diversification of housing stock (3)
- Tax base with more housing development as a growth strategy (4)
- University Avenue- plan for how to develop to increase tax base
- Balance small town feel and growth

Three Priorities for Shorewood Hills?

Operations

- Due diligence on cost vs value on expenses such as regular vendors
- Maintain level of services with consistent staff (2)
- Strategic plan is a guiding/holistic document that is implemented (2)
- Realign roles and responsibilities in the office*
- Standardization/modernization of outbound communications*
- Keep up with technology maintenance*
- Operational efficiency for organization
- Continued transparency

Three Priorities for Shorewood Hills?

Governance

- Formalize the Village decision making infrastructure and how meetings are run (3) (1*)
- Clear understanding of what staff can do/their role
- Making sure that the priorities are set and it is clear who has authority to direct staff*
- Streamlining of governance process between committee and department heads*
- Broader resident input on decisions

Three Priorities for Shorewood Hills?

Other

- Improve Shorewood's reputation
- Community engagement and outreach to create welcoming space
- Keep referendums at a minimum
- Term limits on some commissions to encourage change
- Card readers for payment*
- Amenable to change and growth
- Balance the small town historic with common sense change (2)



Questions?

- **Board Interviews**
- **SWOT Survey**
- **Retreat**

Next Steps

Thank you!

