

Strategic Plan Process Framework

Project Overview

The Village of Maple Bluff is embarking on a process to complete a strategic plan to chart major Village decisions over the next two to five years in a coordinated, efficient, responsive, and effective manner. The process will align long-term community values with operational and fiscal realities, assuring that the resulting plan is both visionary and implementable. The process is anticipated to be completed by Spring 2026. It will include survey, in-person, and on-line opportunities for community participation.

Project Roles

The Village Board will:

- Provide general planning process advice within the outlines of the agreed scope.
- Receive, weigh, and interpret community input.
- Lead development of the Village’s Mission, Vision, Values, and Priorities (definitions below).
- Aid in the development of SMART Goals to achieve Priorities.
- Ultimately adopt the strategic plan and direct its implementation.

The Village Board will be supported by a Strategic Plan Core Team, which will manage the project, move the process and participation efforts forward, assemble and share information with the Board, and lead development of Objectives and Activities. The Core Team is made up of the following individuals, with their roles indicated:

- *Mark Roffers (Village Planner/MDRoffers Consulting)* – project management, timeline adherence, community participation lead, meeting facilitation, plan delivery lead.
- *George Brown (former Village Trustee and strategic planning consultant)* – process guidance, strategic insight and advice, visioning lead, participation support, initial plan review, Team and Board facilitation.
- *Tanner Nystrom (Village Administrator)* – internal alignment oversight, intergovernmental context advice, communications support, Village staff coordination, initial plan review.
- *Sarah Danz (Deputy Village Administrator)* – data aggregation management, meeting logistical coordination, community outreach support, initial plan review.
- *Kevin O’Driscoll (Village President)* – policy coordination, Board liaison, initial plan review.

Context & Purpose

This project is intended to align municipal operations with shared values, community aspirations, and financial realities. A foundational step is to define consistent planning terminology that ensures clear understanding and alignment among Village staff, consultants, the Village Board, and the broader community.



While the Village’s internal staff teams have previously adopted Mission, Vision, and Values (MVV) statements to guide their daily work, this strategic planning process will result in MVV statements for the Village as a whole. These will be shaped by community engagement, and serve as the philosophical foundation for future Village planning and decisions.

Once adopted by the Board, the Village-level MVV statements will offer a common anchor for both Board-level decision-making and operational implementation. Staff teams will then revisit and may refine their internal MVVs to ensure consistency.

Mission, Vision, and Values (MVV): Foundational Identity

The development of MVV statements for the Village as a whole will allow Maple Bluff to clarify:

- Who we are as a community
- Where we want to head and what we want to be
- What principles will guide us along the way
- How we will organize ourselves

MVV statements help distinguish ongoing, valued services from areas of strategic change—ensuring that continuity and innovation are both reflected in the final plan. This matters because:

- Not all valuable services or traditions require "Priority" status to be maintained.
- MVV statements allow the Village to clearly document its enduring commitments, even if and where no immediate change is planned.
- Strategic Priorities must be aligned with MVVs, ensuring that any departure from the status quo still reinforces the Village’s current values and long-term vision.

For example, “maintaining a personalized level of public service” may not be designated as a “Priority” if no major change is intended, but may be central to the Village’s Vision regardless.

Proposed Planning Terminology

The following preliminary definitions are intended to clarify expectations, ensure internal consistency, and support transparent progress monitoring. These terms will be used but could also evolve during the strategic planning process and in the final plan structure:

“Mission”

Definition: The Village’s core purpose and responsibilities—why we exist.

“Vision”

Definition: The aspirational future state the Village is striving to create.

“Values”

Definition: Core principles that guide our conduct, decisions, and expectations.

“Priority”

Definition: A broad, long-term commitment that reflects a strategic shift from the status quo and guides Village direction over the next 2 to 5 years.

Set By: Village Board

Scope: Limited to 3–4 total for clarity and focus

Purpose: Establish community-wide direction grounded in data, research, and input; depending on resource availability, the Village may have to stop doing something else redirect some focus.

“Goal” (Linked to a Priority)

Definition: A targeted and actionable outcome that aligns with a specific Priority. Must follow the SMART model (Specific, Measurable, Achievable, Results-based, Time-bound).

Set By: Staff with Board guidance

Purpose: Drive implementation efforts

“Objective” (Linked to a Goal)

Definition: A supporting element of a Goal. Objectives break down Goals into manageable components, often department- or project-specific.

Set By: Staff

Purpose: Guide team actions toward meeting a defined Goal

“Activity” (Linked to an Objective)

Definition: Discrete tasks that contribute to an Objective. Recurring or one-time efforts.

Set By: Department leads and frontline staff

Purpose: Direct staff action, track resource use, and inform workload

Commitments

The Village Board, Core Team, and each of its members commits to the following rules of conduct in the preparation of the strategic plan:

1. Be present. Regular, on-time attendance and active participation is expected. For some meetings, in-person attendance will be critical. Put phones and other distractions away.
2. R-E-S-P-E-C-T. Foster an open atmosphere where everyone can express thoughts, ideas, and options without fear of judgement in the moment or later.
3. Practice patience. Listen actively, let people finish, and seek to understand before responding. Ask genuine questions.
4. Be positive. Be constructive and explain reasoning and intent. Assume others’ positive intentions and avoid speculating on their intent.
5. It’s OK to disagree. When necessary, disagree respectfully and explain why.
6. Stay on topic. Off-topic comments go to the “parking lot.”
7. Stay out of the weeds. Focus particularly on Values and Priorities, directing staff to propose or work out Objectives and Activities (i.e., avoid micromanaging).
8. Be open and honest. Share all relevant information to be sure that decisions are fully informed. Ask when things need to slow down or be explained again or more clearly.
9. Move forward together. Make decisions and directions as a whole Board. Use consensus whenever possible and voting when necessary. Respect Board decisions once made.

Project Timeline

September-October 2025 – Initial Project Understanding and Organization

Purpose

Develop common understanding of project, terms, roles, and participation offerings.

Core Team Meeting #1 (September 29, 2025)

- Introductions and understanding of core team and member roles
- Confirm scope, schedule, data needs, and collection approaches
- Prepare for first Village Board meeting

Village Board Meeting #1 (October 20, 2025)

- Confirm scope, schedule, and terminology
- Endorse Board commitments
- ID information needs, with reference to Current Conditions & Trends Report overview
- ID community survey topics of interest
- Advise on approach to stakeholder meetings

Roles and Deliverables

- *Mark Roffers*: Prepare memo outlining desired meeting outcomes.
- *George Brown*: Contribute to discussion, best practices, commitments, and definitions.
- *Staff*: Schedule meetings, distribute memo, contribute to discussions.

October 2025-February 2026 – Current Conditions and Trends Analysis

Purpose

Provide a common baseline of objective information to support the strategic and later comprehensive planning processes.

Roles and Deliverables

- *Mark Roffers*: Lead preparation of “Current Conditions and Trends” report, including associated data gathering and text and graphic preparation. CARPC staff to support.
- *Staff*: Provide internal Village data (operations, budget, staffing, utilities, facilities), highlight intergovernmental dynamics, identify state and other mandates and constraints.

Village Board Meeting #2 (December 16, 2025)

- Review highlights from draft “Current Conditions and Trends” report
- See other assignment for this meeting below

Core Team Meeting #3 (February 3, 2026)

- Review draft “Current Conditions and Trends” report

November 2025-May 2026 – Community Communications & Project Management

Purpose

Provide and update platforms for communicating with Maple Bluff residents on the project.

Roles and Deliverables

- *Mark Roffers*: Prepare and update content for webpage and project schedule, work with staff to disseminate plan and other content, help address issues.
- *Staff*: Host updates on Village website, assist with newsletter/email formatting and distribution, final review of messaging, ensure accessibility and engagement.

November 2025-February 2026 – Vision & Values Survey; Stakeholder, Influencer, and Focus Group Meetings

Purpose

Understand residents' vision, values, desired identity, assets, opportunities, challenges, and service and expenditure priorities for the future of the community.

Roles and Deliverables

- *Mark Roffers*: Draft, revise, and publish survey; analyze results; prepare for and facilitate most stakeholder, influencer, and focus group meetings; analyze and share meeting results.
- *George Brown*: Provide critical input on survey and meeting framing, tone, questions, and readability.
- *Staff*: Assist with survey and meeting logistics and distribution; hard-copy printing; provide input on survey and meeting questions.

Core Team Meetings #2 and #3 (November 4, 2025; February 3, 2026)

- Finalize survey, groups, and questions; discuss dissemination and logistics
- Discuss results once survey and meetings substantially complete

Village Board Meeting #2 (December 16, 2025)

- Review survey results
- Advise on stakeholder interactions based in part on survey responses
- See other assignment for this meeting above

January-March 2026 – Preliminary Vision and Priorities Identification

Purpose

Develop MVVs, preliminary Priorities, and preliminary SMART Goals through interactive Board workshop and follow-up.

Core Team Meeting #3 (February 3, 2026)

- Prepare for Village Board visioning and priorities workshop
- See other assignment for Core Team Meeting #3 above

Village Board Meeting #3 - Vision and Priorities Workshop (February 27, 2026)

- Review results from community survey and stakeholder interactions
- Develop/refine MVV statements
- Identify preliminary Priorities to advise on next process and production steps

Core Team Meeting #4 (early March 2026)

- Review preliminary outline of MVV statements, priorities, and SMART goals

Village Board Meeting #4 (March 2026)

- Review refined outline of MVV statements, priorities, and SMART goals
- Advise on other desired strategic plan components and community input

Roles and Deliverables

- *Mark Roffers*: Support facilitation of vision and priorities workshop, lead drafting of outline of MVV statements, priorities, and SMART goals
- *George Brown*: Advise on outline format, logic, and content; lead facilitation of Board's vision and priorities workshop
- *Staff*: Provide background context, Village mission framing, and feasibility assessment

March-May 2026 – Additional Input and Strategic Plan Preparation

Purpose

Prepare, revise, and endorse a strategic plan. As directed by the Board and appropriate to the project stage, the later steps of the process may include one or more of the following:

- A second web-based community survey
- Additional small or focus group meetings
- A community forum
- Additional web-based outreach and input

Core Team Meetings #5 and #6 (early April 2026)

- Guide any additional community input opportunities
- Review initial draft strategic plan, expected to include MVV statements, priorities, SMART goals, objectives, and activities

Village Board Meetings #5 and #6 (April and May 2026)

- Review results of additional community input opportunities and draft plan

Roles and Deliverables

- *Mark Roffers*: Draft strategic plan, revise as directed, engage in additional community involvement as directed and agreed
- *George Brown*: Provide narrative suggestions and document readability review
- *Staff*: Ensure strategies align with operations and implementation capacity, provide logistical support for additional community involvement