

**CITY OF WEST LIBERTY, IOWA  
STRATEGIC PLANNING AND GOAL SETTING REPORT 2020**

**Mayor:**  
Robert Hartman

**City Council: 2020-21**

Jose Zacarias  
Diane Beranek  
Cara McFerren

Robert Rock  
Dave Smith

**Department Heads:**

PW Water/Sewer Superintendent – George Pearl  
Electric Superintendent – Jon Meade  
Parks & Recreation Director – Nick Heath  
Library Director – Debra Lowman

City Clerk/Finance – Lee Geertz  
Fire Chief – Kirt Sickels  
Building Inspector – Terry Goerdts  
Police Chief –

**DRAFT**

**Facilitated by:**  
Patrick Callahan  
Callahan Municipal Consultants, LLC  
December 5, 2019

# City of West Liberty, Iowa

## Strategic Planning and Goal Setting Session

### 2020

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#### **Introduction**

The City of West Liberty requested assistance from Patrick Callahan in November 2019, for a strategic planning and goal setting process. Mr. Callahan agreed to organize and facilitate a process that involved the following steps:

1. Prepare a questionnaire to identify department needs, capital projects, accomplishments, programs, issues, trends and team building suggestions.
2. Prepare a list of the overall capital projects and suggested initiatives and programs based upon the comments of the elected officials and city department heads.
3. Conduct a strategic planning and goal setting session with the elected officials.
4. Preparation of this final report.

#### **Goal Setting Work Session**

City Council Members and the Mayor held an informal non-binding work session that was conducted by Mr. Callahan on December 5, 2019. The City's elected officials and department heads were asked to do the following:

1. Identify the major accomplishments of the City in 2018 and 2019, as listed by the Mayor and Council, and by the City Department Heads (**Exhibits A&B**).
2. Review the list of most important issues, concerns and trends facing the City in 2020, as listed by the Mayor and Council Members and by the City Department Heads (**Exhibits C&D**).
3. Review and revise the list of potential initiatives, policies, and programs. (**Exhibit E**)
4. Indicate those initiatives and programs that are the most urgent or important at this time.
5. Review and revise the list of potential capital projects. (**Exhibit F**)
6. Indicate those capital projects that are the most urgent or important at this time.
7. Provide comments and suggestions regarding teamwork objectives. (**Exhibit J**)
8. Provide comments and suggestions from the City Department Heads – (**Exhibit I**)

**Note:** The Letter of Introduction, the Agenda for the Goal Setting Session, and the Preliminary Questionnaire are attached to this report as Appendix A, Appendix B and Appendix C, respectively.

### **THE CITY COUNCIL'S LIST OF "GIVENS"**

After reviewing the list of proposed programs and policies, the Mayor and City Council Members concluded that the City was already committed to the completion of the following programs, policies, initiatives and capital projects:

1. Monthly Update reports from City Department Heads
2. Study the need for a new water well in future

Since the City Council had already committed to the completion of these items, it was agreed that the Mayor and City Council would not need to rank or prioritize these suggestions.

### **INITIATIVES AND PROGRAMS – 2020**

**The Mayor and City Council identified the following initiatives and programs as the most urgent or important.**

#### **A. Top Priority Programs and Policies**

1. GIS/GPS everything
2. Review and Update Utility Rates and Fees
  - A written policy for water & sewer system – clearer code
  - Rate plan – step to implement and continue tracking all fees and rates for services.
  - Review whether a utility rate increase will need to be implemented
  - Review of disconnect and reconnect utility rates
3. Search for ways to expand city growth geographically

#### **B. Second Tier Programs and Policies**

1. Housing Incentive Program for Developers and Homeowners
2. Staff Training – Service, safety, and human resource compliance
3. Create street improvements schedule or capital improvements plan for streets
4. Feasibility Study – City Hall & Police Department building improvements or relocation.

**NOTE:** A complete list of all programs and initiatives, as ranked by the Mayor and City Council Members is attached as **Exhibit C**.

### **CAPITAL IMPROVEMENT PROJECTS – 2020**

**The Mayor and City Council identified the following capital projects and equipment purchases as the most urgent or important.**

#### **A. Top Priority Capital Projects and Equipment Purchases**

1. Electric Generators at sanitary sewer lift stations
2. The 6<sup>th</sup> Street water main project
3. Identify technology and implement an upgrade plan – software, computers, meters, and net metering
4. Continue street improvement projects
5. Influent meters located after the storm water pumps, as requested by the Iowa DNR.

## **B. Second Tier Capital Projects and Equipment Purchases**

1. West side tower loop
2. City hall – remodel Building or a new building
3. Additional restrooms at Dutton Sports Complex

## **TEAM BUILDING AGREEMENTS**

The Mayor and City Council reviewed a list of ideas and suggestions relating to team building and building a better working relationship. The list of team building suggestions is identified as **Exhibit J**.

## **FUTURE PLANNING SUGGESTIONS**

It is recommended that the city staff and management team prepare an “action plan” for the top ranked capital projects, and the initiatives & programs. The action plan for each goal would define the steps needed to accomplish the various tasks or objectives. This action plan could then be presented to the Mayor and City Council for review and approval and made a part of this Goal Setting Report.

It is recommended that the goals and objectives be posted in the Council Chambers at City Hall. The posting of the City Council’s goals and objectives will serve as a reminder to the City Department Heads and Staff Members as to the priorities that were established by the Mayor and City Council.

It is recommended that the City Council review the lists of capital projects/equipment purchases, and initiatives, programs, and monitor the progress that is made on each item on a quarterly basis. The City could use a format that shows the project or item side by side with a comment that updates the City Council and the residents of the City on the progress that has been made on each item at the end of each quarter. The tentative dates for the quarterly updates are: April 7, July 7, October 6, & January 5.

It is important to note that the prioritizing of all the capital projects and various initiatives is not “cast in stone.” The two lists can be modified as new circumstances may dictate. Hopefully, the Mayor and City Council will repeat this process in 2021 or 2022, which may result in some additional modifications.

It is recommended that the City prepare a capital improvements plan to identify the City’s capital projects over the next four to seven years. The plan could include cost estimates, descriptions of the projects, the justification, and sources of funding.

## **COMMUNICATION OF COUNCIL GOALS AND OBJECTIVES TO CITIZENS**

Since the citizens of West Liberty are basically the “shareholders” or owners of the City, it is important that they are informed about the goals and objectives that have been established by the Mayor and City Council. The following is a brief summary of various activities that have been used in other cities to communicate the City Council’s goals and objectives to local residents.

1. **City Website.** After the Mayor and City Council have reviewed and formally adopted the Goal Setting Report, a copy of the report can be placed on the City’s website for review by the citizens of West Liberty.

2. **Newspaper Article.** The City could request that the local newspaper publish a list of the City Council's goals and objectives.
3. **Town Hall Meeting.** The City Council could schedule a town hall meeting or public forum to present a summary of the City's goals and objectives and to seek comments and observations from local residents.
4. **City Hall Posting of Goals.** The Council's goals and objectives could be posted in the lobby area at City Hall for interested residents to review.
5. **Open Houses – City Facilities.** Annual "open houses" at various City buildings, such as City Hall, Police Station, Fire Station, Public Works Shop, Aquatic Center, Wastewater Plant, Water Plant, and Library could be held to inform the citizens about the upcoming city projects and programs that have been proposed.
6. **Community Leaders' Meeting.** The Mayor and City Council could schedule an annual or semi-annual meeting with the School Board and Chamber of Commerce Board of Directors to review and discuss the City Council's goals and objectives. These meetings could also provide an opportunity to learn more about the projects, programs, and objectives under consideration by these same organizations.
7. **Presentations to Service Clubs.** The Mayor, Council Members, and City Manager could make brief presentations to local services clubs and organizations outlining the goals and objectives.
8. **Public Places –Reading Material.** A copy of this goal setting report or a brief summary of the City's goals and objectives could be made available in public places, such as the West Liberty Library, medical clinic, lawyer offices, or where local residents could read this report while waiting for appointments.

#### **FINAL COMMENTS**

It was a pleasure to assist the City of West Liberty with this goal setting process. We were impressed with the level of cooperation of the city staff and the elected officials.

Once again, thanks to the City Clerk, Department Heads, the Mayor, and the City Council Members for the great cooperation and timely response during this process.

Patrick Callahan  
Callahan Municipal Consultants, LLC  
December 8, 2019

**EXHIBIT A**  
**CITY OF WEST LIBERTY, IOWA**  
**GOAL SETTING SESSION 2020-21**

**Major Accomplishments – Mayor & Council Members Responses**

1. Electric sub-station at electric power plant
2. Removal of Ash trees
3. Maxon Street Improvement project
4. Park and Recreation fundraising for playground project
5. Returning the management of wastewater treatment plant back to the City
6. Addition of the new housing development north of the Dutton Sports Complex
7. Full cycle completion of the Sidewalk Improvement Program initiative
8. Completion of the Recycle Center and implementation of the curbside recycling
9. The initial preparation & presentation of the Street Study Improvement Plan
10. Transformer & switchgear electric infrastructure improvement project completed
11. Success with the second new metering (PT/CT) electrical improvement

**EXHIBIT B  
CITY OF WEST LIBERTY, IOWA  
GOAL SETTING SESSION 2020-21**

**Major Accomplishments – Department Heads' Responses**

1. Curbside Recycling Collecting to include building
2. Water Treatment Reverse Osmosis Treatment
3. WWTP Upgrade for compliance with Iowa DNR requirement
4. City Hall Financial Administration Transitional Staffing
5. Nuisance and Abatement Program implemented and in progress
6. Maxon Ave Street Improvement Project Completed
7. Short Street Housing Development
8. Electric Switchgear Transformer Upgrade at Electric Power Plant
9. Equipment and Vehicle upgrades for Fire/EMS and Public Works – Ambulance, Fire Truck, Dump Truck, Computers, Bucket Truck, and Skid Loader
10. New Playground Equipment
11. One set of lights at Dutton Sports Complex
12. Upgrade Transformer at Electric Plant
13. Substation upgrade
14. Updated playground equipment at Kimberly Park – spring 2020
15. Assumed control of waste water treatment plant
16. Completed sidewalk program – over a four year period
17. Electric Pole Yard construction
18. Initiation of an “on call” pay plan
19. Rebuilding of the rural electric line
20. Increased efficiency improvements to the library (HVAC/LED)

21. Downtown cleanup and beautification
22. Four-way stop sign at 4<sup>th</sup> and Spencer
23. Increased external funding acquisition including grant writing and fundraising efforts by the General Fund departments.
24. Rich venue of community engagement opportunities from Parks and Recreation and the Library.

**EXHIBIT C**  
**WEST LIBERTY, IOWA**  
**GOAL SETTING SESSION 2020-21**

**Issues and Concerns – Mayor & City Council Member Responses**

1. Affordable housing for older population – ranch style & smaller
2. Sell off empty city lots to developers and get them back on property tax roles
3. Continue discussion regarding safer pedestrian traffic across the highways
4. Connecting trails to parks, parks to parks (Wapsi), and neighborhoods throughout city
5. Future of Downtown Task Force or downtown revitalization
6. Continue on working on better communication with citizens of West Liberty
7. Hiring new City Manager
8. Determine the future of 115<sup>th</sup> and East 3<sup>rd</sup> Street
9. Hiring new Police Chief
10. Hiring new Library Director

**EXHIBIT D  
WEST LIBERTY, IOWA  
GOAL SETTING SESSION 2020-21**

**Issues and Concerns – Department Heads' Responses**

1. Competitive market for housing – lack of incentives and land to develop
2. Technology – cost of upgrades to software, protection, utility meters
3. Limited pool of laborers for employment within City careers – recruitment and sustainability
4. Lack of bonding capacity to create quality of life program – Trail system and sustain pool, playground, and sports complex
5. Lack of funding to upgrade City Hall Administration and Police Department Building – The only two departments in the City where the work environment is inefficient due to the deterioration of building structure and antiquated HAVAC system.
6. Lack of planning and funding for infrastructure upgrades – Utility rates and savings
7. Declining cohesiveness with employees due to age gaps and employer not having a succession plan for employee longevity.
8. Governmental policies and the ability to shrink City's taxation with the General Fund's capacity to operate essential services and quality of life programs for the community.
9. Employee turnover rate – employees leaving for jobs in other cities.
10. Need for better communication
11. Abandoned properties in town
12. Need to continue making improvements to sanitary sewer system.
13. High number of monthly disconnects
14. Clearance issue above and under trees for electric lines
15. Amount of garbage and the poor appearance of City alleys in the Downtown Area.
16. Sustainable municipal funds for Parks and Recreation, Library, Police and Fire Department.
17. Aging infrastructure will continue to degrade without solid plan for replacement.
18. Inconsistent enforcement of building, tenant/landlord laws, ordinances, fireworks policy, and inspections and compromising the quality of life for residents.
19. Increased cost of living in West Liberty is deterring potential commuter population.

**EXHIBIT E**  
**WEST LIBERTY, IOWA**  
**GOAL SETTING SESSION 2020-21**

**Significant Initiatives, Programs & Policies – Mayor & City Council Members’ Rankings**

| <b>Programs or Policy</b>                                                                                                                                                                                                                                                                                                     | <b>Top Tier (x2)</b> | <b>2<sup>nd</sup> Tier</b> | <b>Total Score</b> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------------------|--------------------|
|                                                                                                                                                                                                                                                                                                                               | 6                    | 0                          | 12                 |
| 1. Review and Update Utility Rates and Fees<br>*A written policy for water & sewer system – clear code<br>* Rate plan – step to implement and continue tracking all fees and rates for services<br>* Review whether a utility rate increase will need to be implemented<br>* Review of disconnect and reconnect utility rates | 5                    | 0                          | 10                 |
| 2. Search for ways to expand city growth geographically                                                                                                                                                                                                                                                                       | 5                    | 0                          | 10                 |
| 3. Housing Incentive Program for Developers and Homeowners                                                                                                                                                                                                                                                                    | 4                    | 1                          | 9                  |
| 4. Staff Training – service, safety, and human resource compliance                                                                                                                                                                                                                                                            | 3                    | 2                          | 8                  |
| 5. Create street improvements schedule or capital improvements plan for streets                                                                                                                                                                                                                                               | 3                    | 1                          | 7                  |
| 6. Feasibility Study – City Hall & Police Department building improvements or relocation                                                                                                                                                                                                                                      | 1                    | 5                          | 7                  |
| 7. Update the Cemetery Guidelines                                                                                                                                                                                                                                                                                             | 1                    | 4                          | 6                  |
| 8. Online work orders and timesheets                                                                                                                                                                                                                                                                                          | 2                    | 0                          | 4                  |
| 9. Natural gas source for electrical generation replacing the diesel fuel option                                                                                                                                                                                                                                              | 0                    | 4                          | 4                  |
| 10. Wage Table – entry and percent for merit & education                                                                                                                                                                                                                                                                      | 0                    | 4                          | 4                  |
| 11. Administrative Procedures and Policies – Operation of cash, funds, and dual control                                                                                                                                                                                                                                       | 0                    | 3                          | 3                  |
| 12. Home inspections to ensure that sump pumps are not connected to the sanitary sewer system                                                                                                                                                                                                                                 | 0                    | 2                          | 2                  |
| 13. Expand on city ordinance and enforcement regarding animal control for all domestic pets                                                                                                                                                                                                                                   | 0                    | 1                          | 1                  |
| 14. Rec Desk Software & website for Parks & Recreation Department and Library                                                                                                                                                                                                                                                 | 0                    | 1                          | 1                  |
| 15. Natural gas franchise fee                                                                                                                                                                                                                                                                                                 | 0                    | 0                          | 0                  |
| 16. Review open burning ordinance                                                                                                                                                                                                                                                                                             | 0                    | 0                          | 0                  |
| 17. Review Policies and Enforcement Procedures<br>*Review enforcement of building inspections<br>*Review enforcement of ordinances and laws regarding rental housing<br>*Review enforcement of zoning for residential and business use<br>*Improve public access to City Council proceedings                                  | 0                    | 0                          | 0                  |

| <b>Programs or Policy</b>                                                                                                                                                                                  |   |   |   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|
| 18. Increase beautification of West Liberty areas outside of downtown area                                                                                                                                 | 0 | 0 | 0 |
| 19. Include routine health screenings and influenza vaccinations for both part-time and full-time employees of the City                                                                                    | 0 | 0 | 0 |
| 20. Continue high level of engagement with community events and programs through the public and quasi-public goods, such as Parks & Recreation, the Library, the Fire Department and the Police Department | 0 | 0 | 0 |

**EXHIBIT G**  
**WEST LIBERTY, IOWA**  
**GOAL SETTING SESSION 2020-21**

**Capital Projects & Equipment Purchases – Mayor and Council Member Rankings**

| <b>Capital Project or Equipment Purchase</b>                                                         | <b>Top Tier (x2)</b> | <b>2<sup>nd</sup> Tier</b> | <b>Total Score</b> |
|------------------------------------------------------------------------------------------------------|----------------------|----------------------------|--------------------|
| 1. Electric Generators at sanitary sewer lift stations                                               | 6                    | 0                          | 12                 |
| 2. The 6 <sup>th</sup> Street water main project                                                     | 5                    | 0                          | 10                 |
| 3. Identify technology and implement an upgrade plan – software, computers, meters, and net metering | 4                    | 2                          | 10                 |
| 4. Continue street improvement projects                                                              | 5                    | 0                          | 10                 |
| 5. Influent meters located after the storm water pumps, as requested by the Iowa DNR                 | 4                    | 1                          | 9                  |
| 6. West side tower loop                                                                              | 3                    | 1                          | 7                  |
| 7. City hall – Remodel building or a new building                                                    | 1                    | 4                          | 6                  |
| 8. Additional restrooms at Dutton Sports Complex                                                     | 2                    | 2                          | 6                  |
| 9. Repair Library alleyway access at both Spencer Street and Highway 6 points                        | 0                    | 4                          | 4                  |
| 10. Indoor pool & recreation center                                                                  | 0                    | 3                          | 3                  |
| 11. Cemetery improvements – consider a columbaria                                                    | 0                    | 3                          | 3                  |
| 12. Dog park                                                                                         | 0                    | 3                          | 3                  |
| 13. Removal of DLA at the Power Plant - \$200,000                                                    | 0                    | 2                          | 2                  |
| 14. Continue the lighting improvement project at Dutton Sports Complex                               | 0                    | 2                          | 2                  |
| 15. Start replacing sanitary sewer lines                                                             | 0                    | 1                          | 1                  |
| 16. Turn 7 <sup>th</sup> Street from Elm to Columbus into a one way street                           | 0                    | 1                          | 1                  |
| 17. Conversion of Kimberly Park electric line from overhead to underground                           | 0                    | 1                          | 1                  |
| 18. GIS program                                                                                      | 0                    | 0                          | 0                  |
| 19. Replace sewer vac truck                                                                          | 0                    | 0                          | 0                  |
| 20. Up size water main to industrial park                                                            | 0                    | 0                          | 0                  |
| 21. Renovation and or construction of City Hall to include Police Department and Parks               | 0                    | 0                          | 0                  |
| 22. Trail extension to Dutton Sports Complex and West Liberty Schools                                | 0                    | 0                          | 0                  |
| 23. Pool upgrade or renovation                                                                       | 0                    | 0                          | 0                  |
| 24. Park amenities upgrades – shelters, permanent restrooms & pickle ball courts                     | 0                    | 0                          | 0                  |
| 25. Recreation building/indoor facility                                                              | 0                    | 0                          | 0                  |
| 26. Splash pad                                                                                       | 0                    | 0                          | 0                  |
| 27. Wi-Fi in the parks                                                                               | 0                    | 0                          | 0                  |
| 28. Basketball Court at Kimberly Park                                                                | 0                    | 0                          | 0                  |
| 29. New street sweeper                                                                               | 0                    | 0                          | 0                  |
|                                                                                                      |                      |                            |                    |

|                                                                                         |   |   |   |
|-----------------------------------------------------------------------------------------|---|---|---|
| 30. Prepare a Street plan for upgrading streets using the street study completed by V&K | 0 | 0 | 0 |
| 31. Replacement of small bucket truck - \$145,000                                       | 0 | 0 | 0 |
| 32. Expand Library parking lot and designate it as secondary downtown parking area      | 0 | 0 | 0 |

**EXHIBIT I  
WEST LIBERTY, IOWA  
GOAL SETTING SESSION 2020-21**

**Teamwork Suggestions – Mayor & City Council Members Responses**

1. Continue work session/scheduled discussions for action plans and information
2. Committee work/discussion sessions
3. City department heads status overview of their department's activities and projects

**EXHIBIT J  
WEST LIBERTY, IOWA  
GOAL SETTING SESSION 2020-21**

**Teamwork Suggestions – Department Heads Responses**

1. Council and Mayor need to utilize training opportunities - roles and responsibilities
2. Stay focused and stay the course to maintain consistency
3. City Administrator to include employees in the decision-making process
4. Utilize the committees more to provide employees the time to educate and communicate specific information
5. Council to make time to be prepared prior to council meetings and submit questions concerning or relating to the employees prior to the meeting. If information or issue has been resolved, do not publicly throw the City employees "under the bus"
6. New council members need an overview on how each department works and the services that are provided
7. Tour the different sectors of the public works operations
8. Routine community police officer's presence at the Library particularly in the late afternoon/evening hours
9. Increased regular visits from the Mayor and City Council members to all City services
10. Increased communication with department heads regarding City strategy and day to day operations



# Callahan Municipal Consultants, LLC

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November 2, 2019

## APPENDIX A

**To: Mayor and City Council  
West Liberty, Iowa**

**From: Patrick Callahan, Municipal Consultant**

**Re: Goal Setting Session – 2020**

We are looking forward to facilitating the Mayor and City Council 2020 Goal Setting Session on Thursday, December 5, 2019 starting at 5:00 PM at the West Liberty Fire Station. The agenda for the session is enclosed for your review.

First of all, thank you for selecting Callahan Municipal Consultants, LLC to conduct the City Council's goal setting session. We are looking forward to assisting the City on this process.

### **Strategic Planning or Goal Setting Session**

We have facilitated numerous goal setting sessions for cities in Iowa from 2004 to 2019. Each session is unique and informative. When we started doing goal setting sessions in 2004, we developed an advance questionnaire in order to enhance the productivity of the session and reduce the amount of time on the more routine portions of the meeting. The questionnaire allows us to review issues in advance and thus provides more time for the primary focus of the session, which is to discuss, review, and prioritize the City Council's goals and objectives. We would like to thank you for responding to the advance questionnaire for this year's goal setting session.

### **City Accomplishments**

The first thing that we like to do at these sessions is to reflect upon the City's recent accomplishments. Many council members in other cities are so focused on the current or most pressing issues of the time that they lose track of all the city's accomplishments. Most council members are pleasantly surprised to review how much has actually been accomplished by their city over a span of two years.

### **Issues, Concerns, and Trends**

We also like to take the time to look to the future as to issues or trends that have the potential to impact the City in either a positive or negative manner. A positive trend might be an increase in new housing construction. Whereas, a negative concern could be the passage of a bill by the Iowa General Assembly that might drastically reduce property tax revenues to the City's general fund. While the City may have little or no control over some of these trends or issues, it is usually better to acknowledge them and possibly develop a "game plan" as to how to address them in the future.

### **Capital Projects**

It is important to take the time to itemize and prioritize the City's capital project and major equipment needs. Since the City does not have a capital improvements plan (CIP), we may want to identify any projects or equipment purchases that should be included in the City's CIP. We will review, discuss, and prioritize the City's capital projects and equipment needs. This information and the direction provided by the City Council at this session will be very useful to the City employees.

**Policies, Programs, and Initiatives**

Once we have completed the ranking of capital improvements or the “bricks and mortar” projects, we will review the list of potential programs, policies, and initiatives. Examples might include updating the City’s employee’s handbook or the development of another source of revenue for the general fund. The Council will also be asked to prioritize these proposals.

**Team Work Objectives**

The final part of the session will be a discussion regarding team work and how the City Council members interact with each other and the City employees. We may identify and discuss ways to enhance the level of communication between the City Council and the organizations or persons who interact with the Council. If you are pleased with the current level of interaction with each other, the City employees, the local residents, and outside agencies, then this portion of the session may be brief.

**Completion of Questionnaire**

There is enclosed a questionnaire that we would ask all the elected officials and city department heads to complete prior to the goal setting session. We will summarize the results of the questionnaire and make them available prior to the meeting. In order to have enough time to summarize the results, please return the questionnaire to us by November 25<sup>th</sup>.

If it is more convenient to list your responses to the questionnaire on separate sheets, you are welcome to do so. You can list the five headings and provide your comments under each of the topics.

We promise to maintain the confidentiality of the responses to the questions on the questionnaire. The summary of the responses to the questions will not make reference to any names or individuals.

You are welcome to mail your completed questionnaire to Patrick Callahan, 417 Kaitlynn Avenue, Anamosa, Iowa 52205 or you can send it to our e-mail at [callahan.cmc@gmail.com](mailto:callahan.cmc@gmail.com). You can also give your questionnaires to Lawrence and he can forward them to us.

**Final Goal Setting Report**

We will prepare a final report summarizing the City Council’s 2020 goal setting session. We will also provide you with some suggestions on how to monitor the progress of accomplishing the Council’s goals and objectives and ways to communicate these goals to the ultimate “bosses or owners” – the citizens of West Liberty.

Thank you for making the commitment to attend this goal setting session on December 5<sup>th</sup>. We look forward to meeting with you.

# **APPENDIX B**

## **CITY OF WEST LIBERTY, IOWA MAYOR AND CITY COUNCIL GOAL SETTING SESSION – 2020**

**Thursday, December 5, 2019  
5:00 PM  
West Liberty Fire Station**

### **AGENDA**

1. Introduction and Opening Comments
2. General Overview of the Meeting and the Goal Setting Report
3. Brief Review of City Accomplishments – Past Two Years – Exhibit A
4. Brief Review of Issues, Concerns and Trends – Exhibit B
5. Review and Ranking of Programs, Policies, and Initiatives – Exhibit C
  - A. Review of Proposed Initiatives
  - B. Clarification of Items
  - C. Revisions, Additions, Deletions and Combinations of Items
  - D. Ranking of Items – Placing of the “Dots”
  - E. Review List of “Givens” or Ongoing Projects
6. Review and Ranking of Capital Projects & Equipment Purchases – Exhibit D
  - A. Review of proposed projects
  - B. Clarification of items
  - C. Revisions, Additions, Deletions and Combinations of Projects
  - D. Ranking of Items – Placing of the “Dots”
  - E. Review List of “Givens” or Ongoing Projects
7. Review & Evaluate “Team Work Objectives” – Exhibit E
8. Final Report to the Mayor and City Council – 2020 Goal Setting Process
9. Questions, Comments, and Suggestions
10. Adjourn

# APPENDIX C

## MAYOR AND CITY COUNCIL GOAL SETTING SESSION – 2020 WEST LIBERTY, IOWA

### PRELIMINARY QUESTIONNAIRE

#### Introduction

The Mayor and City Council of the City of West Liberty will be conducting a goal setting session on Thursday, December 5<sup>th</sup> at 5:00 PM, at the West Liberty Fire Station. The purpose of the session will be to identify and prioritize the City's overall goals and objectives for the next two years. In order to prepare for this session, you have been asked to help identify key issues and potential objectives that will be reviewed by the Mayor and City Council prior to the ranking of any goals for the City. It is requested that you list your responses to the following questions.

#### I. Major Accomplishments

Please list the top five to ten major accomplishments of the City of West Liberty over the past two years. These accomplishments could be as large as a street project or as simple as a newly adopted city policy. The items do not need to be in any particular order.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## **II. Issues, Concerns, Trends, and Opportunities**

Please list specific issues, concerns that you have regarding future city services, policies or operations. These issues or concerns can relate to such things as an aging population or loss of state revenues. You do not need to identify the potential answers or solutions to your concerns.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

## **III. Significant Initiatives, Programs or Policies**

It is requested that you list any initiative, program or policy that you think that the City should consider in the next two years. Examples of such items from other cities have included such things as updating employee job descriptions, writing a policy on open burning, conducting an annexation study, reviewing water and sewer rates, etc. These suggestions should not include construction projects, as these will be listed in the following section. These items do not have to be listed in any particular order.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_

#### **IV. Capital Projects / Construction Projects / Equipment Purchases**

Please list the capital projects or equipment purchases that you think the City should consider over the next three years. These capital projects could include such things as street construction, public works equipment, public safety equipment, etc. If you have a rough estimate on the cost of such projects, please note it.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

#### **V. Teamwork**

In order to accomplish the selected goals and objectives, it is important that the City's elected officials work as a team and have good decision making skills. Please list some suggestions that the Mayor and City Council members could do in the future to improve the Council's teamwork, decision making process, and ability to accomplish the stated goals and objectives.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Please designate your role with the City: \_\_\_\_\_ Elected Official \_\_\_\_\_ City Employee

#### **Return of Questionnaire**

**Please complete and return this questionnaire to Lawrence McNaul or Patrick Callahan (callahan.cmc@gmail.com) by Monday, November 25<sup>th</sup>.**

**Note: If it more convenient to list your responses to the questionnaire on separate sheets, you are welcome to do so. You can list the five headings and provide your comments under each of the topics.**