

# STRATEGIC PLANNING WORKSHOP REPORT

**City Council and Senior Leadership Team  
City of Keller, Texas**



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## INTRODUCTION & BACKGROUND

At the request of the Mayor and City Manager, Baker Tilly US, LLP. (Baker Tilly) organized and facilitated a two-day strategic planning workshop for the City Council and senior city staff. This planning workshop was the first such workshop conducted in many years and the first for the current elected and appointed leadership team.

In a series of interviews with the Mayor, members of the City Council, the City Manager, and a group meeting with the senior management team, workshop participants provided input on the strategic challenges and opportunities to discuss in the strategic planning retreat.

### City Council Interview Summary

The following topics provide an overview of the Mayor and City Council interview results.

#### – Workshop Goals

- Create a clear set of plans to address the next 2-3 years' priorities
- Develop both short- and long-range goals for the community; 3-5 "big picture" items for the Council and a framework for how to achieve them
- Clarify our collective vision for Keller
- Keep the discussion at a high level, don't get into minutia
- Address the proper roles of Council and staff
- Focus on the needs of the City as a whole vs. narrower interests; don't forget who owns the seats the Council members are filling
- Council members should LISTEN to each other, not just HEAR each other
- Start thinking about Keller in the post-pandemic era

#### – Community and Organization Goals

- Strengthen citizen engagement efforts (see Southlake's SPIN program)
- Focus on creating a "family-friendly" or "families first" mindset
- Correct internal organizational "blips" related to staff performance/dynamics
- Develop and utilize the Northeast Park property
- Address the "property tax dilemma" experienced by seniors (to enable them to stay in their homes)
- Explore options to give Keller Parkway a "facelift."
- Provide more information to the public on how the city operates; consider recording lessons/lectures on local government topics for online replay
- Improve the planning and permitting processes

- Provide the City Secretary the authority to appoint her "Coordinator" directly
  - "Dream Big" on the expansion of the city's parks and trails system; do more with the city's sports park
  - Enhance economic development and attract more UNIQUE businesses to Keller
  - Move the Old Town Keller project along
  - Create Advisory Councils for Seniors and Youth, and listen to the ideas they have
  - Support/sponsor more family-friendly community events
  - Address recruitment and retention difficulties in Fire and Police; increase compensation to competitive levels
  - Ensure that staff morale is high to retain key personnel
  - Make decisions about/implement the Future Land Use Plan and Johnson Road issues
  - Look for opportunities to do more outsourcing and leveraging of private sector business practices
  - Implement a more aggressive sidewalk program
- **Other City Council Observations**
- The City Council gets along well with each other and is "quite unified"
  - City Directors/Department Heads are hardworking
  - The City Manager doesn't always share information with the Council as a way to "protect" the members
  - Some council members want more access and involvement in operational decision making and have an advisory role in the hiring of key staff
  - Fund balances are rising; perhaps some of that money can be reinvested in additional personnel or other service enhancements
  - Several Council members believe that the City's staffing levels are too lean – the Manager should "loosen the purse strings" to hire additional staff to improve service levels
  - Decision-making processes are too cumbersome and slow at both the Council and staff levels of the organization

### City Staff Focus Group

Using a "Plus/Delta" facilitation process, appointed city officials at the Director level and up provided their perspectives on the current state of the City of Keller organization and the upcoming strategic planning workshop. Participants were first asked to share their observations in terms of the organization's most positive/helpful attributes. These are the "plusses" of the process. Next, participants provided constructive suggestions for improvement or change: the "deltas." This input was captured on flip charts as shown below:



(What is going well?)

- 
- + We have a friendly, approachable City Council
  - + The City Council listens to the staff and wants to understand what we do, why we do it
  - + We have a strong, collaborative team of managers
  - + Both the City Council and the city staff are very responsive to citizens – a strong customer service focus
  - + External communication efforts are good
  - + The city's financial condition is strong – no major financial problems



(What might benefit from positive change?)

- 
- ▲ Internal communication could be improved
  - ▲ Even though things are good, sometimes the Council focuses on the "drama"
  - ▲ The distinct roles and responsibilities of staff and Council are not always observed
  - ▲ We tend to over-react to social media posts
  - ▲ Trust that the process will get us where we need to go
  - ▲ Support the decisions once made by a majority vote of the Council
  - ▲ Improve the management of the citizen input process
  - ▲ We should periodically conduct independent citizen surveys and use the results to improve

## PLANNING PROCESS OVERVIEW

Effective strategic planning involves gathering, sorting, and prioritizing the best thinking of the City of Keller's policy leaders and executive managers, focused on the core purposes of the organization and the most important attributes of success. The City of Keller's strategic planning workshop, conducted over two days in March of 2021, resulted in the development and agreement on a framework to guide the decision of both elected leaders and appointed managers over the next three to five years. The elements of that framework include:

- **Validation** and revision of the existing statements of the city organization's vision, mission and core values.
- An **examination** of the current operational environment and the identification of important external forces and trends that influence and impact the City of Keller's ability to meet citizen expectations.
- **Assessment** of the organization's strengths, weaknesses, opportunities and threats.
- Development of five strategic goals and the **identification and prioritization** of 26 operational objectives around which key policy decisions can be evaluated and essential organizational and operational activities can be managed.
- **Identification** of 10 high-priority objectives to catalyze economic and operational progress.

The strategic planning workshop focused primarily on **What** the City of Keller needs to realize its vision for the community's future and accomplish the mission of the municipal government organization. Therefore, the strategic planning process is policy-oriented in nature and less about **How** the city should carry out the day-to-day operations and delivery of public services.

Good strategic planning addresses the issues that challenge you today and, more importantly, those that will challenge you tomorrow. Accordingly, the planning workshop was designed as an exercise in collective foresight. Both elected leaders and appointed managers worked together to clarify what success looks like for the City of Keller in light of expected future conditions and the direction that the community's policy leaders want to take the city organization.



## ENVIRONMENTAL SCAN/CONTEXT MAP

Strategic planning cannot occur in a vacuum. Instead, it must be based on a clear understanding of the environment within which the strategy will be carried out. The Mayor, City Council members, the City Manager and top members of the professional staff participated in a structured exercise to describe the current conditions impacting the City of Keller's ability to effectively understand, plan and deliver services in the public interest. This exercise focused the thinking of participants on the following:

- Societal and community trends
- Political factors
- Economic climate
- Citizen needs
- Employee needs
- Technology factors
- Uncertainties

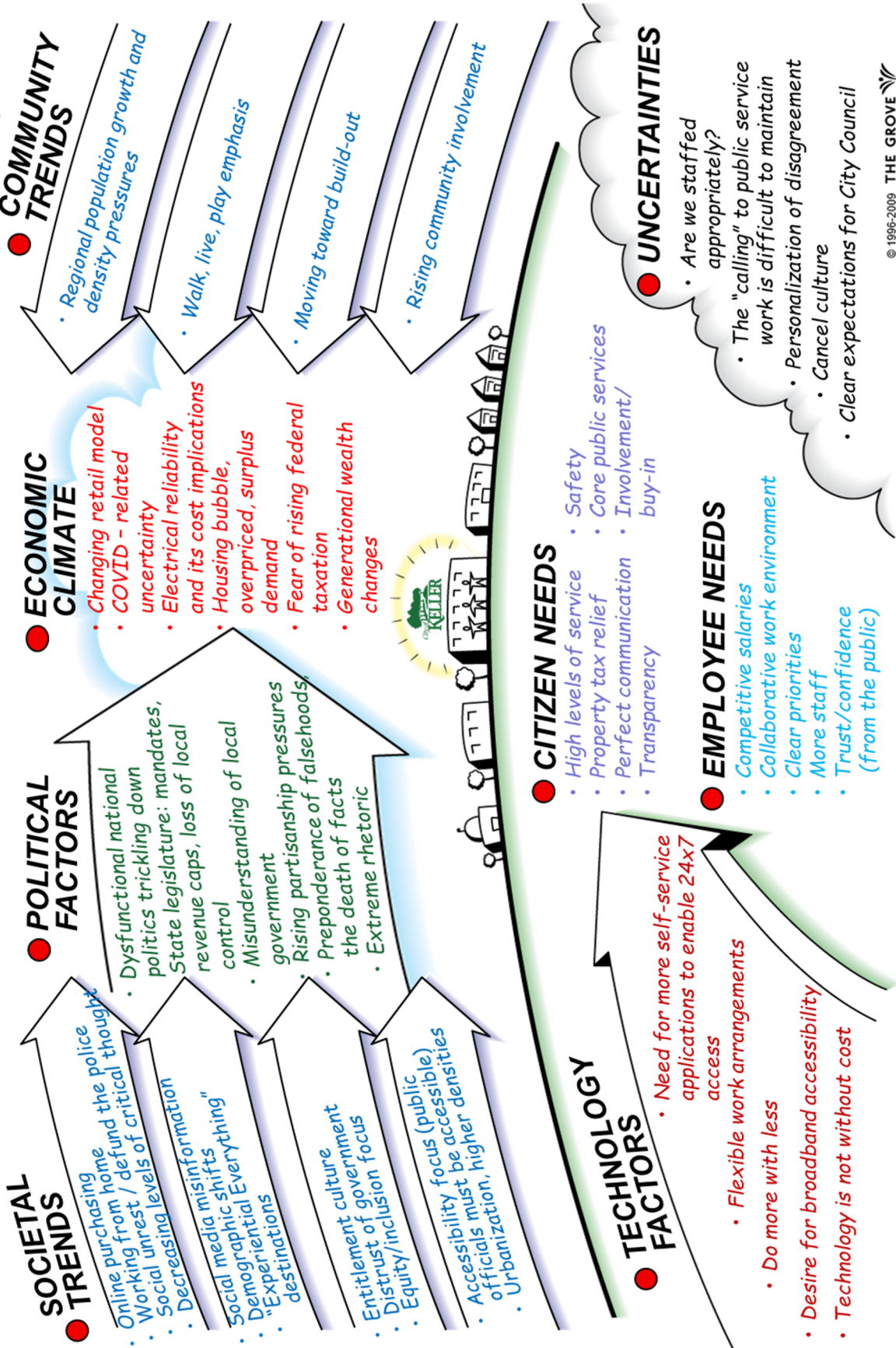
In addition to documenting these crucial factors and trends, workshop participants discussed their significance for the Keller community and their impact on city government and its ability to deliver quality services at an affordable cost.

In the form of a graphic context map, the results of this environmental scanning activity can be found on the following page.





# CONTEXT MAP



## STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT) ANALYSIS

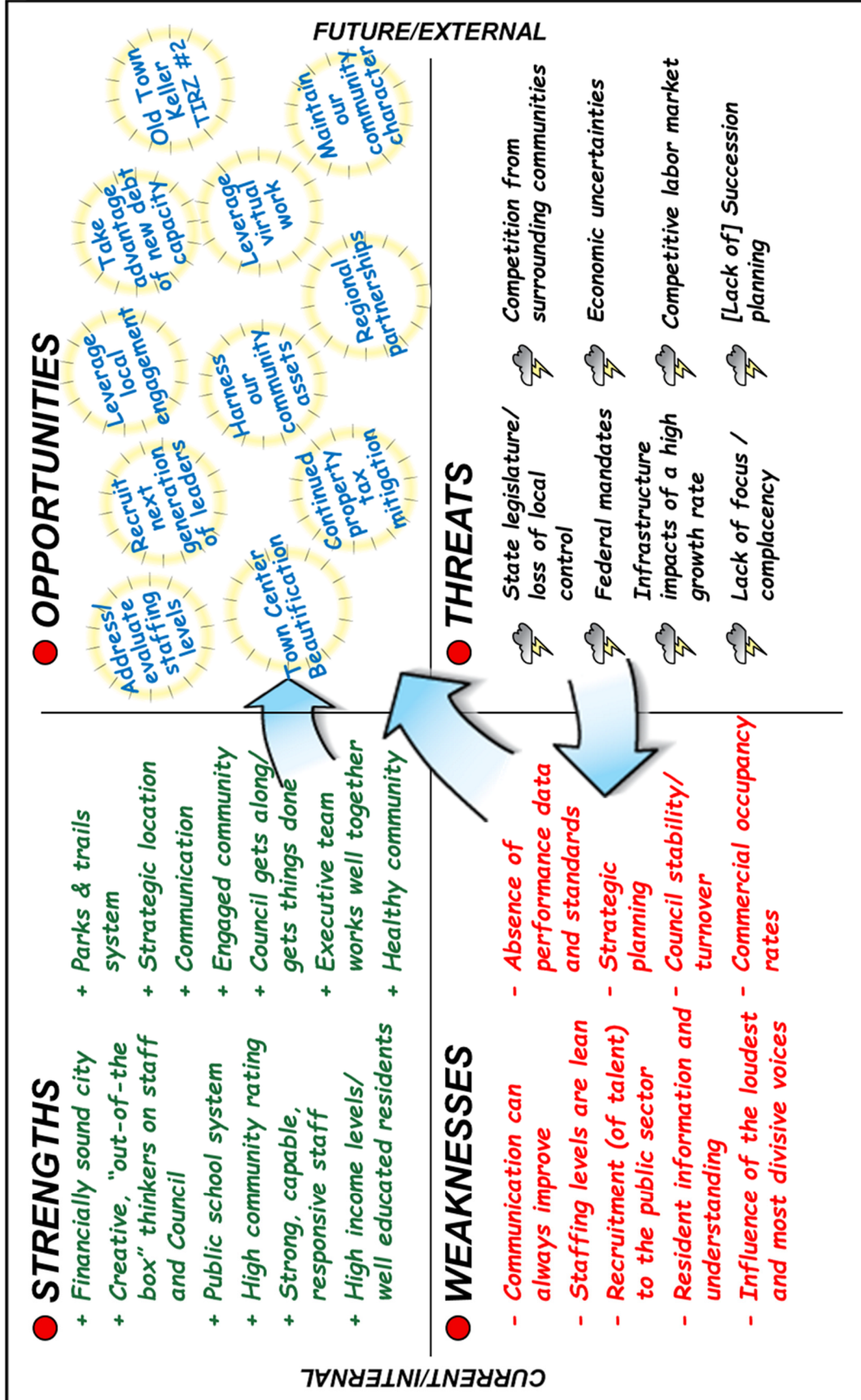
Whereas the environmental scan was primarily focused on external conditions, for the SWOT analysis, workshop participants were asked to critically and constructively consider attributes of the City of Keller organization itself.

- **Strengths** are those assets and capabilities currently available within the organization, which can be leveraged to achieve desired results.
- **Weaknesses** are those problem areas or aspects of the government organization that are currently standing in the way of strategic success, and that should be overcome to achieve optimal results.
- **Threats** are current or potential future external events that, if unmitigated, can impair the organization's ability to realize strategic success. These may be political, economic, societal, natural or man-made in nature.
- **Opportunities** are future-focused and are conditions that can, if properly understood, be captured to obtain strategic advantage through capitalizing on strengths, overcoming problems and mitigating threats.

The SWOT matrix on the following page displays the consensus Strengths, Weaknesses, Opportunities and Threats identified by the Keller leadership team.



# SWOT MATRIX



In the SWOT analysis, the "Opportunities" section is often the most revealing in terms of the desired future direction of the organization and the community. To identify opportunities, the strategy workshop participants considered the things that need to be achieved to take advantage of the organization's strengths and community, overcome weaknesses, and mitigate or minimize threats.

Strategic opportunities identified through this process included the following:

- Evaluate and address city staffing levels
- Recruit the next generation of civic leaders
- Learn from the active engagement of the local community
- Take advantage of the city's increased debt capacity
- Effective usage of the Tax Increment Reinvestment Zone to advance the Old Town Keller project
- Beautify Keller Town Center
- Continue to mitigate the property tax burden on Keller residents
- Harness the many assets of the Keller community for the benefit of all
- Leverage lessons learned from the pandemic-related virtual work environment
- Build and capitalize on regional partnerships with other units and levels of government and the private sector
- Maintain Keller's unique community character

## VISION, MISSION AND VALUES

An organization's **Vision** is aspirational in nature. It defines what the organization wants to be or to achieve. It is an idealized description of the desired future state of the community. City Council members and senior members of staff completed a structured visioning activity, using photographic imagery to spark conversations and develop concepts regarding their shared vision for Keller's future.

The results of this visioning activity are shown below:



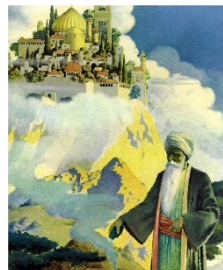
- The hard work and support by the city organization is not always visible



- Multi-generational community
- Information is important
- High literacy rate



- New beginnings
- The opportunity to break out



- Wise leadership brings the vision to reality



- Teamwork, engagement, communication and working on a common goal
- Built to last



- What are we leaving behind for the future?
- Building a legacy



- Family-friendly community
- Renewal
- The old teaching the new



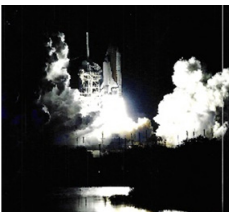
- Raising a family
- Slow down, enjoy moments together
- Quality of life



- Use our time wisely



- Holding uncertainty at bay



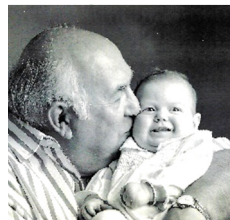
- Harness all of our strengths
- Get to the next level of success
- Address new challenges



- Changing retail environment may influence our economic potential



- Dreams and inspiration
- What we are here to protect



- Most family-friendly city



- Low taxes

Next, using an anonymous online polling tool, both City Council and staff participants thought about and entered the top three words or short phrases that best described their individual vision for the City of Keller. The resulting "word cloud" – with the words that appeared most frequently shown in larger/bold text – follows below:



Finally, based on the visioning activities, the participants agreed on a revision to the city's vision statement to incorporate a "family-friendly" aspect as shown below:

**KELLER VISION**

**"Keller is Texas' premier family-friendly community in which to live, work and play. We will face the issues of tomorrow while preserving our unique character."**

A **Mission Statement** describes the organization's purpose. It defines the "business" of the organization and its relationship with its customers. Council members briefly reviewed and confirmed the continued validity of the existing mission statement, as follows.

**MISSION STATEMENT**

**"We commit to preserving a safe, informed and vibrant community of quality neighborhoods, thriving businesses and natural beauty by setting the standard for engagement, collaboration, service and innovation."**

**Core Values** are the fundamental principles that guide how members of the organization conduct themselves while carrying out the mission in pursuit of the vision. Together, the values provide an ethical framework for decision-making and action. As with the vision and mission statements, the City Council and staff developed a set of core values and supporting definitions in a prior workshop. The City Council reviewed the existing value statement and made minor adjustments, resulting in the following listing:

**KELLER CORE VALUES**

**Excellence  
Integrity  
Service  
Creativity  
Communication**



## STRATEGIC GOALS AND OBJECTIVES

After systematically scanning the external environment, evaluating the strengths and weakness of the organization, identifying opportunities and threats, and confirming the City of Keller's overall vision, mission and values, workshop participants next turned their attention to the specific areas of policy leadership and management focus that they believe are likely to have the most significant impact on the long-term success of the community and the municipal organization.

To identify these strategic focus areas, the workshop facilitator applied a technique known as "future pull." The workshop leader challenged the participants to go forward in time to imagine great success mentally. Participants were then asked to visualize a situation where the city had achieved its vision by successfully accomplishing its mission while operating within its value framework. Then they were asked:

***"Looking back from a position of great success, what, specifically, did the city do to achieve that success?"***

Each participant listed the action steps that, if taken today, would lead the city to that future position. They thought about how to leverage the identified strengths to overcome problems and how to mitigate threats to create opportunities. Many unique ideas were generated. Working together, City Council members then grouped the ideas on a graphical chart to reveal common strategic themes.

From this brainstorming and collaborative process, a total of five strategic goals emerged as the most important for the City of Keller's future, as follows:

### STRATEGIC GOALS

- Elevate Family Life
- Attract Vibrant Development
- Demonstrate Fiscal Discipline
- Improve and Maintain Sound Infrastructure
- Put People First

Within each of the goals, a set of **strategic objectives** were developed and discussed using the ideas generated by the council and staff participants in the "future pull" brainstorming activity.

A total of 26 individual objectives were identified through this process and were then ranked by the Mayor and City Council using real-time polling to establish overall priorities for each goal.

The strategic goals, with supporting objectives listed in the priority order, include the following:

### ***GOAL 1 - Elevate Family Life***

- 1.1 Establish the Keller Sports Park as a premier destination
- 1.2 Expand and maintain the city's trail system to provide continuous connectivity of the parks system
- 1.3 Continue to achieve excellent public safety services
- 1.4 Create family-centric environments (e.g., enhance the Town Center environment)
- 1.5 Provide more "quality of life" events and festivals
- 1.6 Strengthen and expand youth programs in partnership with schools and youth organizations
- 1.7 Determine the highest and best use of the Northeast Park property
- 1.8 Develop all existing park land

### ***GOAL 2 - Attract Vibrant Development***

- 2.1 Accelerate the completion of Old Town Keller
- 2.2 Identify and attract potential Main Street development projects
- 2.3 Bring "experiential businesses" to Keller
- 2.4 Redevelop and enhance primary commercial corridors
- 2.5 Review and update the incentive policy to promote economic development
- 2.6 Implement the Economic Development Strategic Plan

### ***GOAL 3 - Demonstrate Fiscal Discipline***

- 3.1 Maintain fiscally conservative budgets
- 3.2 Prioritize spending where it matters most (public safety, streets/sidewalks, parks/trails)
- 3.3 Strive to ensure that Keller's taxpayers do not pay more city tax dollars on a year-to-year basis
- 3.4 Protect taxpayers' interests

### ***GOAL 4 - Improve and Maintain Sound Infrastructure***

- 4.1 Expand the sidewalk construction program
- 4.2 Increase investment in street maintenance

- 4.3 Develop and maintain comprehensive infrastructure plans emphasizing connectivity
- 4.4 Investigate the potential to improve maintenance and operation of the traffic signal system
- 4.5 Leverage partnerships with the state, county, and private sector

**GOAL 5 - Put People First**

- 5.1 Establish, measure and monitor high standards of customer service
- 5.2 Establish clear employee performance expectations, allow for flexibility and hold ourselves accountable
- 5.3 Recruit, recognize and reward quality city staff
- 5.4 Develop programs to understand and address the challenges of mental health and adolescent homelessness

See the appendix to this document for the results of the Council's priority rankings of the objectives within each goal category.

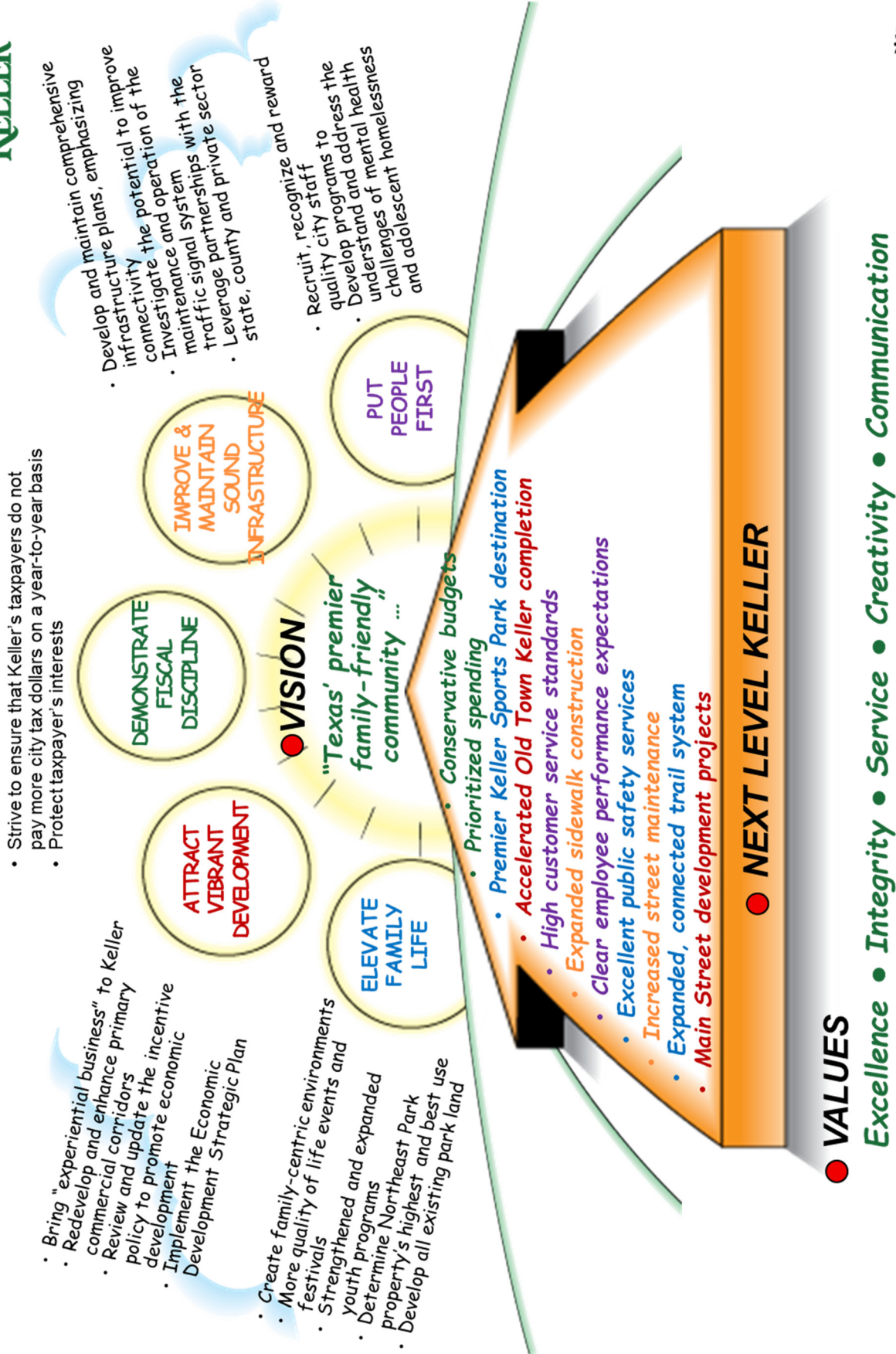
## **"BOLD STEPS"**

### *Taking Keller to the Next Level*

After identifying and agreeing on the five strategic goals, the workshop's focus then shifted to "Taking Keller to the Next Level" by selecting a limited number of strategic objectives to initiate, continue and/or complete in the near term. The City Council reviewed all 26 of the strategic objectives and rank-ordered the most important of them using the online polling tool. These high priority bold steps are listed below, along with the strategic goal each supports:

<b>Top Priorities</b>	<b>Strategic Goal Served</b>
Maintain fiscally conservative budgets	<i>Demonstrate Fiscal Discipline</i>
Prioritize spending where it matters most (public safety, streets/sidewalks, parks/trails)	<i>Demonstrate Fiscal Discipline</i>
Establish the Keller Sports Park as a premier destination	<i>Elevate Family Life</i>
Accelerate the completion of Old Town Keller	<i>Attract Vibrant Development</i>
Establish, measure and monitor high standards of customer service	<i>Put People First</i>
Expand the sidewalk construction program	<i>Improve and Maintain Sound Infrastructure</i>
Establish clear employee performance expectations, allow for flexibility and hold ourselves accountable	<i>Put People First</i>
Continue to achieve excellent public safety services	<i>Elevate Family Life</i>
Increase investment in street maintenance	<i>Improve and Maintain Sound Infrastructure</i>
Expand and maintain the city's trail system to provide continuous connectivity of the parks system	<i>Elevate Family Life</i>
Identify and attract potential Main Street development projects	<i>Attract Vibrant Development</i>

The Bold Steps graphic on the following page captures the results of the goal and objective setting and prioritization process.



## STRATEGY MAP

A strategy map is simply a graphical depiction of an organization's strategy in terms of its vision, mission, core values, strategic goals and business objectives. It serves as a quick reference guide to the city's strategy. It is a helpful tool for organizing and aligning departmental plans, objectives, and resources to support the overall plan. A strategy map summarizing the City of Keller's updated strategy is shown on the following page.



## OUR GOALS

**1**  
 Elevate  
 Family  
 Life

### OUR VISION

Keller is Texas' premier family-friendly community in which to live, work and play. We will face the issues of tomorrow while preserving our unique character.

**2**  
 Attract  
 Vibrant  
 Development

### OUR MISSION

We commit to preserving a safe, informed and vibrant community of quality neighborhoods, thriving businesses and natural beauty by setting the standard for engagement, collaboration, service and innovation.

**3**  
 Demonstrate  
 Fiscal  
 Discipline

### OUR CORE VALUES

Excellence  
 Integrity  
 Service  
 Creativity  
 Communication

**4**  
 Improve &  
 Maintain  
 Sound  
 Infrastructure

**5**  
 Put  
 People  
 First

## OUR STRATEGY

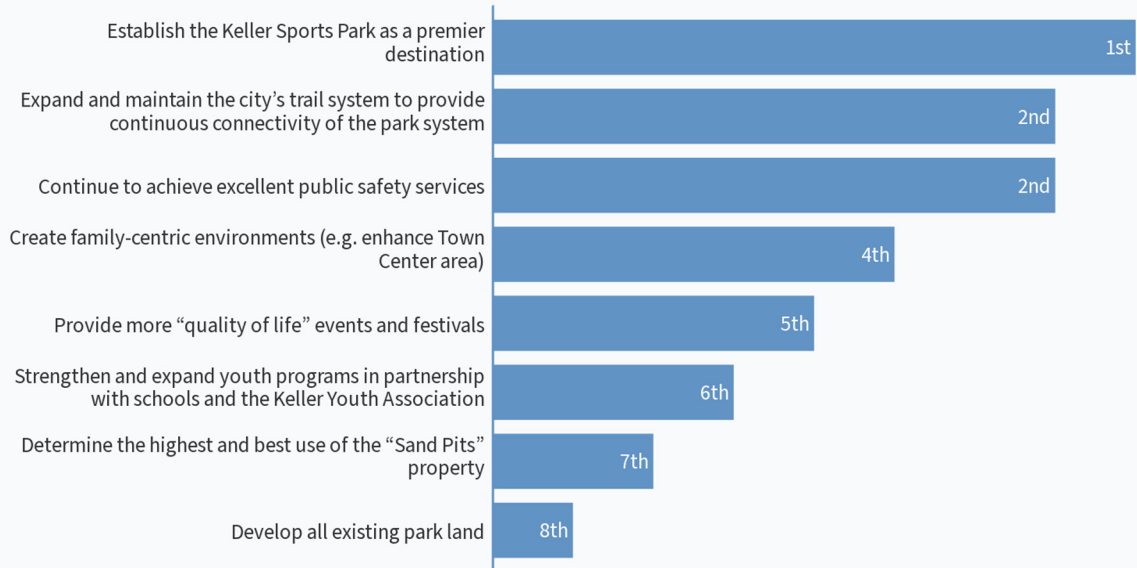
- 1.1 – Establish the Keller Sports Park as a premier destination.
- 1.2 – Expand and maintain the city's trail system to provide continuous connectivity of the parks system.
- 1.3 – Continue to achieve excellent public safety services.
- 1.4 – Create family-centric environments.
- 1.5 – Provide more "quality of life" events and festivals.
- 1.6 – Strengthen and expand youth programs in partnership with schools and youth organizations.
- 1.7 – Determine the highest and best use of the Northeast Park property.
- 2.1 – Accelerate the completion of Old Town Keller.
- 2.2 – Identify and attract potential Main Street development projects.
- 2.3 – Bring "experiential businesses" to Keller.
- 2.4 – Redevelop and enhance primary commercial corridors.
- 2.5 – Review and update the incentive policy to promote economic development.
- 2.6 – Implement the Economic Development Strategic Plan.
- 3.1 – Maintain fiscally conservative budgets.
- 3.2 – Prioritize spending where it matters most.
- 3.3 – Strive to ensure that Keller's taxpayers do not pay more city tax dollars on a year-to-year basis.
- 3.4 – Protect taxpayers interests.
- 4.1 – Expand the sidewalk construction program.
- 4.2 – Increase investment in street maintenance.
- 4.3 – Develop and maintain comprehensive infrastructure plans emphasizing connectivity.
- 4.4 – Investigate the potential to improve maintenance and operation of the traffic signal system.
- 4.5 – Leverage partnerships with the state, county and private sector.
- 5.1 – Establish, measure and monitor high standards of customer service.
- 5.2 – Establish clear performance expectations, allow for flexibility and hold ourselves accountable.
- 5.3 – Recruit, recognize and reward quality city staff.
- 5.4 – Develop programs to understand and address the challenges of mental health and adolescent homelessness.

## **APPENDIX**

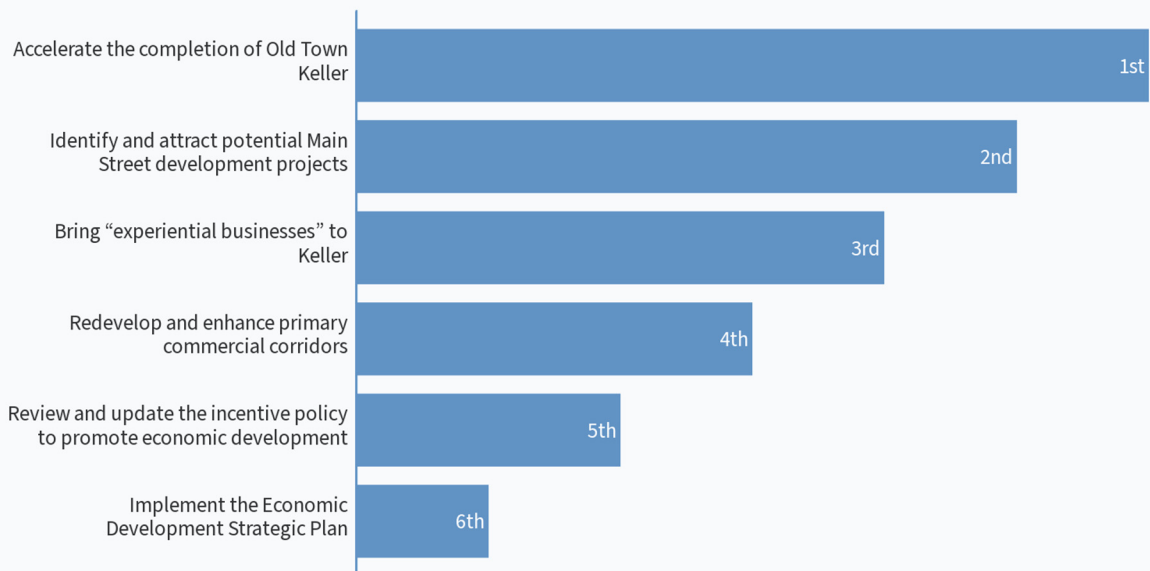
# **Council Priority Polling Results**



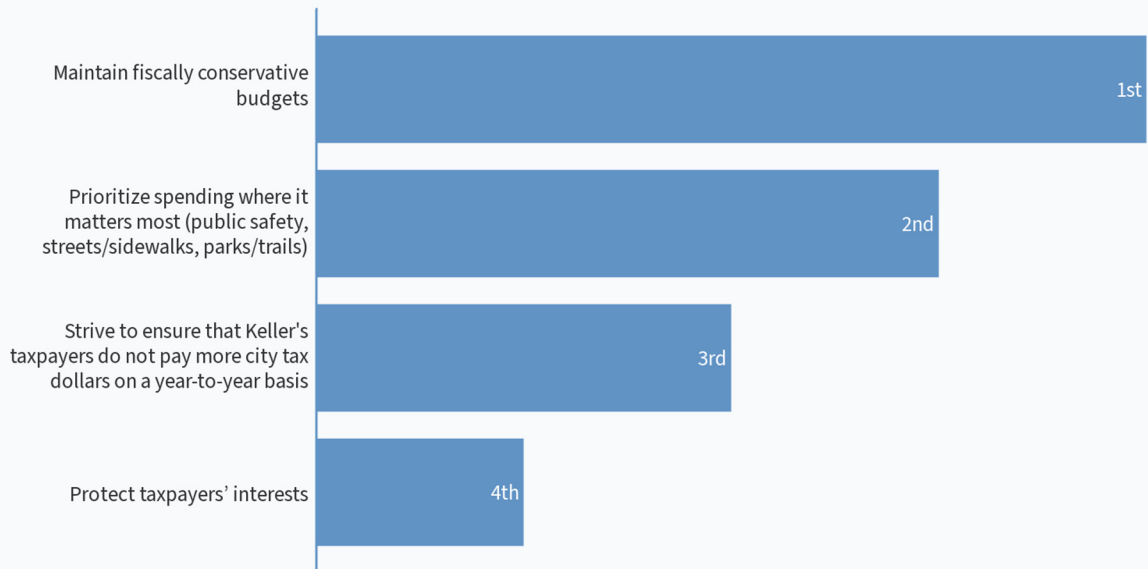
**Please rank the following Family Life objectives in order of their importance to the City of Keller's success**



**Please rank the following Vibrant Development objectives in order of their importance to the City of Keller's success**



**Please rank the following Fiscal Discipline (Tax Relief) objectives in order of their importance to the City of Keller's success**



**Please rank the following Infrastructure objectives in order of their importance to the City of Keller's success**

