



Strategic Plan Progress Report 2019-2024

A LETTER FROM THE Director of Finance

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Dear Village Board,

I am pleased to present the Village of Montgomery's FY2024 Draft Budget Document for your review. As we look ahead to our next fiscal year beginning May 1, 2023, we also head into the last year of our Strategic Plan 2019-2024. Striving for the highest level of government service staff aligns goals and objectives for the next fiscal year directly towards accomplishing the Village's strategic vision and plan. Our Strategic Plan has four primary themes: Quality of Life, Civic Engagement, Economic Development, and Professional Governance.

With more than 20,000 residents and growing, the Village of Montgomery is poised for a sound financial future. The Board and staff are committed to our stakeholders: residents, business owners, visitors, and employees. We purposefully and strategically plan to best prepare the Village for long-term sustainability and growth with our commitment to our mission and vision.

Each theme provided a list of goals and objectives. Understanding how the goals and objectives are defined within the context of the plan is essential, as the goals reflect our plan's broad, value-based statements and initiatives. In contrast, the objectives are the smaller steps developed by the staff to achieve these goals. They are specific and measurable. This Strategic Plan Progress Report provides you with updates on the accomplishments of the Village over the last five years.

The Village of Montgomery has been awarded the Certificate of Achievement for Excellence in Financial Reporting for nineteen consecutive years from the Government Finance Officers Association (GFOA) of the United States and Canada. In addition, the Village has also received the Distinguished Budget Presentation Award from the GFOA for ten consecutive years. Both honors reflect the Village of Montgomery's commitment to excellence. FY2024 will be the same as we focus on sustainability, strategic priorities, and transparency and seek Excellence in Financial Reporting for our 20th consecutive year.

Best Regards,

Jennifer Milewski

Jennifer Milewski
Director of Finance



Village Hall

Administration, Community
Development & Finance
630-896-8080
200 N. River St.

Public Works Department

630-896-9241
891 Knell Rd.



Police Department
630-897-8707
10 Civic Center Ave.

VILLAGE Organizational Chart



Village of Montgomery Residents

The Village Board consists of the Village President and six Village Trustees. The President is elected to a four-year term, and the Trustees are elected at large to staggered four-year terms. The Village Clerk is also elected to a four-year term. The Village Board is responsible for enacting legislation, establishing policies, adopting the budget, and providing guidance and direction for actions that impact the quality of life within the Village.

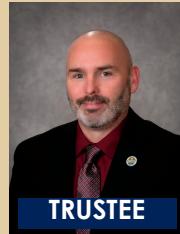
Village President & Trustees



PRESIDENT
Matt Brolley
2021-2025



TRUSTEE
Matt Bauman
2021-2023



TRUSTEE
Tom Betsinger
2021-2025



TRUSTEE
Dan Gier
2019-2023



TRUSTEE
Steve Jungermann
2021-2025



TRUSTEE
Doug Marecek
2019-2023



TRUSTEE
Theresa Sperling
2021-2025

VILLAGE CLERK
Debbie Buchanan
2022-2023

Village Attorney

Village Administrator
Jeff Zoephel

HUMAN RESOURCES

COMMUNICATIONS &
PUBLIC INFORMATION

EXECUTIVE ASSISTANT

POLICE
Chief of Police
Phillip Smith

COMMUNITY DEVELOPMENT
Director
Sonya Abt

FINANCE
Director
Jennifer Milewski

PUBLIC WORKS
Director
Mark Wolf

ADMINISTRATION

INVESTIGATIONS

RECORDS

PATROL

BUILDING & PERMITTING

CODE ENFORCEMENT

PLANNING & ZONING

ACCOUNTING

UTILITY BILLING

ADMINISTRATION

FORESTRY

FACILITIES

FLEET

STREETS

WATER

BOARDS, COMMISSIONS, & COMMITTEES

- Beautification Committee
- Historic Preservation Commission
- Intergovernmental Committee
- Montgomery Development Fund Committee
- Planning & Zoning Commission
- Police Commission
- Police Pension Board

Strategic Plan

OUR MISSION

Through careful planning and visionary leadership, the Village of Montgomery provides an excellent quality of life and a high level of municipal services in a fiscally responsible manner to our community.

OUR VISION

We create a safe, inclusive, and financially stable environment for residents, businesses, and visitors focused on planned economic and residential development, expansion of recreational opportunities, efficient delivery of core services, and effective management of municipal infrastructure.

OUR VALUES

INTEGRITY

Our activities will demonstrate the highest degree of honesty, respect, and fairness to inspire confidence and trust in our local government.

PROFESSIONALISM

We will provide the highest level of knowledge and expertise. We take pride in our work, communicate effectively, project a positive image, and deliver service at the highest standards in every situation.

RESPONSIVE

We will be accessible, open-minded, consistent, and understanding. We will offer fast, friendly, flexible, and fair service to all.

COLLABORATIVE

We will work as a team, committing to open dialogue with residents, businesses, our neighboring communities, and other levels of government to enhance services and problem-solve.

DEDICATED

We will be committed to our community and employees, finding practical solutions to problems that arise as we strive to improve, promote, and help the community where we work and live.

CUSTOMER SERVICE

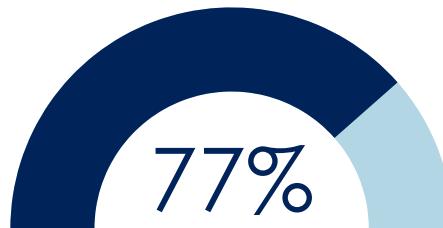
We will focus on listening to and supporting the needs of our customers (residents, businesses, the Board, staff, and other partners), anticipating and delivering high-quality services, and ensuring their satisfaction.

STRATEGIC PRIORITIES

Quality of Life - Civic Engagement - Economic Development - Professional Governance

Quality of Life

- OBJECTIVE COMPLETE
- TASK COMPLETE



1 DEVELOP SUSTAINABLE, ENVIRONMENTALLY-FRIENDLY INFRASTRUCTURE

75%

- Use the GRC checklist to create a local, sustainable, environmentally friendly program. **60% complete**
 - EV charging stations
 - Energy conservation program
 - Solar forum to encourage residential solar
 - Water conservation program
 - Implement LED street light program to reduce electricity costs.

- Develop a recycling education program (improve usage rate) **40% complete**

- Continue planning for a sustainable, healthy, and economical water source.
- Review Village services and adjust/enhance to increase sustainability.

2 ENHANCE VISUAL/AESTHETIC APPEAL OF THE VILLAGE

65%

- Work with the business community and HOA's to beautify existing businesses and residential areas **40% complete**
- Review code enforcement regulations to make sure they contribute to the desired aesthetic and then apply them consistently
 - Increase the number and type of cultural offerings **40% complete**
- Enhance Pedestrian Mobility
 - Continue implementing the sidewalk/bike path gap plan
 - Create a path network to allow west-side residents to walk/bike to the river
- Establish aesthetic and quality standards
- Continue working with developers and the park district to preserve open space and develop parks, and promote them to raise resident awareness.
 - Increase the number and type of public art displays **20% complete**
 - Implement a program to display artwork from the high schools attended by Montgomery residents.
 - Implement the installation on the north side of Village Hall.
 - Enhance wayfinding signage throughout the Village **20% complete**

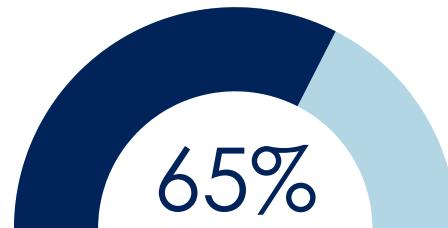
3 EXPAND AND MAINTAIN INFRASTRUCTURE

92%

- Cross-reference infrastructure plans (i.e., water main replacement and road rehabilitation programs)
 - Review plans to make sure they work together and are not in conflict.
- Continue working to develop a safe, efficient, multi-faceted transportation network **75% complete**
 - Work with counties to implement Orchard/Rt.30 intersection improvements
 - Continue lobbying efforts to promote Route 30 widening
 - Continue working with neighboring communities to promote the extension of the Metra line to Montgomery
 - Expand the PACE program in Montgomery
 - Study feasibility for a Park & Ride Program
 - Continue implementing the sidewalk/bike path gap plan
 - Create a path network to allow residents to walk/bike throughout the Village
 - Expand the IRP program to the extent permitted by any increase in funding
- Continue to expand and improve the Village water and stormwater system **83% complete**
 - Continue exploration of regional detention project (TIF #2)
 - Continue exploration of long-term, sustainable water source
 - Implement a water meter replacement program
 - Plan for the implementation of fixed point meter system
 - Develop and implement a water conservation educational program
 - Maintain and replace water infrastructure to improve the system
- Implement an LED street light program to reduce electricity costs
- Continue implementation of tree planting/replacement plan to ensure a healthy, diverse tree inventory

Civic Engagement

- OBJECTIVE COMPLETE
- TASK COMPLETE



1 INCREASE RESIDENT AWARENESS OF VILLAGE ACTIVITIES & OPPORTUNITIES

100%

- Develop a Comprehensive Communications Plan
 - Create a marketing/events planning position
 - Develop public awareness campaign highlighting Village services and activities
 - Develop a public awareness campaign highlighting the budget, showing sources and uses of monies
 - Enhance website and online offerings
 - Increase social media presence
 - Explain completeness and use of the resident email list

2 EXPAND OPPORTUNITIES FOR THE COMMUNITY TO GATHER AND INTERACT WITH STAFF AND ELECTED OFFICIALS

51%

-Enhance and expand current offerings. 88% complete

- Halloween Safety Event
- Special Olympics (Polar Plunge, Cop on Top, Torch Run)
- PD Tours for Community Groups
- National Night Out
- Montgomery Fest
- River Run
- Christmas Tree Lighting
 - Easter Egg Hunt

-Create new opportunities 58% complete

- Attend HOA, youth groups, service organizations
- Coffee with a Cop
- Shop with a Cop, Beards & Badges Program
- Increase school interaction
- Citizens Police Academy
 - Cruise Night
- Develop Veteran's Plaza/gathering place
 - Kayak Race
 - Paddle, bike, run triathlon
 - Farmer's Market
 - Village Open House
- Increase service projects/volunteering opportunities

-Develop events in different areas of the Village 50% complete

-Develop a plan to engage residents from every walk and stage of life 60% complete

-Expand Village Hall hours for increased customer service 0% complete

3 CREATE/ENHANCE NATURAL FEATURES

38%

- Construct a canoe launch to provide greater access to the river 0% complete
- Plan for dam modification, including funding 50% complete
 - Create a white water feature for kayaking/canoeing
- Develop a plan for a riverwalk 0% complete
- Work with the park district to keep the river area clean and control the vegetation

Civic Engagement Cont.

- OBJECTIVE COMPLETE
- TASK COMPLETE

4 CREATE OPPORTUNITIES FOR COMMUNITY FEEDBACK

33%

- Conduct community forums

- Conduct a citizen survey regarding services provided by the Village
- Identify unmet needs of our business community

5 CREATE AND PROMOTE THE VILLAGE IDENTITY

67%

- Community Branding

- Gateway signage

- Historical nature 25% complete

- Determine our story, what makes us unique

- Create a sense of place 25% complete

- Engage with other government units serving Montgomery 50% complete

- Library

- Schools

- Park Districts

- Fire Districts

6 INCREASE ENGAGEMENT WITH CIVIC SERVICE GROUPS

100%

- Chamber of Commerce

- Montgomery Foundation

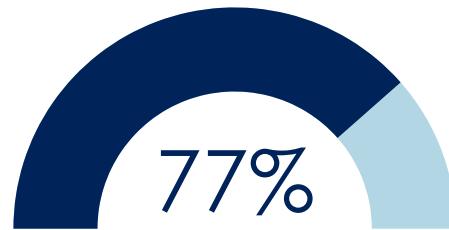
- Rotary Club

- Veterans Groups



Economic Development

- OBJECTIVE COMPLETE
- TASK COMPLETE



4 GOALS
13 OBJECTIVES
19 TASKS

1 ATTRACT AND RETAIN AN ARRAY OF DIVERSE AND ATTRACTIVE BUSINESSES

- Create a business development strategy. 80% complete
 - Redevelopment planning (Lyon Metal, Caterpillar)
 - Attraction planning (Industrial - food service niche, Sports Venue Retail)
- Determine types of businesses to target 0% complete
 - Gap analysis
 - Resident survey
- Develop a dine local program to support restaurants 0% complete
- Locate and attract a hotel/banquet facility 75% complete
- Develop tools for recruitment and retention 80% complete
 - Develop a list of available incentives
 - Review permit and development process
 - Review TIF Districts
- Increase interaction with businesses and developers 100% complete
 - Reinvigorate the Douglas Road task force
 - Create a business recognition program

2 PROACTIVELY WORK TO CREATE A VIBRANT DOWNTOWN

- Determine desired businesses/attractions.
 - Develop a list of attractions to bring people downtown
 - Develop a list of targeted businesses/developments
 - Partner with the library to create an annex at Village Hall
- Develop planning and financing tools 90% complete
 - Create a downtown marketing plan
 - Identify funding source - business district or TIF
 - Develop a plan for strategic property acquisition
 - Secure investors, developers, and brokers

3 RESIDENTIAL-FOCUSED

- Provide housing diversity 80% complete
 - Age-targeted housing

4 OTHER ECONOMIC GOALS

- Develop plan for future annexations 50% complete
- Develop plan for Village-owned properties 50% complete
 - Main Street
- Police Department Campus
- Review current geographic boundaries and determine opportunities for improvements
- Review purpose/mission of Chamber and MEDC

Professional Governance

- OBJECTIVE COMPLETE
- TASK COMPLETE



1 HIRE, DEVELOP, AND RETAIN HIGH QUALITY EMPLOYEES

- Ensure competitive wages and benefits
- Develop an employee wellness program
- Create an employee onboarding/orientation program
- Ensure succession planning
 - Provide ongoing training 75% complete
 - Customer service training
 - Leadership development
 - Create a formalized training program for each position
 - Develop interdepartmental training opportunities
- Provide opportunities to increase employee engagement and morale
 - Recognize employee accomplishments and milestones
 - Provide equipment and training
 - Personal project opportunities
 - Team building
 - Provide opportunities for professional accreditation
- Develop a formal Board orientation process

96%

2 ENSURE FINANCIAL STABILITY AND SUSTAINABILITY

93%

- Enhance and diversify revenues
 - Identify potential new revenue
 - Review fees regularly
 - Increase and diversify the tax base
 - Monthly water billing
 - Increase online payment options and use
- Forecast expenditures and develop cost-saving measures 86% complete
 - Receive AAA bond rating
 - Ensure Village's ability to meet long-term pension obligations
 - Develop a long-term building maintenance plan
 - Create a community investment plan (10 years or longer)
 - Develop a plan for financing and constructing a new Public Works Building
 - Continue funding for scheduled vehicle and equipment replacement
 - Develop a plan to reduce water system loss

3 WORK COOPERATIVELY WITH OTHERS TO REDUCE COSTS, ACHIEVE EFFICIENCIES

100%

- Increase participation and dialogue - federal agencies
- Increase participation and dialogue - state agencies
- Increase participation and dialogue - regional agencies
- Conduct regular meetings with regional counterparts
- Strengthen Intergovernmental relationships
- Continue looking for opportunities for resource sharing

Professional Governance Cont.

- OBJECTIVE COMPLETE
- TASK COMPLETE

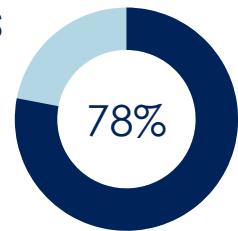


Looking Forward

RESULTS

The 2019-2024 Strategic Plan adopted by the Village Board contained 18 goals, 79 objectives, and 86 tasks to accomplish. As of FY2024, the plan is 78% complete heading into its final fiscal year. The FY2024 Budget Document contains several areas of investment that directly reflect this plan's contents and future initiatives.

18 GOALS
79 OBJECTIVES
86 TASKS



STRATEGIC PLAN 2025-2030

As we look to the development of the Village's future strategic initiatives, goals, objectives, and tasks, there are several areas already identified by staff as important considerations as we begin to bridge the following strategic process.

Community & Board Engagement

Execute a Resident Survey
Promote Community Identity
Seek a Higher level of Transparency and Access to Services
Create opportunities for two-way communication between Village and community

Sustainable Infrastructure

Long-Term Planning of Water & Roadway Infrastructure Replacement
Continued focus on eco-friendly initiatives
Focused preservation and conservation of the Fox River

Economic Development

Focus on crucial Village gateways and annexation opportunities
Seek amenities for enhanced tourism (hotel, entertainment, retail, restaurant)
Update Mill District Master Plan

Internal & External Stakeholders

Engage in an updated compensation study.
Create a framework for better staff reporting and measurement of results
Develop retention initiatives for staff, residents, and businesses
Enhance recruitment efforts for staff, residents, and businesses

Budget Funds

GENERAL FUND

SPECIAL REVENUE

CAPITAL PROJECTS

DEBT SERVICES FUND

ENTERPRISE FUND

POLICE PENSION

SSA FUNDS

PERSONNEL

PRIOR YEAR PAFR