

ILLINOIS MUNICIPAL ASSISTANCE PROGRAM

**Park
Forest,
Illinois**

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Prepared by the Center for Governmental Studies



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EXECUTIVE SUMMARY

The Village of Park Forest engaged the Center for Governmental Studies at Northern Illinois University to conduct an assessment of operations for the purpose of identifying better business practices that will help improve economic vitality. The scope was broad-based with a substantial depth of research and reporting. The team assigned to the project prepared a community profile, conducted on-site visits, interviewed over three dozen citizens, read documents, researched sources, observed activities, presented a preliminary report, and engaged in discussion with Village personnel. Findings and recommendations are the essential work products of this report. Recommendations are presented as operational improvements or as opportunities for success.

Overall, our findings indicate that the Village of Park Forest policy-making and operations are well-connected. In other words, resources expended on services are related closely to governing direction because there are good working relations between administrative staff and the governing board. This positive situation manifests when municipal services are provided to citizens and when the Village is faced with challenges to overcome. In regard to the focus of this report, economic activities, Park Forest has demonstrated a remarkable consistency in planning and following-up to get results.

As with all organizations, there is room for improvement. Our team does not identify anything that is completely new to Village officials and staff nor do we offer the proverbial silver bullet solution. We do offer some specific ways to enhance business practices that should also enhance economic vitality. These encompass: 1) continue Strategic Planning, 2) start Multi-Year Budgeting, 3) continue exploring ways to sustain resources that will maintain target fund balances, 4) continue to use the Capital Improvements Plan to prioritize projects and determine method of payment, 5) adopt a stand-alone Debt Management Policy, 6) continue with the reasonable and prudent Investment Policy, 7) ensure all employees are interviewed during annual performance appraisals and always connect performance to pay, 8) use a matrix tool for Strategic Management, 9) review how Community Branding is being implemented, 10) continue to seek light industry and Research & Development, 11) continue to explore ways to bring fairness in taxation between traditional residential and cooperative residential properties, 12) take a fresh look at the TIF Redevelopment Plan, 13) prepare a new Comprehensive Land Use Plan, 14) reach out to the special districts to improve intergovernmental relations, and 15) share Park Forest services more broadly through regionalization.

PREFACE

PURPOSE

The Illinois Municipal Assistance Program (IMAP) is a program designed and developed by the Center for Governmental Studies, a division of the Regional Development Institute at Northern Illinois University, to help Illinois municipalities assess and strengthen their governance and management practices so they will be competitive in economic development endeavors.

The Governance and Municipal Practices Assessment (GMPA) component of the Illinois Municipal Assistance Program (IMAP) is a review of how the municipality is organized, the governance and management environment of the municipality, the manner in which services and products are provided, the policies, plans and procedures directing municipal activities, and finally, how prepared the community is to be effective in attracting and retaining economic investment by the private sector. Through validation of current practices and examples of successful practices in other municipalities, the GMPA will help elected and appointed officials focus on what must be done to improve planning skills, services, procedures and practices so that the best possible environment exists in the community for creation and expansion of economic development opportunities. Although the GMPA takes a panoramic view, it does concentrate on those areas critical for achieving success.

PREMISE

Both good governance and good management make for good government and a good business climate. A well-governed, clearly organized, effectively managed, receptive, responsive and cooperative municipal government is a key ingredient in a successful recipe for economic development.

Business wants stability, certainty, decisiveness, fairness, and quick action from the local government. Residents want a safe, attractive and economically viable community with good schools and recreational activities. This quality of life comes about from focused municipal and special district government as well as private investment in the community. Both residential and business needs should be met. If only one piece exists, the community will not progress.

First impressions are important. If a community does not present or show well, it will be difficult to sell. Physical appearance, easily obtainable information, a welcoming attitude on the part of the municipal officials, a willingness to assist, quick follow-up, and a focused

commitment to economic development all help to make a good first impression. This impression helps sell the community as a place to do business. A good location, availability of sites, a sufficient and motivated work force, and a good quality of life will be wasted if the private investor cannot obtain information about the community, determine who it is they must do business with, and be confident that the community is



both progressive and has a plan for the future. They must be able to navigate the channels of Village Hall, or they will be frustrated and pursue opportunities elsewhere.

METHODOLOGY

The data and information for the GMPA are gathered in the following ways:

- The application for assistance (**See Appendix A**)
- Village documents, plans, policies and procedures
- Previous community surveys and/or reports
- Visual inspection of the community
- Local newspapers, phone books and newsletters
- Web page
- Promotional and marketing pieces
- Attendance at a governing board meeting
- Interviews with key individuals in the community
- GMPA questionnaires and checklists

It is assumed that the information provided by the municipality is accurate, up-to-date and correct. Verification is accomplished on a sample basis.

Through the GMPA, specific categories are assessed. These include: Policies/Plans/Manuals, Community and Economic Development, and Insurance Service Delivery. Key documents or responses to questionnaires from each category are selected. These documents and responses are considered key because they will reveal information about the structure of the municipality, how it is organized, how it functions, its plans and priorities, how it communicates, its government business practices, and its commitment to economic

development. All of these categories, and the information that is included in them, are part of showing well. There are two levels of key documents. The documents in the first level generally should be in place in a municipality because they are either required by law or are indicative of good business practices. Those in the second level should exist in specific situations.

The first level key documents include:

- the municipal organization chart
- current fiscal year operating and capital budgets
- organization's value, mission, goals and objectives statements
- most recent audited financial report
- personnel policy manual
- purchasing policies and procedures
- employee pay plan
- employee job description
- an employee roster
- comprehensive development plan and implementation strategies
- economic development plan and implementation strategies
- community promotional and marketing pieces including URLs for existing websites
- an inventory of equipment and vehicles and liability and risk management documentation

Each of these items presents a snapshot of a specific aspect of municipal business practice and in total provides an overall picture of how the municipality conducts its business (**See Appendix B for Advanced Material Review**).

The second level documents include: police/fire pension reports, collective bargaining agreements, bond prospectus, and facility management contracts. Not all municipalities will have a local police or fire pension system, collectively bargain with its employees, have issued bonds recently or contracted with others to operate a municipal facility. If, however, these specific situations do exist, then the related documents will reflect the quality and state of the municipality's business practices.

The first assessment is whether or not the key documents exist. If a first level document does not exist, its absence will be noted, and a recommendation will be made to create one. A second broad assessment of the quality of the existing documents and their contents will be made utilizing criteria based on generally accepted standards, benchmarks and best practices in municipal government. Time does not permit a detailed analysis of each document, however the comparison will reveal if the quality does or does not meet the criteria. If it does not, recommendations will be made on how to do so.

RESULTS

The result of the GMPA is the report documenting issues and themes identified, community assets and liabilities, the key document review findings with recommendations for improvements where indicated, and opportunities for success. Some areas require further study and evaluation of perceptions or they are beyond the scope of the study. The report will give the municipal leaders targets for improvements in governance and management areas and better position the community for success in economic growth.

The assessment team consisted of Dawn Peters, Melissa Henriksen, and Katie Davison, of the Center for Governmental Studies (CGS) at Northern Illinois University and Bradford Townsend, a former village manager and currently a financial advisor with Ehlers and Associates, Inc. The on-site assessment process began with interviews of Village elected and appointed officials, employees, residents, and business owners. All interviews were conducted face-to-face or over the phone when schedules did not allow for face to face interviews (**See Appendix C for Interview Questions**).

The following individuals were interviewed on October 5th, 6th, and 13th 2010, or over the telephone on additional dates after the site visits:

LIST OF INTERVIEWEES

1. Tom Mick, Village Manager
2. Robert Wilcox, Fire Chief
3. Larrie Kerestes, Community Development
4. Hildy Kingma, Economic Development and Planning
5. Sandra Zoellner, Economic Development and Planning
6. Sam Montella, Economic Development and Planning
7. Ken Eyer, Public Works Director
8. Bonita Dillard, Trustee
9. Paul Stephanides, Village Attorney
10. Craig Kaufman, IT Administrator
11. Vernita Lewis, Chair, Plan Commission
12. Denyse Carreras, Director of Personnel
13. Jason Miller, Director of Public Relations
14. George Manno, Resident
15. Barbara Osuch, Library Director
16. Tiffani Graham, Resident
17. Mike Jordan, Business Owner
18. Denise Pavlik, SouthCom Executive Director
19. Gary Kopycinski, Trustee
20. John Ostenburg, Mayor
21. Mary Dankowski, Finance Director/Deputy Village Manager
22. Sandi Black, Deputy Village Clerk
23. Sheila McGann, Village Clerk
24. Jenise Ervin, Director of Public Health
25. Rob McCray, Trustee
26. John Joyce, Director of Recreation and Parks

- | | |
|--------------------------------|--|
| 27. Tom Fleming, Police Chief | 34. Elliott Johnson, Aunt Martha's Youth Service/Rich Township |
| 28. Ken Kramer, Trustee | 35. Ron Bean, School Board Member & Former Mayor |
| 29. Dan Graham, Business Owner | 36. Gigi Moore, Aunt Martha's Youth Services |
| 30. Mae Brandon, Trustee | 37. Walt Edmisten, Resident |
| 31. Luke Helm, Resident | |
| 32. Georgia O'Neill, Trustee | |
| 33. Mel Muchnik, Resident | |

Tom Mick, Village Manager, conducted a tour of the community for the GMPA team on the morning of October 5, 2010. This included a drive through lands incorporated to Park Forest and many adjacent properties. The team viewed public facilities, areas of potential redevelopment prospects, and locations of boundary lines.

All checklists and questionnaires used in the GMPA process were submitted (**See Appendix D for Service Delivery Checklists**). Advance materials were provided as requested and as they were available. The assessment team participated in the review of materials. Team members also requested, received, and reviewed additional information from Village staff during the site visit. Village staff forwarded more materials after the site visit in response to the team's request.



I. COMMUNITY DESCRIPTION

Park Forest is a village located south of Chicago in both Cook County and Will County, Illinois. Park Forest is bordered by Olympia Fields to the north, Chicago Heights to the east, University Park to the south, South Chicago Heights and Crete to the southeast, and Richton Park and Matteson to the west.

According to the 2000 Census, there were 23,462 people, 9,138 households, and 6,186 families residing in the village. The 2009 estimate for population was 22,462, which is a decrease of 4.3%. According to Village administration, approximately 18% of the population resides in Will County, while 82% reside in Cook County. The median age is 35.8 which is about the same as the statewide figure for Illinois (35.9). Public schools include Rich Township High School and four elementary schools; Illinois, Indiana, Mohawk, and Talala.

In 2000, the median income for a household in the village was \$47,579, and the 2006-2008 three-year estimates from the American Community Survey (ACS)¹ was \$48,861, which represents a 2.7% increase. In 2009, in the United States of America, the poverty threshold for a

Demographic Changes in Park Forest			
Demographic	2000	2009 (Est.)	% Change
Population	23,462	22,462	-4.3%
Median Income	\$47,579	\$48,861	+2.7
Below Poverty Line-Individual	6.7%	12.1%	+5.4
Below Poverty Line-Family	5.7%	7.4%	+1.7
Unemployment Rate	4.7%	11.3%	+6.6
Source: ACS, 2009, LAUS, 2009, US Census, 2009			

single person under 65 was \$11,161; the threshold for a family group of four, including two children, was \$21,756. In Park Forest, 6.7% of individuals in 2000 met this threshold, while by 2009, this had increased to 12.1%. Similarly, in 2000 5.7% of families were below the poverty line, while that number increased to 7.4% in 2009.

The increase in numbers could be a reflection of the dramatic increase in unemployment in the area. In 2000, Park Forest had an unemployment rate of 4.7% which was in line with both Illinois (4.5%) and the U.S. (4.0%) averages. The unemployment rate has increased to 11.3% as of 2009 (most recent available through Illinois Labor Force estimates for a

House Characteristics		
Year Structure Built	Count (#)	Share (%)
Total housing units	10,103	10,103
Built 2005 or later	48	0.5%
Built 2000 to 2004	299	3.0%
Built 1990 to 1999	235	2.3%
Built 1980 to 1989	272	2.7%
Built 1970 to 1979	701	6.9%
Built 1960 to 1969	1,426	14.1%
Built 1950 to 1959	5,419	53.6%
Built 1940 to 1949	1,485	14.7%
Built 1939 or earlier	218	2.2%
Source: ACS, 2009		

community of this size). This is above both the Illinois rate (10.1%) and the U.S. (9.3%). While this is an alarming increase, the entire country is suffering from similar hikes in unemployment rates due to the national recession.

According to 2009 ACS data, there were 10,103 housing units in Park Forest, with a median value of \$115,500. There is a vacancy rate of 6.7% which is approximately 677 housing units vacant. As shown in the table to the right, the vast majority of housing construction in Park Forest occurred in the 1950s, as well as a large number built from 1940-49 and 1960-69.

¹ The American Community Survey (ACS) is an ongoing survey that provides data every year, giving communities more current information than the Census can provide. It is based on *estimates* of a three-year average, and in this case represents 2006-2008.

Of some concern is that only 48 homes have been built since 2005. This is mostly likely a reflection of the stagnant economy, and the fallout from the housing market crisis. Many interviewees described this as an issue in attracting young families to the area in the next section.

In 2008, 3,029 jobs were available in Park Forest, with the majority located in the Health Care and Social Assistance sector (47.6%) accounting for 1,442 jobs. Education Services was second (21.4%), followed in a distant third by the Public Administration sector (7.1%). The table on the left shows the top five jobs by industry in 2008.

Top 5 Park Forest 2008 Jobs by Industry Type (2-digit NAICS)	Jobs (#)	Share (%)
Health Care and Social Assistance	1,442	47.6%
Educational Services	647	21.4
Public Administration	215	7.1
Administration & Support, Waste Management	131	4.3
Retail Trade	102	3.4
TOTAL WORK FORCE FOR TOP 5	2,537	84%
Source: Illinois Department of Employment Security, 2008		

Later in the report, the diversity of tax revenue and jobs will be analyzed in more detail. However, it can easily be seen that the economic base has some diversity, however the tax base may be suffering from the lack of retail, and overall development and redevelopment, which is discussed as a challenge facing the Village in the interview section.

Employment data from 2008 shows that 76.4% of those employed in Park Forest live in either Will or Cook County, with the majority (15.1%) living in Chicago, Illinois. Park Forest is a close second with 10.2%, followed by Chicago Heights (4.0%).

Labor Shed: Where Workers Live who are Employed in Park Forest		
	Count (#)	Share (%)
Chicago, IL	457	15.1%
Park Forest village, IL	308	10.2
Chicago Heights village, IL	122	4.0
Richton Park village, IL	84	2.8
Homewood village, IL	63	2.1
Matteson village, IL	58	1.9
Harvey village, IL	53	1.7
University Park village, IL	45	1.5
Hazel Crest village, IL	44	1.5
Tinley Park village, IL	43	1.4
All Other Locations	1,752	57.8
Source: US Census 2008		

It is positive that Park Forest is able to attract workers from many different areas including eight other counties (outside of Will and Cook) and four other states besides Illinois (Indiana, Michigan, Wisconsin and Ohio). This potential labor pool can help attract additional businesses and development.

Conversely, as shown in the graph on the left, Park Forest also has many residents that commute to jobs outside of the area for employment. The employment data details the daily migration of workers to job sites outside of Park Forest. For example, while Park Forest gains 457 workers from Chicago, it also loses about 2,240 workers who live in Park Forest but work in Chicago.

Commute Shed: Where Workers are Employed who Live in Park Forest		
	Count (#)	Share (%)
Chicago, IL	2,240	23.2%
Chicago Heights village, IL	617	6.4
Park Forest village, IL	308	3.2
Matteson village, IL	298	3.1
Tinley Park village, IL	264	2.7
Harvey village, IL	206	2.1
University Park village, IL	176	1.8
Orland Park village, IL	171	1.8
Richton Park village, IL	169	1.8
Homewood village, IL	163	1.7
All Other Locations	5,036	52.2
Source: US Census 2008		

Also, the Village of Chicago Heights claims 617 of Park Forest’s residents, but 122 employees commute from Chicago Heights to work in Park Forest as well. It is important to know and understand commuting patterns because it affects what people buy and where they get goods and services from, which stores or businesses will locate to an area given traffic, and helps economic developers establish potential collaborations and partnerships.

II. ISSUES AND THEMES IDENTIFIED

Issues and themes were identified from the village’s application for a GMPA, the above referenced interviews, comprehensive plan materials, other documents, and websites sponsored by the Village of Park Forest.

A. Application

The following issues were raised in the application and/or noticed by the GMPA team in reviewing the application:

- There is a need for commercial redevelopment
- There is a need to address aging infrastructure
- The Village struggles to engage and meet the needs of a changing and diverse population

B. Interviews

Person-to-person interviews were conducted with 37 people on October 5th, 6th, and 13th, 2010. The following 10 questions, plus follow-up queries when needed, were posed to interviewees. Each session took between 30 and 60 minutes to complete. While the answers

were unique, common statements and reoccurring themes emerged. Our team offers a disclaimer concerning the contents of this section that opinions expressed may or may not be factually based. Interviewees were free to express what they perceive to be the situation in Park Forest. Further, the statements may or may not be consistent with findings and recommendations of the NIU IMAP team. They are summarized here.

- **WHAT DO YOU LIKE ABOUT YOUR COMMUNITY?**

An overwhelming majority of those interviewed stated that they enjoy the uniqueness and small town atmosphere where “everyone knows everyone” even though they are nearly 25,000 in population. Many of those interviewed described diversity, and embracing that diversity, as one of the best qualities the Village has to offer. The Village, in terms of government and administration, is open, transparent, accessible and responsive. People were very happy with the support of the arts and their parks and recreation facilities. Many interviewees mentioned a strong police department that is actively engaged with the community and especially the youth. Also, many in the community are actively involved in volunteering and supporting cultural activities. Lastly, there is a sense of entrepreneurialism in the community and a “let’s do it first” mentality: planned community; outdoor shopping plaza; and going green are examples.

- **WHAT DON’T YOU LIKE ABOUT WHAT IS HAPPENING IN YOUR COMMUNITY?**

Most respondents had to put a lot of thought into this question, mainly because they did not have a lot of negative things to say about the community, but several themes emerged.

Economic Development, Property Taxes and Financial Pressure

One of the main concerns was the length of time it has taken for economic development initiatives to address redevelopment. The lack of large businesses and the disappearance of the retail base are causing a burden on the individual tax payers. This is especially true of the elderly, who are often on a fixed income, and can no longer afford to live in the Village due to property tax increases. Interviewees acknowledge that the effects of the downturn in the national economy are impacting local development and that Park Forest has been interested in attracting commercial development, but not much has been happening in that arena.

The high property taxes were mentioned by nearly every interviewee, and although people understand that schools are a big part of that, it is still a burden. Also, with the schools not doing so well, the financial question of “Why do we pay so much, for little results?” naturally arises. This directly leads to the attraction and retention of young families, new housing and new development.

Housing and Perceptions of Crime

Some residents were concerned with the number of abandoned homes and abandoned businesses in the area, including the downtown. The maintenance of homes, both rentals and owner-occupied, came up as issues. There is a perception that some of the people who are moving into the Village cause problems which result in higher crime rates. This issue is not specific to Park Forest, according to interviewees; it is the region as well. The region is under pressure because of changes in Chicago with the tearing down of public housing, resulting in a tremendous amount of pressure on the surrounding communities. This is both in terms of large numbers of people who need more services and who need to be acclimated to a more suburban way of life. In turn, outward migration has put tremendous pressure on the schools. Overall, respondents agree that there are a few pockets of “unpleasantries” and higher crime areas, but the police seem to be trying to address the issues. There was a concern that the perception of crime and the reality of crime are not the same.

Youth and the School Systems

In general, the interviewees see the Park Forest School System as the largest barrier to attracting and retaining individuals with children because the school system is not up to acceptable academic standards. The ability to grow as a community and have engaged youth is impossible without a decent school system. Couple this with property taxes being high and disproportionate to other communities (especially border communities) and community members see this as an issue. “White Flight” is becoming an issue, and interviewees do not feel that school board members are addressing it.

A secondary effect of the perception of poor school systems is a community wide concern about youth behavior becoming more rowdy and street-oriented. Some residents feel that the Village has a responsibility to control the youth issues by creating after school activities and continuing to encourage the positive roles that police officers and police programs have on youth. There was also a push that parents need to assume more responsibility for being involved as well.

- **WHAT IS YOUR OPINION OF MUNICIPAL SERVICES?**

There was a consensus among respondents that there was not a lot to complain about in terms of municipal services. Many of the individuals interviewed felt that the Village was doing the best it could with the resources available. There may be a need for some services to be consolidated, similar to the 911 dispatch center, in order to move forward successfully. The Village offers a lot that could be done by outside agencies at a cost savings. A minor issue of concern was an aging infrastructure, but again residents felt that the Village was doing the best

it could with available resources. They have an excellent Aqua Center that is well-staffed, well-maintained, and well-run. This provides a positive outlet for youth.

The staff at the Village tries to reach out to citizens, keeping them informed and involved. There was some concern over Village cleanliness and garbage in terms of timeliness, removing all debris, and tree trimming. Again, the police and fire departments were mentioned as sources of pride for the community.

Although interviewees thought there were a lot of services for the size of the town, the complaint of too high of taxes is also mentioned. Many residents sense that the Village is suffering economically due to the lack tax base, and many suggested that the Village needs some businesses that do rely on traffic. Lastly, there was an overall sense that employees care as much about the community as the residents, as a sense of pride in the community.

- **IN YOUR OPINION, WHAT COULD BE DONE TO IMPROVE MUNICIPAL SERVICES?**

Themes among the recommendations included: increasing the tax base to alleviate the reliance on property tax dollars; more ways to communicate between Village and residents (i.e., better Web site, easier access, expanded Village hours); create an animal patrol; a bracelet program for senior citizens and handicapped residents; sidewalk repair program; focus on other areas for development besides downtown (i.e., Route 30 where there is high exposure).

In general, as stated above, there were not many complaints about municipal services; however the respondents as a whole feel like the community can be improved most by communication, collaboration and consolidation, maintaining strong, transparent leadership, teamwork, accountability and responsiveness of the local government.

- **WHAT ARE THE CHALLENGES FACING YOUR MUNICIPAL GOVERNMENT?**

Economic Development: Many respondents talked about economic development in general as a need. There was some focus on trying to make a grocery store successful, while acknowledging that there are stores closely located to Park Forest and there have been some failures. There needs to be a diversification of the tax base, with an emphasis on different businesses and industries, so the community will not be so vulnerable to the varying success of the retail sector.



Housing and Crime: Housing redevelopment and new development (i.e., the old golf course) were mentioned as challenges to attracting middle class residents. This is complicated by the high property taxes in the area, both business and residential. There needs to be attention given to Eastgate and the rental portion of the multi-family townhomes because these are two areas of town that are causing problems for the community due to crime, or perception of crime, and their growing need for services.

Schools: Local governments have to be more proactive in working with the school districts and viewing the school district as their partners. Park Forest is served by five school districts for the elementary and high school. The municipality needs to be more active in all of the school boards to hold them accountable for positive outcomes. This goes hand-in-hand with needing to attract new residents through an improved relationship with schools.

Succession planning was also mentioned as a challenge. As older workers retire, a void will be left within the Village. This presents an opportunity to seriously look at hiring the right talent and not just promote from within. It also provides an opportunity to develop people within the organization to give current employees the opportunity to move up. It is a great opportunity for professional development from within and to “get the right people on the bus”.

- **WHAT ARE THE CHALLENGES FACING YOUR COMMUNITY?**

Several respondents said that competition among neighboring communities for jobs, residents, and retail are challenges. Also, there is a concern for residents to send their children to the local Park Forest School Systems. It is important to provide affordable housing for younger families, and address the property tax issue that is hindering the housing market, including the five Park Forest area cooperative corporations (co-op) paying their fair share in taxes. It is a challenge to attract and retain businesses to increase sales tax receipts and relieve the dependency on property taxes. Some residents do not have a sense of volunteerism for community and not-for-profit organizations. New residents moving in do not have the same sense of community and participation and longer-term residents and parents seem to be less engaged in the schools.

- **WHAT WOULD YOU DO TO FACE THESE CHALLENGES?**

The Village needs to be more aggressive about getting things done and taking the lead on economic development; be prepared for the upswing of the economy. There needs to be a focus on being more proactive and going out to seek businesses that will be best for the community. A few interviewees said the community could use more affordable housing in order to attract young families, which could mean redevelopment or utilizing vacant land. Many interviewees acknowledged the slumbering housing market, but a plan can be ready for

when that changes. It is also important to instill in new homeowners and residents what is expected in terms of upkeep, maintenance, and codes, while trying to have current property owners maintain their property as well.

The Village needs to explore different industries for growth, and sustain growth in the commercial and retail sectors that support the kind of community that is wanted. This could include hiring more economic development staff to try to get more retail and other industries to increase revenues. Interviewees want to see the community marketed and branded, (i.e., a shop local campaign). The community needs to be encouraged to get involved and attend meetings. When it comes to the school issues, the respondents noted that responsibility also belongs to the parents and parenting. Education is a cooperative effort, and all parties need to come together from parents, to the school boards, to the Village.

- **WHAT DO YOU THINK THE RESIDENTS SAY ABOUT THE COMMUNITY?**

Many stated that they are hearing from the residents that there is a need for a more vibrant economy as it relates to businesses. Business development is struggling and attracting new business and retaining the ones the Village has is a struggle. They also sense the impact that finances and the schools have on the community and are concerned about it. There was some consensus that Park Forest has been a great place overall, but over the last 10 years or so it has been deteriorating. In a lot of ways the sense of community is dying because many people are leaving due to high property taxes and the increase in crime (many noted it was reality, while others claimed it was perception). The services provided are done so with a balanced budget, and in the best way with limited resources, including great parks, cultural activities, and bike trails. Many felt that residents would say they have a great government that is open and honest with little to no power struggles.



- **WHAT DO PEOPLE FROM OUTSIDE THE COMMUNITY SAY ABOUT YOUR COMMUNITY?**

Some interviewees said that those who know Park Forest admire the community; others that do not know as much think that property taxes are too high and they could live in better places. Some people outside of the community see Park Forest in a poor light because housing is not as modern as other communities; no ability to modernize.

Other interviewees said that Park Forest has been put on the map in the last 5-10 years and that other communities look to Park Forest as setting an example – a model for how to govern and grow. This dueling role seems to be emphasized from other interviewees who said there is an identity crisis in the Park Forest, “Who are we going to be?” They talked about the need for branding and moving “beyond the mall mentality.” What does the future look like?

- **DO YOU HAVE ANY SPECIFIC AREAS THAT YOU FEEL SHOULD BE ADDRESSED IN THIS STUDY?**

The age old question of finances and how to attract retail, commercial, and residential development and thoughts for the timing should be addressed. If there really is an economic recovery on the horizon, what does the future hold for development? It was recommended that Park Forest pursue proactive strategic planning for land use and economic development. The Village needs to address the tri-village development issue (Olympia Fields, Matteson & Park Forest) and do more with bordering neighbors (Chicago Heights, University Park). This could include consolidation of Village services, which was mentioned several times, as an approach to alleviation, regionalism and efficiency.

There is a need to focus on co-op issues and questions about equalizing taxes, paying their fair share for the basic services. Any ways to alleviate the property tax burden, including analyzing the diversity of industry and type of jobs where residents can earn a decent living. Park Forest is a planned community and they need to plan their future and go after it.

Schools are a major issue – schools impact demographics and who wants to move in, both business and residential. It is also tied directly to economic development, the housing market, crime, and needs to be looked at holistically, not just as one chunk on its own. Park Forest is an ecosystem and when one part fails, the ecosystem can fail. As a Village, explore some of the best practices for small municipalities that Park Forest can adopt. Park Forest needs to get back to the community pride that they once had.

C. Comprehensive Land Use Plan

The Village of Park Forest has a long history of community and land use planning. This policy and practice goes back to its origin in the 1940’s as one of the planned communities established to create housing opportunities for military veterans after World War II. A good example of this legacy is the process that resulted in publication of the Comprehensive Plan 1980-81. That document refers to a variety of previous efforts including the Comprehensive Plan 1967.

The 1980-81 plan states the purpose for undertaking this type of activity:

“The Comprehensive Plan is a management tool. It’s an instrument which establishes long-range policies for the Village in a coordinated, unified manner ... The Comprehensive Plan helps elected and appointed officials make difficult choices between competing interests and it serves as a guide for decision-making. The Plan does not resolve differences; rather, it highlights those differences and focuses attention upon them so they can be resolved.” (Background Information, pp. 1-2)

The plan has ten “input” chapters that catalog the process involving officials and members of the community, in-depth research on a wide range of community facts, and planning guides on a variety of topics. Attention is paid to facilities, services, and land use for both public and private activities. Input #10 on Land Use and Environment alone provides insight on the community as a whole. Here is a succinct description:

“As a Planned Community, Park Forest’s land use pattern was set by the original developer. The community was planned as a freestanding suburban satellite town. The early plans called for a concentrated urban core (the Park Forest Plaza) surrounded by relatively high density townhouses with the balance of the community being family homes. Construction in the Village followed this well-defined pattern. Now the Village encompasses almost 5-square miles of which 95% are developed.” (Land Use & Environment, p. 1)

That chapter of the plan goes on to list goals, objectives and policies for a variety of topics. A few noteworthy examples are listed below:

- ❖ *“Economic Development – To provide a broad range of convenient retail, service, and industrial opportunities ... To expand Park Forest’s tax base in order to maintain a high service level ... to promote the Park Forest Plaza area as the Village’s downtown. (Land Use & Environment, p. 37)*
- ❖ *Housing - To preserve and enhance Park Forest’s stable residential environment, providing persons of all ages, races, and incomes the opportunity to live in sound, affordable housing. (Land Use & Environment, p. 43)*
- ❖ *Land Use & Environment – To provide a framework for the orderly and sensitive development and/or redevelopment of the Village ... To provide a living environment which offers a clear sense of community, while still providing for individuality. (Land Use & Environment, p. 45)*
- ❖ *Establish and enforce urban design mechanisms such as sign ordinances, landscaping standards, landmark preservation, and architectural standards.” (Land Use & Environment, p. 46)*

Another feature of the Comprehensive Plan is the Land Use Map and supporting maps. There are many similarities to the current Land Use Map. The contents of this document clearly point to a progressive approach to community stewardship. Community leaders took their charge seriously with the intent to use the plans as a guide for implementation. For example, the Village initiated a program to identify and pursue the acquisition of tax delinquent properties. Some are rehabilitated and many are demolished. The purpose is to remove urban blight as a way to stabilize the neighborhoods. This theme carries forward in subsequent years as our reviews of other documents in the following paragraphs indicate.

D. DownTown Master Plan

We will not recount here the many events leading up to the current situation regarding the place now called DownTown Park Forest because they are well-known to community leaders and others. It should suffice to state that overall economic conditions, additional transportation routes in southern Cook County, corresponding changes in traffic patterns, corporate business decisions, the decisions of neighboring municipalities, and local actions all played a role. We further observe that this business district has been the subject of debate and some controversy over the years. Nevertheless, decisions and actions indicate that a long-standing consensus exists to continue implementing a master plan for the downtown. Commitment and determination to forge ahead are a common theme among those the IMAP-GMPA team interviewed. This is blended with an apparent openness to ideas that may improve the efforts.

The President and Board of Trustees adopted a first master plan (MP) in 1997 for creating a different kind of business district in the former Park Forest Plaza regional mall. This marked the beginning of a long-term strategy to transform what became a vacant and blighted area into a more traditional community downtown. The original MP stated the underlying premise:

“In response to a changed retail environment and desire to make downtown a more attractive shopping area, the Village took control of its destiny and purchased the property in December, 1995. The Village now owns 90% of all targeted development properties in Downtown Park Forest.” (p. 1)

The essence of the plan is to recognize three basic factors: the site is no longer a regional draw, citizens still consider the area to be the heart of town, and it



has sustainable value as a scaled-down community service and retail center. Recommendations encompass demolition of 200,000 square feet of former commercial space to the redevelopment of 25 acres of old parking lot and former retail space into condominiums/townhomes. This was a bold MP! The planning consultant illustrated potential improvements through numerous renderings and maps.

The MP Update of 2002 was commissioned to review existing physical conditions, public improvements and private developments that occurred during the five intervening years, conduct focus group discussions, and facilitate workshops to consider new planning/design ideas. Village leaders were clearly on-task, wanted to pause for a brief time, and take another look at the situation with the help of professional planning consultants. Here is a sample of MP Update findings:

- ❖ *“...the Village has established a cultural arts center...the arts continue to appear to be the most powerful theme for Downtown.” (p. 11)*
- ❖ *“... build on the community’s loyalty and the public’s desire to go back to traditional downtowns not only for shopping but to socialize and have fun.” (p. 11)*
- ❖ *“Providing more activities and amenities for seniors, especially now that 174 new residents will be living in the new senior housing, could provide additional strength to the Downtown market.” (p.11)*
- ❖ *Opening up the center of the vacant mall, where the smaller shops, theater and Village Green were located, was the critical first step in the redevelopment process. (p. 13)*
- ❖ *The large unattractive parking lots on the perimeter of the new Downtown have become physical and psychological barriers to the area’s revitalization. Improving the lots and reconstructing the parking lot driveways as interconnected pedestrian-friendly streets ... are critical to changing the real and perceived isolation of Downtown. Completion would alleviate parking congestion on Main Street.” (p. 13)*

Again, planners produced updated renderings and maps. They illustrated what later became the Victoria Place townhome development on the west side of Downtown, the Victory Center independent living and assisted living centers, and store fronts along Main Street. The report lists commercial, residential, and institutional developments that were attracted to the area. The MP Update concludes with recommended implementation of remaining priorities by phases. Here are representative items:

- ❖ *“Conduct a feasibility study of the reuse of former Marshall Field’s building for a banquet facility and/or culinary school.” (p. 25)*

- ❖ *“Organize a new focused Downtown marketing program that targets commercial business for Downtown core building spaces ... encourage townhomes and apartment buildings for Victory Place frontage sites.” (p. 25)*
- ❖ *“Review annual program of activities [for the Village Green] to determine if additional events and activities could be added to draw more people to Downtown.” (p. 25)*

The report states that clutter and confusion at specified places should be replaced with clear, welcoming, and informative signage. This includes wayfaring signs and storefront signs within the Downtown with entrances facing toward Main Street. Two of the most prominent outcomes of the recommendations are the Downtown Park Forest entryway arch and the tall marquee sign on Lincoln Highway (Also known as U.S. Route 30 and 211th Street).

Our team reviewed these reports knowing what has happened the past 8 years. The Village clearly stayed the course in testing alternatives and in implementing changes using the MP and MP Update as a guide. Examples include erecting new street signage, demolishing the Marshall Field’s building, and retaining long-standing businesses in the redeveloped Downtown. Additionally, higher density housing is now located in the western part of Downtown Park Forest.

E. Downtown Conversion

Village of Park Forest officials, current and past, have been working on ways to convert the former Park Forest Plaza regional mall into a town center. This has been a complex challenge with the Village undertaking a monumental intervention after the original business model failed.

One document from recent Village records provides insight and regarding this topic. In 2003, Park Forest took part in one of the Technical Assistance Panel projects produced by the Urban Land Institute Chicago in cooperation with the Campaign for Sensible Growth. The study report entitled Park Forest, Illinois, Building on the Legacy: Creating a New DownTown has been used as a guide. The report has influenced recent planning, decision-making, and action. It is referenced in the most recent Park Forest Strategic Plan for Land Use and Economic Development (see p. 2). Notable findings and recommendations that may still be relevant today are displayed in *“italics”* followed by an IMAP-GMPA team comment in [brackets]:

- *Resident Comments: “High taxes present a significant challenge for the Village...We’ve voted for every single referendum for the schools...and three-quarters of it goes there.” (p. 12)*
- *Study Panel: “Cook County Property taxes create an ‘excessive burden’ that Park Forest cannot ignore.” (p. 14)* [The property tax rates may be higher than many communities, but the cost of housing is lower in the affordable

community of Park Forest. There is an inverse relationship in the property assessment and taxation formula. When a local government sets the levy, the County will compensate by either raising rates on a diminished equalized assessed valuation (EAV) or by reducing rates on an appreciated EAV. The former applies to Park Forest.]

- *Resident Comments: “The town’s original planners paid little attention to industrial development.” (p. 12)* [There is only one relatively small area zoned M-1 for light industrial and M-2 for heavy industrial.]
- *Study Panel: “The potential for programming along Main Street and on the Village Green has drawing power for more than just the 24,000 residents of the Village. The Social aspects (that the arts assets) provide to you is unmatched.” (p. 15)* [The Village Calendar of Events Spring/Summer 2010 and Business Resource Guide 2010/11 are examples of promotional materials the Village has created to promote Downtown assets.]
- *Study Panel: “The panel’s commercial vision positions the downtown as a specialty and convenience center. Park Forest must reduce its retail square footage to between 150,000 to 200,000 to match demand, based on the rule of thumb that a retail area needs about 8 square feet of space per person; using the Village’s 24,000 population as a yardstick.” (p. 15) “...look at perhaps razing the back portion (of Marshall Fields), preserving the historic façade on the Village Green.” (p. 19)* [The report previously noted that a total of 363,000 sq. ft. remained of the former mall turned downtown area. (p. 4) The Village has reduced excess capacity during the intervening years with demolition of the former Marshall Fields department store.]
- *Study Panel: “The panel’s commercial strategy hinged heavily on hiring a professional leasing and management director, or an outside firm, to complement the Village’s existing staff.” (p. 16) “...start by hiring a development advisor to direct retail and residential development and manage other consultants....hire additional dedicated staff in the person of a downtown redevelopment director...” (p.19)* [The Village now employs a Director of Economic Development and Planning, an Assistant Director of Economic Development and Planning, a Director of Community Development, a Community Relations Coordinator, and a Downtown Park Forest Property Manager.]
- *Study Panel: “...develop an annual marketing budget that includes line items for informational materials and public relations, trips to trade shows, and paid advertising.” (p. 16) “...the Village should plan on spending somewhere between \$75,000 and \$100,000 overall.” (p. 22)* [The annual Village Budget for 2010-11 includes funding for the Department of Economic Development (ED). Dollars spent far exceed the panel’s suggestion with the ED budget directed toward promotion, attraction, and retention activities.]

- *Study Panel: “The Village should investigate the market for residences with 10 to 15 dwelling units per acre, assuming two- to four-story buildings, with a mix a multi-family mid-rises and townhouses.” (p. 18) “...the community will need to prove that new housing can be absorbed.” (p. 23) [The Village did attract a quality townhome development on property at the northwest area of the downtown. Various types of senior-oriented housing are still viable on a large scale in the current market. The Victoria Place multi-family senior housing was built in the eastern entry lane along Main Street. Nevertheless, can the community absorb more conventional housing and senior housing for active adults or limited care?]*
- *Study Panel: “Better builders like to see a couple-hundred units (of housing) or more. That’s what’s economically viable. You also will be able to absorb some of the excess parking that some folks feel has a blighting effect.” (p. 17) [The housing market and economy the past three years has not been conducive to major housing development or redevelopment.]*
- *Study Panel: “...the downtown still looks like a mall from a distance. We like the idea of getting rid of the parking and expanding housing to the south and across from the senior complex.” (p. 21) “...clustering commercial spaces and grouping ‘like uses’ in the three major clusters of arts, food and entertainment, and services for synergies...orienting activity toward the street is an ace-in-the-hole.” (pp. 16-17) [Signage on buildings and for wayfaring through the downtown is now primarily oriented toward Main Street.]*
- *Study Panel: “...reserve its existing TIF increment for commercial and infrastructure use...” (p.18) [The annual Village Budget for 2010-11 includes funding for the Downtown Tax Increment Financing (TIF) District. The TIF emphasizes tax rebates and infrastructure improvements.]*

The Village has a record of accomplishment, but has not yet achieved the ultimate goal to fully redevelop a self-sustaining downtown Park Forest. The bottom-line message from the study is to down-scale former mall property, introduce more housing as a catalyst for residential-commercial synergy, and build on the strength of existing arts and services. The Village has been implementing this approach in various ways for many years.



F. Strategic Planning

The Village has used different forms of community and operational planning for many years **(See subsections C and D above as prime examples)**. Officials, staff and others take planning seriously as a way of doing business in Park Forest. They have used this methodology to evaluate issues, set policy, work to implement priorities, periodically review outcomes, and make adjustments when necessary. There have been notable amount of patience and endurance in the pursuit of goals and objectives. This extraordinary characteristic spans many years and different terms of the Board of Trustees. Continuity in leadership and supporting staff has contributed to this positive situation. A good example concerning land use and resource allocation is the Comprehensive Plan 1980-81. In regard to strategic planning the Village produced Pride in the Past, Promise for the Future: Strategic Plan, June 1992 and the Strategic Plan for Land Use and Economic Development, November 2008.

The 1992 strategic plan (SP) was produced with the typical process of group brainstorming, deliberation, goal-setting, and timelines for implementation. It covers a wide scope of issues in the community: e.g., housing, human services, community image, redevelopment, etc... **(See Sec. IV Review of Key Documents at subsection A on Values, Mission, Goals and Objectives Statements regarding this document.)** In contrast, the SP produced in 2008 is a detailed study of economic development from the land use perspective. Findings describe the status of specific locations within the Village. Recommendations are presented on how best to improve those locations for the betterment of the community at-large. Further, targeted sites are prioritized with consideration toward sequencing of projects, the interrelationship of projects, the impact on other properties, and financial return on investment for the Village. The purpose of the report is stated and restated:

“This community wide Strategic Plan addresses other distinct, strategic areas of the community that, when taken together with the plans for DownTown and the 211th Street Metra Station, will serve as the Village’s comprehensive plan for land use and economic development. Together, these plans establish and prioritize the Village’s development agenda, with the ultimate goal of building a stronger tax base and enabling the creation of a more sustainable community.” (p. 3)

“...these Plans will provide policy direction over the next fifteen years for Village staff and officials, in particular the Sub-Areas included in the Plan. As with any comprehensive plan, these Plans will be living documents, with the necessity that they be revisited and updated from time to time to reflect changing market conditions, Village priorities and emerging opportunities.” (p. 5)

The report goes on to identify residential, commercial and employment goals. An underlying theme is that housing and retail development can strengthen each other. The synergy created by both produces an outcome greater than what each could generate individually. In order for Park Forest to fully embrace this theory, the report

advocates for proactive support of both forms of land use adjacent to each other. This position was derived in part from an inventory of existing conditions conducted at the front end of the SP process:

“...the Village is losing over \$100 million in annual retail sales potential to other jurisdictions. If residents were the only factor generating sales in the community, the community would see almost \$140 million in sales. But stores in Park Forest currently support only about \$36 million in sales. Clearly there are opportunities in several key retail segments to draw additional sales growth to the Village.” (p. 10)

The report presents a consistent strategy of promoting the highest and best use of multiple sites throughout the community. The range of ideas include higher density housing in existing residential areas and changing existing residential property to retail when traffic patterns provide the opportunity for business customers. Redevelopment opportunities were described for seven sub-areas. The most promising were analyzed further to test the potential rate return on investment by the Village (see p. 25 of report).

The question of whether Park Forest leaders act on SP’s and other plans is actually addressed by the consultants in this report:

“The recommendations from the Master Plan and the Technical Assistance Panel have been nearly all implemented. While some redevelopment remains to be undertaken, the transformation of DownTown Park Forest has advanced enough to be characterized as a traditional downtown that provides for store visibility, pedestrian access, an interconnected street system, access to public transit, and a mix of land uses.” (p. DG-1)

One of the most obvious examples of Park Forest planning and action is the demolition of more than 400,000 square feet of former regional mall space in the DownTown. [The most recent building to go down is the nearly 120,000 sq. ft. former Marshall Fields store.] That activity started during the time of this IMAP-GMPA study. This follows recommendations of previous plans to down-scale the central business district. Planners and decision-makers concluded that the large amount of vacant space was not needed. Further, it detracted from efforts to establish a quaint and attractive community-oriented downtown. A traditional Main Street was built through the property and store fronts were directed toward it. New open space was filled with higher density housing near the DownTown businesses. That established the potential for a real-life synergy between the residential and retail properties.

The details presented on sub-areas are not reiterated here. We do want to point out that the plan does prioritize the targeted sites. The section on Priorities for Action provides the following listing:

1. *211th Street Metra Station Transit Oriented Development Area*
2. *DownTown Park Forest, including the DownTown Gateway South Western Avenue Annexation Area*
3. *Eastgate Neighborhood*
4. *Residential Infill and Redevelopment*
5. *Norwood Square Shopping Center*
6. *Park Forest Business Park*
7. *Sauk Trail, including West Gateway, East Gateway and Corridor*

The apparent factors supporting the order of priorities are Village policy statements, the other plans referenced above, and perceived market opportunities. Decisions and actions of the Village in the wake of the report indicate an awareness to use the plan as a guide for how to best use limited resources to achieve the stated priorities. The Economic Development and Planning Director's report to the President and Board of Trustees, dated 10/1/2010, describes the status of priorities in the SP for Land Use and Economic Development (See pp. 4-3 to 4-6). The Director explained to our team that the 2008 SP is comprised of the land use and economic development elements of the Village's official comprehensive plan formally adopted by the Board in 2009 as Section 78-62 of the Municipal Code. She further described how the Village integrated the SP effort with Comprehensive Planning:

"The Plan Commission and Board of Trustees chose to undertake comprehensive planning by focusing on seven strategic areas of the Village that need to have focused development and/or redevelopment attention over the coming years. The Strategic Plan specifically incorporates the DownTown Master Plan and the 211th Street Transit Oriented Development Plan, so this means that the comprehensive plan address all the strategic areas of the village." (H. Kingma email message to B. Townsend dated 1/6/11)

The Director went on to state that the Village was in the process of developing a housing policy plan (an element of the comprehensive plan) in partnership with the Metropolitan Mayors Caucus and the Chicago Metropolitan Agency for Planning. **(See Sec. V Opportunities for Success at subsection.)**

G. Transit-Oriented Development

Park Forest Officials and staff consider land adjacent to the 211th Street (Lincoln Highway/U.S. Route 30) Metra Electric Train Station to be a prime target for redevelopment. Two former automobile dealerships, one vacant and one re-used for office space, are located next to the

Park Forest commuter parking lot that serves Metra riders. They believe this proximity provides an opportunity to leverage the train station for quality re-use of the properties. They met with leaders of the Village of Olympia Fields and Village of Matteson, who also identified underutilized facilities and land within their jurisdiction, to explore how they could work together to



redevelop the area. They jointly pursued and proceeded with a Transit Oriented Development (TOD) study through the Regional Technical Assistance Program (RTAP) of the Regional Transportation Authority (RTA). The RTAP scope encompassed a study of improvements to the station buildings on the overpass platform, improvements to parking lots, better/safer pedestrian access, and ways to use TOD strategies to promote redevelopment within a one-half mile radius of the Metra train station.

After completing an inventory of land around the train station, a full market assessment was conducted to determine whether and to what extent new business or residential projects could be attracted. Some of the findings are:

- ❖ *“There is potential for an additional 20,000 to 30-000 sq. ft. of retail space in the southeast quadrant along Lincoln Highway/US Highway 30, assuming a stop light is installed at Indiana [Street] to ensure adequate access.” (p 3-10)*
- ❖ *“A high retail vacancy rate along Lincoln Highway/US Highway 30 and the planned redevelopment of the Lincoln Mall [in Matteson] will make it difficult to attract a large number of retailers and restaurants to the station area.” (p. 3-10)*
- ❖ *“The station area could support approximately 20,000 to 25,000 sq. ft. of office space in a single-use building or a mixed-use retail and office building that serves small office tenants.” (p. 3-10)*

The report went on to describe key issues and opportunities presented at the site:

- ❖ *“The most important opportunities relate to ‘areas with redevelopment potential,’ which are underutilized and vacant parcels with near-term development potential ... In addition there are numerous opportunities or station improvements and streetscape enhancements.” (p. 4-1)*
- ❖ *“The two commercial properties and the commuter parking lot in Park Forest may have redevelopment potential as a mixed-use project with retail/office uses, condominiums, townhouses, and structured parking.” (p. 4-1)*

Workshop sessions, hosted by Park Forest, and Steering Committee meetings were held to perfect a plan and reach consensus on pursuing it. Participants preferred short-run and long-term improvements with a few presented here:

- ❖ *“[In the short-run... Park Forest will seek out interested developers to redevelop the commercial parcels along Lincoln Highway/US Highway 30 with mixed-use commercial and with multi-family residential uses.” (p. 6-1)*
- ❖ *“Park Forest should establish partnerships with the existing commercial property owner, developer(s) and necessary public agencies to facilitate redevelopment.” (p. 6-6)*
- ❖ *“[In the short-run]... enhance the Lincoln Highway/US 30 underpass for pedestrian comfort, while long-term improvements should include a pedestrian tunnel from Park Forest to the Matteson (south) station entrance.” (p. 6-1)*
- ❖ *“In the long-term, the Villages could seek out public and private funding sources and work with Metra to explore the feasibility for two shared-use parking structures” (p. 6-14)*

In order to bring the ideas and plans to reality, the report recommends implementation methods like those listed as follows:

- ❖ *“... a cooperative spirit and a project champion(s) are necessary for successful implementation. Each Village should formally institutionalize their cooperative efforts and designate a project representative to ensure that the planning and implementation process are seamless and continuously pursued.” (p. 7-2)*
- ❖ *“The Villages should amend their development regulations to include a mixed-use zoning district, a planned unit development (PUD) classification, or a transit zoning overlay [district].” (p. 7-3)*
- ❖ *“Each Village will need to contribute local funds for various public improvements in order to highlight a commitment of its vision of the station area, and to provide an incentive for the private sector to contribute through high quality development.” (p. 7-5)*

There is a section on strategy that details different ways for the municipalities to take specific action on redevelopment; e.g., Capital Improvement Plan with identified revenues, sales tax revenue sharing among the municipalities, tax abatement incentives for developers, land banking (Park Forest has already done this with one of the tax delinquent former car dealership properties), Tax Increment Financing (TIF) District, Transportation Enhancement District, and Business Improvement District. Other TOD-related grant and in-kind assistance programs are also identified. The TOD report also advocates for intergovernmental initiatives including lobbying transportation planners at the Chicago Metropolitan Agency on Planning (CMAP) plus State and Federal legislators.

A revised Preliminary Preferred Concept Plan was finally approved. It includes shared-use parking lots and a new name for the Metra station; i.e., “Park Forest/Lincoln Highway.”

The three Villages are proceeding with efforts to redevelop the area. The latest effort is to secure more technical assistance. A request for proposals (RFP) was issued in September 2010. Here is the Scope of Services description:

“In order to attract a developer, or developers, to implement the 211th Street TOD Plan, and ensure that the redevelopment is of the highest quality possible, additional planning work and financial analysis is needed. This includes amendments to the municipal development regulations to permit transit oriented development, the creation of corridor design guidelines, a detailed analysis of the financial incentives possible for implementation of the Plan, and a financial analysis and development pro forma to determine site preparation costs and projected property values based on the Plan. This section describes each of the key elements that will be the focus of this contract for additional planning and implementation studies.” (See Park Forest official website.)

Park Forest and Matteson passed resolutions stating their intention to work together to accomplish the goals of the 211th Street TOD Plan. Olympia Fields joined with them to secure a \$100,000 grant from the Illinois Department of Commerce and Economic Opportunity to conduct the phase two studies related to implementing the plan. The project will proceed as soon as a consultant is on board. The Economic Development and Planning Director’s report dated 10/1/2010 provides a complete update (See p. 4-4).

H. Public Information and Community Outreach

The Village of Park Forest performs many outreach activities and publishes numerous pieces of information related to community outreach.

The Village publishes a community magazine entitled Discover three times yearly. It is a well-written, full-color periodical with articles ranging from past to present to future events or items of interest. For example, the Fall 2008 edition included a “Mayor’s Message” in which the concept of civic energy is tied to current activities. Mayor Ostenburg references the best-selling book The Organization Man, by William H. Whyte, in which the following description is applied to the Village: “Park Forest probably swallows up more civic energy per hundred people than any other community in the country.” The remainder of that message and magazine highlights a variety of programs and accomplishments. The Summer 2010 edition has an article entitled “Village Officials Take Measures to Adapt to Current Economic Climate.” Specific actions are cited to explain how the Village government has been careful and conservative with spending during the economic downturn. It is a good example of transparent public relations. Other

articles deal with Main Street entertainment, public library offerings, a Park Forest Medal of Honor recipient, construction, the bi-monthly utility billings, and other items.

The ***Business Resource Guide*** is published annually with contact information for businesses, the Village, schools, regional services, and places of worship. There is a map of DownTown Park Forest with specific locations noted.

- ❖ The Village is in the 6th year of running the ***Neighborhood Meeting Program***. This is a primary way for staying connected with the community and dealing with issues.
- ❖ The Police Department has informational brochures available on police protection services and community oriented policing programs.
- ❖ The Fire Department produces an annual report and distributes materials on fire prevention and ambulance services.
- ❖ The Public Works Department publishes the annual ***Water Quality Report*** and has other information available upon request.
- ❖ The Public Health Department created a variety of promotional and information items. Services are marketed under the moniker of ***Nurses Plus***. The materials convey a definite brand of friendly, competent, and caring service.
- ❖ The Village distributes the ***Resident Handbook*** to new arrivals. There is a map, brief summary of Park Forest history and character, services, and contacts.
- ❖ Several community events are conducted throughout the year, brochures are sent out, advertising is placed and new resident packets are issued as well. Many of these events are presented together in the twice-a-year ***Calendar of Events***. This schedule is published for Spring/Summer and Fall/Winter.
- ❖ Special Meetings/Open Houses are held for a variety of topics as they come up. Some of these gatherings for major initiatives are referenced elsewhere in this report.

I. Park Forest Website, Social Media and Web-based Marketing

Park Forest's official website, www.villageofparkforest.com, contains a wealth of information and links related to the Village and the surrounding area. The home page emphasizes community news on Village projects, entertainment, Village services, successes, and participatory events. It also includes contact information and easy to use buttons for clicking to other website pages.

Village Board Regular Meetings and Rules Committee (Committee of the Whole) meetings are recorded and available through video-streaming. Both the video and audio quality is good. For example, the 11/1/10 Regular Meeting comments of the Mayor included comments on the Strategic Goal-setting session held on 10/23/10. He said it was productive and thanked all participants. He particularly commended the Trustees for their extra time and effort to prepare for and take part in this worthwhile planning activity.

The website has a [Facebook](#) social plug-in and [YouTube](#) videos featuring Park Forest events. For instance, there are videos of the [5th Annual Veterans Recognition Night](#) and the [Habitat for](#)

Humanity housing redevelopment partnership. The Village is clearly using social media to inform people and help connect them to the community. Other efforts involve posting messages on Twitter and email marketing through ConstantContact.

There are individual pages for Village Board meeting agendas, minutes, the municipal code, and other official documents/forms. Each department has a web page. The Building Department page is like a one-stop shop of information and forms. It has permit applications, the zoning map, and other useful e-tools. The Public Health Department has a special web site at www.pfhealth.net that is linked to the Village site. The Home Page banner has headings and buttons for emergency communications, elected officials, email notification, the weather, contact numbers, and utility billing payment. The employment page includes available job openings and an application. Email addresses are displayed and visitors to the site are encouraged to contact the Village.

The Helpful Links page lists and links to numerous Park Forest related sites including government officials, media, and civic organizations. One long-time communication tool is cable television at channel 4 for Comcast subscribers and channel 99 for AT&T subscribers.

The Village is continually in the process of updating website information. The content related to community and economic development appears to be accurate and informative. However, it is rather staid in the way it is presented. There is no interactivity and it does not leave a memorable impression on the viewer. **(See Section V at subsection B Public Relations (External & Internal) and Community Branding below on presenting economic information to the public and business prospects.)**

Village staff uses other sites on the worldwide web to market sites in the Village (both publicly and privately-owned) that are available for development or redevelopment. Some examples:

- Location One Information System (LOIS) – the oldest, largest and most affordable database for building and community development. It is officially endorsed by the Illinois Department of Commerce and Economic Opportunity (DCEO).
- CoStar Group – claims to be the #1 commercial real estate information company. It caters to property investors and sales professionals in the U.S. and United Kingdom. The Village updates on a monthly basis.
- Property Line – supports the commercial brokerage community by marketing real estate, promoting commercial brokerage companies, and helping commercial brokers search for real estate opportunities.
- Chicago Southland Economic Development Corporation (CSEDC) – the website presents news and notable property offerings for the

region. The most recent home page features the CN – Chicago Logistics Park.

- Sites to do Business Online – this is an electronic directory of professional businesses and a catalog of website information.

Staff indicates that the aforementioned sites are good resources that have helped develop leads and are effective in maintaining a network of business relations favorable to Park Forest.

J. Information Technology

The way an organization communicates, mobilizes resources, and manages records will have a direct impact on performance. This, in turn, creates an impression on everyone who conducts business with that organization. Existing customers and prospective business owners expect ease of contact, timely response, and quality results. Information technology (IT) is one tool in the box that a corporation or agency should use to achieve performance that produces desired results. It is no longer a luxury, it is a necessity. Perhaps the most important tool in the box from the internal perspective is the file server system. This can improve departmental coordination, response, and quality. There are a variety of external IT items that are important, but the municipal website may have the highest profile.

While the nature of this study did not allow the NIU team to drill down on IT items, we do have a few observations to offer. The Village appears to possess a sophisticated IT infrastructure. For example, our NIU IMPA-GMPA team was able to log onto our own intranet sites using the Park Forest Wi-Fi capabilities. Further, the staff was able to quickly retrieve and provide a variety of documents we requested. Concerning the Village website, homeowners and business owners of Park Forest may use the website to apply for a permit, ask for a billing record, or inquire about a service. Many, if not all, of the services should be comparable to or be more convenient than the old fashioned way: over-the-counter. For outsiders, the municipal website and the links to or from it may be the first point of contact. This could be a corporate executive interested in expanding their enterprise in the Chicago metropolitan area.

In any event, a professional presence and prompt reply from staff will continue to prove that Park Forest is a great place to live and do business. A good IT system can help by enhancing the timeliness and quality of customer service. The Village should continue to reinvest in IT. This includes office programming and equipment, emergency communications, utility meter readings, website, wireless network, and other features.

III. COMMUNITY ASSETS AND LIABILITIES

Assets:

- 1) The Village of Park Forest has a small town feel even though the population is nearly 25,000
- 2) There is a great sense of community pride in the Village
- 3) There is a tradition of civic involvement
- 4) The Village government is seen as transparent, accessible, and responsive to citizens' needs
- 5) The Village provides a wide array of services to its citizens, which leads to a high quality of life
- 6) There is a rich arts culture in the community
- 7) The Village has a strong police department that is engaged in the community
- 8) The Village has a strong fire department
- 9) The community embraces diversity
- 10) The Village has a dedicated professional staff that works well together to get things done in a timely fashion
- 11) There is some land available for new development, including light industrial, commercial and residential

Liabilities:

- 1) The Village owns a number of properties which has caused them to come off the property tax roll leading to less property tax revenue
- 2) The property taxes are high
- 3) The tax base is not diverse, which has led to higher property taxes
- 4) The retail base has declined which has led to less sales tax revenue
- 5) The school system is seen as sub-standard
- 6) There are a number of abandoned properties and businesses throughout the Village
- 7) There is a tax inequity between cooperative housing and standard housing
- 8) There has been an influx of new residents who do not engage in community affairs
- 9) There is minimal retail and industrial development

IV. REVIEW OF KEY DOCUMENTS

The first and second level key documents described in the methodology section to the preface of this report, as provided by the Village, were reviewed off site. The team offers the following analysis and recommendations:

A. Values, Mission, Goals and Objectives Statements

The most important role of a Village Board is to establish a vision for the Village, identify the goals for the community and the organization, set the policies, allocate the resources to achieve the vision and goals, and make sure it all gets done. Having a set of written and clearly understood statements best fulfills this role.

The Village of Park Forest prepared and published Pride in the Past, Promise for the Future: Strategic Plan (SP) dated June 1, 1992. It was the work product of a SP process involving a Steering Committee with group interaction that encompassed interviews with community stakeholders, a resident survey, an advisory committee and several open house meetings for public input. Participants produced a set of overall policy statements for the Village comprised of a vision, beliefs, mission, objectives, and strategies. This created a holistic approach to all Village issues with accountability for follow-up and measured results. The Village Board accepted the report. Here is the Vision Statement:

“Park Forest in the future will be a culturally and racially diverse community of residents who work together with strong and visionary leadership to ensure comprehensive services, financial stability and academic excellence in a safe, attractive environment.” (p. 6)

The next SP component is the set of belief statements:

“We believe we can achieve this vision by revitalizing the values and ideals that make Park Forest a unique community. Park Foresters value:

- *involved and caring neighbors*
- *a community diverse in age, culture, race, religion and economic status*
- *responsive and proactive council-manager form of government*
- *non-partisan Village elections*
- *good municipal services*
- *cultural and recreational amenities*
- *attractive surroundings and open space*
- *the contribution of community groups and religious organizations to our quality of life*
- *our community’s willingness to see Park Forest as part of the larger south suburban community and the desire to remain competitive within that regional environment.” (p. 6)*

The SP presents four areas, each with a specified mission and task force action assignments. They are as follows:

- ✓ **Housing** – *Maintain and upgrade existing housing, and develop quality moderate-to-upscale housing that attracts and retains a diverse population.*
- ✓ **Human Needs & Services** – *Provide human services that support and promote a community diverse in age, culture, economics and race.*
- ✓ **Economic Development** – *Develop a strong and diverse tax base by focusing on commercial*



revitalization; business attraction and retention; and new growth through annexation, with attention to regional issues.

- ✓ **Major Policy** – *[The SP has a listing of 10 items.] Examples of notable policy statements include aggressive annexation, rezoning and development to enhance the original planned community concept, strict code enforcement and maintenance of current housing stock, and an active role in tax reform.” (pp. 7 & 8)*

The report continues with detailed descriptions of issues, findings, objectives, strategies, implementation responsibility, time period to completion, and resources to be dedicated. The section on Human Needs & Services is notable because it calls for using municipal resources to help at-risk persons. This is defined as the elderly, families with children and a single parent, victims of domestic violence, people affected by drug abuse, and those without health insurance. There is a call for addressing the stated needs through services and resources on a regional basis. A real commitment to people is stated in the SP that goes well beyond what most municipalities undertake.

The Village also produced a special type of SP in 2008 related to land use and economic development. **(See Section II Issues and Themes at subsection F Strategic Planning for a review of this document.)** There is remarkable consistency between the 1992 and 2008 SP’s, but the emphasis is different.

Records indicate that Village officials, staff and other community members take seriously the SP process in its different forms. This has continued to be the case for many years. Implementation is continual and there is a periodic status review of goals and objectives at the annual Financial Update session in the second quarter of the fiscal year (Autumn season) and the annual SP Update session held during the third quarter (Winter season).

RECOMMENDATION

The Village is fully engaged in true SP methodology and implementation. Leaders should continue to utilize the SP process , including the annual review sessions at which discussion takes place, results are assessed, and any needed changes in strategy be considered. **(See Sec. V Opportunities for Success at subsection A for advice on how to enhance SP management to achieve targeted outcomes.)**

B. Organizational Chart

The organizational chart is one of the most basic tools for identifying how a business or municipal corporation operates. The chart should make it clear to the reader what lines of authority, responsibility, and accountability exist within Village operations. An organizational chart also presents a readily understandable means to assess the deployment of human

resources. The Village of Park Forest has organizational charts for the Village government as a whole and for each department. They are easy to read and understand.

RECOMMENDATION

Continue to use the present Park Forest organization chart format. Use the organizational charts as needed to educate Park Forest citizens on what comprises their municipal government.

C. Municipal Budget

Illinois municipalities are required to adopt an annual fiscal year budget or an appropriations ordinance. The yearly financial plan is perhaps the most important document that a governing body adopts because it allocates the resources necessary to serve the community. The budget is a forward looking document and can serve to do more than simply state where the money is coming from and how it is being spent. It can take many forms. The budget at a minimum should contain:

- an organizational chart,
- a narrative pointing out the changes that have occurred since the previous budget and the future trends in revenues and expenditures,
- a section on the financial policies of the Village government,
- a description of how the revenue and expenditure numbers were developed,
- a breakdown of what the activities, services, and functions are of each organizational unit and what the personnel and expenditure allocations are to accomplish those activities.

The budget should be in a numerical, narrative, and pictorial format understood by the reader. It may include the goals and objectives of the municipality and its component departments.

The Village of Park Forest staff prepares a proposed annual budget in a comprehensive style for the Village Board to consider, revise as needed, and adopt. The components are a transmittal letter from the Manager and Deputy Manager/Finance Director. There is a financial summary, General Fund operating departments, Enterprise Fund operations/capital, and a variety of special funds. Graphics and charts are used to inform anyone who may open the document. There are details on planned revenue sources, personnel expenditures, commodity expenses and other planned expenditures. The text ties policy priorities to the numbers and provides status updates on accomplishments in relation to goals and objectives. Performance measures are displayed and tailored to each department and program. This allows the reader to see the benchmarks and how they compare to targets. The document generally contains a wealth of data including a community profile, directions on how to use the budget document, tax levy

information, staffing, crime statistics, fire response, community events, health services, and other activities. Organizational charts for the Village as a whole and for each department are displayed.

The Village has been recognized by the Government Finance Officers Association (GFOA) with the Distinguished Budget Presentation Award. The first was presented in 1995 and has continued for 15 years in a row.

The transmittal letter stated the following:

“The budget document presented for your consideration is a line-item budget. Each section begins with a description of the department’s function, an analysis of the accomplishments of prior year’s objectives, objectives for the 2010-11 Budget year and performance measures. This is followed by organizational charts and a summary sheet that includes a history of expenditures for that department. Summary sheets are followed by salary detail and expenditures details. In the proprietary funds, beginning and ending cash is indicated.

The budget serves two purposes: one, as a planning tool and two, as an instrument of control over expenditures. Control is exerted through an on-line accounting system. Financial reports, which compare actual performance with the budget, will be examined monthly. A list of vouchers paid is forwarded to the Village Board on a weekly basis. Financial reports, which compare actual performance with the budget, will be provided to the Board quarterly.” (p. XVIII)

The Park Forest budget format is orderly, informative, and goes well beyond statutory requirements.

RECOMMENDATION

The Park Forest budget is excellent because it is more than a financial planning document. Internally, it is a way to check on progress or lack thereof regarding stated priorities. Externally, it is transparent and provides a substantial amount of public information. This may be the best overall document that the Village of Park Forest produces. Continue to improve and publish it in the years ahead.

Budget efforts would be enhanced if the Village prepared multi-year projections. Five years would be sufficient to provide everyone with a valuable look ahead. The 5-Year Budget Projection Report should be updated on an annual basis. As each year passes, the first year out would be dropped and a new fifth year be added. This is a way to reveal potential trends that could be addressed incrementally instead of waiting until there is a crisis. Our team recommends that the projections

include operational revenues and expenditures plus capital and debt service. Beginning and ending fund balances should be incorporated to provide an indicator of financial condition. Certain assumptions would need to be made regarding revenue adjustments, cost inflation, personnel, infrastructure improvements, and other factors. **(See Appendix E for a sample of the Village of Will County Multi-Year Budget Worksheet.)**

D. Annual Financial Report

A municipality must prepare a comprehensive annual financial report (CAFR) per State law. It is an accounting of management's performance in acquiring revenue and spending it during the previous year. The annual financial report also reveals information regarding the municipality's future financial obligations, commitments and strength through a number of measures. The reporting rules and standards are set by the Governmental Accounting Standards Board (GASB). An independent audit is conducted to determine if the reporting standards are being met.

Park Forest's independent auditors reported that the Village's 2008 - 2009 combining and individual fund financial statements present fairly, in all material respects, the financial position of the Village as of April 30, 2009. They are in conformity with accounting principles generally accepted in the United States of America. There are two sections. The first is an analysis of the Village's financial condition as a whole using a statement of net assets for the entire local government. It focuses on governmental activities, business-type activities, and a combined total. Net assets for fiscal year 2008-09 were reported to be \$35,974,088. The second is an analysis of the Village's financial condition by major fund. It is presented in a traditional format with all funds being assigned to one of three accounting categories; i.e., governmental, proprietary, or fiduciary.

The GFOA presented Park Forest with the Certificate of Achievement in Financial Reporting. The Village has received this designation for 14 consecutive years; since 1996.

The Village Manager and Deputy Village Manager/Finance Director produced a letter of transmittal to the Mayor and Board of Trustees, which provides an overview of strategic and financial matters. It introduces the reader to a wide range of topics and provides a good foundation for anyone who reads the Management Discussion and Analysis (MD&A) section and the CAFR. The authors immediately delve into the economic condition and outlook for Park Forest. It starts with a review and update on the Tax Increment Financing (TIF) District. A substantial amount of municipal resources are directed toward maintaining a positive financial situation and redeveloping the community. This is particularly true regarding the central business district; i.e., Downtown Park Forest. The first TIF District was dissolved and a new one was adopted. The transmittal letter reports:

“The new Downtown TIF District has a certified base EAV of \$3,598,133. The smaller base EAV... [gives] the Village a better opportunity to generate tax increment in the future. The Downtown TIF District will be in place for 23 years, until November 2020. In comparison, the expiration of the initial TIF District would have been December 23, 2008. In effect, the Village extended the life of the TIF District approximately 12 years, allowing the Village to spread debt service payments on the existing \$10 million of debt over a longer period of time. This action minimized the property tax impact.” (p. vi)

The Village emphasis on the Downtown master redevelopment project and its reliance on TIF warrant a review of the Downtown TIF District Fund before our team looks at the General Fund. In FY 2008-09, TIF Fund revenues of \$1,664,141 exceeded expenditures of \$1,359,451 or a positive \$304,690. Bonds were issued in prior years to finance capital improvements and other eligible TIF costs. Two of the original bond issues were refunded to secure lower interest rates and a more favorable debt service structure to accelerate repayment. This produced a net gain of \$114,327.

The economic crisis and resulting decline in the national economy effected Park Forest as much, if not more, than many other communities. As a result, tax revenues decreased by more than \$320,000 or down 1.8% to an aggregate total of \$17,281,933. Expenditures exceeded the previous year by over \$460,000 to \$17,671,122.

In regard to General Fund balance, a total of \$5,951,525 was classified as unreserved and undesignated (See CAFR FYE 4/30/2009 at p. 22). That is a reduction of \$1,321,802 from the previous year of \$7,273,327 (See CAFR FYE 4/30/2008 at p. 22). Part of the reserve drawn down was used to provide \$400,000 in matching funds for an Open Space Lands Acquisition and Development (OSLAD) grant to establish a wetlands classroom and renovate the Aqua Center. An additional \$850,000 of the balance was transferred to the Capital Projects Fund to pay for demolition of the former Marshall Field’s store and to construct a storage facility.

The transmittal letter for FY 2008-09 states:

“This fund balance represents a 3.7 month reserve. The Village Board has established a policy requiring a three to four month reserve in the General Fund. Of the total fund balance, \$1,046,370 has been budgeted to be spent in Fiscal 2010. This leaves available fund balance reserve of 3.1 months of expenditures.” (p. xviii)

The planned draw down on the balance will place available funds at the low end of policy range.

Net capital assets for governmental activities were reported in CAFR note six (6) to the financial statements to be \$14,620,871. That value is a slight increase over FY 2007-08 by about \$23,500. Net capital assets for business-type activities were reported to total \$27,914,385.

That is an increase of \$83,500 compared to FY 2007-08. Note one (1) on significant accounting policies states:

“Capital assets, which include land, construction in progress, buildings and improvements, vehicles, furniture and equipment, and infrastructure assets (e.g., roads, bridges, sidewalks, and similar items), are reported in the applicable governmental or business-type activities columns in the government-wide financial statements. Capital assets are defined by the Village as assets with an initial, individual cost of more than \$10,000...The costs of normal maintenance and repairs that do not add to the value of the asset or materially extend assets lives are not capitalized.”(p. 43)

The note goes on to list assets and assigned life-years. The Village appears to be in full compliance with GASB 34 regarding the valuation and documentation of existing and newly acquired fixed assets. This includes the Park Forest downtown assets.

In regard to enterprise activities, the water and sewer utilities have positive cash flow with a combined net increase in assets for FY 2008-09 over FY 2007-08. Water Fund net assets declined after transfers-out by \$278,716 from \$12,791,291 to a total of \$12,512,575. Conversely, Sewer Fund net assets ascended after transfers-out by \$457,513 from \$3,025,687 to a total of \$3,483,200.

The Village established the DownTown Park Forest enterprise fund to manage this unique asset. The fund broke even due to operating income of \$809,216 plus non-operating income of \$15,164 against expenses of \$824,177. The fund balance increased by \$324,730 after transfers-in to a total of \$2,405,051.

RECOMMENDATION

Village actions have sustained the TIF Fund for the high priority DownTown redevelopment project. The DownTown Park Forest enterprise fund has served a useful and continuing purpose as well. All of this indicates good financial stewardship. This is especially notable during the difficult economic times. The Village should continue to be careful with TIF Fund activities to ensure that revenue streams for operations & maintenance and for debt service are not obligated beyond what is being generated from the property tax incremental income.

General Fund balance has slightly diminished in recent years. Treading water during this challenging time is actually a noteworthy accomplishment. This is especially significant considering the difficult and on-going efforts to expand business and reap the benefits of greater tax revenues. It shows how the Village Board and staff have worked diligently to address the financial impact of economic problems. While the dollars in reserve have dipped, officials and employees have sought new revenues, plus cut costs to maintain a

substantial General Fund reserve. Village personnel should continue to closely monitor fund balances in the context of the three (3) to four (4) month of expenditure policy, cash flow needs, investment potential, and budgeted costs.

Concerning long-term debt to pay for infrastructure, the Village of Park Forest received a credit designation of A3 from Moody's Investors, an independent rating firm, during the 2008 bond issue process. Business or developer prospects considering Park Forest as a location should consider this to be a favorable result. **(See subsection F below regarding Debt Management Policy.)**

Nevertheless, success with capital debt management does not automatically mean that the Village is financially prepared to pay for operations into the future. Elected officials, staff, and their consultants should continue to explore ways to achieve sustainable sources of revenue to pay for day-to-day operations. This includes covering ongoing costs of personnel providing customer service and those performing routine maintenance.

E. Capital Improvements

The capital improvement program or plan (CIP) reveals a Village's foresight for maintaining, replacing, and expanding community infrastructure. Without such a master plan the value of the physical assets of the community are in jeopardy of being diminished and money ill spent. In order for a CIP to be viable, it needs to be based upon facts as to the condition of existing infrastructure and projections for new or expanded infrastructure. Existing streets, water mains, and sewer pipes should be evaluated by engineers as to condition. Then, they should be rated in relation to all others for order of replacement priority and be marked with the cost estimates. New public works and utilities must be identified as to scope with preliminary construction cost estimates from engineers. Next, the staff and elected officials must identify revenue sources and methods of payment.

Another practical CIP benefit relates to coordination of projects. The Village Board and public works staff can make sure water and waste water replacement and extensions occur before or concurrent with street improvements. This can reduce or eliminate the need for open cuts after construction, reconstruction, and resurfacing. The CIP is superior to the case-by-case approach from an economic development perspective too. The Village will be better



prepared to deal with multiple developer situations simultaneously with confidence and in a timely manner.

The Village of Park Forest does recognize the need to improve its infrastructure and facilities to serve the expanding community. In fact, officials and staff have acted decisively over the years to address priorities within financial capabilities. Notable examples are reinvesting in information technology, a build-out of the Village Hall for Public Health services, monumental public information signage, Orchard Drive street reconstruction, vehicle fleet replacement, continuing DownTown facility improvements and streetscape, and reconstructing sanitary sewers.

The Village is diligent and careful to identify funding sources and financing methods to ensure that a stream of revenue is dedicated to pay for projects and major equipment. This can be seen in the governmental and enterprise fund multi-year worksheets within the CIP.

The CIP information is used as a guide for the staff and Village Board as reflected in the Annual Budget.

RECOMMENDATION

The Village should continue to use the CIP for prioritizing and funding projects and replacing major equipment. Some of the projected dollars available in a given fiscal year could become the local match for grant funding. Knowing that possibility in advance will help the staff secure outside resources. This is a big picture way to prepare the Village for current and future economic development issues. Officials and staff should use CIP information to show developers that Park Forest is interested in and acts to reinvest in the public infrastructure and facilities. That will show any interested parties that Park Forest will continue to be a solid and progressive community.

The Village should continue to review the CIP and update it yearly before the budget process begins. That allows the Board and staff to spread out the time and energy they expend on big project issues. Everyone will have the opportunity to use the CIP as a guide for determining whether a project will fit into the annual budget, and whether roadway and utility projects can be coordinated. They can also help the Village decide years ahead whether to pay-as-you go or proceed with debt financing.

F. Debt Management Policy

Comprehensive and up-to-date policies on managing debt can be an important tool to ensure the highest and best use of municipal resources to meet financial commitments, to provide needed services, and to maintain sound financial management practices.

The Village of Park Forest publishes in the Annual Budget a section entitled Long-Range Debt Management. The section is primarily a recounting of bond issues, loans, and refunding bond issues that have taken place during the past decade. The underlying policy direction is stated:

“The Village’s long-range debt policies are rooted in the Village’s conservative approach to budgeting and the Board’s Fiscal Policies, which emanate from that conservative approach. (Annual Budget, p. 1-33)

Related procedures are described later in the budget document:

“The Bond Retirement Fund is used to service all General Fund-related debt. The other debt of the Village is serviced within the appropriate originating fund. Because Park Forest is a ‘Home Rule’ community, the Village is not subject to a legal debt limit.” (Annual Budget, p. 23-1)

RECOMMENDATION

The Village should go beyond a reporting statement in the annual budget or review in the annual audit and adopt a debt management policy. The format should allow the Village to go into more depth on policy direction. It should state upfront the guidelines to follow incurring new debt. The debt management policy in general would surpass the current anecdotal approach that is limited to explaining what has happened and what obligations exist. **(See Appendix F for a sample of the Village of Carol Stream Debt Management Policy.)**

G. Investment Policy

Local governments in good financial condition will find that dollars on hand should be transferred to a relatively safe place until they are spent. This may be for a short time or for a long time. In any event, it is an opportunity for those dollars to earn interest as an investment in one or more financial instruments. There are statutes and regulations governing the fundamental terms of potential investments. Cities and villages can establish more detailed and restrictive rules for how funds are invested. Best management practices indicate that this should be done with guidance of a formal investment policy.

The Village of Park Forest adopted a document entitled Investment Policy. The policy starts with a fundamental statement,

“Investments shall be made with judgment and care - under circumstances then prevailing - which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived.” (Sec. 3.0 - Prudence)

The policy entrusts responsibility for Village investments with the Finance Director/Treasurer. That official is charged with implementing the primary objective of the policy. The components of that objective in order of priority are safety, liquidity, and return on investment. "Safety" is defined as preserving overall capital of the portfolio through diversification to increase the probability that potential losses to individual securities are not more than the gains earned elsewhere in the portfolio. Unfortunately, Park Forest and other entities were not able to achieve that objective during the worst part of the economic crisis. "Liquidity" relates to striking a balance between funds invested and cash-on-hand to cover costs of operation. That priority has been sustained. In regard to "return on investment" the policy allows investment in any type of security allowable in Illinois statutes regarding public funds. Investments are limited to a specific set of instruments:

"Treasury Bills, Treasury Notes, Treasury Bonds, Certificates of Deposit Government Bonds & Tax Anticipation Warrants, State of Israel Bonds Accounts of Life Insurance Companies, Government Agencies (GNMA, FHA, HUD, SBA, etc...), Commercial Paper, Money Market Mutual Fund, Separate Trading of Registered Interest and Principal of Securities (STRIPS), Coupon Under Book Entry Safekeeping (CUBES), Illinois Public Finance Director (Treasurer)s Investment Pool (IPTIP), Illinois Metropolitan Investment Fund (IMET), Bank Managed Fund." (Sec. 8.0 Authorized and Suitable Investments)

Additionally, the Finance Director/Treasurer is authorized to maintain a list of financial institutions authorized to provide investment services and security broker/dealers selected by their creditworthiness and who maintain an office in the State of Illinois.

Unfortunately, the Village has experienced the same challenge as other entities in trying to earn income on a decent interest rate that builds on principal. Some success has been achieved for the long-term investments; e.g., police and fire pension funds that can subsist on relatively low liquidity.

The policy document goes on to reference accountability through reports and audits:

"The Finance Director (Treasurer) shall establish an annual process of independent review by an external auditor. This review will provide internal control by assuring compliance with policies and procedures." (13.0 – Internal Control)

"The Finance Director (Treasurer) shall prepare regular investment reports. The report should be provided to the Board of Trustees and available on request. The report should be in a format suitable for review by the general public. An annual report should also be provided to the Board." (15.0 – Reporting)

RECOMMENDATION

The Village adopted a reasonable and prudent set of investment policies. This is singularly important during times of economic upheaval. We understand that the Finance Director/Treasurer continually monitors the investment portfolio. We recommend that the Village Board and Treasurer review investment practices within the context of the policies at least once annually. This should be done with the assistance of a financial advisor who is independent of the financial institutions with which funds have been invested. This is a way to ensure that policies are actually being implemented and that all options are being considered. The IMAP-GMPA team can refer the Finance Director/Treasurer to potential independent investment advisors who can run cash flow and investment tests.

H. Personnel Policies

A personnel code or policy manual contains the policies and procedures covering the recruitment, selection, and retention of employees. It also delineates hours of work, pay, benefits, and working conditions. A personnel code or manual sets forth the expectations and obligations of both the employer and the employee. It is intended to assist the employee in carrying out his/her duties and responsibilities. If administered effectively, a personnel policy/code will help a village provide quality services for residents, existing business, and prospective developers.

The *Village of Park Forest Personnel Policy Manual* is a comprehensive document covering everything outlined above and more. It is user friendly with a table of contents, index, and a sheet for employees to sign acknowledging review of the contents. The introduction describes the responsibility of employees to the public:

“You are a public employee serving the citizens of the Village of Park Forest. You may be the only contact a citizen has with his/her Village Government. The impression you make may be the citizens’ only impression of the local government. This applies whether speaking over the telephone or in direct personal contact. When answering the telephone, give your name and department. If you are asked a question or presented with a problem you cannot solve, transfer the call to someone who can handle the request or take the telephone number and name so that when you find the solution to the citizen’s request you can return the call. In your contact with a citizen, display a pleasant, sincere and helpful manner. Always remember: THE CITIZENS OF THIS COMMUNITY ARE NEVER AN INTERRUPTION OF YOUR WORK. THEY ARE THE REASON FOR IT.” (p. 1)

There is a welcoming letter from the Personnel Director plus the Village Vision Statement and Statement of Beliefs. Employees are told upfront that they are to sign a form indicating that they have read the manual and understand its contents. There is a description of the Council-Manager form of government in Park Forest. It states:

“The Board hires a Village Manager, who is authorized, through the annual budget process, to employ personnel and purchase equipment and materials, among other administrative tasks. The Manager is responsible for administering and interpreting the policies of the Village.” (p. 7)

The scope of the Personnel Policy Manual is explained including the fact that it is not a binding contract. Employees are selected on the basis of merit, continue as personnel on the same basis, and remain on the payroll as “at-will” employees. Employees are classified by job description and are compensated according to a step-schedule. The second section describes the categories of employee, i.e., full-time, part-time, temporary, seasonal, and paid-on-call. There are exempt employees and non-exempt employees. The “duties and salary” test is clearly described within the context of the Fair Labor Standards Act (FLSA). The manual asserts the Village’s policy to adhere to FLSA with regard to salary and wages, including overtime and benefits. The third section enumerates the range, value, and qualifications for benefits, e.g., holidays, vacation time, sick time, and other leaves of absence. There is an explanation of the Family Medical Leave Act (FMLA) when it applies to specified employees. This includes a special section on maternity and paternity leave. A citation for the U.S. Department of Labor website is provided. Other subsections address educational benefits, health insurance, workers compensation, safety incentive bonus, and expense reimbursement. The Village has an Employee Assistance Program (EAP) too.

The fourth section goes into numerous rules and regulations for an employee to remain in good standing. Examples include not using alcohol or abusing other chemical substances on-the-job. There are many rules for how to properly use municipal equipment and facilities. Employees are told to report all violations. Supervisors are told to enforce all rules.

The text is careful to note when a provision applies specifically sworn police personnel, fire fighters, and public works crew members due to State law or their respective collective bargaining agreement. Residency is a notable example:

“Police officers and firefighters are subject to the residency requirements of their respective collective bargaining agreements. On-call employees of the Public Works Department must live within a 10-mile radius of the Village. Paid on call Firefighters must live within Village limits.

All other employees are encouraged to reside in the Village, but are not required to do so.” (p. 33)

Employee rights per applicable laws and/or regulations are described in the fifth section. Examples range from the Consolidated Omnibus Reconciliation Act (COBRA) benefits upon termination to Equal Employment Opportunity (EEO) to anti-sexual harassment to Americans with Disabilities Act (ADA).

The employee safety rules and regulations have been incorporated into the Personnel Policy Manual as the sixth section. The type of activities addressed are work procedures, reporting violations, enforcing violations, wearing safety clothing, using safety equipment, and filing reports with the risk management agency.

The seventh section explains drug testing rationale and how it relates to Federal Highway Administration (FHA) mandates for Commercial Driver’s License (CDL) designation. The CDL designation can be withdrawn due to violations, thus prohibiting employees in violation from driving municipal vehicles.

Park Forest has an employee appraisal process to measure performance and provide accountability. All employees are evaluated every year with a rating. Exempt and non-exempt personnel may receive merit pay increases beyond their base salary or wage. Union personnel in the Police Department and Fire Department are paid per a scale incorporated into the collective bargaining agreement. The Village adopted a standard set of forms to help facilitate consistent treatment during the appraisal process. This includes a consistent range of work categories being assessed and a section on objectives for the employee to achieve between the current evaluation and next. There is also a section offering the employee an opportunity to write any supporting or objecting comments concerning evaluation results.

RECOMMENDATION

The Personnel Policy Manual is current and incorporates all of components essential to an excellent document. Management should continue to update, administer, and enforce it.

Regarding the employee appraisal process, the one used in Park Forest is actually beneficial to both management and other employees. It provides guidance, accountability, and opportunity for reward for a job well done. All non-union personnel are evaluated and compensated on a scale comparable to grade-based testing. Their pay increase, or lack thereof, is based upon an objective rating.

Union personnel are evaluated, but compensation is related to a negotiated contract scale. The GMPA team suggests that there could be a closer connection between

performance and annual wage adjustments for union personnel. The collective bargaining agreement between the Village of Park Forest and the Labor Council/Fraternal Order of Police – Lodge #163 dated 7/1/2008 to 6/30/2011, has a management rights clause at Article III, Section 3.1. The collective bargaining agreement between the Village and Park Forest Firefighters Association Local 1263 of the International Association of Firefighters AFL/CIO, CLC dated 7/1/2010 to 6/30/2013 has a management rights clause at Article III, Section 3.1. Both union contracts state in part that, “... the Village retains all traditional rights to manage and direct ... its employees ... to establish work and productivity standards ... to establish performance standards ... and to generally carry out the mission of the Village.” The connection between performance and pay would be when a union employee achieves minimum standards. When standards are met, the employee would be entitled to the next step of compensation on the contract schedule. If standards are not met, the pay increase could be placed on hold pending productivity improvement. That approach is analogous to pass/fail testing. Labor council could advise management on the best way to apply standards to the evaluation process. In any event, this should be thoroughly discussed with union personnel before implementation.

During the performance appraisal process, the Village Manager and/or Personnel Director should make sure that evaluators actually interviewed all employees. Further, management needs to verify that evaluators entered useful information to support all ratings and that every form was signed. Any that are not satisfactory should be returned with clear instructions on what to do. This will ensure the integrity of the process and compensation system.

I. Procurement

Policies and procedures covering the purchase of goods and services are intended to assure that fiscal resources of the municipality are utilized in the most effective, efficient and impartial manner possible. The same is true for the procurement of professional services.

The Park Forest Code of Ordinances states the intended purpose of the Village Board of Trustees in adopting a Purchasing Policy:

“...to establish that the principle of competitive bidding and economical procurement practices shall be applicable to all purchases as herein described ... The Village shall encourage and actively promote local businesses and minority- and woman-owned business enterprises to bid on village purchases.” (Village Code, Purchasing Policies, Sec. 2-496 a, b)

The policies enumerate several specific purchasing and procurement requirements. The Village

Manager is responsible for administering them:

“The Village Manager shall be the general purchasing agent of the Village, and the Village Manager or his designee shall purchase all materials, supplies, services and equipment necessary for the operation of the Village” (Village Code, Purchasing Policies, Sec. 2-454(1))

The Village Board of Trustees has overall policy and approval authority:

“The Village Board of Trustees shall approve all purchases when the expense thereof exceeds \$20,000.00 and reserves the right to reject any or all bids, to waive any minor informality or irregularity in any bid and to make award to the response deemed to be the most advantageous to the Village and which shall be the lowest responsible bidder. ” (Village Code, Purchasing Policies, Sec. 2-454(2))

There are exceptions to these fundamental procedures and policies. For example, there is a provision for waiving the bidding process during emergency situations. Such purchases can occur subject to a cap of \$40,000 and a subsequent Board vote to ratify the action. Another, more common situation, is when the Village is procuring services or otherwise purchasing items that are not adaptable to public bidding. The listing:

- a. Professional service contracts,*
- b. Items available only from a single source,*
- c. Utilities,*
- d. Magazines, books or similar articles of an educational or instructional nature,*
- e. Procurements through state, local, federal or other government agency contracts,*
- f. Classifieds,*
- g. License and permits,*
- h. Maintenance or equipment servicing contracts performed by the manufacturer or authorized service agent,*
- i. Contracts for the printing or engraving of bonds, water certificates, tax warrants and other evidences of indebtedness,*
- j. Testing necessary to develop a qualified products list,*
- k. Items purchased for resale not resulting in a net loss,*
- l. Other purchases with the approval of a simple majority plus one of the Board of Trustees present at any regularly scheduled meeting of the Board of Trustees.” (Village Code, Purchasing Policies, Sec. 2-454(4))*

The administrator may proceed with purchases of \$2,500.00 or less. Procurement above \$2,500.00 requires sealed bids to be submitted to the Village Board for approval, rejection, or waiver. Department directors review and approve invoices for payment within the dollar limits. Contractual services in the annual budget for recurring expenditures are typically not bid unless State statutes mandate. Examples include legal services, utilities, and engineering services. All disbursements are submitted to the Village Board for consideration and approval at regular meetings.

RECOMMENDATION

The Village of Park Forest has a formal structure and tradition regarding procurement activities. The GMPA team is not aware of any problems with process or accountability. The Purchasing Policy is another way to show business contacts and potential commercial developers that Park Forest is managed professionally.

J. Liability and Risk Management

Municipalities are always at risk of a lawsuit due to their high profile, breadth of activities, and the perception that they have deep pockets full of money. Every effort must be made to create a culture within the organization that values an awareness of potential liability, safety, and risk avoidance. Saving dollars by minimizing liability is of equal importance to maximizing revenues and expending funds prudently.

Park Forest is a member of the Intergovernmental Risk Management Agency (IRMA). IRMA is a consortium of municipalities that combine their resources to purchase levels of risk management insurance and to establish a funding pool for losses retained or self-insured. IRMA is governed by a board of trustees comprised of one (1) representative for each member municipality. The plan for all lines has a self-insured retention of \$100,000 to \$1,000,000, a middle layer of insurance coverage with limits from \$1 million up to \$5 million, and a catastrophic layer of coverage with limits up to \$250 million each occurrence and aggregate. Every year, the broker secures quotes for policies, analyzes them, and reports to the Board of Trustees with a recommendation on the best plan at the best price. The Village staff expressed overall satisfaction with IRMA.

RECOMMENDATION

Continue as a member of IRMA. However, make sure that an independent professional advisor periodically looks at the layers of self-insured risk as well as the insurance proposed by the broker. The purpose would be to promote the best coverage structure.

Focus attention on employee safety in Park Forest and in the organization of other IRMA municipalities. Incorporate safety training and practices throughout the various departments. This effort will pay dividends with fewer injuries, lower property losses, and more productivity. IRMA should reward members in good standing with a rating that results in lower premiums.

V. OPPORTUNITIES FOR SUCCESS

The GMPA team strongly suggests that the Village take steps to address recommendations contained in the *Key Document Section*. This includes the continuation of many best practices already in place plus the changes being recommended. As noted therein, if followed, the resulting improvements of the Village's business practices will be to enhance the governance and management team, with a clear sense of direction and purpose. The community will then understand what the local government is doing to ensure progress. What follows are other opportunities for success that will help to promote economic development in the Village of Park Forest.

A. Strategic Planning and Management

The Village has a long-standing practice of using SP to plan and guide management actions to implement priorities **(See Section II Issues and Themes Identified at D. DownTown Master Planning, E. Down Town Conversion and F. Strategic Planning; plus Section IV Review of Key Documents at subsection A. Values Mission Goals and Objectives Statements)**.

Management has included regular written and verbal reports at meetings of the Village Board, in community publications, and the Village website. The information is transparent and worthwhile. Activities are tied to the SP priorities. It is usually in a lengthy narrative form. This can be a challenging format for people who have limited time to read municipal documents.

RECOMMENDATION

The Village should enhance its tracking and reporting methods by using a matrix. This would be a type of chart that organizes priorities by category, denotes the responsible leader(s), designates a target timeline, and marks the outcome. The matrix was first developed for the City of Wood Dale, Illinois. In that case, the multi-year SP process produced policy statements and measurable priorities tracked on a priority grid with tracking charts. The International City/County Management Association presented the City with the [Award for Innovations in Local Government Management](#) in 2002. A more recent version that Ehlers & Associates produced for another municipality is provided as a sample to literally illustrate this recommendation. **(See Appendix G for the Village of Forsyth Strategic Plan Management Tracking Matrix.)**

B. Public Relations (External & Internal) and Community Branding

The Village, organizations and businesses around Park Forest have helped define the image of Park Forest by promoting the community through various formats. This is particularly obvious with documents related to “DownTown Park Forest.” **(See Section II Issues and Themes Identified at sections C. Comprehensive Plan, D. DownTown Master Plan, E. Down Town Conversion, and F. Strategic Planning.)**

Promotional publications, the Village website, advertisements, Discover magazine, calendar of events, and other means of communication contain a wealth of information. They are all high quality forms of outreach. The website appears to provide the most current information available regarding events and how to participate. A good example is the amazing variety of Parks & Recreation programming displayed in brochures. **(See Section II Issues and Themes Identified at subsection H. dealing with public information and community outreach.)**

In regard to DownTown, Park Forest has progressed far along the path of changing from a regional mall to a community main street. This is due in great part to proactive municipal and other civic leadership. Once the problem was identified and plans were made to improve the situation, people took action to implement. We have already explained this process and the results. There is a unique mix of tenants in the DownTown spaces or nearby. This includes a performing arts center, art galleria, a movie theater, and small retail shops. The 75% or more occupancy rate is a positive situation even if some spaces are occupied by not-for-profit agencies. We know that all of this information is tracked, measured, and reviewed by municipal official **(See Section II Issues and Themes identified at the subsection C. Comprehensive Land Use Plan, D. DownTown Master Plan, E. Down Town Conversion, and F Strategic Planning.)**

Additionally, Village leaders described their community branding exercise. They were able to identify how residents and business operators can experience a real sense of community. Further, they were able to identify a welcoming image and service offerings for people outside of Park Forest.

Despite all of the plans and activities, our team does not perceive a well-defined theme or brand that is conveyed within the Park Forest community or to the outside world. For example, it is not clear whether the downtown strategy has a local focus only or has some regional potential different than the regional mall of the past. Both are mentioned in the documents we read and reviewed, but the outcome is not clear. To get a sense of what our team is trying to convey here, one can spread out on a table all hard-copy information sources and design drawings related to the downtown. One can also display on a computer monitor the website pages related to the downtown. The production is high quality, but one will not see a visual,

audio, or written message that grabs the imagination. It does not break through the clutter of marketing initiatives in other communities. The website page on DownTown Park Forest is a disappointment. It only displays a few photos and some available space information. Except for the downtown archway entrance, public and private signage in town is not particularly notable for visitors or residents. The new sign on U.S. Route 30/Lincoln Highway is noticeable, but is not really notable. Streetscape and the restored business facades in the downtown area are appealing features. However, one cannot discern a unique or attractive theme.

RECOMMENDATION

The Village leaders should take a fresh look at how they are informing people within the community and outside the community about the merits of Park Forest. Review how the official Community Branding Strategy is being implemented. We recommend this even though our team knows that community leaders have gone through a number of processes to catalogue attributes, devise the most advantageous way to use them, and develop how to best convey those attributes to others. The purpose, for the most part, has been to reinvent and revitalize the DownTown as a down-scaled destination. In implementing the community brand, the Village should portray the best attributes of the entire community to Park Foresters and the outside world. This effort should go beyond publishing or displaying a catch phrase, producing colorful graphics, or installing special features and facades along public rights of way. The attributes should be marketed to the public-at-large or to specific target audiences. The detail of content, frequency, visual impact, and coordination can then gain maximum results. All parties involved with some form of business promotion, even residential development, should be encouraged to use the themes and images in their marketing strategy.

A community's website is its window to the world. One of the challenges identified in the research and analysis of Park Forest is the marketing of the Downtown. In the IMAP team's review of the Park Forest website, the team believes that the Downtown link can be enhanced with the goal of being informative for citizens as well as potential businesses and developers looking for retail or commercial space. The team suggests that the main green link labeled Downtown should be the entrance page to Downtown opportunities, which could include lease opportunities, shopping opportunities, dining venues and other Downtown activities. The examples below provide an idea of what can be done with marketing the Downtown on the web, although none of them provide all of the information that is referred to above:

<http://www.vah.com/> - The Village of Arlington Heights has a "Discover" link on the homepage. The page goes to a site that offers links to information such as dining opportunities, shopping venues, accommodations, and attractions, which includes

information about the arts and cultural activities in the municipality. While it lacks information about vacancies and lease opportunities, it does give an idea of the vibrancy that can be added to a website that adds excitement to what is available downtown.

<http://www.ci.mchenry.il.us/departments/downtown/downtown.html> - The City of McHenry has a downtown link that includes a drop down menu with information about the TIF district, master plan, overlay map and more. Again, it does not have all of the information needed, but it is presented in an easy, accessible manor.

The Village of Park Forest could enhance its Downtown link by incorporating some of the ideas from the above websites. The Downtown button could go to a page that has pictures of the Downtown with links from that page that could include Downtown Businesses, Dining on the Green, Commerce Arc, lease opportunities, how to do business with the Village (explanation of the process and links to forms needed), Downtown Master Plan, and other pertinent links to information.

The Village has been progressive in creating a presence on Facebook and Twitter. These social media tools provide a quick and easy way to inform citizens of current happenings in the Village. Some organizations have turned to using these social media tools as economic development tools. An article by Aliza Sherman entitled “5 Ways Cities are Using Social Media to Reverse Economic Downturn,” produced by Mashable, a source for news in social and digital media, explains how Facebook, Twitter, LinkedIn and YouTube have been used by five different cities and regions to catch the attention of and network with site selectors and developers across the nation. **(See Appendix H, “5 Ways Cities are Using Social Media to Reverse Economic Downturn.”)**

C. Balanced Land Use Strategy & Taxation Strategy

The Village has a well-documented history of promoting retail and residential development. However, redeveloping industrial property was also part of earlier planning and continues to be a priority of the Village. Industrial land use is a goal of the Comprehensive Plan 1980-81 that developed to a much lesser extent than residential and commercial land use. Park Forest continues to be a place dominated by residential and commercial lands and a relatively small portion of property with light industrial. This means that when the County or Township assessor values properties and the various local governments submit their annual property tax levy, most of the tax burden falls on owners of land classified as residential and commercial. To address this phenomenon, staff reported the following activities designed to increase the industrial base:

- *“Successful negotiation and resolution of mitigation issues to enable CN’s (Canadian National railway) U.S.-based growth and expansion plans, which ultimately impact millions of dollars of freight...*
- *... innovative ordinance change to allow industrial uses to locate in obsolete portions of existing buildings in order to preserve tax base, maintain built square footage, increase number and variety of job opportunities and to assist property owners with stabilizing and diversifying their lease options and collections.*
- *The Strategic Plan includes specific recommendations for the Park Forest Business Park and the South Western Avenue Annexation Area (generally considered the Village’s best opportunity for new, large scale industrial development).*
- *... working with University Park on a boundary agreement to solidify our right to annex land on the west side of Western Avenue for potential new industrial development.*
- *The Village program to proactively pursue tax-delinquent properties for redevelopment includes land in the Park Forest Business Park.” (H. Kingma email message to B. Townsend dated 1/6/11)*

The NIU IMAP-GMPA team believes that a balanced land use strategy provides a community with the ability to perform better, or at least survive better, when the economy takes a major downturn. A balanced situation is one in which residential, commercial and industrial/research and development all contribute to the overall character of the community. Further, each provides a special array of attributes that in combination with the others, can contribute to stabilizing the community tax base and employment base. The most recent economic crisis demonstrated that communities with this diverse portfolio tended to weather the problems better than those with high retail. For example, communities with regional malls and no industrial reported major reductions in sales tax income. They were among communities with the greatest number of lay-offs or attrition vacancies. Others with a more balanced ratio of land use have weathered the financial storm.

Park Forest faces a challenge that many communities struggle with: maintaining municipal services in times of static or fewer revenues. The Village receives property taxes, but most revenues are from other sources. Some are extremely sensitive to economic conditions and political decisions beyond Village control. Prime examples are State revenue sharing dollars in the form of income



and sales taxes. Others are also affected by the economy, but the Village has more control over rates, including building permit fees, ordinance violation fines, and customer utility fees. The majority of the property tax bill is based on school district levies, yet high property taxes are nonetheless seen as an issue. A property tax bill can be lowered in a few ways. One is to cut costs (and thereby lower the levy request), another is to diversify the tax base (different land uses), increase the number of properties (development and annexation), and the fourth is for property values to rise.

The unique challenge facing Park Forest is their cooperative housing units. The number of housing units that the cooperative housing represents in comparison to the entirety of units in Park Forest (approximately 20% of all housing units) is a concern because of the property tax assessment of the units, with their low assessed value (based on “selling” price) and thus low property tax assessments. It may be necessary to look at the options for assessing units within the Village, in particular the cooperative units, to determine if the tax burden is being distributed fairly.

Assessors throughout the country typically look at three approaches to obtain a property’s value: the cost (replacement) approach, the income approach and the sales comparison (market) approach. They are discussed below.

Cost Approach - is an estimate of value derived for property by determining the cost to construct the building(s) less the estimated depreciation of the property. The Cost Approach is most effective when valuing unique manufacturing properties as income and sales data may not be available for these owner occupied properties. Marshall & Swift™ cost calibration software is used to apply cost estimates to this type of property.

Income Approach – is an estimate of value based on the rental income generated by the property. This approach is often a very important indicator of property value for income-producing properties. The Cook County Assessor’s Office uses market estimates for income, expenses, and a rate of return for an investor (the capitalization rate) to determine value.

Sales Comparison Approach – is an estimate of value that compares the subject property to similar properties that have recently sold and have similar characteristics or indicators of value. Differences in location, physical characteristics, time of sale, physical condition, size, age and other market related conditions are adjustments that can be made to sale prices. This accounts for differences between comparable sold properties and the subject property. Extensive editing and adjustments are made before unsold

similar properties are valued. Also, large commercial transactions are thoroughly analyzed because of the complexity of these types of sales.

RECOMMENDATION

The Village should continue to expend substantial time and effort on seeking light industrial and/or research & development firms. Those willing to locate their headquarters in Park Forest would be particularly desirable because any sales taxes generated could be attributed to the Village. Perhaps the existing industrial park or vacant shopping center space are prospective locations. The ultimate purpose for this strategy is to bring more balance to the land use and revenue stream of Park Forest.

Village President/Mayor Ostenburg explained during the January 5th Board meeting, at which our team presented the preliminary report, that Park Forest officials have pursued many ways to address the cooperative taxation issue. The Village has been active nationally with cooperative associations. Research has revealed how properties are appraised or valued in other towns, talked with board members of the cooperatives, and explored potential legislative solutions. For example, the Illinois Municipal League proposed a 1% sales tax increase that if adopted, would be used to reduce reliance on property taxes. It appears that no change will happen unless the affected parties collaborate and State laws are amended. Therefore, we recommend that the Village look at how communities with similar cooperative structures in other States and nations handle their cooperative taxing issues. They should also talk with the management board of the units to discuss a legislative compromise that could satisfy the owners as well as other residents.

D. Economic Development and Tax Increment Financing

The Village dissolved the original TIF District in 1997 after it was used many years to help transform the dying Park Forest Plaza into a revitalized Park Forest DownTown. Property assessments increased in 2000 and tax increment began to build to where the levy now produces slightly over \$1,000,000 annually. As we begin 2011, 10 years remain on the current TIF District through 2020. Our review of documents, interviews, and on-site observations indicate that property tax increment has been expended in Park Forest the way this form of economic incentive was meant to be used. Planning, public infrastructure, and private redevelopment activities were funded in part to spur activity that would otherwise not have happened but for the TIF resources. The work of transformation is not yet completed and, as with any venture, there is always room for improvement.

RECOMMENDATION

Take a fresh look at the redevelopment plan, results, and new activities underway. Some of TIF is already committed, but consider other opportunities for development initiatives going forward. Bring in a new TIF advisor periodically to help with brainstorming. Continue to involve the Village's network of contacts.

E. Updated Comprehensive Plan

Closely related to a balanced land use strategy is the need for an update to the Comprehensive Plan. The Comprehensive Plan was done in 1980-81 with an update to it in 1992. The Strategic Land Use Plan for Economic Development, adopted in November 2008, was meant to augment the comprehensive plan. Also, a Master Plan for Downtown Park Forest was developed in 1997 and updated in 2002. While all of these plans have addressed specific needs at the time they were developed, there has been no comprehensive look at land use in the Village for many years. **(See Sec. II Issues and Themes Identified at subsection F. Strategic Planning for information on how the Village has integrated comprehensive planning and strategic planning with economic development.)**

A comprehensive plan is different than a strategic plan in that a comprehensive plan addresses land use whereas a strategic plan is generally geared towards the overall goals of a municipality, not just those related to land use. It is important to have an updated comprehensive plan to help defend against a legal challenge to a zoning decision. The Village has addressed this by adopting the Strategic Plan 2008 per an ordinance amending the Park Forest Code of Ordinances. It is also important to go through a comprehensive planning process periodically to ensure that the community is engaged and generally supports the vision and direction that is manifested in the document. Village officials and staff have stated that this was, in effect, done less than three years ago when the SP 2008 updated policy priorities and embraced several other economic studies. The Village Manager has stated that a traditional comprehensive plan is more relevant to newer or growing communities with open greenspace rather than a mature, built-out and mostly land-locked community like Park Forest. Others pointed out that a full-fledged comprehensive plan document would cost over \$100,000 and the Village simply cannot afford it.

RECOMMENDATION

Given the age of the current Comprehensive Plan and the challenging economic conditions that are occurring during the event some are calling the Great Recession, it is highly recommended that the Village of Park Forest prepare a Comprehensive Plan for current and future land use. The Village has undergone changes and while the

documents stated above have addressed some of those changes, a Comprehensive Plan would be useful on several different levels, especially for the long range economic growth and development/redevelopment of the Village. The Comprehensive Plan will provide a working set of tools to improve the community and make it more economically viable as it addresses infill and redevelopment issues.

The Comprehensive Plan document could help resolve many of the concerns brought up during the interview process. An approved comprehensive planning document can serve as a strong policy guide for many years, yet be flexible enough to allow for changes in implementation strategy. In other words, the Village will be able to adapt its use of resources toward strategies that are working successfully and away from those that are failing. New implementation strategies that develop can be added as well. It also provides a tool for aggressive planning that can help the Village attract more business and retail opportunities by giving potential developers an up-to-date Village-approved document to refer to when meeting with interested parties.

Given the Village’s geographic location, specifically its lack of immediate access to the interstate system, the proposed Comprehensive Plan would afford elected officials and community leaders the opportunity to examine the highest and best uses for the land within and around Park Forest. There is opportunity for transit oriented design in the space vacated next to the commuter rail line. There is potential for development on the property that used to be the old golf course. Identifying locations for affordable residential development can assist with rectifying the stagnating population counts, especially if combined with high visibility commercial.



F. Intergovernmental Relationships

One of the most important factors in attracting families to a community is the quality of the community schools. One of the recurring themes heard during the interview process was the concern for the quality of the schools that serve the Village of Park Forest children. The Village of Park Forest is served by five different school districts. While the municipality does not have any control over these school district boards, the municipality does have an opportunity to forge relationships with the school boards in order to address some of the concerns of its residents. These school board members are colleagues who are leaders within their own right and who impact the educational decisions at the local level. It is important to forge

relationships with these people in order to provide a positive influence into the school systems within the Village.

RECOMMENDATION

It is recommended that Village leaders (both elected and select appointed staff) get to know members of the local school boards and possibly convene regular meetings in order to forge constructive relationships. John Perry, who is a past village manager in Park Forest and author of the new book [Blueprint for Building Community](#), suggests that “you need to educate them about the village mission. You need to identify issues for the community around which they can assist. You need to identify issues important to these other governmental entities and how your village strategy supports their needs.” For example, a strong bond with the School Districts and other local governments can enhance economic development efforts. They can become partners with the Village in attracting and/or retaining business. This is particularly important regarding TIF District initiatives. During these meetings the Village should focus on keeping local school officials up-to-date on activities and issues in the Village, particularly as they relate to youth activities. The Village could also involve these leaders in a strategic planning session. Meetings with the various school boards could be held on a quarterly basis and include other government entities as well. However, given the issues with the schools, it may be wise to just focus on forging the school board relationships initially.

G. Shared Services

The Village provides the whole range of traditional services in the field of public safety, public works, building standards, planning, and zoning code. Park Forest goes well beyond that range to provide services that many people in Illinois would consider to be extraordinary for a municipality. These include public health (nursing and environmental) and parks and recreation (performing arts center, water park, recreational activities, public green space, and public library). It is commonly known among people with knowledge about local government that Illinois has the most decentralized local government situation in the United States. This includes a variety of special districts with jurisdiction ranging from street lights to mosquito abatement to sanitary treatment to schools. Park Forest may have it right by being organized and operating with a degree of central coordination and efficiency that cannot be matched by the typical fragmentation of taxing



bodies. This places Park Forest in a unique situation to initiate partnerships and alliances with other agencies or governments.

RECOMMENDATION

Concurrent with our observation about the scope of Park Forest responsibilities, we see the potential for even greater efficiencies. In particular, we refer to regionalization of services. The Village should retain its status as a leading community in the southern metropolitan area. This has been demonstrated in many ways through the South Suburban Mayors and Managers Association and other forums or alliances over the years. Our team does not have a list of agencies that the Village may target as allies or partners. However, an example we have to underscore our recommendation is the joint 9-1-1 Emergency Communications Center project that Park Forest and others have established. Our second example is the Aqua Center with its service to residents and non-residents. We do suggest that the Village take an informal inventory of other Village services and how they may be expanded to serve outside of the municipal boundaries. This may increase potential revenue streams as well as expand the service area. Possibilities for this initiative include public health, police patrol/investigations, fire protection/prevention, and recreational events.

VI. CONCLUSION

The Park Forest Village Board and staff are commended for undertaking a critical review and examination of their governing and management practices. Some municipal officials prefer to continue to do things the same old way. Unfortunately, sometimes the same old way of doing things leads to the same old result. Time and circumstances change. If the Village Board and staff are not prepared for change and poised to take advantage of the opportunities that change can offer, the community will not progress.

It has been a pleasure to be of service to you. It is the hope of the Center for Governmental Studies and Regional Development Institute that the Village of Park Forest finds this assessment to be of value. We are thankful to everyone who participated in the process. The cooperation and courtesies extended were much appreciated.

APPENDICES

Appendix A: Park Forest IMAP Application

Appendix B: Advance Materials Reviewed

Appendix C: Interview Questions

Appendix D: Service Delivery Checklists

Appendix E: Village of Will County-Multi-Year Budget Sheet

Appendix F: Debt Management Policy for the Village of Carol Stream

Appendix G: Village of Forsyth Strategic Plan Management Tracking Matrix

Appendix H: “5 Ways Cities are Using Social Media to Reverse Economic Downturn”

APPENDIX A: Park Forest Request for IMAP Services

REQUEST FOR IMAP SERVICES

CENTER FOR GOVERNMENTAL STUDIES
NORTHERN ILLINOIS UNIVERSITY

COMMUNITY INFORMATION

1. **Government Applicant (municipality):** Village of Park Forest
2. **Contact person:** Tom Mick **Phone number:** 708-748-1129
Email address: tmick@vopf.com **Fax number:** 708-503-8560
3. **Name of person completing application:** Tom Mick
Address: 350 Victory Drive, Park Forest, IL 60466
Phone Number: 708-748-1129
Best time to call: 8:30 AM to 9:30 AM and 4:30 PM to 5:30 PM, Monday - Friday
4. **Please attach a map and provide directions to Municipal Office.**
5. **Please list your municipal website:** www.villageofparkforest.com
6. **What is your council/board meeting schedule?** 1st, 2nd and 4th Mondays of each month at 8 PM. Schedule will change in January 2011 to 1st, 3rd and 4th Mondays of each at 7 PM.
7. **Community Character:**
 - Urban/Metropolitan
 - Suburban
 - Rural/Exurban
8. **Background information:**

1990 Population: 24, 656	General Fund Annual Budget: \$18,572,500	
2000 Population: 23,462	Annual Utility Budget: \$8,251,056 (Water, Sewer, Refuse)	
Special Census Population N/A	Year N/A	Projected 2010 Population 23,462
Geographical Size (Sq. Mi.): 4.978	Projected 2010 Geographical size: 4.978	
2008 Equalized Assessed Valuation: \$219,491,270		
1998 Equalized Assessed Valuation: \$129,132,392		
Current Municipality Property Tax Rate (\$/100 EAV): \$4.9250 (2008)		
Current Property Tax Rate of All Jurisdictions (\$/100 EAV): \$16.8050 (2008)		

Number of Full Time Employees: 170 Full Time Equivalents

Are any employees unionized: yes no

If so, how many union groups does the municipality have? 2 (FOP & IAFF)

Home Rule: yes no

Form of Government:

Mayor/Council

Commission

Council/Manager

Mayor/Council/Administrator

MUNICIPAL SERVICES INFORMATION:

9. Municipal Departments and Services

	Staff	Contract	NA		Staff	Contract	NA
Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inspections (Bldg)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Airport	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Library	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cemetery	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Natural Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Data Processing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parks & Recreation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dispatch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Personnel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Econ Development	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Police	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Public Works	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EMS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sanitary Sewers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Mgmt	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sewage Treatment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Engineer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Storm Sewers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Water	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Key:

Staff = Service is provided by the municipality and staffed by public employees

Contract = Service is provided by the municipality, but is done through a contract with another entity or business

NA = Service is not provided by the municipality

ISSUES AND OPPORTUNITIES

10. What are the significant issues or concerns facing your municipality?

Need for commercial redevelopment for a stagnant/declining sales tax base.

Struggle to engage and meet the needs of an ever-changing and very diverse constituency.

Addressing the needs of an aging infrastructure.

Community Development – which oversees Building, Zoning and Housing operations in addition to a new position of Director of Economic Development and Planning. The Director of Economic Development and Planning has spearheaded both of the planning projects noted above.

As part of the Strategic Land Use Plan, the Village has undertaken efforts to acquire various commercial and residential properties in the most cost efficient manners possible (no cash bid, tax delinquency, etc.). Strategic purchases of property will allow the Village to better stimulate and/or control the type of re-development which will take place across the community in the months and years ahead.

To help project the Village’s housing stock and quality of life of the community, the Village has implemented a Crime Free Housing Ordinance and a Vacant Building Registry Ordinance. Both of these initiatives have come from a multi-departmental initiative called the Village’s Troubled Building and Property Task Force. An additional Housing Inspector and Police Officers have been hired to the Village’s workforce over the past decade to help facilitate initiatives coming out of the Task Force.

Regarding the aging infrastructure, the Village implemented a Grant Seeking Task Force in 2005 and since then has pursued numerous grants. The results have been positive as literally 10’s of millions of dollars have been secured for infrastructure improvements, either in the way of grants, matching grants and/or low-interest stimulus funding.

CHECKLIST AND ATTACHMENTS

- X Attach a resolution by the city council or board of trustees requesting management assistance, with a pledge of support to participate in the study.
- CGS may need to interview elected officials and staff by phone to clarify the request.

The best time to schedule an interview is: (Show a time in one hour intervals)

Morning: X Afternoon: Evening:

Which day of the week works best? Monday through Friday

Please provide directions to your municipal building from NIU in DeKalb.

I-294 South to I-80 West to I-57 South to Sauk Trail. Exit Sauk Trail right (east) to Indianwood Boulevard (stoplight). Left on Indianwood and follow it to the first stop sign which is Orchard Drive. Village Hall is located at the northeast intersection of Indianwood and Orchard, set back in a shopping center about 800 feet off the actual cross streets.

----- Or -----

I-88 East to I-355 South to I-80 East to I-57 South to Sauk Trail. Exit Sauk Trail right (east) to Indianwood Boulevard (stoplight). Left on Indianwood and follow it to the first stop sign which is Orchard Drive. Village Hall is located at the northeast intersection of Indianwood and Orchard, set back in a shopping center about 800 feet off the actual cross streets.

11. What type of assistance are you seeking?

An outside, unbiased perspective is sought which gives both constructive and reinforcing feedback on Park Forest's provision of local government services. The Village has a history of seeking outside perspective so as to help us 'think outside the box.' Such a viewpoint may give us the impetus to consider additional approaches currently not undertaken in Park Forest. Also, positive reinforcement of those approaches, documents, etc. already in place would be welcomed as the Village's leadership compares itself to other municipal organizations in Illinois.

12. Why are you requesting assistance?

The analysis would coincide with the Village's annual strategic planning processes. Such processes have unfolded every year for the past 12 fiscal cycles.

13. What are the expectations from elected officials, staff, and/or public regarding the assistance being requested?

See answer to #11 noted above.

14. What are the opportunities for economic development, such as housing, commercial or industrial development, transportation, tourism, etc., and how do they affect the demands placed upon local officials for services and infrastructure?

Opportunities do exist in spite of the current downturned economy. A series of planning studies have been undertaken in the past few years (Strategic Land Use Plan for Economic Development, 210th Street Transit-Oriented-Development Concept Plan) as the Village situates itself positively for commercial and residential redevelopment. A primarily landlocked community, opportunities for green-field development and/or boundary expansions are limited – but both do exist on the southern limits of the Village. A boundary agreement for expansion potential is being explored with neighboring communities to the south and a shuttered former municipal golf course will allow for 60+ acres of new development as may be driven by the development community.

Protecting the community's housing stock and quality of life are key objectives of the Village's leadership as is the ongoing charge of repairing and/or replacing an aging infrastructure with a finite supply of revenues. When and where possible, such infrastructure work is done while leveraging as much county, state and/or federal grant funding as possible.

15. What actions have been taken to address the issues/concerns identified in question 10 & 14? What are the opportunities for intergovernmental cooperation to address some of the issues and concerns?

As noted above, the Village has undertaken a series of studies which have been completed. The implementation phases of the 211th Street TOD Concept Plan and the Strategic Land Use Plan for Economic Development are now underway. Prior to 2005, the Village had one Department Head overseeing the operations of Building, Planning, Zoning, Housing and Economic Development. These duties were divided up in 2005 into 2 positions: Director of

APPENDIX B: Advance Materials Reviewed

- Organization Chart
- Municipality Budget: Most Current
- Capital Improvement Budget: Most Current
- Police/Fire Pension Annual Report: Most Current
- Values, Mission, Goals, and Objective Statements
- Facility Management Contracts
- Audited Annual Financial Report: Most Current
- Certificates of Insurance, Coverage, and Declarations
- Roster of employees by Department and Job Descriptions
- Personnel Manual/Employee Handbook and Pay Plan
- Collective Bargaining Agreements
- Lists of Boards and Commissions
- Wastewater Inspection Reports : IL EPA: Most current
- Public Water Supply Report – Most Current
- Most Recent Bond Offering Statement (Prospectus)
- Service Contracts (e.g., Engineering Services, Legal, EMS, etc.)
- Most Recent Edition of Community Newsletter
- Comprehensive Plan
- Zoning Map
- Economic Development Plan/Studies
- Community Promotional Brochures, Maps, etc.
- Local Phone Book
- Recent Edition of Local Newspaper
- Web Page URL
- Inventory of Vehicles and Equipment
- Intergovernmental Agreements (Including Boundary)

APPENDIX C: Interview Questions

- What do you like about your community?
- What don't you like about what is happening in your community?
- What is your opinion of municipal services?
- In your opinion, what could be done to improve municipal services?
- What are the challenges facing your municipal government?
- What are the challenges facing your community?
- What would you do to face these challenges?
- What do you think the residents say about the community? Municipal government?
- What do people from outside the community say about your community?
- Do you have any specific areas that you feel should be addressed in this study?

APPENDIX D: Service Delivery Checklists

PUBLIC WORKS	MUNICIPAL	OTHER	N/A	#EMPLOYEES FT: PT: S:
Street lights				
Vehicle/Equip Maintenance				# Vehicles (all depts.)
Street – Maintenance				# Miles of Streets
Street – Seal coat				
Street – Crackfilling				
Street – Cleaning				
Snow Removal				
Street – Markings				
Street – Signs				
Street – Engineering				
Street – Inspections				
Traffic Signs/Signals				
Street Tree Care				
Sidewalk Repair				
Storm Sewers				
Parking Lots				
UTILITIES				#EMPLOYEES FT: PT: S:
Water Service				
Water Treatment				
Water Main Repairs				
Water Meter Reading				
Water Testing				Vendor/Lab:
Wastewater Treatment				Type:
Wastewater Sludge Disposal				
Sanitary Sewer System				
Wastewater Testing				Vendor/Lab:
Electric Generation				
Electric Distribution				
Electric Meter Reading				
Natural Gas				
Building/Equip Maintenance				
Commercial – Refuse				
Residential – Refuse				
Solid Waste Disposal				
Solid Waste Recycling				

Billing				
OTHER ENTERPRISES				
Airport				
Cemetery Maintenance				
Cemetery Grave Openings				
Conference Center				
Other				Specify:
FINANCE	MUNICIPAL	OTHER	N/A	
Data Processing				
Payments/Processing				
Checks/Issuance				
Invoice Mailing				
Receivables Processing				
Issue/Process Purchase Orders				
Taxes/Fees Collection				
Licenses Issuance				
General Ledger Accounting				
Prepare Annual Budget/ Financial Report (Audit)				
PERSONNEL				
Recruitment/Selection				Civil Service?
Time Sheet Preparation				
Time Sheet Processing				
Issue Payroll Checks				
Maintain Personnel Records				
Workers Compensation				
Risk Management				
Safety Programs				
RECORDS MANAGEMENT				
Board Minutes				Exec. Session:
Board/Commission Minutes				Exec. Session:
Ordinances/Resolutions				
Final Engineering "Plans/As Built"				
Plats				
Recorded Documents				
Licenses				
Safety Program/Right-to-Know Law				
Preparation of Agenda – Council				
Preparation of Agenda – Boards				
Notifications – Open Meetings Law				
Citizen Complaints/Responses				

Preparation of Ordinances & Resolutions				
Recodification of Municipal Code				
Liability Claims				
Service Contracts				See Below
Development Agreements				
Insurance Contracts				

CONTRACTUAL SERVICES				PROVIDE COPIES OF CONTRACT
Legal				
Engineering				
Economic Development				
Facility Management				
Equipment/Vehicular Service				
Building Maintenance				
Tree/Street Maintenance				
Community Protection				
Inspection				

**Base Budget Financial Forecast
General Fund**

General Fund Balance Analysis-Base Budget

	<u>Aug-10</u>	<u>Targeted Fund Balance (3 mos. operating)</u>	<u>Difference</u>
	<u>Est. General</u>		
May 1, 2010 Beginning Cash Balance	\$435,431		
PLUS: 2010-2011 Est. Budgeted Revenues	\$13,361,288		
LESS: 2010-2011 Est. Budgeted Expenditures	<u>\$11,903,244</u>		
Ending/Beginning Cash Balance	<u>\$1,893,475</u>	\$2,732,464.00	(\$838,989.00)
PLUS: 2011-2012 Est. Budgeted Revenues	\$13,397,459		
LESS: 2011-2012 Est. Budgeted Expenditures	<u>\$12,843,051</u>		
April 30, 2012 Ending Cash Balance	<u>\$2,447,883</u>	\$2,957,166.46	(\$509,283.90)
PLUS: 2012-2013 Est. Budgeted Revenues	\$13,895,618		
LESS: 2012-2013 Est. Budgeted Expenditures	<u>\$13,539,039</u>		
April 30, 2013 Ending Cash Balance	<u>\$2,804,462</u>	\$3,132,766.16	(\$328,304.64)
PLUS: 2013-2014 Est. Budgeted Revenues	\$14,206,624		
LESS: 2013-2014 Est. Budgeted Expenditures	<u>\$14,310,062</u>		
April 30, 2014 Ending Cash Balance	<u>\$2,701,023</u>	\$3,289,828.26	(\$588,804.86)
PLUS: 2014-2015 Est. Budgeted Revenues	\$14,472,486		
LESS: 2014-2015 Est. Budgeted Expenditures	<u>\$16,020,861</u>		
April 30, 2015 Ending Cash Balance	<u>\$1,152,648</u>	\$3,475,768.32	(\$2,323,120.40)

ASSUMPTIONS

Revenues

- * Home Rule 1% in effect for a full year beginning FY 10/11
- * 40% Property Tax Rebate distributed during mid FY 10/11 and then thereafter
- * Income & Use Tax remains flat for all 5 years
- * Only building permit activity for FY 10/11 and forward is 25 residential homes & listed commercial/industrial
- * New Lenox Town Center sales tax was included as calculated by consultants (base only)
- * No engineering fees will be received in FY 11/12 and forward
- * Shared Administrative Costs Reimbursement recognized the employees taking SIP
- * Common activities will remain flat
- * All other revenue is assumed to increase 3% of previous year

Expenditures

- * (2) Entry Level Police Officers were added in FY 12/13
- * No longer using MFT funds for Street Labor as in FY 11/12; portion of salaries return to General Fund
- * Capital Outlay includes 2 leased squads and street equipment recurring leases based on FY 10/11 numbers
- * One-time terminal reserve reductions from health insurance pool returned to the expenses in FY 10/11
- * Debt & Transfers reflect current annual debt obligations
- * Beginning FY 13/14, \$100,000 will be paid to Illinois Tollway Authority for the ramp (\$1,050,000 obligated in 2014/15)
- * 10% increase in health insurance premiums 5/1/11 & forward
- * All other expenditures increase 5% of previous year

FOOTNOTE: Revenue projections assumes full income tax payments from the IDOR received

**General Fund Analysis
Expenditures**

FY 13/14 Estimated Budget-5% Increase of 12/13

400	\$199,562.00	\$1,733,122.20	\$73,277.66	\$834,164.90	\$49,741.99	\$774,977.50	\$3,664,846.25
410	\$710,955.00	\$143,910.98	\$46,837.51	\$29,050.60	\$11,818.19	\$0.00	\$942,572.28
420	\$627,819.00	\$151,955.15	\$10,302.86	\$67,759.26	\$16,871.23	\$0.00	\$874,707.50
430	\$411,352.00	\$95,297.90	\$5,348.23	\$23,844.49	\$8,810.68	\$0.00	\$544,453.30
450	\$3,881,658.00	\$843,907.76	\$259,834.72	\$643,499.43	\$65,852.66	\$0.00	\$5,694,752.56
470	\$3,000.00	\$0.00	\$34,960.28	\$28,668.58	\$14,966.93	\$0.00	\$81,595.79
480	\$930,434.00	\$233,901.88	\$214,189.57	\$214,429.19	\$80,494.30	\$100,000.00	\$1,773,448.94
490	\$0.00	\$0.00	\$17,364.38	\$98,976.94	\$0.00	\$0.00	\$116,341.31
810	\$92,792.00	\$21,483.87	\$7,408.80	\$22,342.16	\$578.81	\$0.00	\$144,605.64
815	\$12,710.00	\$0.00	\$0.00	\$3,802.80	\$0.00	\$0.00	\$16,512.80
820	\$1,520.00	\$0.00	\$347.29	\$22,660.51	\$0.00	\$0.00	\$24,527.80
830	\$42,866.00	\$8,821.54	\$2,894.06	\$3,229.77	\$20,501.54	\$0.00	\$78,312.92
835	\$60,986.48	\$0.00	\$17,480.14	\$268,783.18	\$6,135.41	\$0.00	\$353,385.19
\$6,975,654.48	\$3,232,401.28	\$690,245.48	\$2,261,011.80	\$275,771.74	\$874,977.50	\$14,310,062.27	

FY 14/15 Estimated Budget-5% Increase of 13/14

400	\$209,540.10	\$1,906,434.42	\$76,941.55	\$875,873.14	\$52,229.09	\$778,227.50	\$3,899,245.80
410	\$746,502.75	\$151,108.53	\$49,179.38	\$30,503.13	\$12,409.10	\$0.00	\$989,700.89
420	\$659,209.95	\$159,552.91	\$10,818.01	\$71,147.23	\$17,714.79	\$0.00	\$918,442.86
430	\$431,919.60	\$100,062.79	\$5,615.64	\$24,826.72	\$9,251.22	\$0.00	\$571,675.96
450	\$4,075,740.90	\$886,103.15	\$272,826.46	\$675,874.40	\$69,145.29	\$0.00	\$5,979,490.19
470	\$3,000.00	\$0.00	\$38,708.29	\$30,102.01	\$15,715.28	\$0.00	\$85,525.58
480	\$976,955.70	\$245,596.97	\$224,899.04	\$225,150.65	\$84,519.01	\$446,000.00	\$2,203,121.38
490	\$0.00	\$0.00	\$18,232.59	\$103,925.78	\$0.00	\$0.00	\$122,158.38
810	\$97,431.60	\$22,558.06	\$7,779.24	\$23,459.27	\$607.75	\$0.00	\$151,835.92
815	\$12,710.00	\$0.00	\$0.00	\$3,992.94	\$0.00	\$0.00	\$16,702.94
820	\$1,520.00	\$0.00	\$384.65	\$23,793.53	\$0.00	\$0.00	\$25,678.19
830	\$45,009.30	\$9,262.62	\$3,038.77	\$3,991.26	\$21,526.62	\$0.00	\$82,228.56
835	\$64,035.80	\$0.00	\$18,354.14	\$282,222.32	\$6,442.18	\$0.00	\$371,054.44
\$7,323,575.70	\$3,460,677.45	\$724,757.76	\$2,374,062.39	\$289,560.33	\$1,224,227.50	\$15,416,861.12	

* includes the Village Hall Bonds, Roadway Capital Improvement bonds and the Illinois Tollway Authority annual payment beginning in FY 13/14

Exhibit A

APPENDIX F: Debt Management Policy for the Village of Carol Stream

Village of Carol Stream Debt Management Policies

Purpose

The Debt Management Policies set forth comprehensive guidelines for the Financing of capital projects and infrastructure. It is the objective of the policies that (1) the Village obtain financing only when necessary, (2) the process for identifying the timing and amount of debt or other financing be as efficient as possible and (3) the most favorable interest and other costs be obtained.

Responsibility

The primary responsibility for developing financing recommendations rests with the Finance Director. In developing the recommendations, the Finance Director shall be assisted by the Village Manager, Assistant Village Manager and Assistant Finance Director, the four of whom shall comprise a Debt Management Committee. The responsibilities of the committee shall be to:

- meet no less than annually to consider the need for financing and assess progress on the Capital Improvement Program;
- meet as necessary in preparation for a financing and review changes in state and federal legislation;
- review annually all debt issues to determine whether refinancing or restructuring may be in order. (The Finance Director will monitor such opportunities on an ongoing basis.);
- review annually the provisions of ordinances authorizing issuance of obligations; and,
- annually review services provided by the Financial Advisor, Bond Counsel, Paying Agent and other service providers to evaluate the extend and effectiveness of services being provided.

Annually, the Finance Director and Village Manager shall jointly prepare a written report on the status of Capital Improvement Program financing. The report shall be based in part on information collected from the Village Engineer and Public Works Director and shall include a projection of near term financing needs compared to available resources, an analysis of the impact of contemplated financings on the designated revenue source and user charges, and a financing recommendation, trends in interest rates and other factors as appropriate.

Bond Counsel Involvement

The Bond Counsel will issue an opinion as to the legality and tax-exempt status of any obligations. The Village will also seek the advice of Bond Counsel on all other types of financings and on any other questions involving federal tax or arbitrage law. Bond Counsel is also responsible for the preparation of the ordinance authorizing issuance of obligations and all of the closing documents to complete their sale and will perform other services as defined by contract approval by the Village Board.

Financial Advisor Involvement

The Village will seek the advice of a Financial Advisor when necessary. The Financial Advisor will advise on the structuring of obligations to be issued, inform the Village of various options, advise the Village as to how choices will impact the marketability of Village obligations and will provide other services as defined by contract. To ensure independence, the Financial Advisor will not bid on nor underwrite any Village debt issues on which it is advising.

Short Term Debt

General

Short-term obligations may be issued to finance projects or portions of projects for which the Village ultimately intends to issue long-term debt; i.e., it will be used to provide interim financing which will eventually be refunded with the proceeds of long-term obligations.

Short-term obligations may be backed with a tax or revenue pledge, or a pledge of other available resources.

Interim financing may be appropriate when timing of the financing is critical. Short-term obligations can often be obtained more quickly than long-term obligations and thus can be used in emergencies until long-term financing can be obtained. In addition, in some cases when the amount of financing required is relatively small, it may be cheaper for the Village to issue a small amount of short-term obligations to provide for its immediate needs than to issue a larger amount of long-term obligations to provide financing for both immediate and future needs when the carrying costs of issuing obligations which are not immediately needed are taken into account.

Line of Credit

With the approval of the Village Board, the Village may establish a tax-exempt line of credit with a financial institution selected through a competitive process. Draws shall be made on the line of credit when (1) the need for financing is so urgent that time does not permit the issuance of a long-term debt, (2) the need for financing is so small that the total cost of issuance of long-term debt including carrying costs of debt proceeds not needed immediately is significantly higher, and (3) the Debt Management Committee approves the draw. Draws will be made on the line of credit to pay for projects designated for line of credit financing by the Village Board. Only projects which will ultimately be financed with the proceeds of authorized bonds may be designated.

Long Term Debt

Long-term obligations will not be used for operating purposes and the life of the obligations will not exceed the useful life of the projects financed, but in any case no longer than 20 years.

Level or declining debt service shall be employed unless operational matters dictate otherwise, or except to achieve overall level debt service with existing bonds. The Village may choose to delay principal payments or capitalized interest during project construction.

The Village shall be mindful of the potential benefits of bank qualification and will strive to limit its annual issuance of debt to \$10 million or less when such estimated benefits are greater than the benefits of exceeding the bank qualification limit. Should subsequent changes in the law raise this limit, then the Village policy will be adjusted accordingly.

The cost of issuance of private activity bonds is usually higher than for governmental purpose bonds. Consequently, private activity bonds will be issued only when they will economically benefit the Village.

The cost of taxable debt is higher than for tax-exempt debt. However, the issuance of taxable debt is mandated in some circumstances and may allow valuable flexibility in subsequent contracts with users or managers of the improvement constructed with the bond proceeds. Therefore, the Village will usually issue obligations tax exempt, but may occasionally issue taxable obligations.

Leasing shall not be considered when funds are on hand and could be made available for the acquisition unless the interest expense associated with the lease is less than the interest that can be earned by investing the funds on hand or when other factors such as budget constraints or vendor responsiveness override the economic consideration.

Whenever a lease is arranged with a private sector entity, a tax-exempt rate shall be sought. Whenever a lease is arranged with a government or other tax-exempt entity, the Village shall strive to obtain an explicitly defined taxable rate so that the lease will not be counted in the Village's total annual borrowing subject to arbitrage rebate.

The lease agreement shall permit the Village to refinance the lease at no more than reasonable cost should the Village decide to do so. A lease which can be called at will is preferable to one which can merely be accelerated.

Since the market for lease financings is relatively inefficient, the interest rate available at any one time may vary widely. Therefore, the Village shall obtain at least three competitive proposals for any major lease financing. The net present value of competitive bids shall be compared, taking into account whether payments are in advance or in arrears, and how frequently payments are made. The purchase price of equipment shall be competitively bid as well as the terms and cost of financing.

The advice of the Village's bond counsel shall be sought in any capital leasing arrangement and when federal tax forms are prepared to ensure that all federal tax laws are obeyed.

The Village may consider issuing certificates of participation to finance a very large project. Analysis will be performed because financing costs may be greater than other types of financing.

Other Types of Financing

From time to time other types of financing may become available. Examples of these options are debt pools with other entities and low-interest loans from state agencies such as the Illinois Environment Protection Agency. The Debt Management Committee will prepare a written analysis of an option. The analysis will include consideration of the advice of the Village's and Financial Advisor.

Ratios

- Adverse tax opinions or events affecting the tax-exempt status of the security
- Modifications to rights of security holders
- Bond calls
- Defeasances
- Matters affecting collateral
- Rating changes

The Finance Director will be designated “Compliance Officer” for disclosure requirements. Levels of reporting will include:

- Annual compliance reports to the City Council Finance and Government Committee Notification by certified mail to NRMSIRs, and SIDs of material events, with copies to the Village Board. These reports will be included in the Annual report that is submitted to the Village Board by the Debt Management Committee.
- Copies of CAFR and updated tables from the Official Statement to NRMSIRs and SIDs within six months of fiscal year end.

Arbitrage Liability Management

It is the Village’s policy to minimize the cost of arbitrage rebate and yield restriction while strictly complying with the law.

General

Federal arbitrage legislation is intended to discourage entities from issuing tax-exempt obligations unnecessarily. In compliance with the spirit of this legislation, the Village will not issue obligations except for identifiable projects with very good prospects of timely initiation. Obligations will be issued as closely in time as feasible to the time, contracts are expected to be awarded so that they will be spent quickly.

Responsibility

A personal meeting with representatives of the rating agencies will be scheduled every few years or whenever a major project is initiated.

Credit Enhancement

Credit enhancements are mechanisms which guarantee principal and interest payments. They include bond insurance and a line or letter of credit. A credit enhancement, while costly, will usually bring a lower interest rate on debt and a higher rating from the rating agencies, thus lowering overall costs.

During debt issuance planning, the Financial Advisor will advise the Village whether or not a credit enhancement is cost effective under the circumstances and what type of credit enhancement, if any, should be purchased. In a negotiated sale, bids will be taken during the period prior to pricing of the sale. In a competitive sale, bond insurance may be provided by the purchaser if the issue qualifies for bond insurance.

Secondary Market Disclosure

SEC 15c2-12 regulations became effective July 3, 1995. The regulation requires municipal debt issuers to provide specified financial and operating information for fiscal years beginning on January 1, 1996, or later. The information provided should mirror the information provided in an official statement at the time of a primary offering. The annual financial information is to be sent to all Nationally Recognized Municipal Information Depositories (NRMSIRS) designated by the SEC. Additionally, issuers must notify the State Information Depositories (SIDs) if one exists.

In addition to the financial and operating information any material event must be provided to all NRMSIRS, Municipal Securities Rulemaking Board (MSRB) and to the state SID's. Municipal debt issuers will be obligated to provide ongoing disclosure on the status of the following material events:

- Principal and interest payment delinquencies
- Nonpayment-related defaults
- Unscheduled draws on reserves
- Unscheduled draws on credit enhancements
- Substitution of credit or liquidity providers, or the failure to perform

Because of the complexity of arbitrage rebate regulations and the severity of non-compliance penalties, the advice of Bond Counsel and other qualified experts will be sought whenever questions about arbitrage rebate regulations arise.

The Finance Director will be responsible for identifying the amount of unspent debt proceeds including interest which is on hand and for ensuring that, to the extent feasible, the oldest proceeds on hand are spent first.

If necessary, the Village will contract with an arbitrage rebate service provider to maintain a system for computing and tracking the arbitrage rebate liability. The arbitrage service provider will notify the Village within 60 days of year end of the amount of any accrued liability and will also notify the Village 60 days in advance of when a rebate of excess arbitrage earnings is due to the Internal Revenue Service.

The Village's Bond Counsel and Financial Advisor shall review in advance any arbitrage rebate payments and forms sent to the Internal Revenue Service.

The expenditure of obligation proceeds will be tracked in the financial accounting system by [type of issue]. Investments will be pooled for financial accounting purposes and may, at the discretion of the Finance Director, be pooled for investment purposes. When investments of bond proceeds are co-mingled with other investments, the Village shall adhere to the Internal Revenue Service rules on accounting allocations.

Arbitrage rebate costs shall be charged as negative interest revenue to the funds in which the related obligation proceeds were originally deposited.

Internal Interim Financing

In order to defer the issuance of obligations, when sufficient non-restricted reserve funds are on hand, consideration shall be given to appropriating them to provide interim financing for large construction contracts or parts of contracts. When the appropriations are subsequently re-financed with the proceeds of obligations or other resources, the non-restricted reserve funds shall be repaid. When expenditures are reimbursed from debt issuances, applicable state law and the Internal Revenue Service rules on reimbursements will be complied with so that the reimbursements may be considered expenditures for arbitrage purposes. Requirements are in general:

Investment of Bond Proceeds

The investment of bond proceeds will be dictated by the bond indenture and state statutes.

The Finance Director and Financial Advisor will prepare the cash flow requirements for the bond proceeds and shall be used as a guide in structuring the maturity of the bond proceeds portfolio.

Debt covenants and arbitrage requirements will be designed to maintain compliance with both debt and investment policies with any arbitrage liability adjusting net investment income in the year in which the liability was incurred.

Debt service reserve funds shall be maintained and invested, as applicable, in compliance with the debt agreements.

Modification To Policies

These policies will be reviewed annually by the Debt Management Committee and minor changes may be made with the approval of the Village Manager. Significant policy changes will be presented to the Village Board for confirmation.

APPENDIX G: Village of Forsyth Strategic Plan Management Tracking Matrix

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

CATEGORIES

Page Specific priority items are assigned to a category to organize efforts. Cross references are provided to indicate interrelationships.

- 9 Atmosphere of Village - Community Character
- 9 & 10 Community & Economic Development
- 11 Operations & Finance
- 12 Public Safety
- 12 & 13 Public Works, Facilities & Services
- 13 Regional Relationships

PRIORITY STATUS TRACKING = ✓ ⇔ % Description

Status Priorities are tracked and periodically designated a completion status. The designated leader or team declares a percentage of the priority item completed from 0% up to 100%. Further, a brief description of the status displayed for each priority item. This information is submitted to a designated tracker who periodically reports results. Note: The Village Board can revise the priority level of an item, abandon an item, and add an item.

		Level 1	Level 2	Level 3	Ongoing	Leader/Team
⇔	Ongoing Priority				⇔	
Level 1a	To be developed and accomplished during 2010.	✓				
Level 1b	To be developed during 2010. To be implemented during 2011.					
Level 2	To be developed during 2011. To be implemented during 2011 and/or 2012.		✓			
Level 3	To be developed during 2012. To be implemented during 2012 and/or 2013.			✓		

Level	Status of Priority Item: <i>Examples of logged entries -----</i> ⇔	Status %	Description	Leader/Team
#	Priority item description in Strategic Plan	100%	The Board <i>continued its financial support for the program.</i>	
#	Priority item description in Strategic Plan	50%	Plans approved for project. Land acquisition in progress.	
#	Priority item description in Strategic Plan	0%	No decision made or resources applied to program / project.	

Ehlers & Associates

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6/30/2010

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

ATMOSPHERE OF VILLAGE - COMMUNITY CHARACTER		Status %	Description	Leader/Team
Level				
⇒	Maintain ambiance of a friendly, small town community.			Village Board
1b, 2, 3	Expand the public library.			Village Board, Library Board, Finance & Public Library Advisory Cmt, Staff
1b, 2, 3	Complete bike-pedestrian trail connections.			Village Board, Parks & Recreation Advisory Cmt, Staff, Engineer
1b, 2, 3	Design and build a community center.			Village Board, Parks & Recreation Advisory Cmt, Staff, Engineer
3	Identify needs and develop community parks.			Village Board, Parks & Recreation Advisory Cmt, Staff, Engineer
⇒	Continue to incorporate storm water engineering into all projects.			Village Board, Public Works Advisory Cmt, Staff, Engineer
⇒	Continue community events; i.e., annual festival and other ways of bringing people together			Activities & Events Advisory Cmt, Volunteers, Staff
1a	Develop an effective individual and team project management program.			Administrator, Department Managers, Strategic Plan Consultant

Cross Reference: See Public Works, Facilities & Services for regulations for building and storm water management.

COMMUNITY & ECONOMIC DEVELOPMENT		Status %	Description	Leader/Team
Level				
⇒	Use comprehensive plan and other means to carry out vision and mission.			Village Board, Plan Commission
⇒	Support controlled growth consistent with the comprehensive plan.			Village Board, Plan Commission
1a	Ensure that the C&ED role of the Mayor/Village President is clear.			Village Board, Administrator
1a	Ensure that the C&ED role of the Village Administrator is clear.			Village Board, Administrator

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

COMMUNITY & ECONOMIC DEVELOPMENT (Continued)		Status %	Description	Leader/Team
Level				
2	Review and update the comprehensive land use plan			Village Board, Plan Commission, Staff, Consultant
2	Review and update the zoning code of ordinances			Village Board, Zoning Board, Staff, Consultant, Village Attorney
1b	Review and revise marketing materials with a consistent promotional theme.			Economic Development Advisory Cmt
1b	Review and revise websites to display a consistent promotional theme.			Economic Development Advisory Cmt, Staff, Consultant
1b	Use an economic development/planning consultant to assist with efforts.			Village Board, Economic Development Advisory Cmt, Staff
2	Support new affordable housing as a way to retain younger residents.			Village Board
2	Plan for and work with developers on moderate priced residential housing.			Village Board, Economic Development Advisory Cmt, Staff
2	Small scale pedestrian-friendly commercial area for shoppers.			Plan Commission, Parks & Recreation Advisory Cmt
2	Attract a grocery store, drug store, dry cleaner and other basic business services.			Economic Development Advisory Cmt, Staff, Consultant
3	Diversity tax base by attracting office & technology compatible with community.			Economic Development Advisory Cmt, Staff, Consultant
3	Review and update the subdivision code of ordinances			Village Board, Plan Commission, Staff, Consultant
3	Annex lands to the east and west to lead the way for future growth.			Village Board

Cross Reference: See Operations & Finance for diversifying tax base.

Cross Reference: See Public Works, Facilities & Services for building code.

Cross Reference: See Regional Relationships for joint strategies, combined economic development efforts, and respective roles of Mayor/Village President and Village Administrator.

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

OPERATIONS & FINANCE		Status %	Description	Leader/Team
Level				
⇒	Provide administrative and direct service departments with needed resources.			Village Board, Finance & Public Library Advisory Cmt
⇒	Maintain a professionally competent and transparent financial program.			Treasurer, Auditor
⇒	Maintain a professionally competent and transparent record-keeping program.			Village Clerk
⇒	Continue producing a balanced budget with sufficient revenues and fund balances.			Village Board, Finance & Public Library Advisory Cmt, Treasurer, Administrator
1a	Review Village outstanding debt and debt management policy. Identify and cost savings and take action.			Finance & Public Library Advlsory Cmt, Treasurer, Financial Consultant
1a	Review Village investments and cash flow policy. Maximize liquidity and interest income. Take action accordingly.			Finance & Public Library Advisory Cmt, Treasurer, Financial Consultant
1b	Review Strategic Plan and CIP prior to starting the Annual Budget process (See current Budget and CIP document).			Village Board, Finance & Public Library Advlsory Cmt, Administrator
1b	Identify grant funding and other outside sources of revenue and apply per CIP.			Administrator, Consultant
1a	Assign to new Village Administrator authority needed to manage daily operations.			Village Board
1a	Ensure that Village Administrator personnel and budget authority is clear.			Village Board, Village Attorney
2	Diversify the tax base with less reliance on sales taxes.			Village Board, Economic Development Advisory Cmt
2	Use HR consultant to review staffing assignments, compensation, and numbers.			Administrator, Village Clerk, Consultant

*Cross Reference: See Community & Economic Development for attracting new and diverse businesses compatible with the community.
 Cross Reference: See Public Works, Facilities & Services for utility rate study and incorporating revenue sources in CIP.*

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

PUBLIC SAFETY Level		Status %	Description	Leader/Team
⇒	Continue to protect people and property in a way that instills confidence.			Village Board, Health & Safety Advisory Cmt, Sheriff
⇒	Retain and strengthen the partnership with the Macon County Sheriff.			Village Board, Health & Safety Advisory Cmt, Sheriff, Administrator
1b	Identify and quantify standards of service and performance of Sheriff services.			Village Board, Health & Safety Advisory Cmt, Sheriff
2	Conduct a citizen survey to determine community satisfaction. Report on results.			Village Board, Health & Safety Advisory Cmt, Sheriff
2	Review performance in relation to standards and community satisfaction.			Village Board, Health & Safety Advisory Cmt, Sheriff
2	Utilize cutting-edge technology to promote proactive and responsive service			Village Board, Health & Safety Advisory Cmt, Sheriff, Administrator

PUBLIC WORKS, FACILITIES & SERVICES		Status %	Description	Leader/Team
1a. ⇒	Review and update capital improvements plan [CIP] to meet needs for next year (See current Budget and CIP document).			Village Board, Public Works Advisory Cmt, PW Director
⇒	Maintain and improve infrastructure to meet current needs (See current Budget and CIP document).			Village Board, Public Works Advisory Cmt, PW Director, Engineer
⇒	Continue emphasis on storm water management and flood control (See current Budget and CIP document).			Village Board, Public Works Advisory Cmt, PW Director, Engineer
1a	Incorporate designated revenue source in the CIP.			Village Board, Treasurer, Administrator
2, 3	Review and update the capital improvements plan to meet future needs.			Works Advisory Cmt, PW Director
3	Study water and sewer rates to ensure customer payment equity and the ability to cover cost of operations, maintenance, and capital.			Village Board, Public Works Advisory Cmt, Financial Consultant

Village of Forsyth Strategic Plan 2010 - 2013

MANAGEMENT OF PRIORITIES BY CATEGORY AND LEVEL

PUBLIC WORKS & FACILITIES (Continued)		Status %	Description	Leader/Team
3	Review and revise building and life safety codes on for new construction.			Code Administration Consultant
3	Review and revise storm water management policies and regulations.			Village Board, Public Works Advisory Cmt, PW Director, Engineer

Cross Reference: See Atmosphere of Village and Community Character for public library, community center and recreational projects.

Cross Reference: See Community & Economic Development for comprehensive land use plan, zoning code, and subdivision code.

Cross Reference: See Operations & Finance for balanced budget with sufficient revenues, fund balances, and grants.

REGIONAL RELATIONSHIPS		Status %	Description	Leader/Team
⇔	Foster mutually beneficial relationships with other local governments.			Village Board, Mayor, Administrator
⇔	Foster mutually beneficial relationships with the business community.			Mayor, Administrator, Economic Development Advisory Cmt
1a, ⇔	Ensure that the regional role of the Mayor/Village President is clear.			Mayor, Administrator
1a, ⇔	Ensure that the regional role of the Village Administrator is clear.			Mayor, Administrator
1b, 2	Focus in particular on cultivating a positive working relationship with Decatur.			Mayor, Administrator
1b, 2	Be a more active member of Macon County Economic Development Corporation.			Mayor, Administrator
1b, 2	Be a more active member of the Decatur Convention & Visitors Bureau.			Mayor, Administrator
1b, 2	Relate more actively with Decatur/Macon County Chamber of Commerce.			Mayor, Administrator
2	Collaborate with others in promoting a regional technology business park.			Economic Development Advisory Cmt, Mayor, Administrator
3	Negotiate and implement a boundary line agreement with Decatur.			Village Board, Mayor, Village Attorney, Administrator

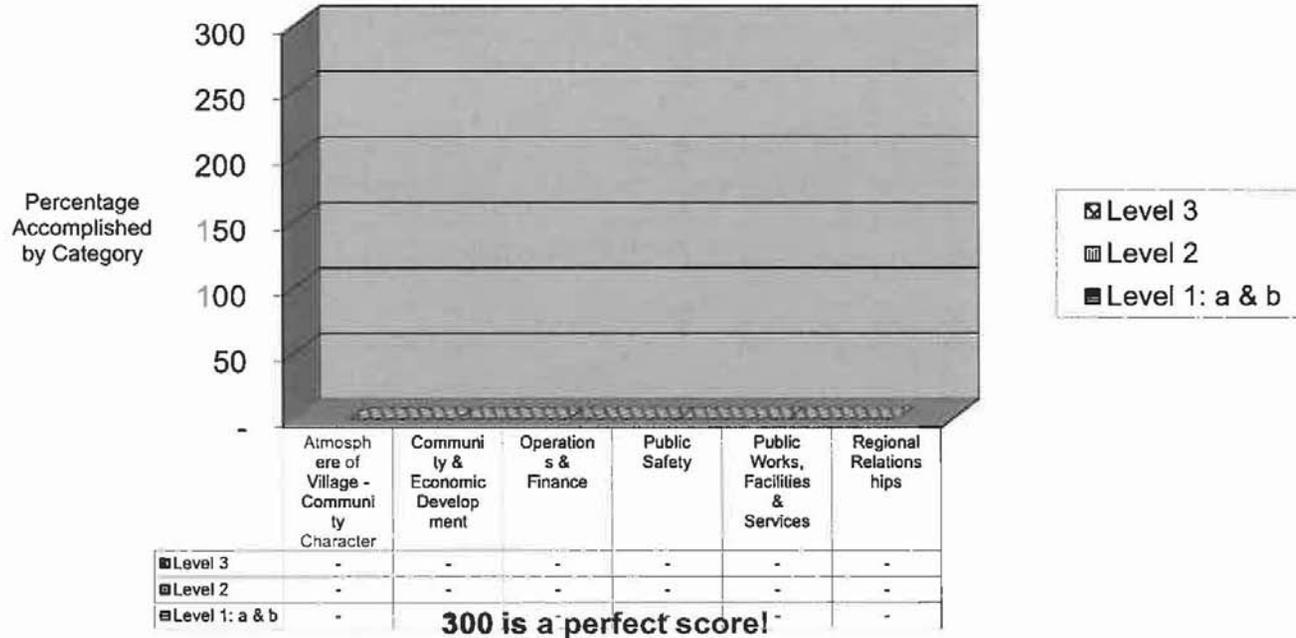
Cross Reference: See Community & Economic Development for regional collaboration and respective roles of Mayor/Village President and Village Administrator.

RESULTS REPORT

DATE: XX/XX/20XX

Atmosphere of Village - Community Character	Community & Economic Development	Operations & Finance	Public Safety	Public Works, Facilities & Services	Regional Relationships	
-	-	-	-	-	-	
-	-	-	-	-	-	
-	-	-	-	-	-	Average = -

**VILLAGE OF FORSYTH, ILLINOIS, USA
STRATEGIC PLAN AND MANAGEMENT RESULTS**



APPENDIX H: “5 Ways Cities are Using Social Media to Reverse Economic Downturn”

5 Ways Cities Are Using Social Media to Reverse Economic Downturn

December 16, 2010 by Aliza Sherman 23



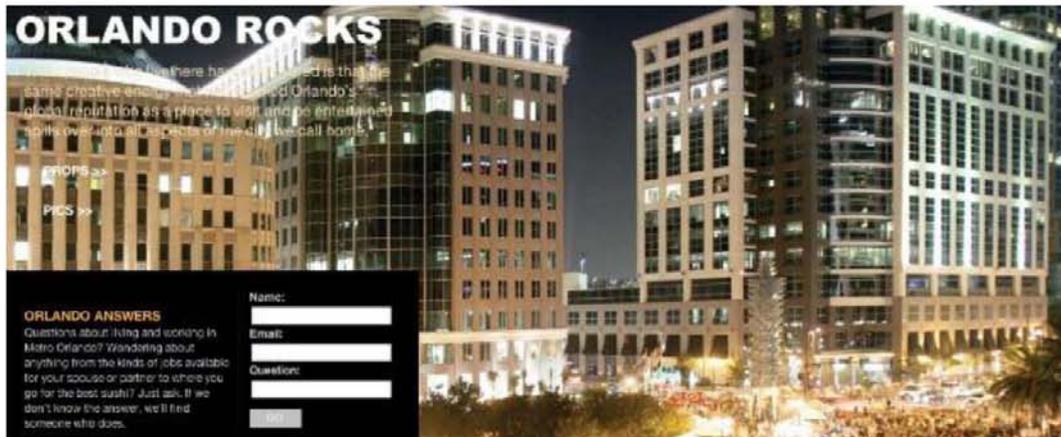
The economic downturn has forced cities and states across the country to be more creative as they compete to attract companies and stimulate local economies. In just the past year, local economic development agencies have turned to social media tools and tactics to enhance their efforts nationally and locally.

According to a 2009 survey conducted by the International Economic Development Council (IEDC) and marketing agency Development Counsellors International (DCI), 57% of IEDC members surveyed said they were using social media tools. Of that, 63% had used them for less than a year. At the time, developers primarily focused their social media efforts on internal or regional uses, such as disseminating news and providing links to resources that support local businesses. LinkedIn was the social network of choice.

What a difference a year makes. Since the survey, economic developers have expanded their social media repertoire. Looking beyond localized efforts, they are using blogs, Twitter, Facebook and YouTube to attract and interact with site selectors and company decision makers nationally and globally.

Here are five ways cities and regions are using social media today.

1. Strengthening or Rebranding a Region's Image



When Orlando was wooing a New York City-based company, it heard a concern that it wasn't considered "edgy" enough and was too "theme-parkish." To demonstrate an "edgier" image, the Metro Orlando Economic Development Commission created a microsite with a YouTube and Flickr presence. The city also sourced stories from their members as well as testimonials about why they love living and working in Orlando through Facebook, Twitter and its e-newsletter.

The result? Orlando was shortlisted and matched against the target company's home base of Manhattan. The company decided not to relocate, but the Metro Orlando Economic Development Commission credits social media as part of what helped rebrand their city and make a strong showing in its recruiting efforts.

2. Showcasing Story Ideas for the Media

The Maryland Department of Business and Economic Development (DBED) used social media to generate media interest. The DBED launched a new website — ChooseMaryland — along with branded social media channels including Twitter, Facebook, LinkedIn, YouTube and Flickr.

Since launching its social media channels, the DBED has seen its efforts turn into news stories and media opportunities, including a story in the *Maryland Daily Record*, an interview by tech correspondent Mario Armstrong on his *Digital Café* radio show as well as retweets and blog posts by reporters from the *Washington Post* and *Baltimore Sun*.

Further south, the Greater Richmond Partnership, Inc. posts videos on YouTube of CEOs who have successfully relocated their companies, businesses that are growing in the area, and community leaders extolling the benefits of their city — all as promotional tools. They also created a series of videos titled *Boundless Creativity* specifically for a UK conference for businesses interested in expanding their presence to the U.S. to promote the creative class centered in greater Richmond.

3. Attracting Former Residents Back to an Area

In the Midwest, the Republic County Economic Development in Kansas uses LinkedIn and Facebook to locate and reach out to alumni and other former residents. The goal? To entice them back to their region to fill available jobs or to relocate their companies and create new jobs. The organization uses LinkedIn to identify professionals who might match the services that are needed in the county. The hope is that if someone already has a connection to their area, they may have more incentive to return. The agency rounds out its social media efforts with a YouTube channel to promote a positive image about its communities.

The county hired Jenny Russell, an external Internet and social media marketer to handle the launch of the social media channels and to manage the day-to-day. As the Republic County Economic Development co-coordinator, Russell estimates that she spends about seven hours per week on social media promotions and management.

4. Linking Job Seekers to Jobs

Workforce development is a major aspect of economic development, and social media has been a useful way for economic development groups to promote and get results. In addition to the Greater Richmond Partnership's (GRP) social media channels for outreach on LinkedIn, Facebook, Twitter and Flickr, the organization also launched social media channels for its workforce program, RichmondJobNet. Those job-specific channels include a Facebook Page and a Twitter presence. According to Jennifer Yeager, marketing communications consultant for the GRP, of the 21,500 tweets the organization has posted, 90% have been job listings.

5. Promoting Local and Regional Businesses and Assets



The Roanoke Regional Partnership catalogued the destinations and activities for its region in a comprehensive website in order to raise interest in outdoor assets like the Blue Ridge Mountains, Appalachian Trail and Blue Ridge Parkway. Then it began using Facebook and Twitter to create or

promote events such as scavenger hunts, outdoor expos and a film festival. They also use social media to share new data about outdoor businesses in the region, solicit input from residents for outdoor activities and answer questions for people planning outings.

The economic development agency, which represents three cities and four counties in southwest Virginia, has four Facebook accounts and four Twitter pages. According to Thomas Becher, president of public relations and advertising agency tba, within one year of adding social media to its communications mix, greenway use in the area was up 29% and state parks usage rose 12% – four times the average in Virginia.

What Does the Future Hold?

With social media adoption growing rapidly amongst economic developers in the past year, where else can they go to reach their audience and goals? Louisiana Economic Development has its sights set on mobile with the recent launch of EQ, its quarterly economic report publication for the iPad. The interactive app includes videos, photographs and content showcasing Louisiana's economic progress, business successes and Q&A's with industry leaders in the state.

"Economic development groups are increasingly turning to social media as a means of communicating both within their communities and externally with key audiences," said Ryan Shell, director of digital and social media for DCI. "The medium has enormous potential for our profession."
