



# STRATEGIC PLAN

2021-2022

# LORENA

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## ACKNOWLEDGEMENTS

From the City Manager

Whereas a Comprehensive Plan is adopted to be a guide for the next 20 to 25 years, a Strategic Plan is meant to be a guide for the first three to five years of the Comprehensive Plan. Our goal in forming the strategic planning committee was to include a total representation of our citizenry, business owners, and landowners/developers. Thus, City staff recruited the strategic committee from representatives of local church groups, Lorena Economic Development Corporation (LEDC), Lorena Chamber of Commerce, Lorena City Council, Lorena Independent School District, Planning and Zoning Commission (P&Z), City staff, landowners/developers, and consultant(s). The Committee worked hard to ensure a sense of purpose and direction are layered evenly in the Strategic Plan for the future success of Lorena by leaving room for “tweaks” and/or “adjustments” necessary to flow with both the internal and external forces in the unforeseeable future.

Ultimately, I would like to thank the Strategic Planning Committee for their discussions, reviews, and approval of the final draft. Next, I would like to thank the Lorena City Council for believing that the path forward begins with planning today for the future of Lorena. Finally, I would like to thank Mitchell Planning-especially Dr. Richard Lewis and Joanne Ford-Robertson for their ability to guide the committee in this endeavor to produce a living and breathing document that will serve the City of Lorena well in the coming years.

**Strategic Planning Committee:**

City Council:	Kelly Yarbrough and Emily McKensie
Chamber of Commerce:	Eva Greenup
Lorena Economic Development:	Jason Mundo
P&Z:	Don Bagby and Brad Wetzel
Representative of Local Churches:	Heath Kirkwood
Lorena ISD:	Superintendent Joe Kucera
Business Owner:	David Greenup
Local Bank Representative:	Lisa Torrez
Landowner/Developer:	Chris McGowan
City Staff:	Police Chief, Tom Dickson; Director of Public Works, Kevin Neal; City Manager, Joseph R. Pace



# LORENA

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## HISTORICAL BACKGROUND

The City of Lorena is located thirteen miles south of Waco in southern McLennan County. Originally settled in the 1850s, the townsite for the community (Old Town) was laid out in 1881 with the alignment of the Missouri, Kansas, and Texas railroad between Hillsboro and Taylor. A railroad stop was constructed in order to provide access for cotton products from the local gin to be brought to market. The original name of the community was "Aerl Station," named for the community founder Daniel Aerl. However, Aerl Station was later renamed Lorena (pronounced Lo-REE-nah) for the oldest daughter of a prominent settlers, Charles A. Westbrook and Mary Virginia Whitsett Westbrook.

Lorena Westbrook was born in 1861 on the Westwood family plantation. She attended Baylor University, graduated in 1879, and then married Sterling Clark Robertson that same year. They had several children. She died in San Antonio at the age of 91. She is buried in a cemetery just south of the City of Lorena.

In 1884 the Lorena community had a general store, two grocery stores, and one hundred and fifty residents. Area farmers utilized the railroad station in Lorena to shipped cotton, corn, and livestock. By 1890, Lorena had grown to include a hotel, a school, a steam cotton gin and gristmill, two churches, three general stores and two hundred fifty residents. Historical population estimates rose to 375 in 1892, and to 500 in 1896. Though the population of Lorena was reported as 342 throughout the 1930s and most of the 1940s, between 1933 and 1945 the number of rated businesses fell from 22 to 7. Lorena's population estimates also fell to 242 in the 1950s. However, in 1970 the U.S. Census showed the population as 406 and by 2018 it was almost 1800.

The introduction of the interstate highway system in the late 1950s and early 1960s contributed to the boost to population and the local economy. Aligned with US 81, Interstate 35 linked Lorena once again with major population and commerce centers within the State in a similar way the railroad did. Residential development to the City has been increased over the years by outward migration of people moving from the more urban areas of Waco and enjoying the more rural lifestyle that Lorena has to offer.

## STRATEGIC PLANNING PROCESS OVERVIEW

### Overview

As organizations attempt to enhance the services or the products provided in an ever-changing client environment, strategic planning becomes one of the most effective approaches to streamlining operations and setting long-term and short-term initiatives. Strategic planning involves the development of a collective vision, mission, and corresponding strategic themes and initiatives. As a result, organization activities become focused and accomplishing important initiatives becomes more attainable.

A strategic plan and its corresponding initiatives represent activities beyond normal organizational operations. Therefore, embarking on a strategic planning process involves actions and initiatives that are additional to normal operations. Moreover, strategic plans will impact the organization financially by requiring funding above the operational budget.

### Strategic Planning Process

Strategic planning is a systematic process for evaluating the nature of an organization and defining long-term initiatives. Usually, a strategic plan is developed as a 3 to 5-year plan. The resulting plan is a guide for addressing an organizational mission composed of goals (initiatives) and related action steps.

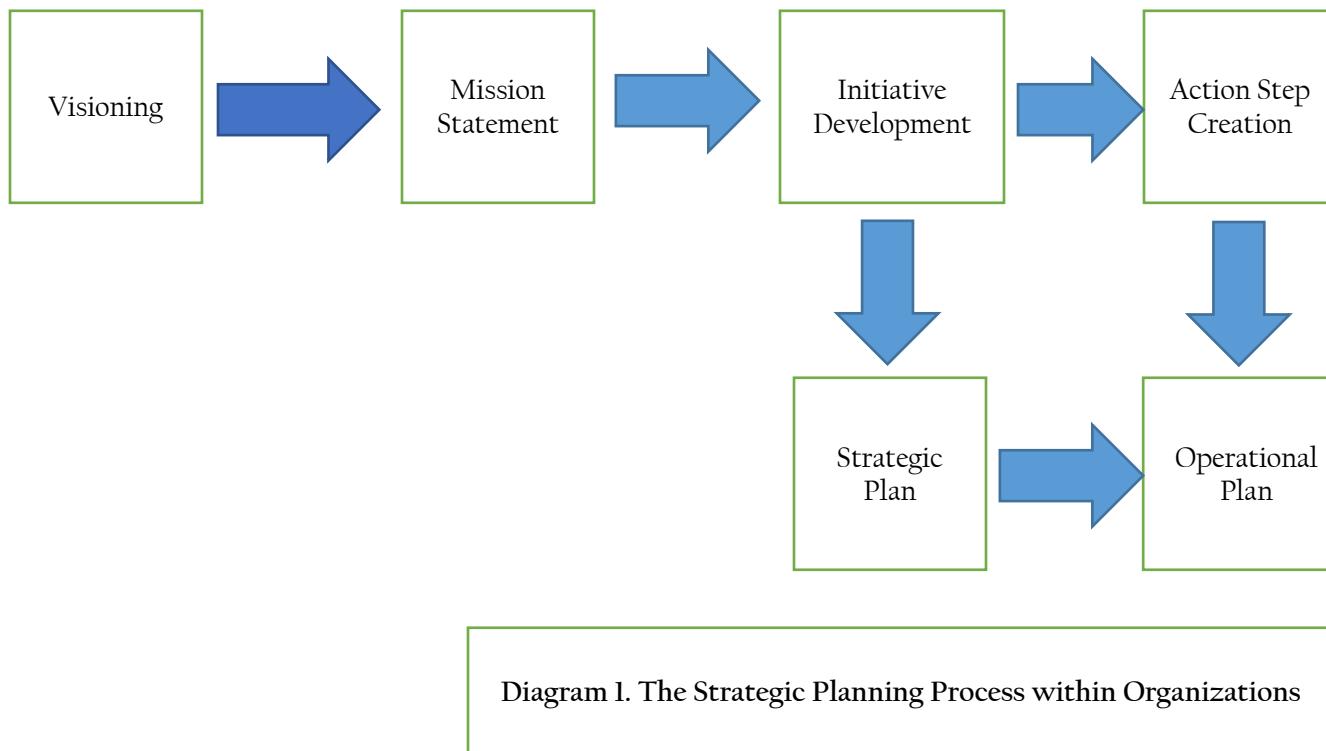
Strategic planning begins by addressing the following three questions. **Where are we today? Where are we going as an organization? How do we get there?** After these preliminary questions are answered by the organization, a four-step process to build the plan is initiated. Diagram 1 illustrates this process.

**Step One - Creating a Vision for the Organization.** During this phase of the process, the articulation of the organizational culture, structure, and direction is formulated by team members. This includes the ability of team members to perceive changes in the organization as well as identifying core values. The result of this phase is the creation of a comprehensive vision statement that describes how the organization will look in the future.

**Step Two - Creating a Mission Statement.** After the creation of the organizational vision statement, a mission statement is developed directly from the vision. The mission statement should be concise and easy to understand from both the employees' perspective as well as the clients. It should incorporate the organizational culture as well as specific outcomes.

**Step Three – Goal (Initiative) Identification.** A goal is a broadly defined planned organizational outcome or accomplishment. Goals are multi-dimensional and easy to understand but too broad to measure directly. They should flow directly from the vision and mission statements.

**Step Four - Creation of Action Steps.** Action steps are the concrete activities for addressing the goals identified. They must be quantifiable as well as measurable for tracking the status of goals. Most goals have multiple actions steps that are time bound. Action steps are then assembled into an operational plan for guiding strategic goal implementation.



## Potential Issues Associated with Strategic Plans

For most organizations, there are four potential problems linked to strategic plans. One involves stressing numbers instead of quality. Many times, strategic plan success is tied to quantitative results (increased number of in profession employees, enhanced training efforts, etc.). Rather, assessment of plans should also take into account the impact on quality results. For instance, how is the employees/clients experience improved, how has the workplace become a better environment for the employee/client, or how has the plan improved the overall well-being of the employee.

Another potential pitfall is neglecting the analysis of both the internal and external environment. An organization must consider the internal environment and determine whether it is prepared for embarking on a strategic planning process. Coupled with this decision is assessing the impact on the strategic planning process by forces outside of the organization.

Implementation is a third potential problem related to strategic planning. Identifying a vision, mission statement, and initiatives is relatively simple. The difficult work is translating these into action steps and tasks. In other words, turning the abstract into the concrete can be tough for organizations. For a strategic plan to work, measurable initiatives with action steps must be developed along with assigning individuals or organizational units to accomplish them.

Lastly, every strategic plan has financial considerations. The costs associated with implementing a strategic plan are above the costs associated with operational activities. All strategic plans will impact the budget and this must be assessed by the organization before starting the process. Failing to address the financial considerations is the ultimate *deal breaker*.

## STRATEGIC PLAN DEVELOPMENT

### Strategic Planning Overview

The purpose is to produce a vision for the City of Lorena, Texas along with the 5-year strategic plan complete with actions steps related to implementation. The process will lead to a culminating document that encompasses the vision, policies and growth strategies as guidelines for the overall Comprehensive Plan, goals, objectives and implementation framework.

### Description of the Strategic Planning Process

**Task I. Policy Development and Vision Statement (Strategic Planning).** The Round Top Consulting Associates (RTCA) attended the Vision and Goals Workshop (conducted in charrette format) and collaborated with Mitchell Planning Group in assembling information linked to the identification of the City's strengths, weaknesses, opportunities, and threats. This effort led to the updating of the Comprehensive Plan as well as provided some initial information for development of the strategic plan.

**Task II. Develop a Draft Strategic Plan.** The RTCA developed the strategic plan from the information gleaned from community sessions as well as meetings with City stakeholders and staff members. The process of creating a strategic plan involved, but was not restricted to, the following action steps.

- Met, in conjunction with the Mitchell Planning Group, Community Leaders, Appointed and Elected Officials to discuss issues and priorities
- Created the strategic plan with vision, mission, strategic initiatives (goals), and action steps

**Task III. Finalize the Strategic Plan.** The RTCA, in conjunction with Mitchell Planning Group, assisted in finalizing the strategic plan. Actions related to finalization are presented below.

- Conducted work sessions with the Strategic Planning committee to review the draft strategic plan
- Made revisions, as necessary, from the information received from the Strategic Planning committee.

## FACTORS INFLUENCING STRATEGIC PLANNING

All strategic planning processes are impacted by funding levels within the organization. Additionally, there tends to be some tension between operational and strategic activities. Operational activities are supported and funded through the organization's budget. Strategic activities are fund driven as well but the question becomes, "does the organization have the funds to support them?" Clearly, factors that influence strategic planning efforts must be seriously considered with respect to whether their impact is positive or negative.

### Internal Factors

For the City of Lorena, internal factors must be addressed regarding the strategic planning process. Structural issues may create constraints on how well the City will be able to address the strategic goals. For instance, municipal policies and other state regulation or guidance may negatively impact goal implementation efforts. Additionally, the size of Lorena's municipal government, from a bureaucratic standpoint, along with potential human resource (manpower) issues could impact goal implementation as well. Other related to structural issues such as budget constraints and availability of time may negatively affect strategic planning efforts.

From a personnel perspective, limiting internal factors may be linked to total assets available within the City of Lorena. These assets include personnel and various equipment. In addition, differences of opinions on how to address implementation issues may be a factor. Lastly, there may be knowledge gaps within the organization regarding strategic planning implementation.

## External Factors

External factors may influence the strategic planning process. Therefore, they must be taken into consideration as implementation of the strategic plan takes place. Bureaucracies outside of the City of Lorena at the county, state, regional, and Federal level could impact planning efforts. These entities independently or in some level of cooperation could constraint action steps or tasks associated with strategic plan implement. Related to bureaucratic influence is intergovernmental relations. The nature of the City of Lorena's relationships with other entities may have an impact of the strategic planning process. Lastly, stakeholder influence must be taken into consideration as well. Throughout this document, partnering with local stakeholders is an important asset for planning purposes.

Economic and clinical health of the community is a major influence on the direction and pace of strategic planning. Associated with this is community expectations often guided by media reporting. Additionally, climate issues and transportation access are key issues that must be addressed as the strategic planning process moves forward. Lastly, the COVID-19 pandemic has an impact on the economic health of the City of Lorena, and it could have a lingering effect that limits some aspect of strategic planning.

## VISION, MISSION, AND CORE VALUES

### VISION

Lorena will be a thriving city with a “hometown” feel. It will be supported by excellent schools and infrastructure including utilities, road, bike lanes, and sidewalks. It will be a unique place to live and visit, capitalizing on its downtown historic district and its location along the IH35 corridor. With multigenerational neighborhoods it will have a diversity of housing types and price points. Community gathering spaces will be connected to neighborhoods and commercial areas. Active business and small industries will produce a stable tax base.

### MISSION

The City of Lorena preserves, protects, and enhances the quality of life of our citizens by providing a high level of service in a fiscally responsible manner.

### CORE VALUES

**Inclusiveness.** Our actions, priorities, and policies include different types of people, businesses, and ideas and treating everyone fairly and equally.

**Livability.** The key factors that add up to our community’s quality of life include the natural environment, economic prosperity, social equity, educational opportunities as well as cultural, entertainment and recreational amenities.

**Excellence.** Delivery of services and products which is exceptionally good and surpasses ordinary standards.

**Sustainability.** Long-term viability of the community through excellent fiscal, social, economic, and environmental management.

**Preservation.** Fostering and preserving the history, uniqueness, and character of the City for our future generations.

## STRATEGIC GOALS

**Enhance Community Involvement.** This goal is aimed at getting residents more involved in the community and participating in community activities. As a result, residents will understand, value, and embrace Lorena's future.

**Improve City Infrastructure.** Upgrade and implement improvement to all components of the City's infrastructure. This includes, but not restricted to, water, wastewater, streets, and drainage planning.

**Enhance Businesses through Growth and Development.** The City will expand business presence and the number of businesses in Lorena. This enhancement includes the development of downtown. This expansion will lead to healthy growth and development of the business sector.

**Enhance Available and Affordable Housing.** The City will assist other entities in expanding the availability and affordability of housing. This will give individuals and families more housing choices in Lorena and will improve overall livability.

**Create Community Spaces.** Expansion of community spaces provides enhanced quality of life for residents. This is achieved through the availability of more city spaces such as parks, bike and hiking trails, nature trails, etc.

**Expand Local Tax Base.** Through increasing business development, improving city infrastructure, increasing the number of residents, and attracting tourism, the local tax base will be positively impacted.

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## IMPLEMENTATION PLAN 2021-2022

### GOAL A. Enhance Community Involvement

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Expand community events.	<ul style="list-style-type: none"> <li>• Rebrand the City Logo to a more modern representation of the City, now and into the foreseeable future.</li> <li>• Identify entertainment events for involving the community.</li> <li>• Encourage participation in National Night Out.</li> </ul>	City Staff, Chamber of Commerce (CofC), EDC	Bullet point # 2: In Progress
Solicit citizens for appointment to vacant positions on City committees/board.	<ul style="list-style-type: none"> <li>• Increase volunteer pool for boards and commissions.</li> </ul>	City Council, City Staff, EDC, CofC	In Progress
Conduct needs assessment for Downtown for moving forward.		CofC, EDC, City	Beginning of Process. EDC and Chamber of Commerce have agreed in principle to the idea
Continue efforts to solicit community input/reviews of developing plans.		City Council, City Planner	
Promote the Chamber of Commerce.	<ul style="list-style-type: none"> <li>• Create a City orientation committee.</li> </ul>	CofC, City Council, City Staff, EDC	
Encourage attendance of City Council meetings.		City Council, City Staff	Virtual viewership is actually up thanks to utilizing social media
Plan community events, lectures, town hall meetings, etc. put on by local citizen experts.	<ul style="list-style-type: none"> <li>• Promote the City's Website and videos.</li> </ul>	City Staff, CofC, EDC	In Progress with "What is Happening in Lorena" videos

## GOAL B. Improve City Infrastructure

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Develop long-term budget and funding plans to support projected street, utility, and public building maintenance (determine priority needs).	<ul style="list-style-type: none"> <li>Hire an engineering consultant to develop a utility masterplan.</li> <li>Look for grants/funds to improve roads.</li> <li>Plan for state-of-the-art water tower.</li> <li>Capture backwash water and flood waters and process for City use.</li> </ul>	City Manager, Director of Finance, Public Works Director, City Engineers	In Progress
Get community input in the infrastructure planning process.		City Manager and Public Works Director	
Research public resources for unique methods to fund start-up infrastructure needs.		City Manager and Public Works Director, HOTCOG	In Progress
Look to increase salaries of all City employees and benefits.		City Council, City Manager, City Secretary	
Create additional pedestrian and bicycle paths.		City Manager, EDC Consultant, Waco MPO	
Complete contract with the City of Robinson.		City Manager, Director of Finance, City Engineers	In Progress

### GOAL C. Enhance Businesses through Growth and Development

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Promote Old Town Lorena.	<ul style="list-style-type: none"> <li>Explore cost-sharing business starts for downtown.</li> <li>Actively solicit, through advertisement or social media, growing businesses that might be a fit for out Downtown.</li> </ul>	City of Lorena, EDC, CofC	Very Beginning stages
Have EDC members attend conferences and promote Lorena opportunities.	<ul style="list-style-type: none"> <li>Incentives to bring businesses to Lorena.</li> <li>Market location of Lorena to highways</li> <li>Bring in full-time EDC employee.</li> <li>Implement a small business incubator within a vacant building with agreements to support succession with a long-term lease.</li> </ul>	EDC Board of Directors, EDC Consultant	
Encourage the City, Chamber of Commerce, and EDC to work together.	<ul style="list-style-type: none"> <li>Get buy-in from existing businesses.</li> <li>Identify barriers that prevent business development.</li> </ul>	City Council, City Manager, EDC Board, EDC Consultant, CofC	
Develop appropriate planning and zoning of commercial areas.		City Planner, City Manager, City Secretary, P&Z	

#### GOAL D. Enhance Available and Affordable Housing

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Change the perceptions of multi-family dwellings (apartments, duplexes, townhomes, etc.).	<ul style="list-style-type: none"> <li>Revisit zoning map to identify specific locations for additional duplex, fourplex or apartment additions.</li> </ul>	City Planner, City Manager	
Reduce regulatory barriers that limit the ability to build lower cost homes.	<ul style="list-style-type: none"> <li>Conduct a study to identify demographics related to the needs of young families searching for affordable housing.</li> </ul>	City Planner, City Manager	
Attend tradeshows with builders' associations.	<ul style="list-style-type: none"> <li>Contact city government of other small growing communities that provide affordable housing and glean ideas that would apply to Lorena.</li> <li>Invite Builders of Retirement Villages to Lorena.</li> <li>Structure taxes to be higher on land than on structures, giving incentives to develop expensive lands (possible tax breaks).</li> <li>Market the positive for builders.</li> </ul>	EDC Consultant, City Manager	

## GOAL E. Create Community Spaces

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Develop a community spaces vision.	<ul style="list-style-type: none"> <li>• Research funding available for government grants related to parks or community space development.</li> <li>• Schedule an open forum for ideas from citizens who have experienced a park or community space that they think might be applicable to Lorena. (Parks Master Plan)</li> <li>• Identify talents and assets within our community before planning.</li> <li>• Continue to push for connecting sidewalks throughout Lorena.</li> <li>• City and EDC work together for park grants.</li> <li>• Enhance and expand McBrayer Park.</li> </ul>	City Manager, EDC Consultant, Waco MPO Staff	
Adhere to the ordinances that new developments have to set aside greenspaces.		City Manager, City Planner, P&Z, City Council	In progress
Look for partners to provide support.	<ul style="list-style-type: none"> <li>• Partner with schools.</li> <li>• Partner with developers (PIPs).</li> </ul>	City Manager, City Planner, EDC Consultant	

## GOAL F. Expand Local Tax Base

Action Step	Tasks Needed to Accomplish Step	Responsible Office/Person	Status
Develop and market incentive that would be of interest to business ventures or new start-ups.	<ul style="list-style-type: none"> <li>Incentives to bring businesses to Lorena (consider tax abatements).</li> </ul>	City Manager, City Council, EDC, CofC	
Actively recruit businesses or industries to Lorena that fit with our community.	<ul style="list-style-type: none"> <li>Partner with property owners and real estate professionals that can assist with developing attractive opportunities for business ventures.</li> <li>Nurture and support local businesses to create jobs.</li> <li>Market Lorena to new residents, especially retirees and middle-to-high income families.</li> <li>City and Chamber work together to shore up the downtown area. (Already began- include the EDC).</li> <li>Recruit small business owners to come to Lorena.</li> <li>Bring in service stations and fast-food restaurants.</li> <li>Push for development inside the City.</li> </ul>	EDC Consultant, EDC	
Improve City services to entice people to move to Lorena.		City Council, City Manager,	

## LONG-TERM ISSUES

Long-term issues are items that the City of Lorena should monitor over time. They are not the focus in the first two years of the strategic plan. However, some of these should be considered as strategic goals in the out-years of the current strategic plan. During the strategic planning process, several long-term issues were identified for future addressment and they are outlined below.

- Establish a City Fire Department.
- Reduce the sewer rates.
- Enhance beautification and image through improved lighting, signage, landscaping, and welcome signs.
- Further improvement to the infrastructure and expand city boundaries.
- Develop a more detailed master plan for the city of Lorena that is cohesive and considers the relationships of adjacent area's zoning.
- Assist in expanding the local public-school system.
- Recruitment and retention of City staff members.

## APPENDIX A

### Key Terms

**Action step.** A specific activity related to accomplishing an initiative. This is also called a strategy.

**Goal (Initiative).** A broadly defined planned organizational accomplishment or outcome. This is often referred to as a goal.

**Mission statement.** A brief overview of an organization's purpose, identification of its clients, and statement of broad outcomes.

**Operational plan.** A specific outline for accomplishing short-term initiatives. It consists of the initiatives as well as action steps, performance measures, and budget items. It is sometimes referred to as an implementation plan.

**Organizational change.** Any alteration that moves an organization from the known to the unknown.

**Performance measure.** A quantitative or qualitative summary for determining the status or success of an action step and the associated task(s).

**Planning schedule.** A timetable for creating and implementing a strategic plan.

**Strategic plan.** A guide for accomplishing an organizational mission composed of a number of initiatives and strategies. It usually spans 3-5 years to allow for phased organizational change.

**Strategic planning process.** It is a continuous process of systematically evaluating the nature of the business, defining its long-term objectives, identifying quantifiable initiatives, developing strategies to reach these objectives and initiatives and allocating resources to carry out these strategies.

**Task.** An assignment or duty needed for accomplishing the action step.

**Vision statement.** A vision statement is a relatively abstract view or picture of how an organization or an organizational component will look in the future. It often provides an articulation of organizational culture, structure, and direction. It represents a destination for the organization or an organizational unit. It is usually composed of several sentences or short paragraphs. It should not be longer than 75-100 words. Organizational goals should be deduced and created from a vision statement.