

# FAIRFIELD STRATEGIC PLAN

## SUBJECT MATTER EXPERT

### WORKING SESSION SUMMARIES

#### PREFACE

The Strategic Plan Committee encourages everyone to read this short Preface before diving into the detail of the Subject Matter Expert (SME) Working Session Summaries, to establish an understanding of the purpose and goals of the Town's first Strategic Plan.

First a word about the purpose of this document. What follows are the summaries of the discussions of the Subject Matter expert sessions, as facilitated and summarized by Houseal Lavigne Associates (HLA). The goal of the summaries is to capture the nature of the conversations and are not an exact transcript of the conversations word for word. When, in the natural course of discussion, there were examples and potential options discussed they were captured and are documented here. However, these examples and potential options are not the formal recommendations of either HLA or the SPC, nor can it even be construed that these are the formal opinions of the SMEs. The role of the SMEs was to 'inform' HLA on the fit of various options for Fairfield.

The next step is for HLA to document their DRAFT recommendations, which will be shared with the public and Town officials. During this step, we will gather community feedback before presenting the formal recommendation to the Board of Selectman. The process to communicate the plan, and gather input, is being developed, and will be consistent with the prior approaches for this initiative.

#### INTRODUCTION

A Strategic Plan is a complex undertaking, especially the first time. It is essentially comprised of first assessing where we are as a community, second deciding where we want to go, and lastly identifying what we need to do in order to get there. The first two steps are often easier. It is that last step of setting a roadmap where it can get tricky.

A very simple example we came across during the SPC's work was from a group of 5<sup>th</sup> graders, whose feedback was gathered during our Community Outreach work. When the 5<sup>th</sup> graders were asked to envision their best selves 15 to 20 years from now, they all came up with the typical response: doctors, musicians, actors, police officers, fire fighters, and of course, teachers. When asked: how they intended to achieve those strategic visions, each and every one of them said: 'Study'! They needed to get good grades to achieve their dreams.

Not a one thought they could achieve their dreams without studying. They also realized that achieving that longer term vision would require tradeoffs. In their case, it was recognized that there would be times where instead of going out to play, they may need to take a different step, like studying.

The goal of a Strategic Plan is to offer us a roadmap to achieve our shared vision for the Town. Ultimately success from this Plan comes down to prioritizing the things that can help us achieve our vision over the things that will not. This Plan should clearly indicate that Fairfield should stop doing the things that are counter strategic, and start making strategic, goal-oriented choices, despite sometimes conflicting options.

One of those conflicting options that the Town is facing revolves around maintaining the current level of services that the Town offers, and curbing tax increases. If we want to maintain the level of services, but don't want the current trend in taxes to continue, we need to decide which services and service levels are strategic and which are not. If all services are strategic at the current level, then to keep taxes low, money needs to come from somewhere else (aka economic development). If economic development is the answer then changes need to be made in both density of development and use of available parcels. The Town must come together to combat instances of NIMBYism, where small groups of people attempt to prevent development in direct opposition to the Town's strategic vision.

If it is agreed that the overall result we strive for is different from the status quo, then how we manage and govern the Town is a key aspect of what needs to change. Evidence shows us that a change to the structure of our local government is potentially where we should start.

The summaries that follow are the discussions of the Subject Matter Experts (SMEs) who were chosen to dig into the issues raised by Town residents, business owners, students, and other stakeholders. Please read all these summaries carefully. Do not cherry pick a topic in isolation from the whole, for it is an overall vision we are deciding on, not just one part. Now that we have analyzed aspects of where the Town is now positioned, gathered community input on where we want to go, and leveraged subject matter experts' insights, we will work as fast as possible to develop a draft Strategic Plan, which will tell us how to get there. Once the draft Plan is documented, we will report back to, and gather feedback from the community. This will help to ensure that it captures the shared vision of our Town.

In the end, however, just like the 5th graders, the Town's ability to achieve future success is dependent on the people's willingness to be open minded to a different way of doing things, including compromises on items that are not in line with the shared strategic vision.

Thank you for your interest, and continued support of this important initiative to move Fairfield forward.

Town of Fairfield Strategic Plan Committee

## **BACKGROUND**

In the spring of 2017, the Town of Fairfield embarked on the development of a Strategic Plan. The Strategic Plan is intended to help the Town direct its efforts and resources toward a clearly defined vision for the future. To assist in the development of the Plan, the Town appointed a Strategic Plan Committee (SPC) and engaged the professional consulting firm Houseal Lavigne.

The Fairfield One Town One Vision Strategic Plan process included comparative research and analysis and extensive community outreach to gather resident and stakeholder input to define issues and opportunities within the Town. Initial stakeholder outreach began in the summer of 2018 and was comprised of interviews and meetings with town staff, elected and appointed officials, business owners and other stakeholders. This outreach was followed by community-wide outreach through facilitated public workshops and meetings conducted throughout the Town by the consulting team and members of the SPC. Simultaneously, online questionnaires were utilized to gather additional insight on various topics.

Combined outreach results were significant, comprising approximately 2,000 participants. Applying the social media concept of influencer's to the raw input means that 30% of the community has provided guidance to this process. This work has been summarized in the Community Outreach Detailed Report as of 3-29-2019, and has been described and reviewed with Town management and related Boards (e.g. Board of Selectmen; Board of Finance; RTM) and numerous Town department heads.

Input and information obtained through community input, along with professional analysis and observation, served to define five key topic areas that will form the basis of Strategic Plan recommendations. Subject matter experts (SMEs) in all five key topic areas have been involved to further evaluate potential issues and opportunities associated with each.

## **KEY TOPIC AREAS**

Throughout outreach efforts, over 500 unique issues/topics were identified. For project analysis, they have been grouped into the five key topic areas detailed below. Within each key topic area there are several underlying components, many of which are interrelated. The key topic areas are as follows (not presented in order of importance or magnitude):

- Governance
  - Governance Structure and Processes
  - Town Vision, Goals, and Branding
- Economic Development
- Education
- Community Character and Resiliency
  - Town Zoning, Design, and Infrastructure
  - Community Programs and Facilities
- Financial Stability

In order to gain additional insights on these topics, two-hour Subject Matter Expert (SME) working group sessions were then conducted for each key topic area. These sessions were conducted the week of August 5 and September 30, 2019 and were attended by the SMEs identified by the SPC for their experience and expertise with one or more of the key topic areas. All of the sessions also included SPC representatives and

the HLA consulting team. The meetings were noticed, with members of the public observing various sessions.

*The following is a summary of each of the SME working group sessions. The summaries are a selection of what was discussed and is not intended to be a complete transcript of what was said, nor a recommendation for particular actions.*

## **GOVERNANCE STRUCTURE AND PROCESSES**

Two Governance Structure and Processes SME working sessions were held. The first took place on Monday, August 5, at 3:45 p.m. Two SMEs, Dr. Gayle Alberda, Assistant Professor of Politics and Public Administration at Fairfield University, and Stanton Lesser, Fairfield Town Attorney, took part in the session. RTM party leaders were to be included in the session discussion but had conflicts.

The second session was held on Wednesday October 2 at 7:00 p.m. and was attended by RTM members Pamela Iacono and Karen Wackerman.

Prior to the first session, research had been conducted on emerging trends regarding changes to municipal government across the country and specifically in Connecticut. It was observed that there is a significant trend in adopting town management structures (e.g. Town Council/Town Manager (or Mayor). At the SME working session, the initial research findings were described. Dr. Alberda presented her research and recommendations then the consultant team facilitated a conversation between Dr. Alberda and Town Attorney Lesser.

There were several factors influencing communities to make this change, all of which had the net effect to increase citizen satisfaction, improved management, and better risk management. The specific factors mentioned from research and SME discussions were: efficiency, effectiveness, accountability, responsiveness (access), and equitability. It was also noted that, typically, there is a desire to ensure that elected representation (through the Town Mayor/Council) is not lost.

The research identified recent changes of this type for comparable coastal communities in Connecticut, as well as directly comparable communities (e.g. West Hartford, CT.) having made this governance change. Data was shared that showed the Selectman/RTM form is vastly predominant in very small towns. Fairfield is currently one of the last towns of our size to use this form of government.

Key reasons communities have enacted such changes is that greater management expertise and attention is needed to achieve efficiencies, address complexity in management issues, and limit risks. With the Town manager type structures, there is greater focus on management and execution, without potential distractions of political considerations, or activities.

The process to undertake this change as well as resources to help the Town evaluate the required steps and considerations were identified. SME participants described previous initiatives to update the Town Charter and associated complications and proposed that instead of changing the existing structure of Fairfield's government, the strategic plan should instead identify opportunities within the existing structure to improve efficiency and transparency. Resources include information from Municipal management associations focused on this topic, IBM studies on municipal management, articles, etc.

To supplement the initial research, Dr. Alberda researched different types of government structures. As noted above, the Selectman/RTM structure is primarily used by smaller communities. This included research on how each impacts efficiency, accountability and voter turnout. In addition, Dr. Alberda assessed the process for changing the Town Charter. The report she produced is attached to this document as an appendix. Based on her research, Dr. Alberda recommended that the Town of Fairfield move from a Selectman-RTM governance structure to an adaptive political system. Adaptive political municipalities have government structures that resemble mayor-council municipalities, but have adopted various reforms that include structural characteristics of council-manager municipalities.

The recommended adaptive political system could include the following:

- Appoint a commission to re-design Fairfield's government. This commission must have people with the skills to ensure any new design incorporates the aspects of good government as outlined by the International City Managers Association (ICMA), other comparable communities, or established authoritative sources.
- Conduct an extensive community education and outreach process before changing the Town Charter, to allow the benefits and implications of this change to be understood.
- The redesigned government should be consistent with the following, but can be refined based on the design research and outreach:
  - Replace the First Selectman, Board of Selectmen, Board of Finance, and RTM with an elected Town Mayor/Town Council (of approximately 9 members - TBD). An alternative, Town Council/Manager as identified in the research, would be to hire a full time, professional and experienced Town Manager, working at the direction of the Town Council.
  - Hire a chief administrative officer (with the requisite skills), if Town Mayor structure is utilized.
  - Ensure there are well defined responsibilities for all Town Officials, and a specific delineation of responsibilities for Mayor and Chief Administrative Officer.
  - Structure the Town Council to streamline town representation to (possibly) 1 member per member-district, supplemented by a limited number of At-Large members. This would reduce the number of Town Representatives from all town bodies which currently exceeds 85 people for the major elected officials plus, appointed officials for 28+ boards and commissions exceeding approximately 175 additional town representatives. Although many boards may remain with a change to a Town Mayor/Town Council structure, the goal is to seek opportunities to streamline and improve operational effectiveness.
  - Utilize partisan elections which are proven to increase voter turnout.

The conclusion of the SME session was that changing the governance structure of the Town is an issue that needs further work to educate the community, validate the will of the community to institute this significant change, and better define the specifics of the structure. As both the initial and SME research showed, the initial step would be the formation of a Charter Revision Committee to better define the specifics of revised Governance that would best benefit the Town residents.

However, in the meantime, there are some initiatives within just the town administration that should be considered. This includes aligning some town departments into related groupings that have co-dependent objectives (e.g. economic development, park & rec and TPZ). This has the potential effect to align the departments to shared goals like revenue and to allow for commissions to align their work to the strategic plan of the town. It can further provide escalation or problem resolution paths for employees and senior management creating a 'best-management' practice to ensure mission conflicts are visible and get the

attention they warrant. It also has the benefit of streamlining communications across aligned groupings and ensuring departments do not work at cross purposes. Other initiatives should be undertaken within the current structure such as improving IT infrastructure, clearly outlining the roles and responsibilities of all elected and appointed officials and staff, improving communication and coordination, and initiating training for elected and appointed officials. Training would serve to improve understanding and expectations regarding the role of each department or commission in overall Town operations, performance expectations, cross entity coordination, approaches to identify/resolve conflicts, etc.

The second SME session built on the discussions of the August meeting. The RTM participants were provided the research findings explored during the initial session so that a full understanding of the research insights and considerations would be achieved. There was also a focus on the steps associated with changing the Town Charter. There was an acknowledged need to shift the governing structure, with an understanding that change will not be easy, but the timing is good and may be well received by the residents.

Discussion regarding the type of structure generally concluded that the Mayor/Council form of government would be most readily accepted by Fairfield. This was largely due to the fact that it more closely resembled the current structure where the Mayor essentially mirrors the role of First Selectman. While this was said to be a possible preferred option over the Council/Manager form of government, it was also felt that a chief administrative official was needed to operate day to day Town operations. Using the Mayoral form with the Chief administrative officer can be a more costly alternative, depending on the role and compensation structure for the Mayor plus Chief administrative officer.

The alternative of a Town Council/Town Manager should not be eliminated, at this time. During the community education and governance revision steps, resources can be leveraged to best define the comparisons, benefits, and implications between the Mayor/Council and Town Council/Town Manager structures. There are ways to incorporate aspects of the Mayoral into this form, if that is desirable.

In addition, it was stated that the committee structure needs to be revised in accordance with the change. This would include changing to commissions that were advisory/recommending bodies.

A major difference and benefit cited by participants in transitioning to the Town Council was that the number of representatives would be far less than combined RTM, Board of Selectmen, and Board of Finance. As part of the discussion it was agreed that fewer decision-making representatives actually increases a citizen's access to government which goes against what one would expect. The current form of government and the distributed method of decision-making, makes Town government a maze of uncoordinated departments instead of a strength of greater democracy. A Mayor/Town Council with tighter more efficient command and control support, essentially provides citizens with one stop shopping to decision-making authorities and quicker clearer resolution to issues/concerns. Another benefit to Mayor/Town Council was that both caucuses often struggle to fill government positions. With a smaller Council it was felt that it would be easier to find skilled individuals interested in running for the position.

Public education of Town residents was identified as being critical to a successful transition. It was stated that when the Town reduced the RTM from 50 to 40 members there was resistance, in large part due to tradition. People are generally resistant to changing a system that has been in place for as long as the current structure. Many residents do not truly understand the existing structure or the need for change. One of the participants mentioned that prior to becoming a member she did not understand how the RTM operated. While in theory the large number of representatives is thought to be more inclusive, in actuality it

has the opposite impact. Presenting the benefits, efficiencies, access and economies of scale are among the key points to emphasize.

At the conclusion of the meeting, the participants emphasized their support for moving forward with implementing the process of changing the Town Charter and reiterated that now is a very good time to do so.

### **TOWN VISION, MISSION, AND BRANDING**

The Town Vision, Mission, and Branding Focus Group took place on Tuesday, August 6, at 9:00 a.m. Three SMEs took part in the session including, Mark Barnhart, the Director of the Office of Community and Economic Development, Don Irion, a volunteer with the Office of Community and Economic Development (Mr. Irion is a retired corporate marketing executive), and Nancy Carberry, the Chief of Staff to the First Selectman.

A focus of the first half of the conversation was centered on issues related to the Town's website including: the general view that it is outdated, difficult to navigate, and an ineffective tool for attracting new businesses and residents. To begin to resolve these issues, the Office of Community and Economic Development created [www.choosefairfieldct.com](http://www.choosefairfieldct.com) to better market the Town to new businesses, and [www.experiencefairfieldct.org](http://www.experiencefairfieldct.org) (with Chamber of Commerce participation) to promote tourism; however participants discussed how those websites are not widely utilized largely due to the fact that they are not easily accessible via the Town's website given the issues previously mentioned. Participants expressed a desire for redesigning the Town's website to be a priority of the strategic plan, to try and achieve improved effectiveness, as well as potential cost savings.

The second half of the session was spent discussing the internal Town mission. This included a lengthy discussion on Town departments being fragmented, without strong information sharing, under the existing structure, with opportunities to improve how the Office of the First Selectman interacts and directs the regular execution of Town Departments. Since all communications start at the top any re-alignment needs to go all the way to the Office of The First Selectman. Every member of town government is essentially a sales representative for the town. As such every town employee's job role and performance needs to be tied to their role in enabling the Town's strategic plan.

Participants discussed how improved management of the strategic direction of the Town would be fostered by a common roadmap, for all Town departments, that is directly established and enforced by the active participation of the First Selectman. This would include an articulation of the critical challenges being faced by the Town, and how all Town entities (Departments, Boards, Commissions, etc.) need to understand such challenges and how their role and actions can support the Town's needed execution.

### **ZONING, DESIGN, AND INFRASTRUCTURE**

The Zoning, Design, and Infrastructure Focus Group took place on Tuesday, August 6, at 1:00 p.m. Three SMEs took part in the session including, Emmeline Harrigan, the Assistant Director of the Planning and Zoning Department, Meghan Sloan, the Planning Director of the Connecticut Metropolitan Council of Governments (MetroCOG), and Devin Clark, the Transportation Planner for MetroCOG.

The session began with a conversation about the existing zoning code and how it serves the Town. A SME participant expressed concern that the code is not user friendly, does not include tables or graphics, and

does not address modern uses or contemporary development standards. A SME participant spoke about how dimensional standards of residential districts are not in line with existing development patterns, leading to excessive requests for variances.

The conversation then shifted to commercial development. Participants discussed the need to emphasize new commercial areas to grow the grand list including, transit-oriented districts (Metro North), around Sacred Heart University, and along the Fairfield exits to the Merritt Parkway. Participants also discussed infrastructure barriers to commercial development including the need to improve the pedestrian experience to Metro North which entails improving the I-95 underpass and converting the Brentwood Avenue tunnel for pedestrians only. Improved bicycle and pedestrian infrastructure was discussed as necessary for Black Rock Turnpike, Kings Highway, and Merritt Parkway areas; the Black Rock Turnpike (BRT) project has been approved and will begin within the next year. The BRT initiative will take up to 10 years to complete all aspects.

## **ECONOMIC DEVELOPMENT**

The Economic Development SME session took place on Wednesday, August 7, at 9:00 a.m. Six SME's took part in the session including Jim Wendt, the Director of the Planning and Zoning Department, Emmeline Harrigan, the Assistant Director of the Planning and Zoning Department, Matt Wagner the Chairman of the Planning and Zoning Commission, Patrick Carolton of MetroCOG, Joe McGee, the Vice President of the Business Council of Fairfield County, and Mark Barnhart, the Director of the Office of Community and Economic Development.

The session began with a conversation about the process a developer would currently go through when beginning the initial phases of investing in Fairfield. Mark Barnhart expressed that it is his role to lead people through the development process, but a lack of clear understanding of this process by other Town staff has led to confusion in the past. Participants discussed the need for a system in which every Town staff member (with public interaction responsibilities) would have the knowledge necessary to direct developers, business owners, or other people interested in doing business in Fairfield, to the correct resources. Participants then discussed similar concerns and difficulties for residents when they need to engage with the Town for permitting purposes.

Participants then spoke about how current P&Z department capacity limits the hours that the permitting counter is open, which can make it difficult for residents to obtain permits. They expressed a desire for an online permitting portal that would allow residents to learn about necessary permits, and then have the ability to apply, pay, and receive them, without having to go to Town Hall. One example of an online permitting portal is City Base, more information about the digital platform can be found here: <https://thecitybase.com/>.

Additional discussion was held on the potential need and benefit of an "ombudsman" that could help expedite and streamline the movement of significant commercial and residential development through the various development stages and related interaction with Town agencies.

The conversation then shifted to opportunities for new commercial development and the need to grow the grand list. Participants discussed the need to establish the overall property tax generation result to better illustrate to the public the need for new commercial development and to justify economic development efforts. This would be the development and use of a key metric (e.g. Mill rate) for use in evaluating potential



projects and their implications, so the community can see the potential ramifications of new initiatives. There was also discussion of the benefit of creating and communicating an analysis of the pending changes to the mill rate as a result of the various items that impact it (Town spending changes, education spending changes, grand list (commercial/residential) updates, potential for grand list changes from pending revaluation). This type of analysis would improve the awareness of Town residents on the true economics of managing Town spending and taxes.

A SME participant spoke about the need for a plan for Town owned property and Patrick Carolton discussed a similar initiative that MetroCOG completed for another community. In addition to Town owned property, participants expressed the need for an inventory of privately owned vacant commercial space as well as utilizing a specific resource charged with attracting new businesses to fill those spaces. This would be beneficial as the effort to accomplish this extends beyond current staffing and resources.

Perhaps one of the most transformative ideas the group discussed was for the town to create a development vision for areas of the town in advance of development. To date the process is reactive, in that a developer sends the town a proposal the town may or may not want. The suggestion was to look at various areas, say the waterfront, and for the town to come up with a design blueprint that developers can respond to. Each individual proposal would still have to go through standard approvals. This transformative approach also maps to the input received during the community outreach process on the topic of a community blueprint. Better defining how the Town might leverage Public/Private partnerships as part of overall development needs is also needed.

Part of the discussion related to having a growth strategy for a suburban community. As a primarily residential community, there is a stock of single family homes. The point was made that, to keep growing, there may be a need for a different form of residential development – one that has aspects for both younger and older residents. Lacking such could lead to being unable to react to emerging economic and demographic changes.

Additionally as part of that, the developers should be strongly encouraged to integrate community awareness and ideas into their plans, to help quell the surprise and “NIMBY” issues when projects are proposed without community input. This has worked favorably for some recent initiatives. Related to this point, there was a discussion where it was viewed as beneficial to describe topics in such a manner as to “meet the needs of residents” vs. “economic development”. This was viewed as important because “words and messages matter” and can help stem opposition to needed actions.

The conversation then shifted to the organization of Town departments and the need for greater accountability and efficiency between and within departments. Participants discussed the need for the Town to create formalized job descriptions for both staff and elected/appointed officials. They discussed how roles need to be further refined to ensure increased accountability and efficiency and that the Town should incentivize the realization of staff goals and objectives through salary increases. Town staff discussed the need for weekly meetings of Town department heads and the First Selectman to facilitate cross structure communication and to have a greater liaison among facets of government/management.

## **EDUCATION**

The Education SME session took place on Thursday, August 8, at 9:00 a.m. Six SMEs took part in the session including Michael Cummings, the incoming Superintendent of Fairfield Public Schools; Dr. Stephen Tracy,

the interim Superintendent of Fairfield Public Schools; Jennifer Leeper, Board of Education Finance Committee Chair; Jenn Jacobsen, Board of Education Policy Committee member; Christine Vitale, the Chair of the Board of Education, and Alison Hildebrand, Fairfield University Office of Admissions.

The focus group began with a presentation by Ms. Hildebrand on college admissions and how Fairfield schools and students compare to other school districts in the region and across the country. Her presentation highlighted the following:

- Warde and Ludlowe schools are ranked among the top five percent of high schools in the United States
- Fairfield Schools have more advanced placement classes than any other schools in Fairfield County
- Fairfield Schools have among the highest number of students going to college
- Fairfield students are among the most highly sought after by colleges

She also spoke about how Fairfield University is an untapped resource for Fairfield Schools. Opportunities exist for dual enrollment to help expand opportunities for advanced placement classes for students and limit the number and funding for those classes in the high schools.

The bulk of the working session was spent discussing approaches or actions that can be taken to both innovate the schools and moderate spending increases. Finance committee members explained that year to year budget increases before the great recession ranged between 5 to 9.5 percent per year and have now been reduced to 2 to 4 percent. 2019-2020 proposed increase was in the 4% range with 2021 expected to be the same.

**A comment from the SPC Chair and Vice Chair who participated in the SME sessions:**

It is important to note that discussions about educational objectives, achievements, and spending frequently lead to wide ranging viewpoints and in-depth discussions. Fairfield is not unique in this. On one hand we are talking about the educational aspirations for the children of Fairfield. On the other hand, our education funding approximates 65% of the Town's annual budget, and draws significant attention. The attention is both to satisfy ourselves that first, our educational aspirations are being met, and then also accomplished in the most cost effective manner possible. Our community would not benefit from under serving education, yet all residents have a right to be confident that their taxes are being well spent, and with some lens of affordability. Our research has shown that these points of educational aspirations and affordability are on the minds of all of our residents, and all viewpoints merit consideration.

The structure of the session did not allow the SMEs to fully explore the topic of educational achievement. Measuring educational outcomes is not a simple task, and rating agencies have very complex formulas for measuring educational results. What we heard from the Fairfield University admissions SME is that Fairfield Schools are viewed as being in the top 5% nationally. This is a significant accomplishment and is due to the hard and admirable work of our teachers, programs, and administration. What we don't know is what it will take to stay there from a curriculum innovation or financial perspective. Ultimately, it is the education aspirations we have for the children of Fairfield that will drive costs, and financial realities that drive affordability. So a matter for a follow-up discussion is to ask what is the affordable education aspiration that will define Fairfield.

The following discussion notes are grouped into Financial and Educational categories.

#### FINANCIAL DISCUSSIONS DURING EDUCATION SME SESSION:

SME participants expressed that they feel as though there is a chasm between the perception of the school district budget and the reality of their financial stewardship. They felt that better communication with Town residents is needed so that everyone understands the efforts the district has been making to reduce costs, realize savings and continue to meet the education needs of the community. Views expressed indicated that in the short term, significant cost savings are not expected, and specifically in regards to facility consolidation, reducing costs is not likely, largely because there is not an interest in moving away from the "neighborhood school model" as well as it was broadly believed that savings from facilities consolidation would not be reinvested in curriculum but rather used to reduce the budget. Other changes (racial imbalance steps, redistricting, etc.) will also be challenging undertakings, if they move forward. There is significant volatility in the budget range above. If not already being done, the BOE should look to include future budget projections for long term planning to determine the educational impact of recent budgets on ongoing programs and facilities.

Furthermore, the observation has come up that a Town wide referendum may be sought to obtain funding necessary to provide air conditioning in all schools. Referendums are being considered to allow all town residents to have input on such major town spending programs and since budget increases through the current process are not expected to be adequate to provide such facility improvements. Recently, the State has disallowed a/c on some recent building renovation projects. However, as buildings age their maintenance increases and with 17 aging schools the BOE should look into future maintenance projections for longer term planning and determine a useful life for the current facilities.

Participants then discussed the difference between projected enrollment numbers and actual enrollment numbers. They stated that the 2018-2019 high school enrollment was 85 students higher than projected due to an increase in the number of students enrolled in the public school system rather than a private school as anticipated. They also stated that new, higher density residential developments have been impacting enrollment numbers in some schools more than others. They indicated that they would like the Planning and Zoning Commission to be more communicative with the Board of Education about where new housing is built so that they can better prepare for increased enrollment numbers, although discussions with the P&Z department indicate that multi-unit developments do not draw significant levels of increased student populations (as per most recent TOD studies and other reviews).

The discussion then led to State mandates and their impacts on the School District. First, State mandated curriculum changes were mentioned. Participants said that although the mandated curriculum changes have been positive and progressive, they do not come with the additional funding necessary to revise curriculums, resulting in further unfunded State mandates.

This was followed by a discussion regarding State mandated diversity across the district. Participants spoke about how, due to the diversity attributes on one school, the district has been required to create a plan to address this potential imbalance, and is working with the State BOE to explore options to bring schools into better alignment. The State's Open Choice Program which provides high performing school districts additional funds to enroll students from low performing, neighboring school districts was mentioned. These students are often racial or ethnic minorities which helps to resolve issues of diversity. Although Open Choice Program students are filling seats that would otherwise be left vacant and that the School District must pay for regardless of if they are filled, the program is not popular amongst Fairfield residents. Fairfield

residents believe that the School District does not receive sufficient compensation per Open Choice Program student and that they overburden the school system. Participants expressed a need to better communicate the benefits of the Open Choice Program to the public. Next, redistricting was discussed as another strategy for resolving diversity issues in schools. Participants expressed that this is not a desirable option, but one that the Board of Education is exploring as many options as possible before making a redistricting decision.

During the discussion of enrollment projections, the most recent projections, which show a decline in overall enrollment through 2028, was explored. Overall enrollment trends sometime mask aspects of enrollment variations across the various components of the grades (i.e. ECC; K-5; 6-8; 9-12; etc). New enrollment projections are in the process of being prepared and should be available in the Fall. It was discussed how the assumptions being utilized in the projections should be scrutinized to ensure they reflect the most updated actual information (especially births) since such information have significant impact on the projections.

A further key risk was discussed, related to the Town's planning regarding school construction projects. The Town receives approximately 20-25% reimbursement for such building projects. However, such reimbursement is jeopardized if the Town overbuilds to how the State measures the enrollment. Precise analysis and validation of Fairfield status has not yet been performed and should be accomplished to avoid potential funding issues.

As part of the objective to better inform the community, the participants agreed that an analysis of anticipated spending over the next 2 years should be performed and included as part of the overall community update.

#### EDUCATIONAL DISCUSSIONS DURING EDUCATION SME SESSION:

There was also discussion around utilizing FU & SHU dual enrollment options to both reduce facilities cost in the high schools and enhance college preparedness. There was discussion about potential sources of revenue such as increasing sponsorships, parent charitable funds and after hour use services, like Town Concerts. However, there was an equally interesting discussion prompted by Dr. Tracy on the merits of commercializing curriculum. While there may be some revenue benefit, the more valuable contribution of commercializing curriculum would be to provide students the ability to learn real world skills in marketing, communications, accounting etc while they learn about car repair, culinary skills, and so on. This could also lead to public/private partnerships.

Participants also discussed how educational outcomes in addition to potential cost savings could be realized through earlier intervention of high cost programs such as special education. Not only would increased early intervention help to lower the cost structure, by helping kids exit special education sooner, but it would also improve student achievement through accelerating the pace of learning.

### **COMMUNITY PROGRAMS AND FACILITIES**

The Community Programs and Facilities SME session took place on Thursday, August 8, at 1:00 p.m. Four SMEs took part in the session including Julie DeMarco, the Director of Fairfield Human Services and the Senior Center, Scott Walker, the Chair of the Parks and Recreation Commission, Urb Leimkuhler, a representative of Fairfield Senior Advocates (FSA), and Mary Hogue, a member of the Sustainable Fairfield Task Force.

The beginning of the session was spent discussing parks and recreation opportunities in town. First, Commissioner Walker spoke about how the Parks and Recreation Commission is exploring refurbishing the marina. The marina currently has approximately 600 slips. The low cost for users in comparison to adjacent communities has led to an 11-year waiting list for larger slips. Although the marina is popular and widely used, it is not built to contemporary standards, with slips that are too narrow, gangways that are too steep, and a slip layout which is not fully ADA compliant. The topic of Parks and Recreation programs being self-supportive was discussed, including the topic of leveraging these key recreational assets to provide greater returns to support overall town financial requirements.

SPC representatives then told Commissioner Walker about the numerous residents who mentioned a beach front restaurant as something that is missing in Fairfield. The Commissioner agreed that this would be a desirable, economic development opportunity for the Town, and that the Parks and Recreation Commission had heard similar sentiments from residents as well. The Commissioner discussed how the Parks and Recreation Master Plan is nearing the end of its planning period and that an update to the document is needed in order to capture new ideas and initiatives from residents, including new programming in the northern portion of the Town since the majority of options are currently focused near the beach. After completion of the SME session, Commissioner Walker and the SPC participants and HLA consultants discussed aspects of commercial development in the marina area that could encompass commercial/retail capability, along with aspects of a walking boardwalk running west from the marina area towards Penfield Pavilion.

The conversation then shifted to the facilities and programming targeted to senior residents of Fairfield. Fairfield Senior Advocates has also been doing work to better understand the specifics of the senior community, their desires for programs, population trends, and attributes of housing stock modifications that would be of interest to members of the senior community. A significant trend in Town (and the State) is to recognize the importance of seniors to the overall economics impacting all of us. The State recognized this in steps to lessen tax impact of seniors remaining in Connecticut. Here in Town, there has been wide discussion in many FSA meetings on the importance of having programs that will encourage seniors to remain in Fairfield, and the recognition that seniors actually support the economics of the Town by paying taxes, while not adding to the financial cost of additional educational funding. In the current environment, the loss of too many senior households, would have serious cost implications to the Town and State. Further needs recognized relate to the need for senior friendly housing options to allow a natural transition of seniors from existing residences to housing that is more accommodative to senior needs. Many national trends provide examples of approaches to consider, but progress needs an overall plan.

Participants discussed how the Center needs significant upgrades to accommodate expanded programming targeted to active seniors. One idea for additional senior programming that was mentioned by participants was the development of a card, similar to the Stag card used by Fairfield University students, that offers discounts at local stores. Participants then discussed the lack of independent living and multigenerational housing opportunities. Participants then discussed the ideas related to a center of excellence for senior and millennial living. This would be a community initiative that, in addition to basic public services, provides excellent programs and amenities that address the specific needs and interests of older residents, particularly those related to their health, housing, transportation, engagement, communication, recreation and safety. Fairfield Senior Advocates has been keeping apprised about, and participating in, discussions related to the design of an initiative that is multi-faceted aimed at serving the needs of the increasing senior population, as well as providing aspects of economic development that would benefit all Town residents, as

well as post-college potential residents seeking to live in this area in jobs related to their chosen profession. A key element of this is to partner with the Town in the design of such of an initiative, as it will leverage key aspects of Town infrastructure and assets at Fairfield Center and/or Metro Center. There was discussion of the importance of working with key partners capable of providing needed expertise and capability such as Yale Center for Aging, or other reputable providers. A high-level summary of this concept will be prepared. Initial branding of the idea could present the multi-generational aspect of it with the initial naming, such as Senior & Millennial Integrated Living Environment (SMILE) or variations of these key attributes.

Discussion then centered on the lack of knowledge about existing programs that the Town offers. Participants expressed that many residents are not familiar with parks and recreation or senior programming unless they are already involved in similar programs in Town. Participants discussed the need for a dedicated position in the First Selectman's office who would be responsible for communications and to help foster cross advertisement and coordination between various Town departments, businesses, and not for profit organizations such as Fairfield University and Sacred Heart University or Senior Advocates.

Finally, a SME participant expressed the need to codify life cycle costs and sustainability as a primary consideration for all new development or redevelopment in the Town. This would help to support and propel the community's interest in taking prudent steps to maintain and improve the Town's ability to be considered a sustainable community.

## **FINANCIAL STABILITY**

The Financial Stability SME Session took place on Friday, October 4, at 11:00 a.m. Three SMEs took part in the session: Tom Flynn, the Chair of the Board of Finance, Bob Mayer, the Chief Fiscal Officer of the Town of Fairfield, and Emmet Hibson, the Town of Fairfield Director of Human Resources.

The session began with a brief statement by Bob Mayer regarding the differences between strategic planning and financial planning. He expressed the need to ensure that the discussion focused on strategic questions and issues, and evaluate topics with a frame of reference relating to what residents desired the community to be, what changes we desired, how to make changes to what we do in striving for such objectives.

Following introductions and an overview of the process and topic, the conversation shifted to opportunities for cost savings related to Town services. All aspects of the Town spending were discussed, including Town Operations, Board of Education, labor, technology, and various functions. Additional discussion related to how quickly changes could be made and potential investments or spending needed to accomplish changes to current ways of providing town services and conducting town operations.

The SMEs discussed opportunities for regionalization (with neighboring towns) of specific Town services such as tax assessment, human resources, tax collection, accounting, or purchasing, as areas where cost savings could be realized. Additionally, SMEs discussed the need to determine which Town services were considered vital to residents and those that residents would support eliminating, modifying, or charging differently for. The feeling was that essential town services include: Public Safety (Fire & Police), Infrastructure and Education. To some degree everything beyond that is optional. Even essential services like Fire & Police might benefit from evaluating the optimal deployment structure that could maintain response times but at less cost. Concern was expressed over the minimal cost savings that could be realized by modifying town operations related services due to the fact that they make up a smaller percentage of the

Town's budget. SMEs stated that there is no reasonable way for the Town to achieve significant financial savings without structural change including privatization, regionalization, and enhanced economic development initiatives to grow the commercial grand list.

Additionally, the SMEs expressed that there needs to be an evaluation of all of the services the town provides for the purposes of prioritizing the value of those services to the citizens of the Town and identifying candidates to eliminate. Without changes to or reductions of services the Town provides, spending will not be able to be significantly decreased, resulting in continued tax increases. Economic development, if effective, will take time to occur. In the interim, the spending increases will drive tax increases, and will be compounded by the likely impact of the revaluation in 2020.

The SMEs then discussed how the majority of the Town budget consists of fixed costs associated with contractual obligations for staff salaries and pensions. This transitioned to the broader topic of issues that are impacting other towns as well and changes that need to be implemented at a State level (e.g. Labor arbitration approaches, 830 (g), etc.).

The SME's expressed a need for increasing the percentage of departments that manage with a project based costing mindset which helps to align the benefits and results of specific programs with the costs of providing the service. Parks and Recreation was brought up as an example of a department that does this currently. Discussion regarding the Parks and Recreation Department led to an assessment of the need to increase the fees associated with their programming to the market rate, especially at the Marina. Additionally, the SMEs discussed the need to better leverage Fairfield resources, such as waterfront property and other Town assets, to maximize the overall contribution of financial resources to the Town for needed operations. In other words things like waterfront development are not only an economic development opportunity but assets that deserve better fiscal stewardship to maximize the return on the asset.

Finally, the SMEs discussed ideas regarding a strategic target which could help focus efforts around commercial grand list growth. For example, to grow the commercial grand list from 10% to 20% over an x year period. There was no agreement as to what the strategic financial targets should be, but establishing target metrics is imperative to bring focus and discipline to all the operational objectives. In other words, if we were to commit ourselves to grow the commercial grand list to 20% over 5 years, how could that happen? How much new real estate of what type would need to be added? These would be financial targets that would then be passed onto the appropriate departments to implement.

There is also a need for an evaluation of the types of services and service levels provided by the town as the realization of cost savings would not be possible in the short term. Economic development will take time beyond the next several years and realignment of spending may help to close the gap more quickly. It would require all stakeholders to support necessary measures such as establishing a cap on the annual increase of the Town's contribution to all aspects of Town spending, including the Fairfield School budget. To that end, the SMEs proposed that the Town bring in objective third-party experts during the budgeting process to better inform Fairfield decision makers about the variable and fixed costs of each department. Without spending reduction, service level adjustments, or other savings, tax increases will be unavoidable. There potentially will be a significant tax increase on median value homeowners if spending is not moderated and the revaluation results are similar to other neighboring communities.

There was one other topic that was discussed that goes more to the culture of the town, but has a bearing on Town costs. The topic was Average Citizen Residency. The discussion was about the largely anecdotal observation that the Town of Fairfield used to be a cradle to grave community, but is no longer. Residents

were born here, lived their lives here and died here all in the same property, sometimes passing the property along to their heirs. That may no longer be the case. If in fact, as some people believe, Fairfield has become a transient community where young families move in and then move out or downsize as their kids age out of public school, it drastically changes long term modeling on many levels, including investments in senior only facilities. It essentially means, costs will increase, but at a rate much greater than they have in the past since the senior population will not be replenished as people age in. Instead of aging 'in', they will move out or at best reduce their contribution to property taxes. Much more discussion and data are required to study this, but ignoring this possible trend would not be advisable. There will need to be either a senior retention, importation plan or a better life-stage approach to development that appeals to young families as well and/or all the above.

## CONCLUSION

By now you may be asking what this all means. It means there are lots of opinions, all of which are important, including your own. These are the issues the Town faces, these are the issues and opportunities we have to address. There will be a need to think differently, and balance your opinion with those of others, so that as a community, we can thrive and excel.

We have a dated form of government with highly distributed responsibility for decision-making that exists in very few places, other than in New England, and is on the decline even here. We have an excellent public school system whose traditional form of funding is, has been, and will likely continue to be under pressure. We have some of the best real assets in the country in our location, yet have not sufficiently leveraged them for value to the community. We live in a State whose financial troubles are deep, broad and are not going away anytime soon. Both Seniors and Millennials are making similar lifestyle choices, but differ from the traditional wants of Town residents.

Fairfield is at a turning point. We are fortunate in that we have started to think about our choices, yet we cannot wait too long to act. The Strategic Plan Committee sees a potential future of:

- private/public partnerships that allow Fairfield to continue to be a leader in education and a national role model for curriculum innovation;
- a focus on life-phase centric housing;
- culture preserving development that reduces traffic, by eliminating the need for it;
- a stable and robust local economy; and
- utilization of both current and legacy technologies to communicate with and energize all residents.

Yes it is all possible, but only if we begin working on the things we need to now, to achieve that vision.

**Note: An approach to gather feedback from residents and stakeholders on the draft plan will be developed. Additionally, the SPC will engage Town Boards to provide updates and gather feedback, consistent with our prior work on this initiative.**