

Town of Fairfield

Strategic Plan Committee

**Fairfield Strategic Plan
Project Status Review & Subject Matter
Expert Working Session Summary
January 22, 2019**



This material provides an update on:

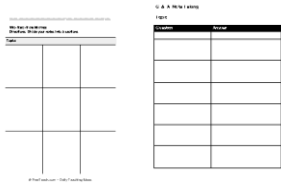
- Strategic Plan development status
- Subject Matter Expert (SME) working sessions
- Next steps in finalizing a Strategic Plan

Strategic Planning Activities

Where We Are in the Process

Structure Analysis

- Gather Information
 - ✓ Document review
 - ✓ Reconnaissance
- Brainstorming Templates
- Strategic Issues
- SWOT
- Etc.



Completed



Gather Stakeholder Input

Interviews & Workshops



- Dept Heads
- Elected Officials
- Boards & Commissions
- Other Stakeholders
 - Business
 - Developers
 - Universities
 - Etc.

Completed



Gather Constituent Input

Community & Business Workshops



Do It Yourself Workshops



Additional Approaches:

- Community Input form
- Web Questionnaire



Completed



Evaluate benefits and implications



Options



Tradeoffs

SPC / Other Feedback



- SME Analysis
- HLA Analysis
- SPC Input
- BOS Discussions

Work Underway

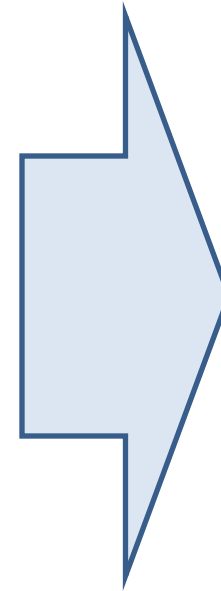
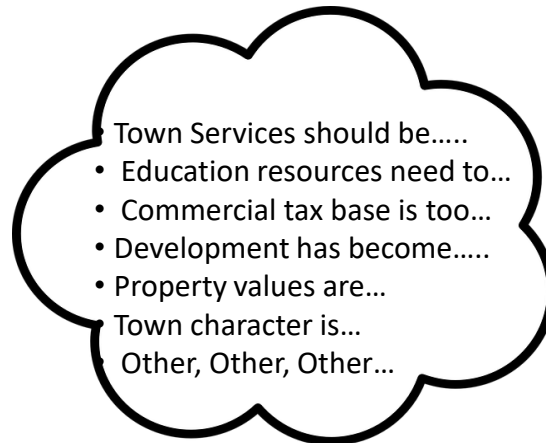
Strategic Plan Committee

Robust Community Feedback Has Been Gathered & Summarized

Data Gathering

Approach
Research & Analysis
Stakeholder Framing Interviews
Community, Business & DIY Workshops
Questionnaires and other input

Viewpoints



Results

Community Outreach Report



- Executive Summary (2 pages)
- Details (10 pages)

Strategic Plan Update

Key Areas From the Community Outreach Work

Topic	Key Components
Governance	<ul style="list-style-type: none"> • Town wide Goals and Branding • Reexamine the Town Charter • Streamline and improved efficiency of Town services • Shared services and multi-community cooperation • Upgrade and integrate technology • Better leverage “a unified” State representation
Financial Stability	<ul style="list-style-type: none"> • Improve non-residential financial contribution - • Spending and economic trend impact on property values • Control of labor related costs
Economic Development	<ul style="list-style-type: none"> • Expand the Office of Community and Economic Development • Identify sites for new commercial development • Eliminate barriers to development, including a “re-imagining” role of Zoning • Proactively address local Landmark blight
Education	<ul style="list-style-type: none"> • Quality of Education • Quality of school facilities • Declining school attendance and rising costs • Lack of diversity throughout the district • Opportunities for greater partnerships with Town Universities
Community Character and Resiliency	<ul style="list-style-type: none"> • Zoning Design • Enhance aspects of the transportation options • Resiliency and sustainability • Senior programs, affordability, facilities, and initiatives to integrate and support them • Unify the community • Maintain and enrich support networks of various kinds

Strategic Plan Committee

Earlier work helped to inform SME session analysis

Strategic Insights & SWOT Analysis



Community Outreach Report



SME Working Sessions

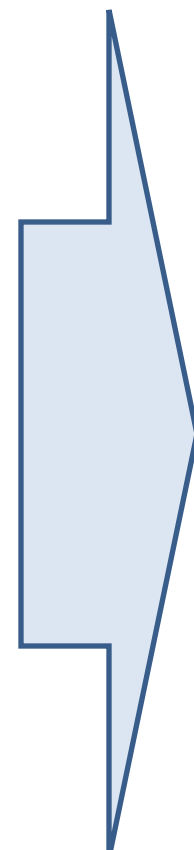


SME Sessions Conducted

Topics	Topics
Governance Structure	Financial Stability
Town Vision Mission & Branding	Town Zoning, Design, and Infrastructure
Economic Development	Community Programs and Facilities
Education	

Questions Evaluated

- What has been tried?
- What new ideas might work?
- What are key leverage points?
- What are implications of changes?
- What are short term actions?
- What are longer term steps?



SME Working Session Summary (16 pages)

Strategic Plan Update

Key Ideas from SME Sessions

Topic	Findings
Governance Structure	<ul style="list-style-type: none"> • Change our form of government to either Town Manager/Town Council or Town Council / Mayor (with a Chief Admin Officer) for effectiveness and improved risk management. • Immediately take steps to improve administration and execution in advance of governance changes.
Town Vision Mission & Branding	<ul style="list-style-type: none"> • Establish a common town-wide vision and mission to address key challenges. • Ensure all Town entities are responsive to address key challenges. • Define and leverage a key marketing image for the Town.
Economic Development	<ul style="list-style-type: none"> • Implement programs to meet the revenue objectives of the town. • Define an overall community development vision for key areas of Town. • Formalize an approach to drive economic growth, leverage key Town assets, and plan for evolving needs of the community. • Implement an economic development focus that will propel development initiatives.
Education	<ul style="list-style-type: none"> • Establish goals and metrics for curriculum innovation to maintain or improve Fairfield's current ratings. • Create a multi-year vision/plan for curriculum innovation considering enrollment projections, facility building forecasts (i.e. what is the High School curriculum our current pre-schoolers will need to learn). • Identify and implement new supplemental sources of revenue (other than property taxes), to support existing levels of education funding. • Identify approaches to manage infrastructure including forecasts for the useful life of facilities, enrollment trends, and other district realignment actions, and replacement upgrade options. • Communicate and implement the steps needed to comply with State mandates. • Validate all planning assumptions in order to ensure full understanding on part of all Town bodies, and limit potential risk in planning decisions. • Devise a model to communicate to the Town the complexity involved in Education financial modeling.

Strategic Plan Update

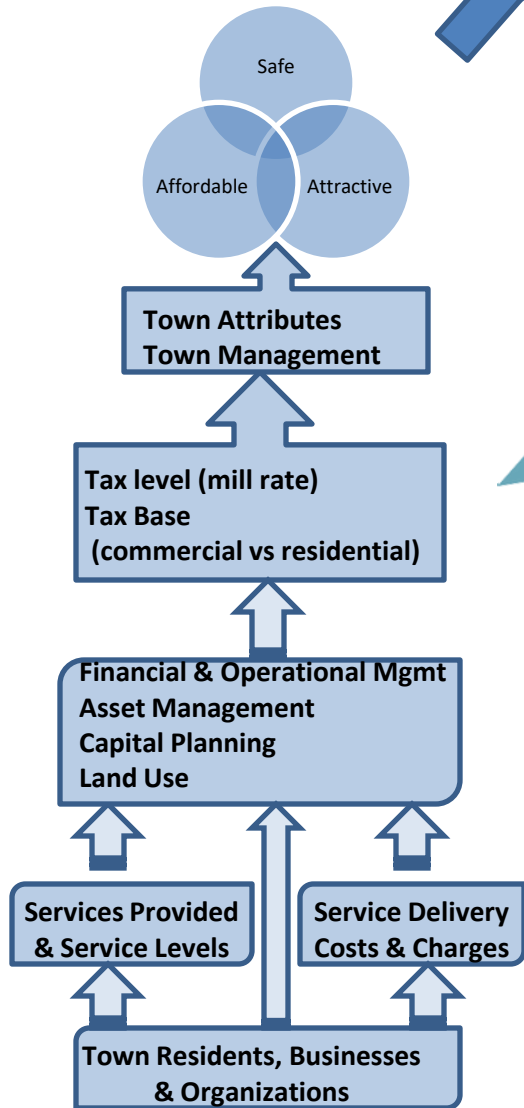
Key Ideas from SME Sessions (continued)

Topic	Findings
Financial Stability	<ul style="list-style-type: none"> • Establish goals for the overall revenue needs of the town and set the revenue contribution objective for each department. • Implement spending increase/decrease targets. • Increase efforts to regionalize services with surrounding communities to achieve economies. • Identify key Town assets and approaches which should be leveraged for economic advantage and returns.
Town Zoning, Design, and Infrastructure	<ul style="list-style-type: none"> • Implement programs to meet the revenue objectives of the town. • Update the existing zoning regulations to better enable development and address NIMBYism. • Continue current efforts improve roads and transportation options. • As other development efforts move forward, identify transportation options that would better enable ease of movement in higher trafficked areas.
Community Programs and Facilities	<ul style="list-style-type: none"> • Mobilize an in depth approach to develop a community initiative which would address multi-generational housing/development needs to the Town's evolving demographics, provide economic development, and leverage Town assets for both Seniors, Millennials, and business. • Invest more deeply in programs to retain seniors as their economic advantages is significant.

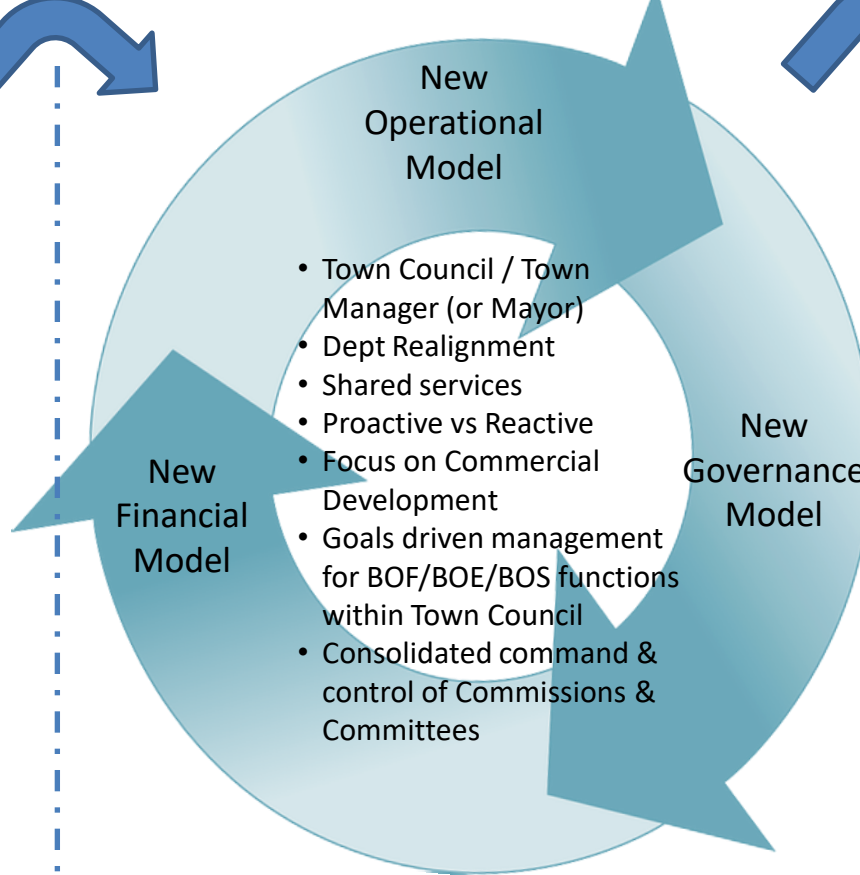
Strategic Plan Update

An Initial View of Strategic Options

Fairfield 2020



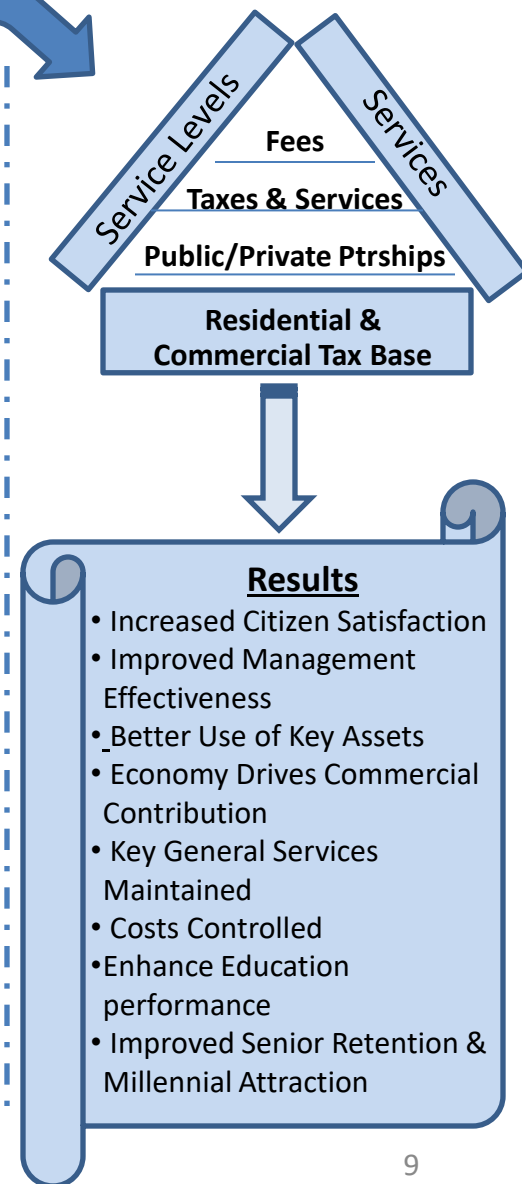
Actions & New Approaches



Key Actions Needed

- Develop new governance structure
- Harness economic development through community visioning & leveraging assets differently
- Apply goal/metric oriented management approaches to manage affordability and costs
- Modify management procedures










Fairfield 2030



Strategic Plan Committee

Draft Schedule for Next Steps

The schedule to complete the plan will be performed to ensure thorough review and input from Town Management and residents

Step	Strategic Plan Finalization Activity	Jan	Feb	March	April	May	June	July	Aug
N/a	Update to New First Selectwoman (Sched 1/22)								
4A	Prepare Strategic Plan Components								
4B	Draft Plan Document								
4B (a)	Draft Plan Review and Revisions								
4C	Town Management and Community Briefings								
4C (a)	SPC Led Public Feedback Activities								
4D	Prepare Final Strategic Plan								
4E	Plan Finalization & Presentation to Town Management								
5	Plan Updates & Monitoring								

Draft

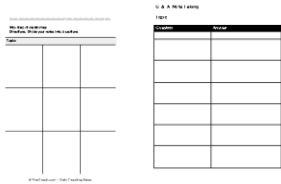
**The following slides were utilized during
status update between community
outreach and SME sessions**

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Additional Approaches:

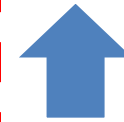
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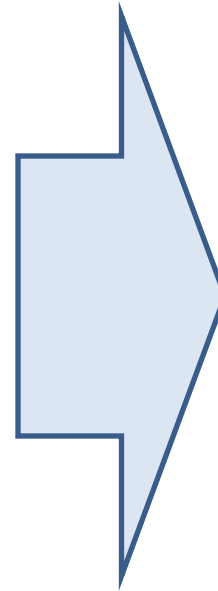
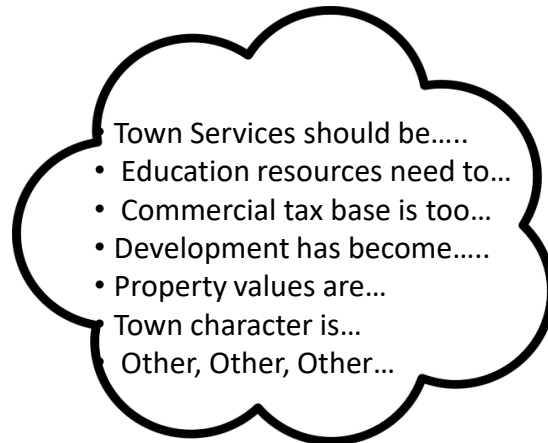
Strategic Plan Committee

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Strategic Plan Update

Summary of Participation/Feedback (Final)

Feedback Has Been Gathered From All Segments of Town

SUMMARY STATUS:

- Direct Input = 2000+ people

HLA COMPLETED WORKSHOPS

- Stakeholder Interviews - (70)
- SPC Workshop - HLA (11)
- FWHS (40); FLHS (40)
- FU (20); SHU (20)
- CW#1 - (40)
- CW#2 - (24)
- BW - (13)
- Joint Board/Commission (9)

HLA WEBSITE SURVEY

- Resident: 979+
- Business: 25+
- Youth: 27
- University: 3
- map.social: 18 features, 2 maps

POST CARDS & SPC WEBSITE

- Submission / suggestions from red Post cards (13)
- Submission / suggestions from SPC web site (6)

SPC COMPLETED DIYS:

- Jennings 5th grade - (17); Woods(25)
- Jacobsen, youth group - (4)
- Bigelow Senior Center - (17)
- Fairfield Senior Advocates (15)
- FBRA (16)
- Stratfield Village Association (10)
- RNoren Neighborhood group (15)
- Woods PTA - (12)
- Osborn PTA - (29)
- North Stratfield PTA (12)
- Holland Hill PTA (17)
- Stratfield PTA (15)
- Riverfield PTA (12)
- Burr PTA (14)
- SE PTA (7)
- Dwight PTA (17)
- Jennings PTA (20)
- Sherman PTA (5)
- McKinley PTA (10)
- Southport Congregational Church - (17)
- B'nai Israel (6)
- Blackrock Church –Adults (21)
- Blackrock Church – Youth (23)
- RTM D#s 2,3,4 (9)
- RTM D#s 8 & 10 (14)
- Update to State delegation (4)
- SPC completed Interviews (3)

Strategic Plan Update

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Strategic Plan Committee

The Path to Finalizing the Strategy

Strategic Insights & SWOT Analysis



Community Feedback



Next Steps

Potential Strategic Options



Subject Matter Expert (SME) Input & Analysis



Community Feedback (approach TBD)

SME Participation to leverage Stakeholder interview participants

Refinement & Evaluation

Strategies, Refinement, Reviews



Finalize Report



Strategic Plan Update

Subject Matter Expert Panel (Draft 5-9-2019)

Topic	Key Components	SME Candidates
Governance	<ul style="list-style-type: none"> • Town wide Goals and Branding • Reexamine the Town Charter • Streamline and improved efficiency of Town services • Shared services and multi-community cooperation • Upgrade and integrate technology • Better leverage “a unified” State representation 	
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EXAMPLE

The following slides were utilized during the community workshops to provide background on the Strategic Plan initiative.

Strategic Plan Update Objectives

Objective:

- Provide a status update and identify key points documented in the Community Outreach results.
- Describe next steps in the Strategic Plan process.
- Provide background on the Strategic Plan initiative.

Strategic Plan Committee

Background

- The Town determined it would be beneficial to develop a strategic plan and has established a Strategic Plan Committee (SPC) and committed resources to develop such a plan.
- Such a plan helps to evaluate certain key questions:
 - What is the current status of the Town and how did we get here?
 - What would maintain and improve the desirability of the Town?
 - What actions are needed to help that be achieved?
- The process to develop the plan will involve widespread community input, perspectives from elected and appointed officials, businesses, Town employees, residents, and other community groups.
- This material has been prepared to provide a snapshot of current status.
- Appendices provide supplemental information on the consulting provider, detailed activities, SPC Committee Charge, SPC members, etc.

Strategic Plan Committee

Strategic Plan – What is it?

- A "Strategic Plan" is the highest level plan or roadmap an organization uses to plan its course and direction. Other operating plans feed into the overarching objective of the Strategic Plan.
- Town has an annual budget and a Plan of Conservation and Development (POCD) and many other topic-specific, or operational plans.
- The Strategic Plan will have a longer term time horizon, looking out past the next 3-5 years on how to maintain or improve the Town's ability to thrive.
- Strategic Plans for other communities have focused on areas such as: commercial development, economic development, Education, Governance, Financial/tax management, Town character, spending control, etc.
- Fairfield's focus areas will be determined from project analysis, activities and community input.

Strategic Plan Committee

Strategic Plan – Why is it Needed?

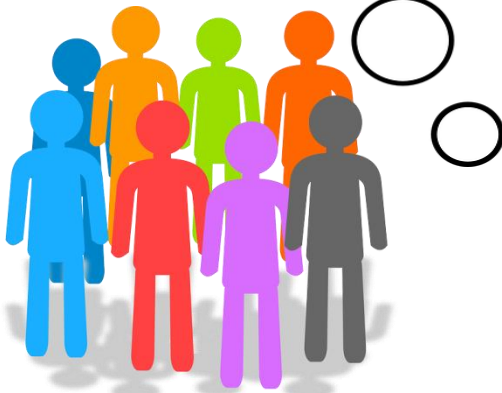
- Economic and fiscal issues here in CT have changed and are impacting the Town in negative ways. State support of key assets have been allowed to erode (e.g. State financial support to Town, Roads, Rails, etc.). This situation presents our town with both opportunities and challenges which need to be evaluated.
- Societal issues (e.g. technologies, worker mobility, demographics, style of living, etc.) have changed, and could present the Town with opportunities we may miss otherwise, or be considered differently in planning decisions.
- Many factors are impacting the overall competitiveness of our Town as we “compete” with neighboring communities in many ways (residents, developers, businesses, workers, etc.).
- Clear, consistent objectives and plans can help to define and respond to needed actions.

Strategic Plan Committee

What is the Path?

Viewpoints

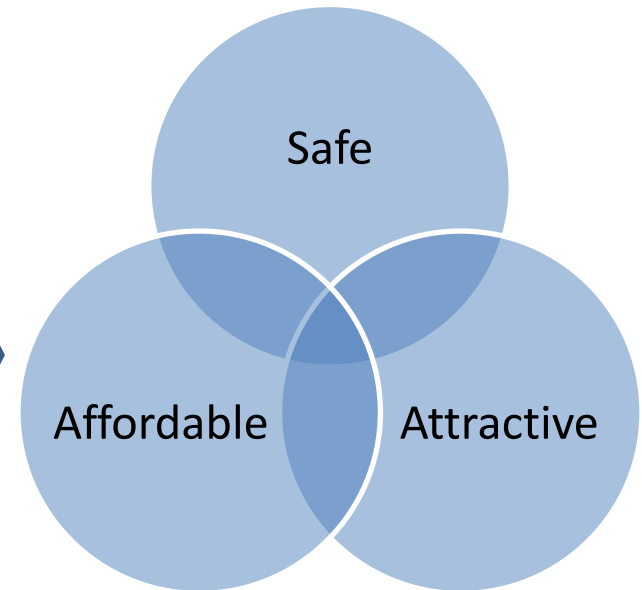
- Town Services should be.....
- Education resources need to...
- Commercial tax base is too...
- Development has become.....
- Property values are...
- Town character is...
- Other, Other, Other...



Analysis

- Objectivity
- Current situation
- Analysis
- Community Input
- New ideas
- Options / Tradeoffs

Objective



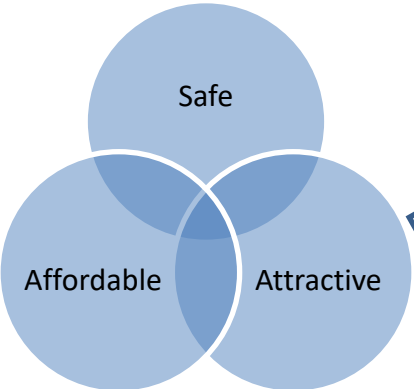
Strategic Plan Update

A Perspective on Traits of Desirable Communities

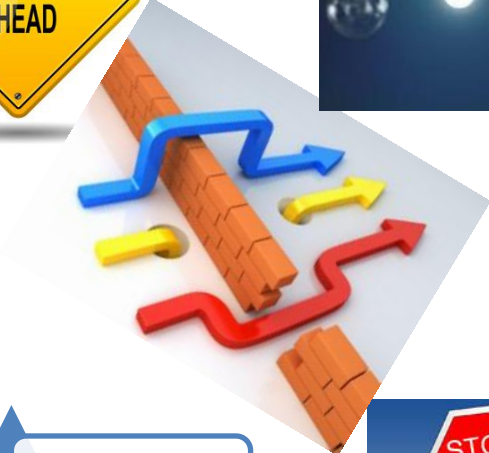
Trait	Illustrative Considerations
Safe	<ul style="list-style-type: none">• Police, Fire, Medical – prevention and response• Emergency preparedness• Communication planning• Other, other, etc.
Attractive	<ul style="list-style-type: none">• Town Character, Style, “feel”, etc.• Education resources and commitment• Vibrant and diverse across all aspects• Physical beauty here / access to other recreational areas• Culture, Arts, Dining, Entertainment• Recreation & Leisure• Other, other, etc.
Affordable	<ul style="list-style-type: none">• Town Services (type, service level, fees, etc.)• Town Operations & Education Spending• Taxes• Residential and commercial tax base• Property values trends• Other, other, etc.

Strategic Plan Committee Considerations Moving Forward

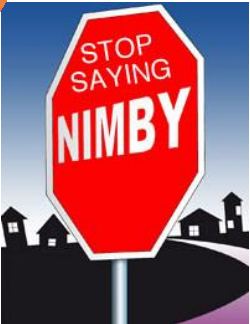
Today



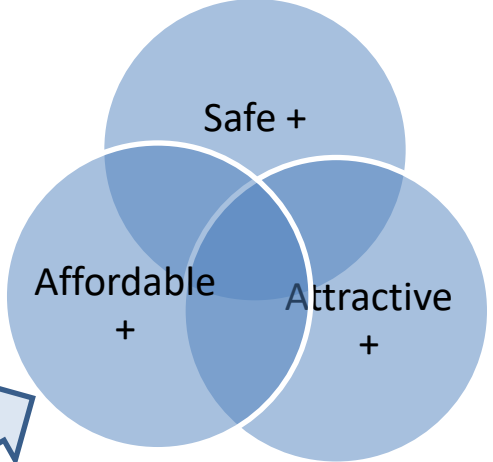
Challenges and Opportunities



- Too Much Change
- Too Little Change
- Wrong Changes



Destination



Objective:
Maintain
or
Improve

Strategic Planning Activities

An Overview of the Process

Structure Analysis

- Gather Information
 - ✓ Document review
 - ✓ Reconnaissance
- Brainstorming Templates
- Strategic Issues
- SWOT
- Etc.



Gather Stakeholder Input

Interviews & Workshops



- Dept Heads
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Gather Constituent Input

Community & Business Workshops



Do It Yourself Workshops



- Additional Approaches:
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 - Web Questionnaire



Evaluate benefits and implications



Options



Tradeoffs

SPC / Other Feedback



- Input and ideas will be gathered from multiple sources
- The RTM has agreed to provide a Liaison for each RTM district

Work Underway



Work Underway



Work Underway



Strategic Plan Update

Strategic Plan – What Are Examples of Strategic Issues?

Example Non-Strategic Issues:

- There is a pothole at the corner of Main and Elm.
- Dogs off leash at the Open Space are becoming a problem.
- This year's budget adjustments do not make sense.

Example Strategic Issues:

- Commercially zoned properties may be able to leveraged more effectively so that a greater grand list contribution can be achieved (e.g. 5% to 10% of GL tax revenues).
- Antiquated or inconsistent zoning regulations may be impeding beneficial development initiatives.
- Key elements of the Town's attractiveness are being impaired by poor land planning.
- Town assets (e.g. commercial assets, beaches, other) should be better leveraged to support spending needs, maintain affordability, and improve property values.
- Spending is exceeding the ability to be supported by residential taxes.

Appendices

The following slides provide supplemental information on the background of the Strategic Plan initiative.

Strategic Plan Committee

SPC Background and Members

- BOS in consultation with other Town Boards determined that a Strategic Plan would benefit the longer term planning needs of the Town, and developed a Strategic Plan Committee (SPC) charge.
- BOS invited residents with an interest and capability to submit their application for consideration and evaluated candidates.
- SPC sworn in and initiated monthly meetings in June 2017.

SP Committee Members:

Marc Andre (3/2018)	Jaclyn Picarillo
Marlene Battista (Secretary)	Stephanie Schechter
Patti Dyer (2/2018)	Justin Thomas
Andrew Graceffa (3/2018)	Kristen Tierney (2/2018)
Jay Gross (Vice Chair)	John Wynne (Chair)
Karen Kaiser	

Strategic Plan Committee

SPC Charge

- Engage a planning consultant with coordination of Town purchasing. Emphasis will be placed on ensuring community engagement.
- Develop a process for completing the plan, which may include several phases.
- Update BOS quarterly, and other Town Boards as appropriate.
- Leverage identified best practices from other municipalities.
- Utilize approaches to gather Stakeholder input and inform and educate residents as appropriate to ensure community awareness and involvement.
- As appropriate and necessary, add members or establish subcommittees to deepen specific necessary skills or perform analysis in order to ensure development of a comprehensive and thorough plan.

Coordination - Initiatives and Organizations:

Many initiatives are under way here in Town requiring coordination to achieve the most impactful direction, synergies, and effectiveness of execution

What groups involved / what initiatives under way?

What are our Opportunities and Tradeoffs?



Strategic Plan Committee

Economic Development Commission

Economic Development Department

Chamber of Commerce

BOS, RTM, Board of Finance, etc.

State funded programs, grants, etc.

Planning and Zoning Commission and regulations

Potential studies, programs, grants, etc.

Transit Oriented Development

Strategic Plan (from SPC)

Strategic Vision (from EDC)

Plan of Cons. & Development (POCD)

SPC provider, CERC, Developer studies, Metro cogs, etc.

Community Viewpoints?

Current Development projects

Development Entities in Town

Other??....Other??
TBD??...TBD??

Idea Evaluation - Potential Changes, Ideas, and Suggestions:

There will be many ideas offered – the focus needs to be on the process by which all ideas are considered on equal footing along with...options and tradeoffs for all

Are there different perspectives or ideas?

Are changes needed / What changes / How?

No sacred cows... everything on table

Will a Vision for the Town be created?

What do we put on hold while we develop the plan?

Need to look at tradeoffs re Town assets

Need to ensure we use similar Towns as Fairfield and outside of CT as well

Why have we waited so long to do this?

Town services, Education... change services, restructure, cut costs, raise taxes?

How to react to State issues – S/T and L/T?

Should look longer term - out 30+ years, but be actionable

Plan needs to be implementable

Using external consultant is good

Why is a consultant needed?

What can be done to improve/transform service delivery?

Other??...Other??
TBD??...TBD??



Strategic Plan Committee

Strategic Planning – A Deeper Dive (1/2)

What is Strategic Planning?

- Strategic planning is used to set priorities, focus energy/resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.
- It is a disciplined effort that produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it, with a focus on the future. Effective strategic planning articulates a) where an organization is going, b) the actions needed to make progress, and c) how it will know if it is successful.

What is a Strategic Plan?

- A strategic plan is a document used to document & communicate the organizations goals, the actions needed to achieve those goals, and other critical elements developed during the planning effort.

What is Strategic Management and Execution?

- Strategic management is the comprehensive collection of ongoing activities and processes that organizations use to coordinate and align resources and actions with mission, vision and strategy throughout an organization.
- Strategic management activities transform the static plan into a system that provides performance feedback to decision makers, and enables the plan to evolve as requirements and other circumstances change during plan execution.

Strategic Plan Committee

Strategic Planning – A Deeper Dive (2/2)

What Are the Steps in Strategic Planning & Management?

- There are numerous techniques for strategic planning, management, and execution. Most follow a similar pattern, have common attributes, and typically cycle through a variation on some basic phases:
 - 1) analysis or assessment, where an understanding of the current internal and external environments is developed,
 - 2) strategy formulation, where high-level strategy is developed and a basic organization level strategic plan is documented,
 - 3) strategy execution, where the high-level plan is translated into more operational planning and action items,
 - 4) evaluation or sustainment / management phase, where ongoing refinement and evaluation of performance, culture, communications, data reporting, and other strategic management issues occurs.

Adapted from: Balanced Scorecard