

# Town of Fairfield

## Strategic Plan Update

**Southport Community Forum**  
**May 12, 2018**

# Topics

- Objectives & Background
- A Strategic Plan – What Is It & Why Needed?
- Strategic Plan Challenge & Traits of Desirable Communities
- An Overview of the Process
- Executive Summary of Work Completed to Date
- Draft Project Plan
- Perspectives on Coordination and Idea Evaluation
- SPC Completed Activities & Planned Next Steps
- How to Provide Your Input & Questions and Suggestions
- Appendices:
  - Background, SPC Members, SPC Charge
  - RFP Responses and Background on Provider Selected
  - Details on Work Completed in Q1 2018
  - Strategic Planning – A Deeper Dive

# Strategic Plan Update Objectives

## Today's Objective:

- Describe the Town's Strategic Plan initiative.
- Provide an update of status.
- Describe methods to provide your voice.

## Strategic Plan Objective:

- Objectively analyze current status and opportunities.
- Develop an objective strategic plan which encompasses community input.
- Structure the plan to ensure implementation success.

# 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

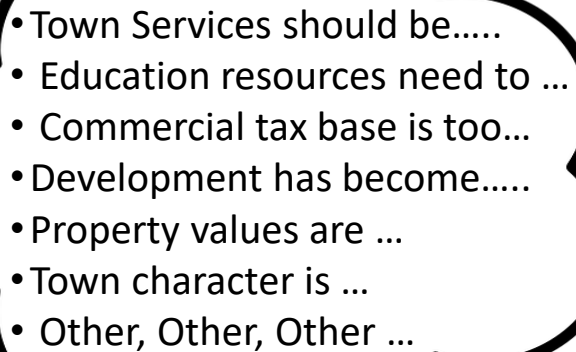
## Strategic Plan – Why is it Needed?

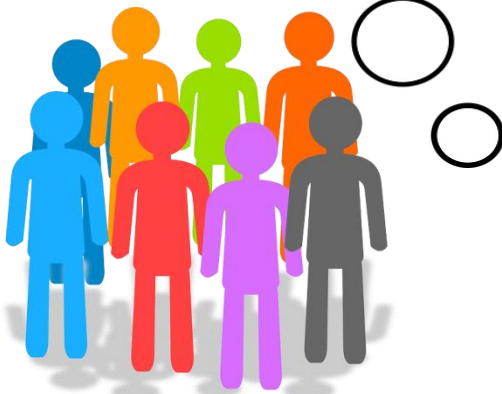
- Economic and fiscal issues here in CT have changed and are impacting the Town in negative ways. Key assets have been allowed to erode (e.g. State financial support, Roads, Rails, etc.).
- Societal issues (e.g. technologies, worker mobility, demographics, style of living, etc.) have changed, and could 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

## The Challenge

### Viewpoints

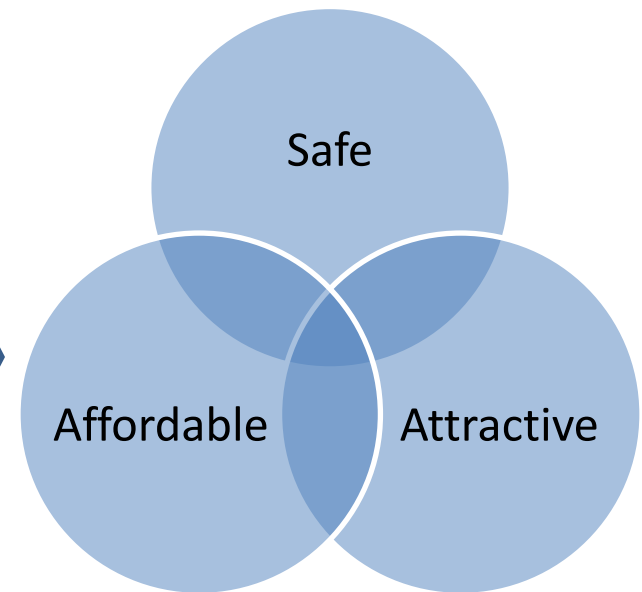
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- Town Services should be.....
  - Education resources need to ...
  - Commercial tax base is too...
  - Development has become.....
  - Property values are ...
  - Town character is ...
  - Other, Other, Other ...



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



# 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:**

- Development initiatives are being impeded by antiquated or inconsistent zoning regulations.
- Key elements of the community'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.

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

### Gather Constituent Input

#### Community & Business Workshops



#### Do It Yourself Workshops



#### Additional Approaches:

- Community Input form
- Web Questionnaire



### Evaluate benefits and implications



Options



Tradeoffs

SPC / Other Feedback



Work Underway



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

# Strategic Plan Project Timing - Draft

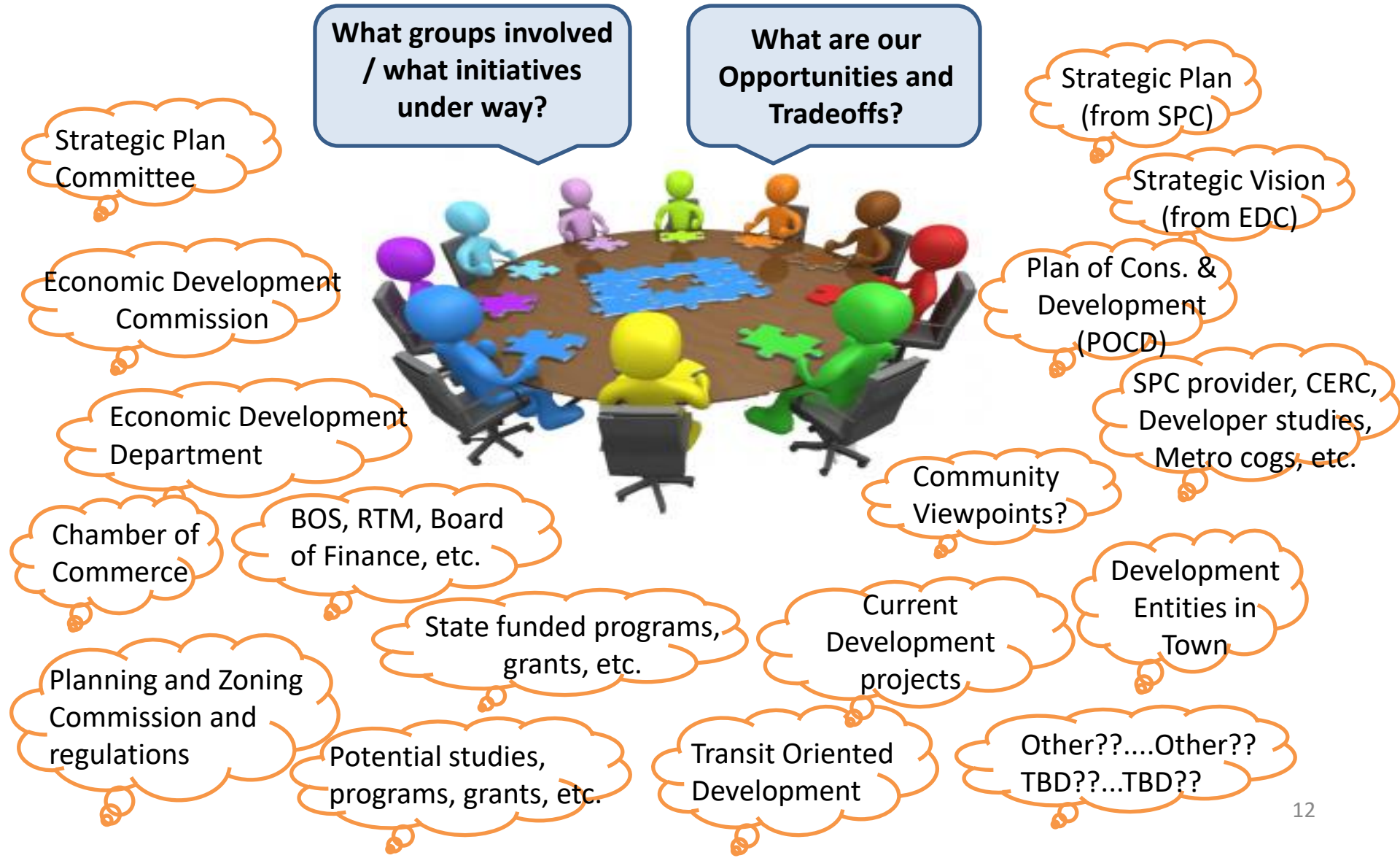
- The draft project plan outlines the time period for each step of the expected work, as well as an indication of the meetings to be conducted and deliverables.
- Project is planned to be conducted over a 10 to 12 month time period.

			2018 APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	2019 JAN	FEB	MAR
1	<b>STEP 1: PROJECT INITIATION &amp; PROJECT PLAN DEVELOPMENT</b>													
	1A	Branding the Strategic Plan												
	1B	Strategic Plan Committee (SPC) Kick-Off & Workshop												
2	<b>STEP 2: CURRENT STATE ASSESSMENT &amp; INITIAL STRATEGIC OPTION ANALYSIS</b>													
	2A	Review Past Plans, Studies, and Reports & Community Recon.												
	2B	Community Outreach												
3	<b>STEP 3: STRATEGIC OPTION REFINEMENT</b>													
	3A	Facilitated Public Forums - Community Discussion and Feedback												
	3B	Refinement of Strategic Options												
4	<b>STEP 4: STRATEGIC PLAN FINALIZATION &amp; APPROVAL</b>													
	4A	Prepare Strategic Plan Components												
	4B	Draft Strategic Plan Document												
5	<b>STEP 5: STRATEGIC PLAN UPDATES &amp; MONITORING</b>													
	5A	Updates and Monitoring Program												

■ Denotes the estimated timeline for each individual task.

# 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



# 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

## Executive Summary of Completed Activities

- Formed Strategic Plan Committee and initiated meetings.
- Performed research for RFPs and Strategic Plans from other communities.
- Outlined approach that would work best for Fairfield.
- Created and issued RFP, and reviewed submissions.
- Completed vendor evaluation and contracting process, and retained consultant.
- Performed brainstorming, issue identification and analysis.
- Met with Town Departments and gathered Town-wide information.
- Fielded consultant, started field work and reviewed Town information.
- Conducted Kickoff workshop with Consulting team to advance issue identification.
- Provided updates to BOS, BOF, RTM, and numerous other Town Commissions.

# Strategic Plan Committee

## Further Details on Completed Activities

Activity	Further Details
<b>Formed SPC Committee...</b>	Meetings 2 <sup>nd</sup> Tuesday of each month Minutes captured and available
<b>Performed research ...</b>	RFPs, Strategic Plan approaches, Actual Strategic plans from other communities, Vendors, etc
<b>Outlined approach...</b>	Community input, objectivity, non partisan, thorough, etc.
<b>Created RFP....</b>	Rigorous RFP; Follow-up Q&As from vendors 8 Submissions; 2 oral presentations
<b>Completed vendor evaluation...</b>	Selected Housea Lavigne Associates National experience with local knowledge
<b>Performed brainstorming...</b>	SPC has performed brainstorming and issue analysis on opportunities and challenges in Fairfield
<b>Town Departments and information...</b>	Identified and gathered all available plans, information, regulations, etc from Town Departments and entities
<b>Fielded consultant...</b>	Town-wide field review, Document review, workshop planning, research
<b>Conducted Kickoff workshop...</b>	Kickoff workshop, initiative branding, brainstorming, issue identification, etc.
<b>Provided updates...</b>	3 BOS updates, RTM update, BOF update, Economic Development Commission, Econ Dev Dept., Town Planning, AHC, Human Services Commission,

# Strategic Plan Committee

## Planned Next Steps

- Execute steps resulting from 4/30 Kickoff workshop and meeting.
- Complete initial SPC planning, and revise plan.
- Review Town information and conduct field reconnaissance with HLA.
- Perform framing interviews / workshop for Town Boards, Officials, Dept heads, etc.
- Begin community engagement and data gathering.
- Evaluate current situation and outline strategic issues.
- Execute overall project analysis as required for Strategic Plan potential options.
- Continue to provide updates to Town Boards, Commissions, and bodies.
- Coordinate with other Town departments, groups, etc.
- Maintain awareness of other initiatives, programs, studies, etc.
- Adapt approach and integrate with other initiatives as necessary to achieve effective execution and optimal result.



# Strategic Plan Committee

## How to Provide Your Comments and Ideas

- Attend our SPC meetings.
- Review our SPC webpage: <http://www.fairfieldct.org/spc>
- Provide input on Community feedback form (can be done now).
- Watch for launch of our enhanced project web site.
- Participate in Community workshop(s) when scheduled in fall.
- Other likely approaches:
  - Participate in smaller “Do it yourself” workshop
  - Web questionnaire

# Strategic Plan Committee

## Questions and Suggestions

- Are there questions on the information provided?
- Are there suggestions or observations for additional or different activities?
- Are there questions on the process planned going forward?

# Appendices

# Strategic Plan Committee Appendices

- Background, SPC Members, SPC Charge
- RFP Responses and Background on Provider Selected
- Details on Work Completed in Q1 2018
- Strategic Planning – A Deeper Dive

# 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.

# Strategic Plan Committee

## RFP Responses

- 8 proposals received. Each response had interesting elements. All aspects of RFP requirements should be able to be achieved.
  - Extensive community input leveraging many approaches
  - Structured SWOT assessment
  - Strategic options and tradeoffs
  - Implementation plan
- Target to start work early in 2018. General timeframe is 1 year to complete. It is recognized that a balance between speed and thoroughness will be critical.

Firm	Location
Blum Shapiro Consulting	West Hartford, CT
CT Economic Resource Center	Rocky Hill, CT
Future IQ	Minneapolis, MN
Houseal Lavigne Associates	Chicago, IL
Kairos Development Group	Philadelphia, PA
Management Partners	Cincinnati, OH
The Novak Consulting Group	Cincinnati, OH
Seismic Partners, LLC	Southport, CT

# Strategic Plan Committee

## Background on Consultant Provider

- As previously described to the BOS, 8 firms submitted proposals to our RFP.
- After a review of the 8 proposals, and oral presentations from 2 firms, Houseal Lavigne Associates was selected.
- HLA is Chicago based, yet has performed work across the country.
- HLA has performed work for MetroCogs and therefore has familiarity with CT and our region. Currently has a project underway with Greenwich (POCD).  
Greenwich project website: (<http://www.hlplanning.com/portals/greenwich/>)
- SPC felt HLA would provide the best combination of new ideas from outside our region, with an already developed understanding of CT and Fairfield County.



# 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