

Town of Fairfield

Strategic Plan Committee

**Strategic Plan Initiative Status & Update to Board of Selectmen
July 2019**



The following slides provide an update on:

- Strategic Plan development status
- Community Outreach results
- 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.



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



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

Completed



Completed



Completed &
Being Socialized



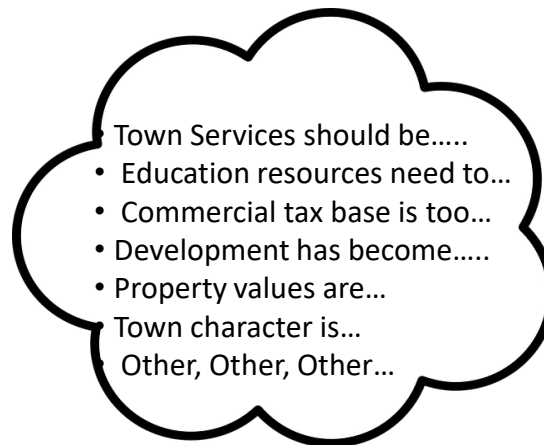
Strategic Plan Committee

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

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

Key Areas From the Community Outreach Results

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

The Path to Finalizing the Strategy

Strategic Insights & SWOT Analysis



Community Feedback



Next Steps

Potential Strategic Options



Subject Matter Expert (SME) Input & Analysis

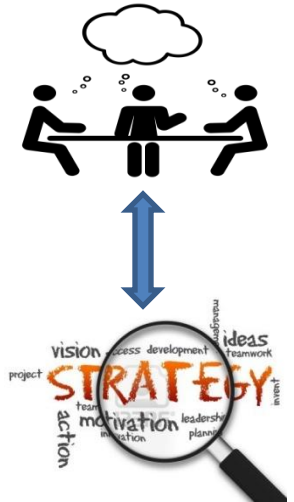


Community Feedback (approach TBD)

SME Participation to leverage Stakeholder interview participants

Refinement & Evaluation

Strategies, Refinement, Reviews



Finalize Report



Strategic Plan Update

Subject Matter Expert Panel (Draft July 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 	<p>1a. Governance SMEs: Topics: Governance structure; Town charter; Town management process changes; More effectively coordinating and streamlining board and commissions; leveraging State representation</p> <p>1b. Town Vision, Goals, Branding SMEs Topics: Town wide Vision, Mission & Goals for Town overall; Dept goals to support execution; Town wide branding to define what is Fairfield; Community unification efforts (this is in community Character section in Outreach summary)</p>
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 	<p>2. Financial Stability SMEs: Topics: Town spending management; Town management processes; Cost of labor; Town Services; Leveraging of technology;</p>
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 	<p>3. Econ Dev SMEs Topics: All Economic Development topics.</p>
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 	<p>4. BOE SMEs: Topics: As defined to the left. Key questions relate to how to manage spending in constrained environment, while delivering high quality education; how to evolve education for programs of the future.</p>
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 	<p>5a. Town zoning design and infrastructure SMEs Topics: Development/zoning design standards; transportation options; infrastructure to support walk ability.</p> <p>5b. Community programs and facilities Topics: Human services type support programs; Senior initiatives to support affordability and desirability.</p>

The following slides were utilized during the community workshops to 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

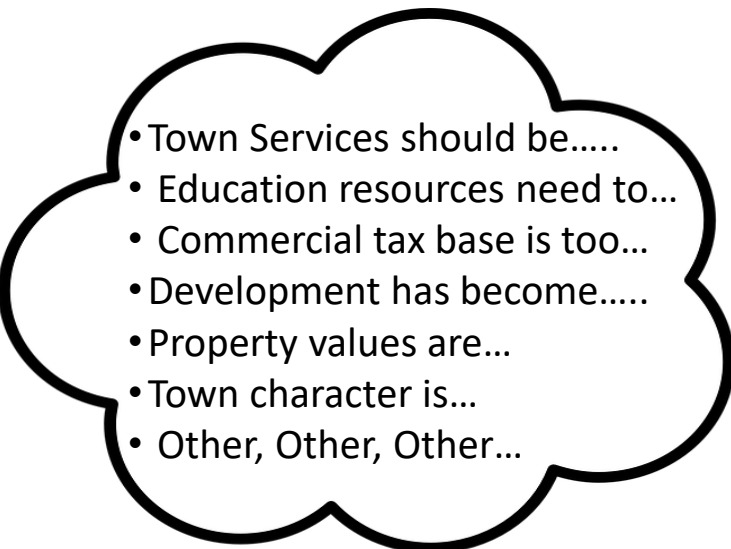
Strategic Plan – Why is it Needed?

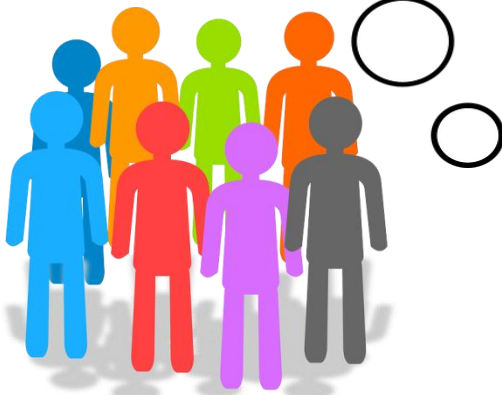
- Economic and fiscal issues here in CT have changed and are impacting the Town in negative ways. State support of key assets have been allowed to erode (e.g. State financial support to Town, Roads, Rails, etc.). This situation presents our town with both opportunities and challenges which need to be 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

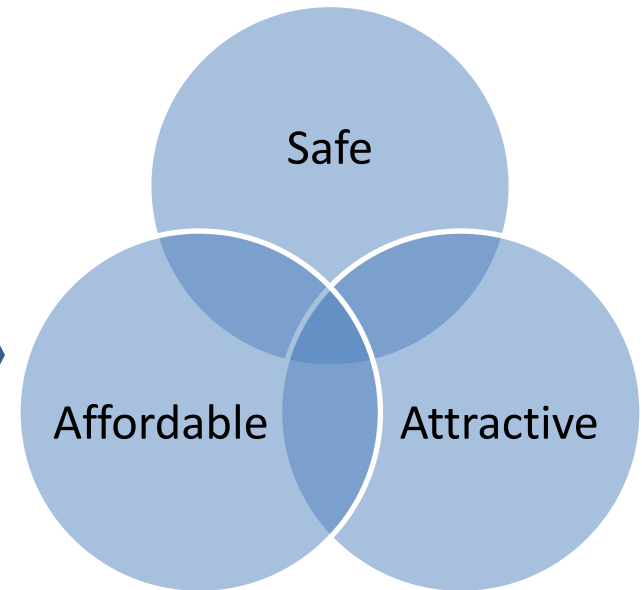
- 
- Town Services should be.....
 - Education resources need to...
 - Commercial tax base is too...
 - Development has become.....
 - Property values are...
 - Town character is...
 - Other, Other, Other...



Analysis

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

Objective



Strategic Plan Update

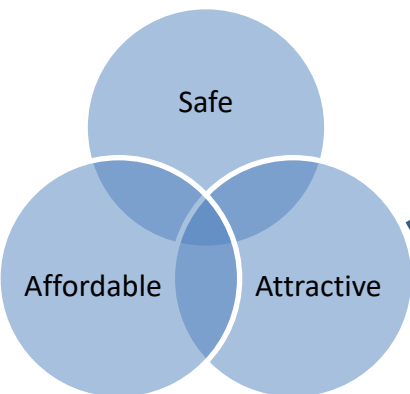
A Perspective on Traits of Desirable Communities

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



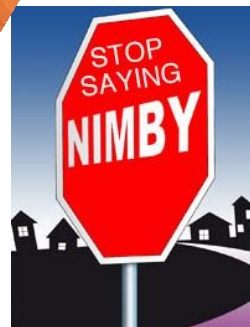
Challenges and Opportunities



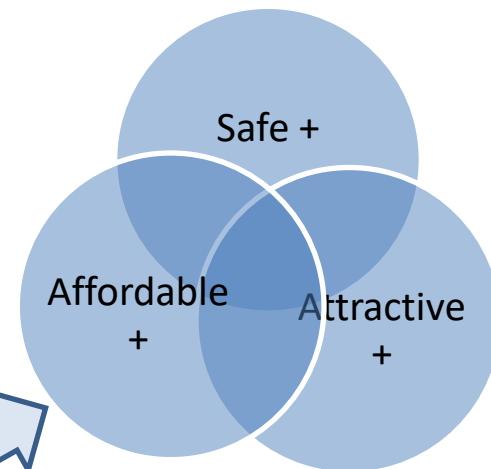
Too Much Change

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.

The first template is a SWOT analysis table with columns for Strengths, Weaknesses, Opportunities, and Threats, and rows for internal and external factors. The second template is a brainstorming table with columns for Topic, Idea, and Action.



Gather Stakeholder Input

Interviews & Workshops



- Dept Heads
- Elected Officials
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- Other Stakeholders
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 - Developers
 - Universities
 - Etc.

Gather Constituent Input

Community & Business Workshops



Do It Yourself Workshops



Additional Approaches:

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Evaluate benefits and implications



Options



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- Input and ideas will be gathered from multiple sources
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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

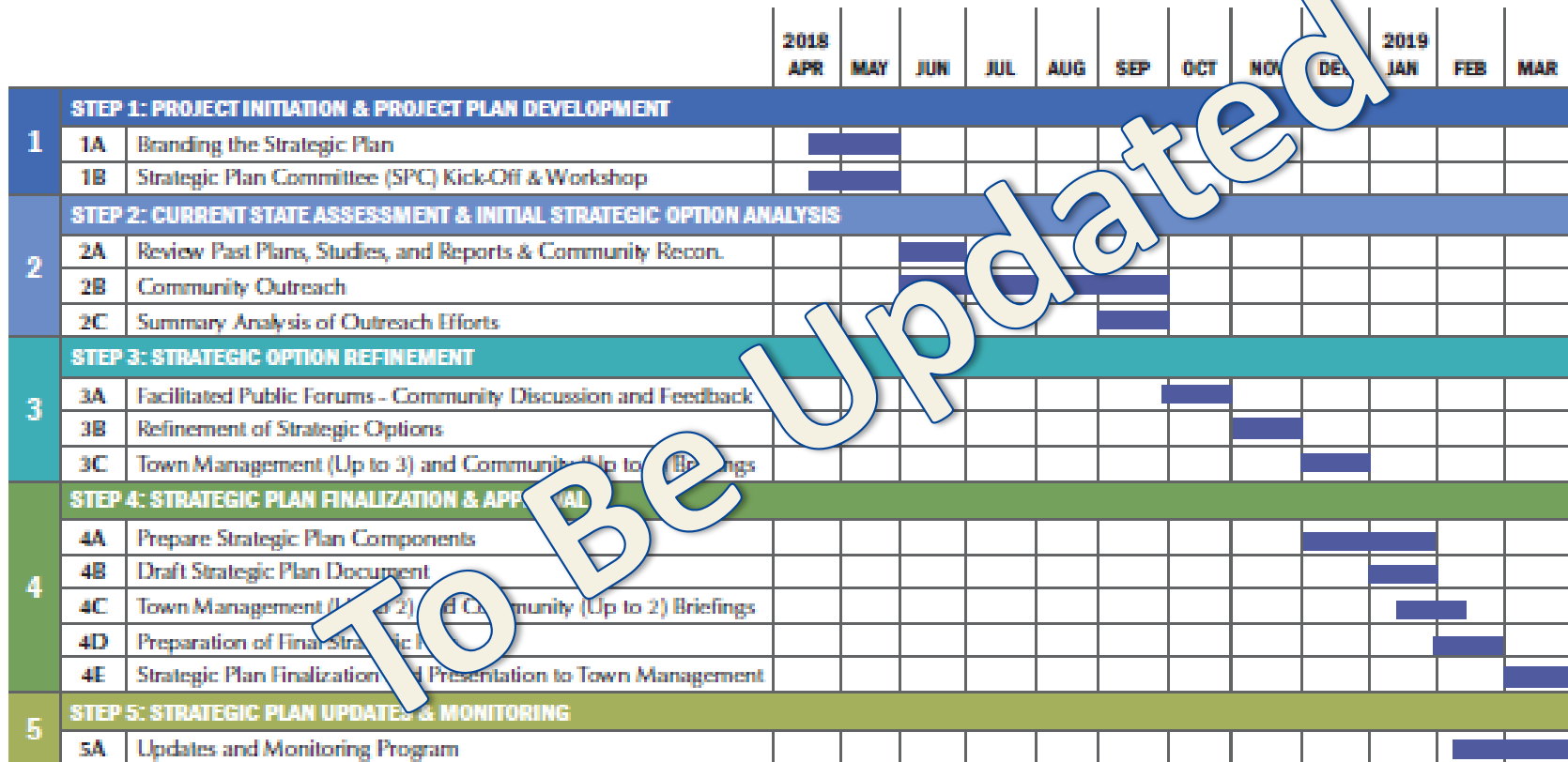
SPC Charge

- 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.

Strategic Plan Project Timing

Note: Schedule in process of update

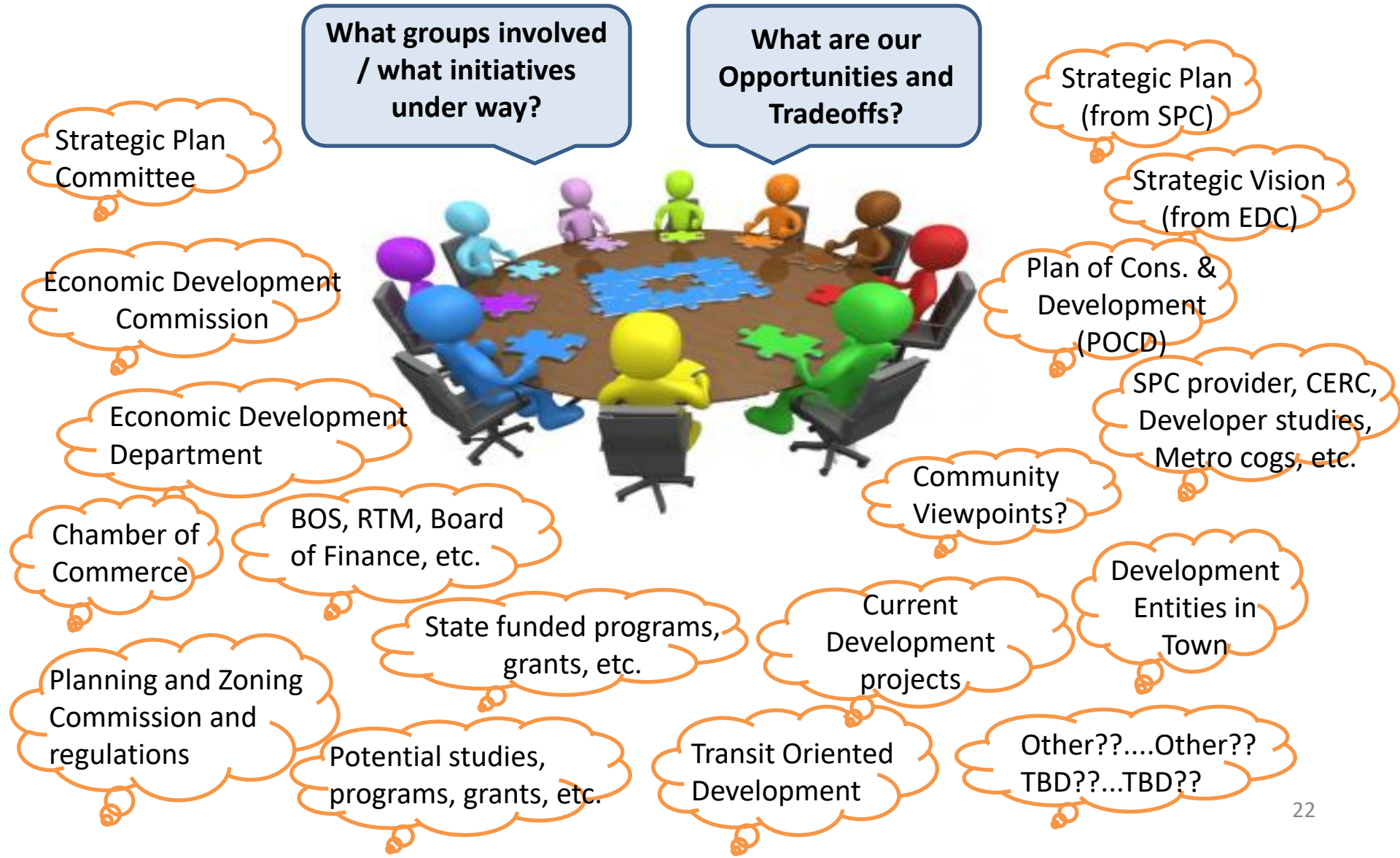
- The draft project plan outlines the time period for each step of the expected work, as well as an indication of the meetings to be conducted and deliverables.
- Project is planned to be conducted over a 10 to 12 month time period.



■ 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

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