

## 2017 Grant Application (Round 2)

Deadline : October 03 2017 at 11:59 PM EDT (Midnight)

### Applicant Information

**Name:** John Monteleone  
**Email:** monteassoc@gmail.com  
**App ID:** 01482521  
**Status:** Submitted  
**Cycle:** None  
**Last Modified:** Oct 03 2017 07:42 EDT by monteassoc@gmail.com  
**App Submitted:** Oct 03 2017 07:42 EDT by monteassoc@gmail.com  
**App Created:** Sep 26 2017 15:57 EDT by monteassoc@gmail.com  
**Last IP Address:** 10.189.245.4

### Request Summary Sheet

#### A. Organizational Information

<b>Legal Name of Organization</b>	Town of Southbury
<b>IRS Tax Status (e.g. 501c3, Church, Public Entity, etc.)</b>	We are tax exempt but do not fall into the categories indicated on the Dept. of Consumer Protection Form
<b>Employee ID # / Federal Tax ID #</b>	06-6002089
<b>Street Address (Organization)</b>	Southbury Town Hall • 501 Main Street
<b>Town/City (Organization)</b>	Southbury
<b>State (Organization)</b>	Connecticut
<b>ZIP Code (Organization)</b>	06488
<b>Telephone Number of Organization</b>	203-262-0647
<b>Website</b>	• Town: <a href="http://www.southbury-ct.org/">http://www.southbury-ct.org/</a> • Strategic Planning Task Force: <a href="http://www.southbury-ct.org/SPTF">http://www.southbury-ct.org/SPTF</a>
<b># of Staff Employed by Organization</b>	100

#### B. Board of Directors Information

<b>Total Number of Board Members:</b>	6
<b>Female</b>	1
<b>Male</b>	5
<b>Not Specified</b>	0
<b>Black or African American</b>	0
<b>American Indian or Alaskan Native</b>	0

Asian or Pacific Islander	0
Hispanic or Latino	0
White	6
Other	0
Two or More Races	0
<b>Are there other special populations that serve on your board that you would like us to know about ...</b>	

No

### C. Contact Information

<b>Chief Executive Officer (CEO) / Executive Director (ED) Name &amp; Title</b>	Chief Elected Official (CEO) – Jeffery Manville, First Selectman
<b>CEO/ED Telephone Number</b>	203-262-0647
<b>CEO/ED Email Address</b>	selectman@southbury-ct.gov
<b>Contact Name for Program/Application (If Different from CEO/ED)</b>	John A. Monteleone or Jennifer Naylor
<b>Contact Title</b>	Chair – Southbury Strategic Planning Task Force Vice - Chair – Southbury Strategic Planning Task Force and Southbury Selectman
<b>Contact Email Address</b>	monteassoc@gmail.com or selectman.Naylor@southbury-ct.gov
<b>Contact Telephone Number</b>	203-565-6100

### D. Project Information

<b>Project Name or Use of Funds</b>	Southbury Community Assessment Survey
<b>Total Project Cost (Please round to nearest dollar)</b>	40000
<b>Amount Requested from CCF (please round to nearest dollar)</b>	15000
<b>Project Start Date</b>	January 15, 2018
<b>Estimated Project End Date</b>	April 15, 2018
<b>Estimated # of People Served by Project</b>	20000
<b>Priority Area Addressed by Grant (choose ONE):</b>	Southbury Issues (Southbury Community Trust Fund)
<b>Please provide a very brief (2-3 sentence) overview of your proposed grant project.</b>	

The Southbury Town Charter requires the town have a Strategic Plan to plan for the future of the community. The Board of Selectman approved the creation of a Strategic Planning Task Force. Its task is to create and recommend to the Board of Selectmen a strategic plan that is transparent, collaborative and inclusive to address three focus areas.

- quality of life
- efficient local government

- changing the mix of the grand list (economic development)

This process requires the assessment of the community by surveying the attitudes and expectations of residents and business leaders regarding these three focus areas.

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**Is this a reapplication request for the continuation of a project we supported within the past two...**

No

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## **New Grant Request**

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### **A. Request Narrative**

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**i. Please provide an overview of your agency's mission, principal services, and primary clients.**

Southbury is a town in western New Haven County, Connecticut, USA. It was incorporated in 1787, and the present day Town of Southbury has 39 square miles and almost 20,000 residents. The Zip Code for the whole town is 06488. The history of the government of Southbury, as in most New England towns evolved from the adult voting population gathering annually in a town meeting to act as the local legislature, approving budgets and laws. Day-to-day operations were originally left to individual oversight, but when towns became too large for individuals to handle such workloads, they would elect an executive board of, literally, select(ed) men to run things for them. They had charge of the day-to-day operations; selectmen were important in legislating policies central to a community's police force, highway supervisors, pound keepers, field drivers, and other officials. As Southbury grew, the more power would be distributed among other elected boards, such as fire wardens and police departments. For example, population increases led to the need for a police department. The First Selectman of Southbury is a paid position. The other five members of the Board of Selectmen serve part-time, with a token or no salary. It is the chief executive branch of local government in the open town meeting form of government. The basic function consists of calling town meetings, proposing budgets to Town Meeting, setting public policy, calling elections, licensing, setting certain fees, overseeing certain volunteer and appointed bodies, and creating basic regulations.

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**ii. Please describe the specific issue or concern that your project will address. Include data, s...**

We have asked the Connecticut Economic Resource Center, Inc. (CERC) to provide us with a work scope to survey residents and business leaders in Southbury to inform and provide insights for the strategic planning process. We have not made any commitment to them.

Business Survey: CERC or another third party will be asked to develop an online survey to gather information about a number of strategic issues facing Southbury businesses. Survey questions will fit into the three focus areas: economic development, efficient government, and quality of life. The questions can include, but not be limited to, areas such as:

- o With what other towns is Southbury similar?
- o What is Southbury known for?
- o What municipal services are utilized; and satisfaction with those services
- o Assets and challenges facing Southbury
- o Opportunities for development

The survey questions will be qualified and tested to be objective and unbiased so that appropriate responses will be measured.

Resident Survey: Similar to the business survey, an objective, unbiased online survey will be developed to gather information about strategic issues facing residents that fit into three core areas: economic development, efficient government, and quality of life.

**Next Steps:**

The Town will have the opportunity to review and provide comments as the survey questions are finalized. The surveys will be formatted using an online survey tool, and a custom web address will be provided to the Town that will provide a link to the survey.

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**iii. How does your proposed program or project relate to the Foundation's funding priorities in th...**

The Town of Southbury is a municipal entity seeking a grant for public purposes. The Board of Selectmen is elected and is representative of the community. Southbury is within and providing services to residents within the 21-town service area. We have filed for an exemption from the Connecticut Department of Consumer Protection. This proposal aligns with the Southbury Community Trust Fund priorities since it supports a variety of programs that benefit Southbury residents. This proposal's values include transparency, inclusion, collaboration and strong partnerships. The survey will identify and address documented community needs and advance broader community plans and priorities.

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**iv. Does this request include funding for equipment or technology?** No

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**v. If this is an application for continued funding, do you plan to make any changes to the scope o...**

Not Applicable

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**B. Workplan (Details of Proposed Request)**

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**i. How, when and where do you plan to implement the grant? List principal steps to complete the pr...**

To assure the greatest potential for a high response to this survey, the town, with the assistance of the Strategic Planning Task Force will provide assistance in as many of the following ways as possible:

- (1) have the survey link promoted in online newsletters and partner with town groups (such as the Southbury Business Association, the Heritage village Masters Association, etc.) to assist the town in promoting the survey
- (2) allow for a link to the survey on the Town web site
- (3) utilize a Town email list of businesses to promote the survey
- (4) mail a postcard to businesses with the survey web link
- (5) highlight the web link in the Voices newspaper and any other local newspapers
- (6) provide postcards with the web link in town buildings and at Heritage Village.

Once the surveys have been completed, the results will be interpreted to see what insights emerge for the Town. The results interpretation may proceed according to the following steps:

- o Initial Review of Results:
- o Organize and Categorize Results:
- o Find Patterns:
- o Generate Visual Representations:
- o Determine Implications:

Following the results interpretation, a report with key findings and insights will be written.

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**ii. Who in your organization will be responsible for these activities? Who will be responsible for...**

The Chair, John Monteleone and Vice-Chair, Jennifer Naylor of the Strategic Planning Task Force will be responsible for coordinating these activities with a third party and for assuring that reports are submitted in a timely manner.

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**iii. Do you plan to collaborate with other agencies or partners on this work? If so, please list t...**

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- Other Towns with Strategic Plans - Seymour and Cheshire
- Pomperaug Health District
- Southbury Based Regional Health Facilities
- Southbury Based Hotels / Accommodations
- Pomperaug River Watershed Coalition
- Naugatuck Valley Council of Governments
- Southbury Business Association
- Town of Southbury Department Heads
- Banking/Financial & Insurance Organizations
- Connecticut Conference of Municipalities
- Tribury Chamber of Commerce
- Retirement & Assisted Living Facilities
- Shelton Economic Development Corporation
- Residential & Commercial Real Estate Developers
- Town Boards and Commission Chairs
- Top 10 Grand List Tax Payers
- Nonprofit Organizations
- Connecticut Economic Research Center
- Connecticut Airport Authority (Oxford)
- CT Department of Economic & Community Development
- Southbury Faith Based Organizations

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**C. Results & Outcomes**

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**i. What are your goals for this proposal? How will you know that your project is successful?**

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**Deliverables**

The Southbury Community Assessment survey final report will include a clear and concise compilation of the data and interpretation of the survey results using best-practices and industry standards. A first draft of the report and all survey responses will be made available to the Town for review and input, and then a final report will be issued. The results from the survey will very likely generate a number of insights, which could inform a public event or consensus building exercise to determine critical investments that could be made (they are so wary about spending any money) for future economic success, or how actions can be implemented and/or measured for success.

**Estimated Timeline**

The entire project will take approximately 8-12 weeks to complete, dependent somewhat upon how long the survey remains open for the residents and businesses to respond.

**Third Party Service Provider**

Southbury will seek bids to help with the survey. We are considering, as one option, using CERC .They are a Department of Administrative Services-approved vendor, qualified to deliver comprehensive and integrated marketing communications solutions, including market research services, to Connecticut's state and municipal entities.

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**ii. List the projected results of your activities. - How much have you done? (e.g. How many peop...**

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We have formed a task force made up of the following residents of Southbury.

- > Jeff Manville - First Selectman - Ex Officio
- > John Monteleone - Chair (Former Selectman)
- > Jennifer Naylor - Vice Chair (Current Selectman)
- > John Reilly - Member of the Board of Finance
- > Jennifer Tokarczyk - Member of the Board of Finance
- > Robert Harrison - Member of the Planning Commission

- > Ed Hatfield - Chair of the Planning Commission
- > Anne Armeno, Chair of the Economic Development Commission
- > Mary Korsu - Member of the Economic Development Commission
- > Jennifer Murphy - Member of the inland Wetlands Commission
- > Donna Lesch - Member of the Inland Wetlands Commission
- > Susan Monteleone - Member of the Zoning Commission
- > Justin Bette - Current Selectman
- > Ron Pugliese - Former Selectman
- > Ron Conti - President of the Heritage Village Masters Association
- > Paul Butler - President of GlobalEdg LLC
- > Mary Wehrberger - Former ED for the Hearth Assisted Living Community
- > Trisha Soucy - Principal of the Rockwell School in Bethel, CT
- > Robert Moser - Former employee of IBM in Southbury - currently with Worldgate, llc.
- > William Sarosky - Chief Fiscal Office - Town of Southbury
- > DeLoris Curtis - Head of the Planning Department

How well will be determined after the survey and when the resulting strategic plan is presented to the community via public meetings. We hope to reach a significant segment of the Southbury community. To assure the greatest potential for a high response to this survey, the town, with the assistance of the Strategic Planning Task Force

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**iii. Identify the tools you will use to assess the impact and results of your program. Please incl...**

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Once the surveys have been completed, the results will be interpreted to see what insights emerge for the Town. The results interpretation will proceed according to the following steps:

- o Initial Review of Results:

A read-through of the data will allow an overall picture of the results without developing any analysis bias.

- o Organize and Categorize Results:

The data will be ordered according to the themes that are emerging. The results will also be considered by demographic and other cohort options to see if there are any notable correlations that can be made.

- o Find Patterns:

Where appropriate, statistical analysis will be conducted on the answers by demographic type to identify statistical significance among the responses. In addition, the most popular responses will be noted as well as anomalies, which may indicate areas for action by the Town. Advanced analytics will also be applied to correctly identify similarities and differences.

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**D. Leveraging & Sustainability**

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**i. Would this grant leverage additional funding to support the project? If so, please list other ...**

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The Town of Southbury has funded the creation and printing of a brochure to explain the strategic planning process to residents and businesses. Additional municipal funding is uncertain due to the lack of a state budget and the expected impact on towns that may lead to supplemental tax bills to pay for town services.

**ii. What resources have you explored/identified that could help to sustain this work (for instance...**

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The strategic planning process proposes to deal with the future of Southbury over a 5 year period with a regular review and update as necessary. We have not yet explored the possibility of fund raising events and donations.

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## Financial & Supplemental Information (Attachments)

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### Nonprofit Registration to Solicit Funds

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**We now require you to complete the Nonprofit Registration to Solicit Funds from the CT Department ...**

My organization is exempt and has received an exemption.

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### Attachments

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**1. Project Budget for New Request <a href="http://connct.org/wp-content/uploads/2017/08/General-Gr...**

Southbury Strategic Planning Task Force Survey Grant-Budget-Form.xls

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**2. Organizational Operating Budget for current year.**

Southbury Strategic Planning Task Force Budget.docx

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**3. Board of Directors List**

Southbury Board of Selectmen - Information.docx

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**4. Other documentation (as needed):**

Southbury Strategic Planning Brochure 08-08-17.docx

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**5. Other documentation (as needed):**

SWOT Analysis -Southbury SPTF Meeting 09-28-17.doc

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**6. Other documentation (as needed):**

Southbury Strategic Planning Task Force Issues.docx

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### Signatures

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**Electronic Signature of Person Completing Application: Name / Title / Date Signed**

John A. Monteleone, Chair - Strategic Planning Task Force 10/03/17

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**Electronic Signature of Executive Director (or equivalent): Name / Title / Date Signed**

Jeff Manville, First Selectman - Town of Southbury 10/03/17

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