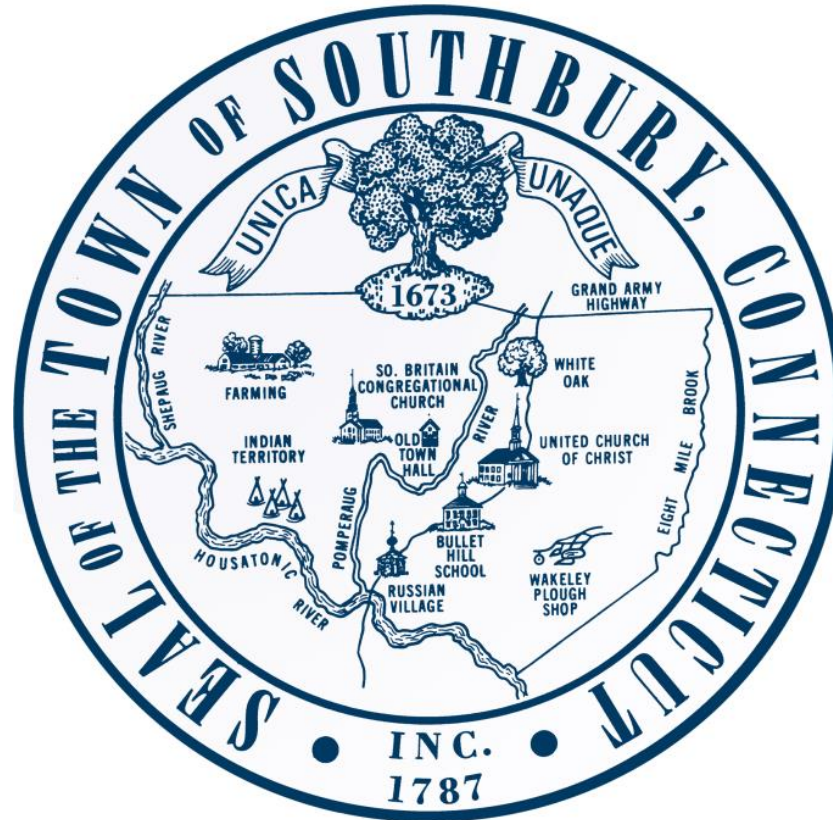


**Strategic Plan Commission
Presentation to the Board of Selectmen
May 16, 2019**



Southbury Strategic Plan



“The best way to predict the future is to create it” - Abraham Lincoln

STRATEGIC PLANNING COMMISSION MEMBERS



John Monteleone
Chairman
Former Chair of the Strategic Planning Task Force (SPTF), former Selectman and retired corporate executive



Ed Edelson
Vice-Chairman
Former First Selectman and retired corporate executive



Tom Marks
Secretary
Small business owner, Pomperaug Youth Baseball director, experienced strategic planner



Ron Conti
Member of the Planning Commission, former member SPTF and former President of Heritage Village Masters Association



Ed Dalterio
Former VP Global Marketing for Stanley Black & Decker; 30+ years corporate strategic planning experience



Chuck Jones
Former Chair of Senior Services Commission, teacher, developmental consultant



Frank Pauza
Retired corporate executive, volunteer at the Audubon Center-Bent on the River and Thresholds, experienced in strategic plan development



John Reilly
Current Board of Finance member, former SPTF Member, retired corporate executive



Kathryn Smith
Former member of the SPTF, experienced business & strategic consultant, former research operations analyst



David Solaz
Internet of Things Solutions Architect, Industrial Engineer and project manager, former travel basketball coach through Parks & Recreation

STRATEGIC PLANNING COMMISSION SCOPE OF RESPONSIBILITIES

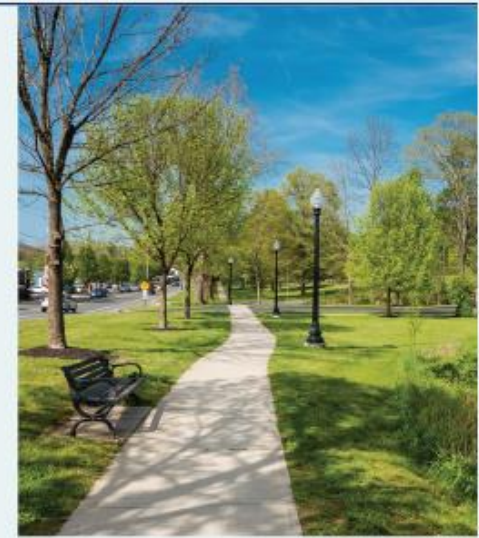
The Strategic Plan Commission shall serve in an advisory only capacity, advising the Board of Selectmen, and such other commissions, departments, and offices as the Board of Selectmen may require, as to the implementation of the Strategic Plan.

The Strategic Plan Commission shall monitor the progress concerning implementation of the Strategic Plan and update the Board of Selectmen accordingly, recommend changes to the Strategic Plan to the Board of Selectmen, advise and provide recommendations to the Board of Selectmen to facilitate implementation of the Strategic Plan, and engage in such other activities as may be directed by the Board of Selectmen from time to time.

As an advisory only body, the Strategic Plan Commission shall have no authority to directly implement the Strategic Plan and shall not and is not meant to replace the duties and responsibilities of any other Town commission, department, or office.

PROPOSED PRIORITY ACTION ITEMS

- **AFFORDABLE HOUSING**
Economic Development / Quality of Life
- **ARTS & CULTURE**
Quality of Life / Economic Development
- **COMMUNITY CENTER**
Quality of Life / Economic Development
- **OPPORTUNITY PLANNING – TRAINING SCHOOL**
Efficient Local Government / Economic Development
- **COMMISSION COMBINING – FACILITATE ECONOMIC DEVELOPMENT**
Efficient Local Government / Economic Development



Town of
Southbury
Connecticut



STRATEGIC PLAN PRIORITIES

GRAND LIST

Pillar 1 – Advance Economic Health

- 1.1 Support active economic development
- 1.2 Establish new policies and programs to attract, retain and expand business development
- 1.3 Cultivate Regional Economic Partnerships
- 1.4 Maintain and enhance Town Infrastructure
- 1.5 Ensure regional marketing of cultural, dining, entertainment and arts activities to promote economic development

Pillar 2 – Enhance Community and Neighborhood Livability

- 2.1 Improve access to a broad range of quality housing that is accessible and affordable
- 2.2 Preserve the significant historical character of the community
- 2.3 Promote health and wellness within the community
- 2.4 Increase volunteerism
- 2.5 Support the town library to ensure it remains highly functioning
- 2.6 Promote and support high quality education

QUALITY OF LIFE

Pillar 3 – Improve Culture and Recreation

- 3.1 Manage the maintenance and use of Town Parks and Open Spaces
- 3.2 Develop a clear vision of the Town's role in the culture and arts while building partnerships with other community organizations
- 3.3 Promote cultural, recreational, educational, historic and entertainment venues
- 3.4 Pursue access to and participation in Lakefront Recreation
- 3.5 Expand Town Community Center
- 3.6 Fund and enhance current Parks and Recreational system

Pillar 4 – Strengthen Environmental Health

- 4.1 Protect and Maintain Open Space
- 4.2 Continue to protect water quality, aquifer recharge areas
- 4.3 Educate citizens about smart eco-friendly practices and the benefits of embracing sustainable living choices
- 4.4 Monitor status of Southbury Training School (STS)
- 4.5 Improve and promote recycling program



EFFICIENT LOCAL GOVERNMENT

Pillar 5 – Foster High Performing Government

- 5.1 Implement Continuous Improvement Practices that increase Customer Satisfaction
- 5.2 Streamline Government Operations while enhancing services
- 5.3 Staff Excellence
- 5.4 Optimize Board and Commission functionality
- 5.5 Continue programs to maintain quality town infrastructure

Pillar 6 – Enhance Public Safety

- 6.1 Continue communication with Local Emergency Preparedness Committee (LEPC) to improve Emergency Preparedness and Response
- 6.2 Identify potential community hazards
- 6.3 Evaluate and reinforce emergency personnel functions while maintaining the highest professional standards for emergency medical care



Town of
Southbury
Connecticut



Strategic Plan Commission

The Scope of Responsibilities of the SPC as defined by the BOS include:

- **serve in an advisory only capacity**, advising the Board of Selectmen, and such other commissions, departments, and offices as the Board of Selectmen may require, as to the implementation of the Strategic Plan
- **monitor** the Town's progress concerning implementation of the Strategic Plan and update the Board of Selectmen accordingly
- **recommend** changes to the Strategic Plan to the Board of Selectmen
- **advise** and provide recommendations to the Board of Selectmen to facilitate implementation of the Strategic Plan
- **engage** in such other activities as may be directed by the Board of Selectmen from time to time.

As an advisory only body, the Strategic Plan Commission shall have no authority to directly implement the Strategic Plan and shall not and is not meant to replace the duties and responsibilities of any other Town commission, department, or office.

Strategic Plan Commission

BACKGROUND:

- March 2, 2017 - First Selectman's Letter to the Community seeking members for the Strategic Planning Task Force
- April 20, 2017 - Strategic Plan Task Force Created *
- November 1, 2018 - Strategic Plan Approved *
- January 3, 2019 - Strategic Plan Commission (SPC) Created *
- February 19, 2019 – SPC Meeting # 1 – Organizational & Review of the Plan
- March 11, 2019 – SPC Meeting # 2 – Review of the Plan
- April 24, 2019 – SPC Meeting # 3 – Review of the Plan / Discussion of Priorities & Implementation
- May 2, 2019 – Invitation to the Board of Selectmen for a Joint Meeting **
- May 9, 2019 – SPC Meeting # 4 – Discussion of Priorities & Process
- May 16, 2019 – Presentation to the Board of Selectmen

** Unanimous Approval by the Southbury Board of Selectmen*

*** Attached to the Invitation included:* Southbury Strategic Plan – Initial Priorities and SPC Exhibits to provide additional information and insight for each priority Action Item.

Southbury Town Website: www.southbury-ct.org/strategicplanning

Strategic Plan Commission

BACKGROUND:

The Strategic Plan Commission had not determined any priorities, pending input from the Board of Selectmen.

However, the SPC proposed the following listing of five (5) initial options with multiple benefits based on the findings of the Strategic Planning Task Force.

- **Housing** – Economic Development / *Quality of Life*
- **Arts & Culture** – Quality of Life / *Economic Development*
- **Community Center** – Quality of Life / *Economic Development*
- **Opportunity Planning** – Efficient Local Government / *Economic Development*
- **Commission Combining** – Efficient Local Government / *Economic Development*

STRATEGIC PLAN COMMISSION

SOUTHBURY STRATEGIC PLAN

Three Goals	Six Pillars	30 Action Items
Grow the Grand List (Economic Development)	Pillar 1 - Advance Economic Health Pillar 2 - Enhance Community & Neighborhood Livability	Five Six
Quality of Life	Pillar 3 - Improve Culture and Recreation Pillar 4 - Strengthen Environmental Health	Six Five
Efficient Local Government	Pillar 5 - Foster High Performing Government Pillar 6 - Enhance Public Safety	Five Three

STRATEGIC PLAN COMMISSION

SOUTHBURY STRATEGIC PLAN

GOAL:
**GROW THE
GRAND LIST**
(ECONOMIC DEVELOPMENT)

**Pillar 1 -
Advance
Economic
Health**

*Advance a healthy,
sustainable economy
reflecting our
community vision,
values and mission.*

Five Action Items

GOAL:
**GROW THE
GRAND LIST**
(ECONOMIC DEVELOPMENT)

**Pillar 2 - Enhance
Community and
Neighborhood
Livability**

*Provide a high-quality
environment and
support quality
neighborhoods that
have access to
numerous town services
and natural resources.*

Six Action Items

GOAL:
**QUALITY
OF
LIFE**

**Pillar 3 -
Improve Culture
and Recreation**

*The importance of
culture & recreation
for the health and
well-being of
individuals and
communities has
been well
documented.*

Six Action Items

GOAL:
**QUALITY
OF
LIFE**

**Pillar 4 -
Strengthen
Environmental
Health**

*Value, protect and
enhance a healthy
and sustainable
environment*

Five Action Items

GOAL:
**EFFICIENT
LOCAL
GOVERNMENT**

**Pillar 5 - Foster
High Performing
Government**

*Maintain responsive
connectivity to town
residents and the
business community
while achieving
efficiencies without
sacrificing operations
or historical
preservation*

Five Action Items

GOAL:
**EFFICIENT
LOCAL
GOVERNMENT**

**Pillar 6 -
Enhance Public
Safety**

*Provide safety and
security while
safeguarding
community
infrastructure*

Three Action Items

STRATEGIC PLAN COMMISSION

SOUTHBURY STRATEGIC PLAN – ACTION ITEMS

GOAL: GROW THE GRAND LIST (ECONOMIC DEVELOPMENT)

Pillar 1 - Advance Economic Health

Advance a healthy, sustainable economy reflecting our community vision, values and mission.

- 1.1 Support active economic development
- 1.2 Establish new policies and programs to attract, retain and expand business development
- 1.3 Cultivate Regional Economic Partnerships
- 1.4 Maintain and enhance Town Infrastructure
- 1.5 Ensure regional marketing of cultural, dining, entertainment and arts activities to promote economic development

GOAL: GROW THE GRAND LIST (ECONOMIC DEVELOPMENT)

Pillar 2 - Enhance Community and Neighborhood Livability

Provide a high-quality environment and support quality neighborhoods that have access to numerous town services and natural resources.

- 2.1 Improve access to a broad range of quality housing that is accessible and affordable
- 2.2. Preserve the significant historical character of the community
- 2.3. Promote health and wellness within the community
- 2.4 Increase volunteerism
- 2.5 Support the town library to ensure it remains highly functioning
- 2.6 Promote and support high quality education

GOAL: QUALITY OF LIFE

Pillar 3 - Improve Culture and Recreation

The importance of culture & recreation for the health and well-being of individuals and communities has been well documented.

- 3.1 Manage the maintenance and use of Town Parks and Open Spaces
- 3,2 Develop a clear vision of the Town's role in the culture and arts while building partnerships with other community organizations
- 3.3 Promote cultural, recreational, educational, historic and entertainment venues
- 3.4 Pursue access to and participation in Lakefront Recreation
- 3.5 Expand Town Community Center
- 3.6 Fund and enhance current Parks and Recreational system

GOAL: QUALITY OF LIFE

Pillar 4 Strengthen Environmental Health

Value, protect and enhance a healthy and sustainable environment

- 4.1 Protect and Maintain Open Space
- 4.2 Continue to protect water quality, aquifer recharge areas
- 4.3 Educate citizens about smart eco-friendly practices and the benefits of embracing sustainable living choices
- 4.4 Monitor status of Southbury Training School (STS)
- 4.5 Improve and promote recycling program

GOAL: EFFICIENT LOCAL GOVERNMENT

Pillar 5 - Foster High Performing Government

Maintain responsive connectivity to town residents and the business community while achieving efficiencies without sacrificing operations or historical preservation

- 5.1 Implement Continuous Improvement Practices that increase Customer Satisfaction
- 5.2 Streamline Government Operations while enhancing services
- 5.3 Promote Staff Excellence
- 5.4 Optimize Board and Commission functionality
- 5.5 Continue programs to maintain quality town infrastructure

GOAL: EFFICIENT LOCAL GOVERNMENT

Pillar 6 - Enhance Public Safety

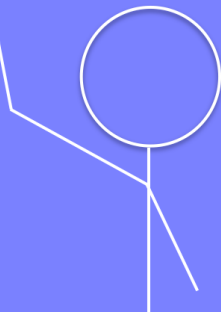
Provide safety and security while safeguarding community infrastructure

- 6.1 Continue communication with Local Emergency Preparedness Committee (LEPC) to improve Emergency Preparedness and Response
- 6.2 Identify potential community hazards
- 6.3 Evaluate and reinforce emergency personnel functions while maintaining the highest professional standards for emergency medical care

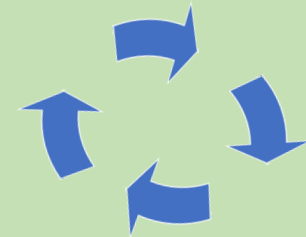
SOUTHBURY STRATEGIC PLAN

IMPLEMENTATION

- 1 Now
- 2 Soon
- 3 At the same time
- X Never
- X Nope
- X Ain't gonna happen



People →
Priorities ←
Process →



STRATEGIC PLAN COMMISSION

SOUTHBURY STRATEGIC PLAN

IMPLEMENTATION – People Board of Selectmen Assets

Town Charter/
Ordinances
Town Clerk

Plan of Conservation
& Development
Planning Department

Town Budget
Board of Finance

Department
Heads

Town
Boards

Town
Commissions

Strategic Plan
Commission

Naugatuck Valley
Council of
Governments
(NVCOG)

State
Representatives

Town
Counsel

Council of Small Towns
(COST)

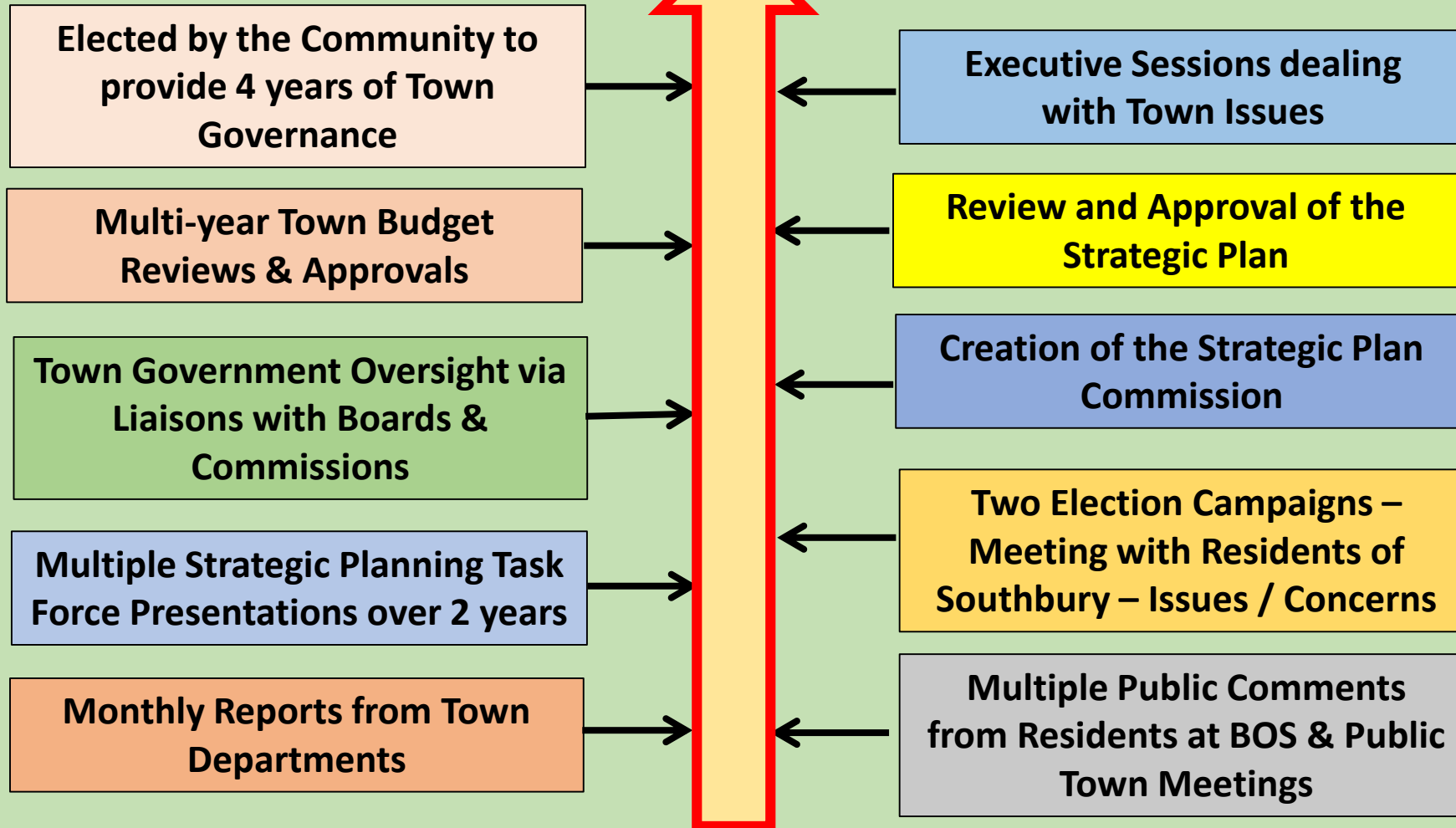
Connecticut Conference of
Municipalities (CCM)

State
Government

Connecticut Economic
Resource Center (CERC)

Southbury Board of Selectmen

Body of Knowledge to Assess Priorities



SOUTHBURY STRATEGIC PLAN

IMPLEMENTATION – Priorities Board of Selectmen

PRIORITY
(Degree of Importance)

- High
- Medium
- Low

TIMING
(Best estimate of when it needs to be done)

- Immediate
- Short Term – within 12 months
- Long Term – beyond 12 months

COST
(Best estimate of the price to be paid
for implementation)

- No Cost
- Low Cost – under \$10,000
- Medium Cost - \$10,001 - \$50,000
- High Cost – Above \$50,000

SOUTHBURY STRATEGIC PLAN

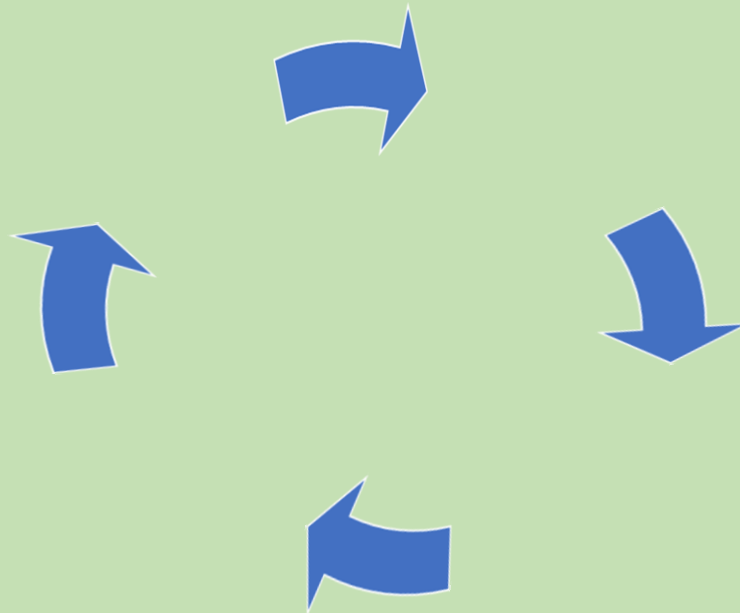
IMPLEMENTATION – Process

Role of the Strategic Plan
Commission

Role of the First Selectman

Role of the Board of
Selectmen

Role of the Department
Heads, Boards &
Commissions



Strategic Plan Commission Proposed Implementation Plan Schedule

May 16, 2019

For Discussion Purposes Only

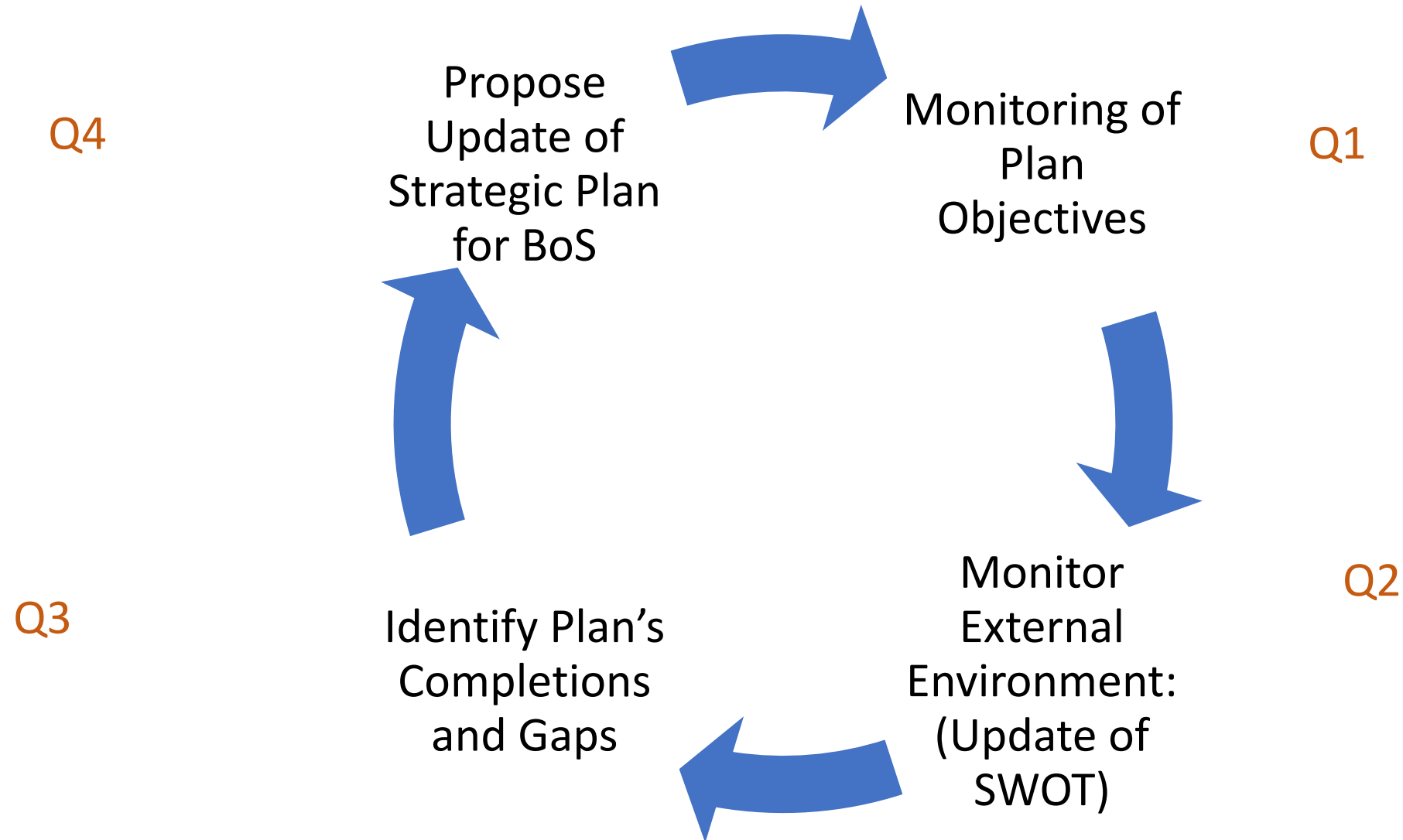
Product vs. Process

- Without an intentional process for updating/revising a plan, the Strategic Plan will quickly become “stuck on the shelf”
- Strategic planning should not be seen as a “one-off” activity but part of an ongoing process
- Even the best process will be undone by a leadership that does not understand or buy-in to the plan
- Direct involvement of leadership in the planning process is critical
- Suggest a process that meets the needs and capability of Southbury’s Board of Selectmen

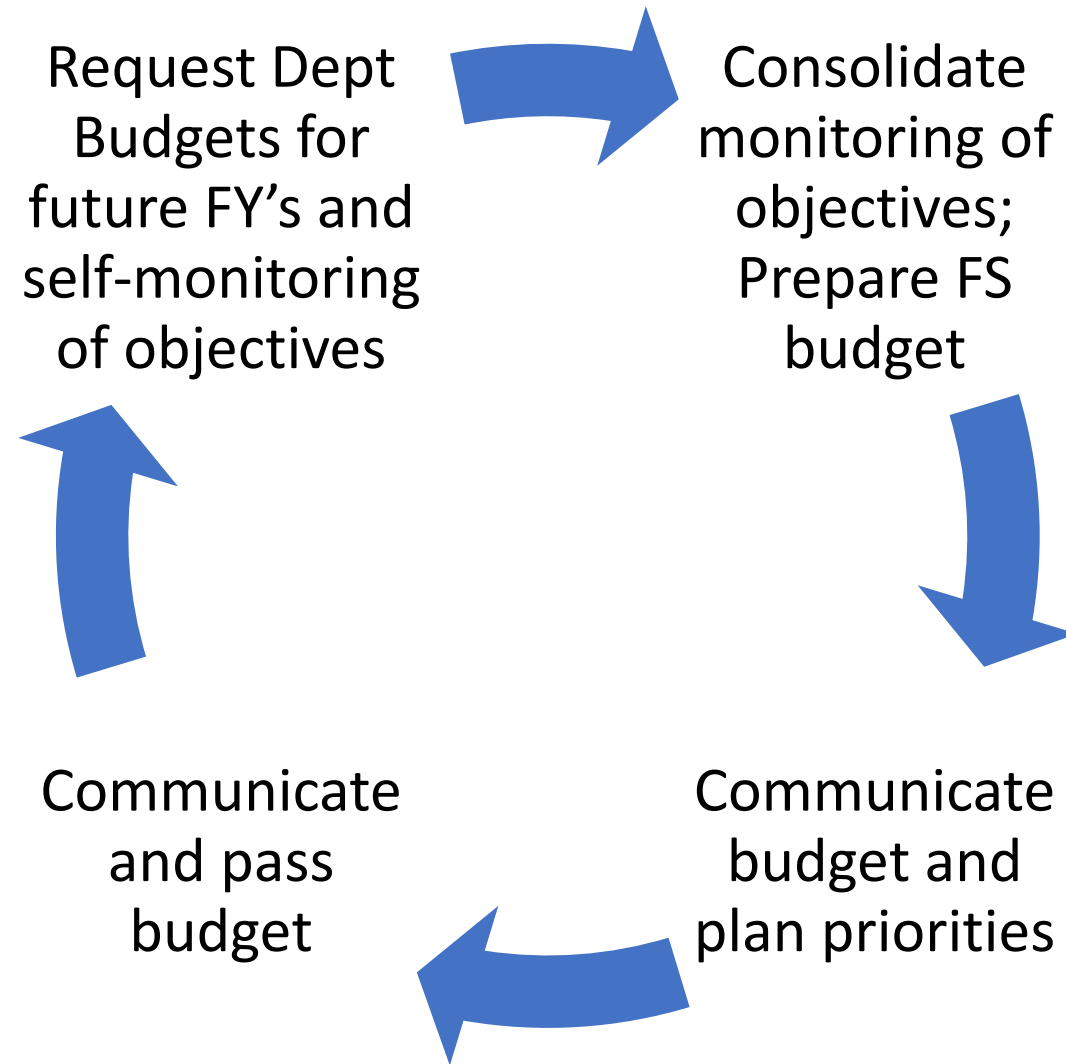
Intro to Proposed Southbury Plan Schedule

- An effective Strategic Plan Process requires a combination of effective methodologies (e.g. SWOT) and a disciplined, periodic (e.g. annual) schedule.
- Disciplined cycle includes major stakeholder's responsibilities:
 - First Selectman
 - Board of Selectmen
 - Strategic Plan Commission
 - Departments and Boards/Commissions

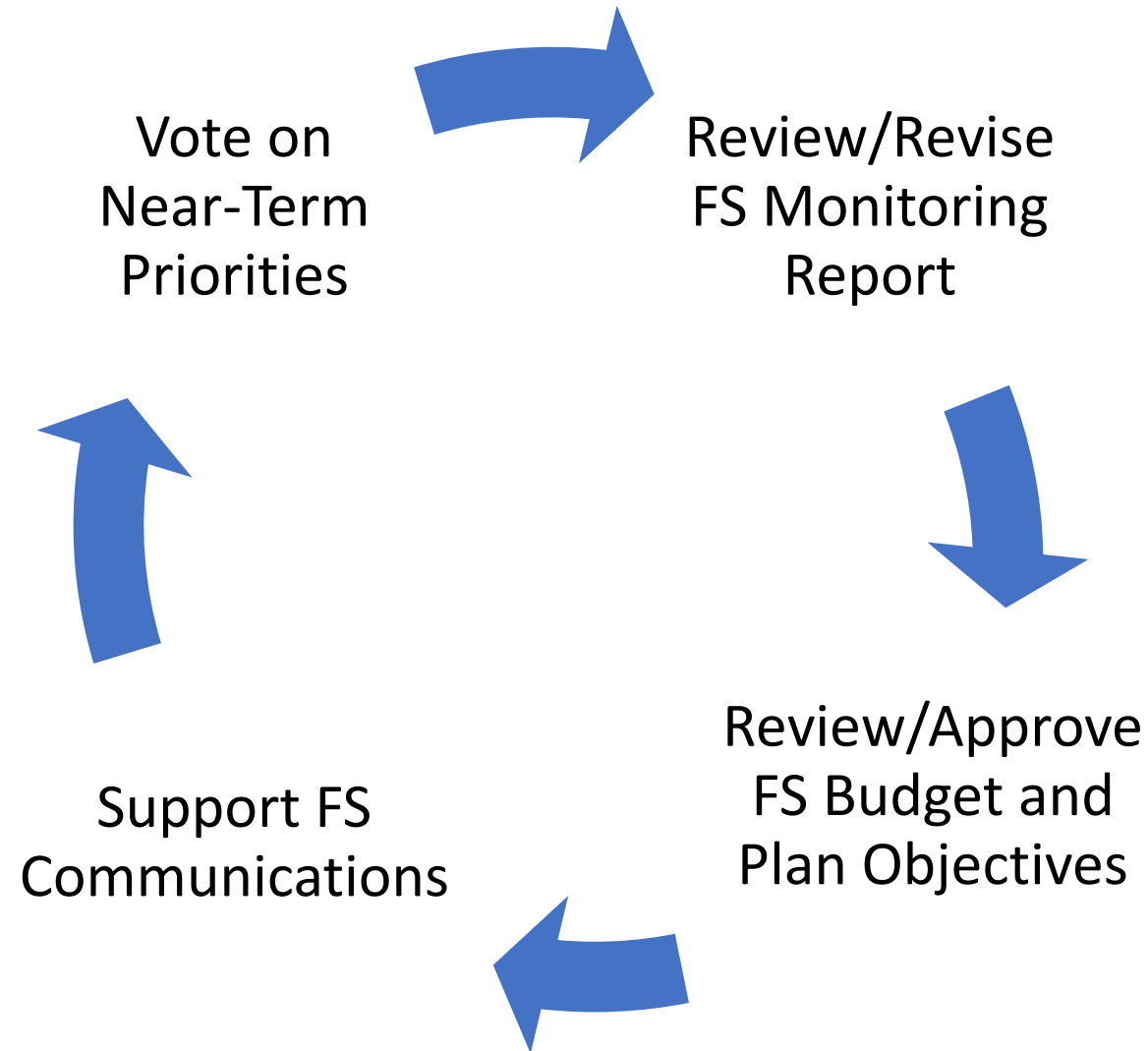
Role of Strategic Plan Commission



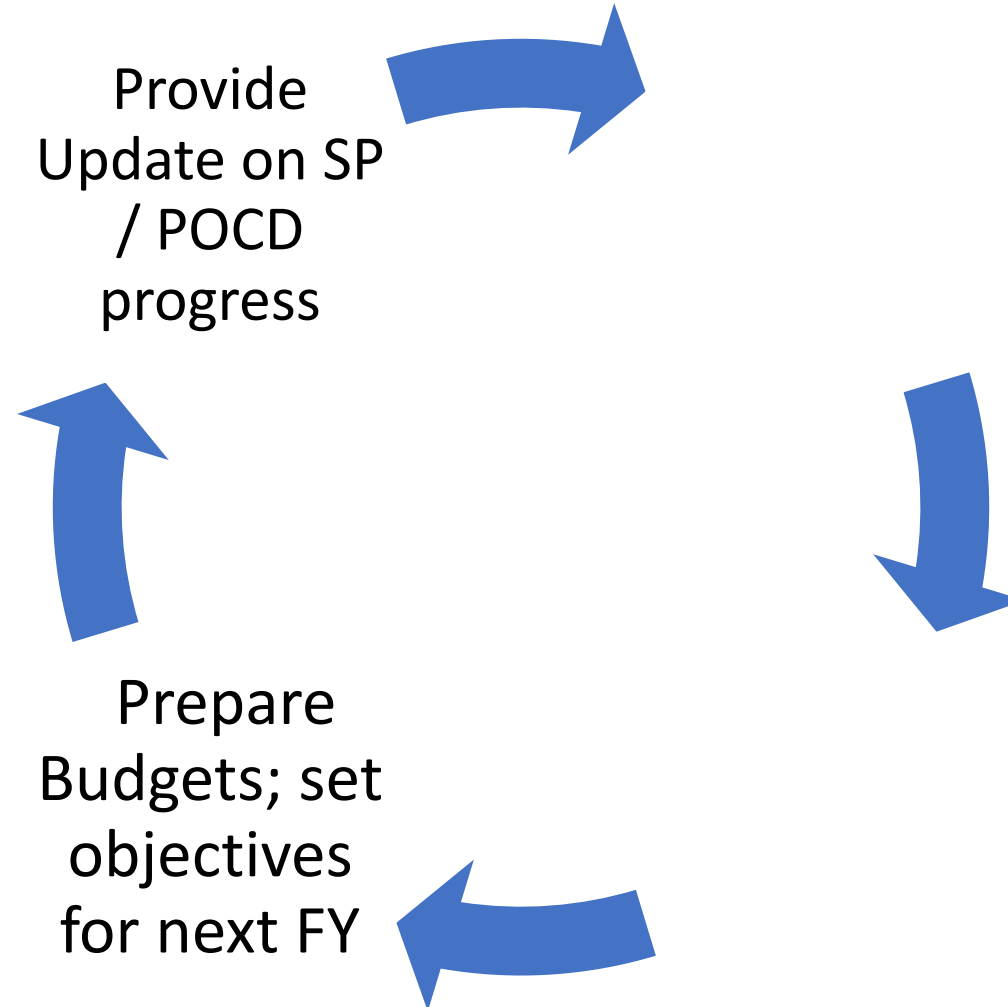
Role of First Selectman



Role of Board of Selectmen



Role of Department Heads, Boards & Commissions



Consolidated Matrix of Stakeholder's Roles by Quarter

Strategic Plan Commission					
Proposed Plan Process – Draft for Discussion Purposes					
	First Quarter	Second Quarter	Third Quarter	Fourth Quarter	Other periods
Current "planning" process (annual budget process with no emphasis on long-term goals/objectives)					
	Preparation and consolidation of departmental and Commission budgets	Review of First Selectman's Budget; Vote by public	Start of new fiscal year	Request for Budgets from Departments and Commissions	Ten year cycle for POCD
Proposed Annual Planning Process					
Strategic Plan Commission	Review progress on SP per input from Dept Heads and Commission Chairs; Report to FS and BoS	Review of SWOT to determine changes in operating environment that might affect SP	Identify gaps and obsolescent portions of Strategic Plan; areas where progress is or is not being made; recommend priorities	Present update/review to SP to Board of Selectman	More detailed department plans e.g. Senior/Social Services
First Selectman	Consolidation of Stewardship of SP and POCD	Communicate budget and plan priorities for coming Fiscal year to public		Issue directive to Department Heads and Commission Chairs to review SP and POCD	
	Budget preparation and consolidation – Departments & Commission			Request for Budgets from Departments & Commissions	
Board of Selectman	Review of FS Stewardship report	Review of FS Budget and Consolidated and Plan Objectives		Vote on near term priorities from Strategic Plan	
Department Heads and Commission Chairs			Provide update on progress towards SP and POCD objectives	Prepare Budgets and set objectives for next fiscal year regarding SP and POCD	
Notes:					
Item missing	Long-term capital budget (10 year) in support of SP				

Thank you for your attention

