TOWN OF MADISON, CONNECTICUT

STRATEGIC PLAN

ADOPTED ON DECEMBER 18, 2023

2023 – 2033
A MESSAGE FROM THE BOARD OF SELECTMEN

The Madison Board of Selectmen is pleased to present the Town’s Ten-Year Strategic Plan to our community. This Strategic Plan will be the cornerstone of all we commit to delivering to the people of Madison in the future: an attractive, sustainable, safe, healthy, and welcoming environment with premier schools, abundant natural and cultural resources, a responsive government, and high-quality public services.

The Vision, Mission, and Values provide the foundation for the plan’s five Key Areas of Focus: Safe & Healthy Community, High Performing Government, Financial & Environmental Sustainability, Thriving Business & Economy, and Modern & Innovative Infrastructure. The team developed the Strategic Goals and Objectives in each Key Area of Focus through an extensive series of public and employee feedback sessions, and incorporated local and national trends. Our strong commitment to protect and support our community underlies every Strategic Objective. These Objectives will guide the work we do to create continuous improvement in Town government, and to preserve what Madison residents value the most.

Through a well-defined implementation plan, the Strategic Plan will be a tool that captures our most important priorities which directs the delivery of appropriate services and development of a comprehensive budget that balances community priorities with the diverse needs of our residents with an emphasis on accountability, sustainability, innovation, and cost efficiency. As a living document, this plan is intended to be flexible, adjusting and changing over the years as necessary to meet community needs. We want to continue to hear from the public what we should be considering for the future.

The process for this plan was unlike any other. We focused on an extensive listening period — gathering feedback in a multitude of ways from elected and appointed officials, community leaders, residents and Town staff. Whether it be attending a meeting or filling out a survey, everyone’s contributions were extremely valuable and made this plan stronger. We also want to convey our special appreciation to the Strategic Plan Advisory Committee, who participated in a very thoughtful, collaborative way.

In short, this Strategic Plan represents the Board of Selectmen’s commitment to deliver a government that reflects the needs and desires of the people to which we serve.

Peggy Lyons
First Selectwoman

Al Goldberg
Selectman

Jennifer Gordon
Selectwoman

Scott Murphy
Selectman

Bruce Wilson
Selectman
ACKNOWLEDGEMENTS

We want to acknowledge the hard work, participation and dedication that went into our strategic plan. Our community was critical to informing the plan and attended focus groups, took surveys, and gave their ideas and opinions to help form the foundation of the plan.

Our Strategic Plan Advisory Committee met multiple times and spent countless hours attending meetings, reviewing language, and giving feedback and recommendations about the plan content and strategies. Our Core Team met weekly with our consultant, SBrand Solutions, to help steer the process. Our amazing work force – who will be responsible for implementing this plan – shared advice and expertise through surveys, meetings, and focused conversations. Thank you to all of you for your love of Madison and your support for our work into the future.
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First settled in 1650 and incorporated in 1826, Madison was once a center for fishing, shipbuilding, farming, and crayon manufacturing. However, over the years the Town evolved into the home of over 18,000 residents working in the New Haven region and enjoying a summer vacation at the shore. From our numerous beaches in the south to our incredible hiking and biking trails in the north, Madison offers a wide range of outdoor recreational amenities to residents and visitors alike. Along with three Town-owned public beaches, we are home to the state’s largest shoreline park, Hammonasset Beach State Park. This public recreation facility draws close to one million visitors every year for swimming, fishing, boating, and camping activities along its two miles of sandy beach on Long Island Sound.

Our beautiful downtown is filled with charming, locally owned shops and a range of restaurants to suit many tastes. Madison also hosts a wide variety of antique fairs, carnivals, and cultural events throughout the year, including our July 4th Concert on the Green, one of the largest Independence Day parades in the state, and numerous road races, marathons, and youth athletic tournaments.
18,113 Current population (US Census)

Moody’s Rating Aaa (strong financial rating)

6 miles of state, local and privately owned beaches

Over 55 miles of trails

91.6% single family homes (American Community Survey 2021)

10,315 acres (44% of total land) of Open Space (2013 POCD)

Key Employers

- VNA Community Healthcare
- Clarity Solutions
- Madison Beach Hotel
- Camp Laurelwood
- Grove School
- Vistalife Innovations
- Madison Public Schools
THE GOVERNMENT OF THE TOWN OF MADISON

The Town of Madison currently operates under the provisions of its Charter, dated November 2022, and the General Statutes of the State of Connecticut. The legislative body is the Town Meeting. The Executive body consists of a Board of Selectmen, a five-member board, with the First Selectman acting as the chief executive officer and town manager. Election to the Board of Selectmen is for a four-year term. A seven-member Board of Finance is responsible for recommending budgets to the public at referendum for approval. Board of Finance members are elected for four-year terms. A nine-member elected Board of Education is responsible for overseeing the operations of the school system and adhering to state statutory requirements regarding public education. The Town has an elected Zoning Board of Appeals and Board of Assessment Appeals.

In addition to elected boards, the Town is also served by over 50 permanent and ad hoc volunteer boards, commissions and committees established through state statute, Town ordinance or by a resolution from the Board of Selectmen. Permanent committee members are appointed by the Board of Selectmen, typically upon recommendation by the local political party town committees. Each of these volunteer boards play an important role in the success of Madison’s Town government and are responsible for important services such as regulatory activities, policy development and project oversight and implementation.

The Town of Madison provides municipal services in the functional areas of Public Safety, Public Works, Land and Building administration, Youth and Family Services, Senior Services, Health and Welfare, Beach and Recreation, and the PreK-12 Public Education System. The Town also provides significant financial support to E.C. Scranton Memorial Library, which serves as the community’s public library.

In regards to public safety, police and emergency dispatch services are provided by the Town of Madison Police Department. Emergency medical services are provided by the Madison Ambulance Association, which receives operational funding support from the Town. Firefighting services are provided by two volunteer fire companies, Madison Hose Company #1 and North Madison Volunteer Fire Company, both of which receive significant funding from the Town for operational and equipment needs.
The Town provides educational opportunity with public schools grades PreK-12. In addition, within Town there are two private schools grades PreK-8, one therapeutic boarding school for grades 7-12, along with nine different daycare programs. Colleges and universities a short distance from Town include Middlesex Community College and Wesleyan University, both in Middletown, approximately 20 miles north of Madison. To the west are Quinnipiac University, Albertus Magnus College, Gateway Community College, Southern Connecticut State University, the University of New Haven, and Yale University, all of which are located in the Greater New Haven area.
**ELECTED BOARDS**

- Board of Assessment Appeals
- Board of Education
- Board of Finance
- Board of Selectmen/First Selectman
- Judge of Probate
- Registrar of Voters
- Zoning Board of Appeals

**TOWN OPERATIONS**

- First Selectman / Chief Elected Official
- Assessor
- Economic Development
- Health Department
- Public Works & Engineering
- Youth & Family Services
- Beach, Recreation & Senior Services
- Emergency Operations
- Human Resources
- Tax Collector
- Non-Government Organizations
- Building Department
- Facilities Department
- Land Use Department
- Technology Department
- Madison Emergency Medical Services
- Communications
- Finance Department
- Police Department
- Town Clerk
- Madison Hose Company No. 1
- North Madison Volunteer Fire Co.
- E.C. Scranton Memorial Library

**APPOINTED BOARDS & COMMISSIONS**

- Academy Advisory Committee*
- Academy Community Center Building Committee*
- Advisory Committee on Community Appearance
- Affordable Housing Committee*
- Bauer Park Advisory Committee
- Beach & Recreation Commission
- Bicycle and Pedestrian Advisory Committee
- Blight Appeals Committee
- Blight Enforcement Committee
- Police Commission
- Capital Improvement Program Committee
- Coastal Resiliency Commission
- Committee for Land Acquisition Strategy
- Conservation Commission
- Economic Development Commission
- Energy & Efficiency Committee
- Emergency Operations Center/Firehouse Expansion Building Committee*
- Employee's Retirement Board
- Ethics Commission
- Facilities Committee*
- Firemen's Benefit Committee
- Flood and Erosion Control Board
- Historic District Commission
- Inland Wetlands and Watercourses Agency
- Land Acquisition Strategy
- Library Expansion Building Committee*
- New Elementary School Building Committee*
- Old Elm Street Historic District Study Committee*
- Police Retirement Board
- Planning & Zoning Commission
- Rockland Preserve Advisory Committee
- Safety Committee
- Salt Meadow Park Governance Committee*
- School Building HVAC Committee*
- Senior Citizen Commission
- Shellfish Commission
- Strategic Plan Committee*
- Solid Waste Disposal Committee
- Veterans Advisory Committee
- Water Pollution Control Authority
- Youth and Family Services Board

* Ad-hoc
Wappinger, Hammonasset, and Quinnipiac people lived in the area until the Town was settled by British colonists in 1641 as part of Guilford. The Town was originally known as East Guilford. It was organized as a separate community in 1707 and in 1826, it was incorporated as a separate town. The Town was the one hundred twenty-eighth town established in Connecticut.

The town was named for James Madison, fourth president of the United States (1809-1817). Largely agricultural with some industries such as shipbuilding, charcoal production, and milling throughout its first 250 years, Madison became mostly a residential town in the late nineteenth century. It has enjoyed some renown as a resort community for seasonal cottagers and tourists, a characteristic that continues to this day.

THE PROCESS OF STRATEGIC PLANNING

PHASE 1
Design and launch the project based on a customized process;

PHASE 2
Research, review and analyze documents including budget, master plans, current strategic plan, regional plans, documents, and other policies;

PHASE 3
Outreach to and engage with your leadership, volunteer boards and commissions, staff, specific partners and stakeholders, and community;

PHASE 4
Facilitate strategic planning sessions and implementation meetings; and

PHASE 5
Create your strategic planning and implementation documents with actionable, realistic, and measurable long-term results.
COMMUNITY INSIGHTS

This is a snapshot of the engagement and outreach process for the Town of Madison Strategic Plan. The feedback came from four main outreach areas and each of these specific outreach areas has a detailed report. Please see Appendix A: Engagement and Outreach report at the end of this document for more information.

The key themes from community outreach and engagement included:

- DIVERSITY OF HOUSING OPPORTUNITIES
- CHARACTER AND HISTORY OF THE COMMUNITY
- THOUGHTFUL GROWTH MANAGEMENT
- HIGH PERFORMING GOVERNMENT
- MULTI MODAL TRANSPORTATION
- VIBRANT ECONOMIC HEALTH
- PRESERVATION OF NATURAL, GREEN AND OPEN SPACES
- QUALITY EDUCATIONAL OPPORTUNITIES

<table>
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<th>674 community survey responses</th>
<th>Visioning session attend by over 100 people</th>
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<td>43 staff survey responses</td>
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<td>Over 150 people attended five focus groups held throughout the community.</td>
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<td>30 confidential interviews</td>
<td>24 weekly meetings to ensure the plan was on track</td>
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<td>5 Strategic Plan Advisory Committee Meetings</td>
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Board Meetings and Workshops to discuss the plan and the process
Community Vision
The Town of Madison is a friendly and thriving shoreline community with small town values, a celebrated history, natural beauty, and a high quality of life.

Town Mission
Our mission is to ensure an attractive, sustainable, safe, healthy, and welcoming environment with premier schools, abundant natural and cultural resources, a responsive government, and high-quality public services.

Values
- **SUSTAINABLE**
  We focus on long term success through making decisions that are financially, economically, and environmentally sustainable.

- **TRANSPARENT**
  We communicate and make decisions in ways that are easy to view and provided on multiple platforms so that our community can understand the "why" behind our processes and policies.

- **PROFESSIONAL**
  We are organized to provide the most efficient and effective level of service possible with professional and dedicated staff.

- **INCLUSIVE**
  We provide our services in a way that is welcoming and accessible and recognizes the contributions from across our community.

Key Focus Areas
- **FINANCIAL AND ENVIRONMENTAL SUSTAINABILITY**
- **HIGH PERFORMING GOVERNMENT**
- **MODERN AND INNOVATIVE INFRASTRUCTURE**
- **SAFE AND HEALTHY COMMUNITY**
- **THRIVING BUSINESS AND ECONOMY**

Charting a Course for Madison’s Future
Madison preserves and protects our natural and built environment through thoughtful and strategic decisions about land use, housing, climate change and financial stewardship.

**HIGH PERFORMING GOVERNMENT**
Madison operates a town government that is effective, efficient, transparent, and professional; has a strong investment in education and our workforce, and delivers services based on diversity and inclusion.

**MODERN AND INNOVATIVE INFRASTRUCTURE**
Madison invests in sustainable public infrastructure to support educational, transportation, economic, and environmental needs.

**SAFE AND HEALTHY COMMUNITY**
Madison is a resilient, connected, and safe community with a focus on health and wellness that creates a flourishing natural and built environment.

**THRIVING BUSINESS AND ECONOMY**
Madison draws, retains, and invests in strong local businesses that serve the needs of the community and attract visitors to the town.
Madison preserves and protects our natural and built environment through thoughtful and strategic decisions about land use, housing, climate change and financial stewardship.

**Outcomes**

- Housing options that meet the needs of the future community
- Fiscally sound town government
- Proactive planning for resiliency in climate change
- Preservation of natural resources and open space
- Multi-generational community

**Strategic Goals and SMART Objectives**

**Goal 1: Create more housing options within the community.**
- Objective 1.1: Comprehensive review of all zoning regulations.
- Objective 1.2: Assess/evaluate amendments to zoning regulations to allow for additional housing variety.
- Objective 1.3: Implement the recommendations in the Board of Selectmen approved Affordable Housing Plan.

**Goal 2: Ensure stable financial support of Madison’s vision.**
- Objective 2.1: Align budgets to strategic goals.
- Objective 2.2: Map line items to strategic goals.
- Objective 2.3: Explore regionalization opportunities to create economies of scale and reduce costs.

**Goal 3: Preserve and protect our natural and built assets.**
- Objective 3.1: Preserve, save and improve resiliency of our coastal assets.
- Objective 3.2: Preserve open space, parks, scenic roads, trails and farms.
- Objective 3.3: Preserve open space, parks and trails as an important part of the community.
- Objective 3.4: Encourage preservation of town historic structures and neighborhoods.

**Goal 4: Create a balanced tax base.**
- Objective 4.1: Attract a wider variety of businesses and business locations.
Madison operates a town government that is effective, efficient, transparent, and professional; has a strong investment in education and our workforce, and delivers services based on diversity and inclusion.

Outcomes

✓ Well informed community
✓ Excellent educational systems
✓ Efficient and effective organizational structure
✓ Community trust in the actions of the government

Strategic Goals and SMART Objectives

Goal 1: Ensure a well informed and participatory community.
Objective 1.1: Develop a marketing strategy for communication.
Objective 1.2: Make a connection between taxes and the value for the cost.
Objective 1.3: Execute the strategic plan.
Objective 1.4: Ensure representation of diverse groups in all areas of government.
Objective 1.5: Promote ownership and involvement within the community.
Objective 1.6: Align volunteer board and commission activities with the strategic plan.

Goal 2: Attract and retain a high performing workforce.
Objective 2.1: Staff is known for professionalism.
Objective 2.1: Staff has needed skills and expertise.
Objective 2.3: Establish consistency in service delivery.

Goal 3: Support educational excellence in our public school system.
Objective 3.1: Adopt a CIP that addresses school needs.
Objective 3.2: Adopt an annual budget to address school needs.

Goal 4: Modernize governance structure.
Objective 4.1: Ensure government is aligned with best practices.
Objective 4.2: Restructure committees for alignment with strategic plan and resources.
Objective 4.3: Actively encourage a diverse and inclusive community that feels open to all.
Objective 4.4: Encourage regional sharing of services with other communities.
Objective 4.5: Establish risk assessment process to prioritize spending.
MODERN AND INNOVATIVE INFRASTRUCTURE

Madison invests in sustainable public infrastructure to support educational, transportation, business, and environmental needs.

Outcomes

✓ Investment into safe and modern facilities
✓ Multi modal and public transportation options that connect the community
✓ Sustainable infrastructure to proactively address future needs

Strategic Goals and SMART Objectives

Goal 1: Provide improved town and school facilities.
Objective 1.1: ADA accessibility for all town facilities.
Objective 1.2: Ensure modern schools that have technology investments.
Objective 1.3: Fund appropriate storage for public works.
Objective 1.4: Provide workspace for town operations.

Goal 2: Build reliable utility connectivity through networks and infrastructure.
Objective 2.1: Attract new telecommunication and broad band providers to improve service.
Objective 2.2: Improve the electrical service to reduce outages throughout the community.

Goal 3: Improve transit for all modes of transportation.
Objective 3.1: Partner with the state for transportation.
Objective 3.2: Establish bus, microtransit, bicycle and pedestrian routes to and from North Madison and Route 1.
Objective 3.3: Connect north of train-to-train station.
Objective 3.4: Improve bicycle and pedestrian options for connectivity.
SAFE AND HEALTHY COMMUNITY

Madison is a resilient, connected, and safe community with a focus on health and wellness that creates a flourishing natural and built environment.

Outcomes

✓ Accessible health care
✓ Accessible outdoor enjoyment activities
✓ Community feels safe
✓ Comprehensive emergency response systems
✓ Strong community engagement and participation

Strategic Goals and SMART Objectives

Goal 1: Foster a connected community through increased engagement.
Objective 1.1: Generate relationships and partnerships within the community.

Goal 2: Strong perception of safety from everyone in the community.
Objective 2.1: Invest in public safety equipment and staffing.
Objective 2.2: Safer access for pedestrians and bicyclists town wide.

Goal 3: Increase access to affordable physical and mental health care.
Objective 3.1: Increase community awareness of public health opportunities and benefits.
Objective 3.2: Identify priority gaps in access.
Objective 3.3: Support transportation choices to medical facilities.
Madison attracts, retains, and invests in strong local businesses that serve the needs of the community and attract visitors to the town.

Outcomes

- Thriving business districts supported by the community
- Safe and appropriate infrastructure for all businesses
- Increase in visitor revenue
- New businesses that meet the needs of the community

Strategic Goals and SMART Objectives

Goal 1: Ensure that business development and growth meets the needs and reflects the values of the community.
Objective 1.1: Make Madison a model for values driven business development and support.
Objective 1.2: Build infrastructure to support business growth.
Objective 1.3: Address needs of home-based businesses.
Objective 1.4: Fund sufficient, safe, and healthy wastewater management.

Goal 2: Ensure a thriving business community.
Objective 2.1: Identify preferred locations for business districts and promote with policies and regulations.
Objective 2.2: Maximize shop local and local spending by meeting the needs of the community.
Objective 2.3: Interact with local businesses to ensure a business-friendly environment.

Goal 3: Create a variety of quality cultural and recreational opportunities for all.
Objective 3.1: Create tax incentives to attract recreation centered businesses.
Objective 3.2: Establish a policy for public and private partnerships.

Goal 4: Foster a thriving tourism industry.
Objective 4.1: Develop agritourism as an attraction.
Objective 4.2: Market, support and leverage town, recreational, historical, agricultural and cultural assets to create opportunities for tourism.
Objective 4.3: Create events that will attract visitors.
Objective 4.4: Encourage lodging for tourists within the town.
Critical Success Factors are the approaches, tools or techniques needed to accomplish the outcomes, factored into the everyday work of the Town. More than one factor may be used concurrently, but too many different factors all at once could be confusing. These are the Critical Success Factors (CSF’s) discussed during the development of this strategic plan – they were mentioned during engagement and outreach, part of other foundational documents, or brought up during the retreat.
STRATEGIC ADVANTAGES AND CHALLENGES

The community has identified a number of advantages and challenges that could impact the implementation of the Strategic Goals described in this document. Advantages are those strengths and attributes that will enable the Town to achieve objectives; challenges reflect issues that could impair the ability to achieve objectives. Each of the challenges described below is reflected in one or more Strategic Goals.

### ADVANTAGES
- A supportive, engaged, and thoughtful community
- Strong support for sustainable environmental actions
- Engaged and committed employees with a strong focus on customer service
- Safe and proactive community policing and fire services
- Collaborative local partners
- Strong revenue and balance sheet
- Educated, adaptable workforce
- Favorable economic profile
- Desirable place to live
- Exceptional schools

### CHALLENGES AND RISKS
- Housing that is affordable and available
- Impact of climate change on coastal infrastructure and amenities
- Transportation issues such as the need for multi-modal paths
- Balancing competing community desires with available resources
- Adding more commercial development consistent with the community vision of maintaining a small-town feel
- Aging infrastructure and growth-related needs, especially downtown
- Planning for future technology needs
- Balancing the diverse perspectives within the community
- Aging population which will change community needs
- Implementation risk for strategic plan
- Attracting and retaining a qualified workforce for the Town and local businesses
- Cost of climate change on capital plans and town operations
- Attracting and retaining a diverse and multi-generational community
- Rising costs for healthcare, public safety, and other essential services
A strategic plan should never collect dust or sit on a shelf – it is a living document. Our plan will need to be adjusted based on community feedback, changes in the economy, or unforeseen circumstances and is designed to be flexible and adaptable. The Town will use guidance and vision from this strategic plan to make decisions about policies, programs, and services.

Through various paths such as the budget and daily activities, this plan will come to life and be continuously updated and improved. A key part of that will be the implementation plan as well as a regular reporting process to the Town Board. As we move into the future, we look forward to achieving our vision of a friendly and thriving shoreline community with small town values, a celebrated history, natural beauty, and a high quality of life.
The strategic plan is a living document which will be fully integrated into the operations, tactics, and daily work of the Town. As a part of that integration, updating the plan on a regular basis is critically important. Below is a graphic that shows the most important steps in creating a culture of strategic planning in Madison. From the Town Board to the staff and including the community, the strategic plan can be a part of the daily work through the Implementation Plan, the budget, master plans and department specific strategic plans that tie tactics back to strategy.
Is this a specific action called out in the Plan?

**YES**

This item's link to the Plan is **strong and overt**

- **Fund and implement within the budget process**

**NO**

Is this a timely opportunity?

- **"Yes"** - and undertaking this item will **support** our ability to carry out prior commitments under the Strategic Plan or our critical services.
  - **Discuss budget, timing trade-off considerations and implications before proceeding**

- **"Yes, but"** - undertaking this item will **detract** from our ability to carry out prior commitments under the Strategic Plan or our critical services.
  - **Discuss budget, timing trade-off considerations and implications before proceeding**

- **"No"** - undertaking this item will **detract** from our ability to carry out prior Commitments under the Strategic Plan or our critical services.
  - **Do not pursue**

- But, there is a **weak** link to an Action or there is a **correlation** to an Objective
  - **Discuss budget, timing trade-off considerations and implications before proceeding**
DEFINITIONS

**Strategic Plan**
A strategic plan is a working, living document that reflects the policy direction from the elected body, sets the Vision for the organization, and drives and informs an Implementation Plan which the staff will create to ensure progress and measurable results. The strategic plan will be updated regularly by the team and reported quarterly by the city staff. The key components of a plan for the elected body to discuss include:

**Mission**
A Mission Statement is a practical, tangible tool you can use to make decisions about priorities, actions, and responsibilities. A mission describes the purpose of your organization - the reason why it exists. It converts your broad dreams and visions into more specific, action-oriented terms. A mission can explain your goals in a clear and easy to understand manner. It creates focus for your work and accountability to stay on track. Because a Mission Statement is the purpose of the organization (why the organization exists) there should not be much change over the years.

**Vision**
A vision statement is your dream of the future. It is a clear, aspirational statement that inspires long term change. The vision leads your organization - it guides your Strategic Goals, Outcomes, Adaptive Strategies and Work Plans.

**Key Focus Areas**
Key Focus Areas are the most important issues, opportunities or trends facing your organization over the next 5 – 10 years. They are usually broad areas of service that will have the most positive impact on your community. Traditionally, they don’t change over the course of several years.
Outcomes (for each Key Focus Area)
The Outcomes are bigger picture and longer term – what is the organization trying to achieve by focusing on the Key Focus Area? What is the end result if we are successful? The Outcomes are usually explained without specific numbers or data because they are explained in terms of what the organization wants or needs to achieve. An outcome is the change/difference that happens as a result of implementing your strategic plan.

Strategic Goals
Strategic Goals are the larger, broader, often intangible concepts that will need to be accomplished to address the Priorities and be successful in the coming years. Strategic Goals are typically longer term (3 – 5 years) in nature and have milestones along the way to measure success. Goals are big, broad statements that, when accomplished, significantly move the needle on your Key Focus Areas. If you are successful at achieving your Goals, you will achieve your Key Focus Areas and realize your Vision.

SMART Objectives
SMART Objectives are milestones along the road to achieving your bigger picture Strategic Goals. They are accomplishments that can be defined in quantifiable and measurable terms. SMART means Specific, Measurable, Actionable, Realistic and Timebound. Objectives are specific, actionable targets that need to be achieved within a smaller time frame to accomplish your Strategic Goals. SMART Objectives typically take between 1 – 3 years to complete.

Action Steps
Action Steps are very specific tasks that need to be completed to achieve the SMART Objectives and Strategic Goals. They are very short term (no longer than 90 – 180 days to complete).
**Critical Success Factors**
Critical success factors are methods or overarching concepts used to accomplish a goal. They can be thought of as a broader tool or technique that will allow your organization to have success more quickly or efficiently. More than one factor may be used concurrently, but too many different factors all at once would probably be confusing. As a result, we recommend that a strategic plan identify just a few (4 - 6) CSF’s to work on at any one time. Think of them as the high-level tools or techniques needed to accomplish the outcomes, factored into the everyday work of the town.

**Key Performance Indicators**
Key Performance Indicators are measurable values that demonstrate how effectively the organization is achieving Strategic Goals and Outcomes. KPIs are used to evaluate success at reaching targets metrics in budget, strategic planning, master plans, and more. A great KPI measures not just numbers – it measures what is most important. A short example: if your desired Outcome is to increase community engagement, don’t measure the number of people that attend meetings. Instead, measure how engaged they are.

**Implementation Plan**
The Implementation Plan is a spreadsheet or tracking document for the strategic plan that is based on the Key Focus Areas, Strategic Goals and Outcomes. The Implementation Plan tracks several key issues: the SMART Objectives to accomplish the Goal, the Action Steps that will accomplish the SMART Objective, and the KPI’s that will measure success for the Outcomes. Included will be who is responsible, specific timelines, and any resources needed to accomplish the work.
APPENDIX A: ENGAGEMENT AND OUTREACH RESULTS

This is a summary report of the engagement and outreach process for the Town of Madison Strategic Plan. The feedback came in four main outreach areas and each of these specific outreach areas has a separate report which is accessible through the link:

1) **Surveys:** Two surveys were conducted, one for internal staff and one for the community.
2) **Focus Groups:** Focus Groups were held for the community and for staff.
3) **Interviews:** Thirty confidential interviews were conducted with internal staff, external partners, commission volunteers and community members.
4) **Community Visioning Session:** This session was open to the community and focused on the vision for the future.

All of the data and information gathered was reviewed and used to create this overall compilation of the most common themes. While this is perceptive data, there were thousands of individual data points which can be used to inform the strategic plan conversation and the creation of Key Focus Areas, Strategic Goals, Critical Success Factors, and Outcomes.

**Strategic Plan Process**
The methodology and process for the update to the Strategic Plan included a kickoff launch and five main phases:

- **Phase 1:** Design and launch the project based on a customized process;
- **Phase 2:** Research, review and analyze documents including budget, master plans, current strategic plan, regional plans, documents, and other policies;
- **Phase 3:** Outreach to and engage with your leadership, volunteer boards and commissions, staff, specific partners and stakeholders, and community;
- **Phase 4:** Facilitate strategic planning sessions and implementation meetings; and
- **Phase 5:** Create your strategic planning and implementation documents with actionable, realistic, and measurable long-term results.

This process was directly informed by the community and by prior strategic planning work, the Plan of Conservation Development, and other documents.
ENGAGEMENT AND OUTREACH SUMMARY

Key Themes
The Key Themes evident in all of the engagement and outreach methods are as follows. While we have included a description, please note that the topics may not have the same definitions for everyone that participated in the process. Key Themes are often interrelated and support one another, adding to success in all areas when one area has success. These are in alphabetical order, as there is no priority order.

Diversity of Housing Opportunities
As elsewhere in the country, housing opportunities are a shared concern for the community. Affordability, location, and types of housing were all comments as well as the shortage of housing stock. Housing for seniors who want to downsize but stay in the community, housing for families returning to Madison (where they grew up), housing for the workforce, and housing price points are all part of this theme.

Character of the Community
Preserving the small town feel and character of the community was an important theme shared by the participants. Green space, beach, open space, trees, trails, and parks all contribute to that heritage and character. Preservation of historic buildings and artifacts was a strategy mentioned in this context of maintaining that character as well.

Thoughtful Growth Management
Growth was an often-discussed concept in our outreach, and the need to project, plan for and manage that growth thoughtfully is the common theme. This would include addressing land use planning and zoning policies; determining wastewater infrastructure; and Town programs, services, and facilities.

High Performing Government
This common theme would include elements of financial sustainability, investments in technology, well maintained infrastructure, intergovernmental partnerships, and a dedicated professional workforce. Strong communication combined with innovative, effective, efficient, and transparent services are components of a high performing government. A consistent sub theme was dissatisfaction with divisive political management and decision making.
ENGAGEMENT AND OUTREACH SUMMARY

Multi Modal Transportation
This theme would include not only roadways and train transportation but also walking paths and bike lanes. Public transportation and accessibility are key components in this theme.

Vibrant Economic Health
Improving the tax base; business attraction, expansion, and retention; increasing light industry; investing in broadband solutions; creating and supporting jobs, and a diversity of economic prospects are all connected in this theme. Expanding commercial opportunities in other areas of the community outside of downtown was a common conversation.

Preservation of Natural, Green and Open Spaces
Another common theme was the strong desire to protect and preserve the natural habitat, open spaces, beaches, green spaces, parks, and trails throughout the community. Not only do these contribute to the overall quality of life and feeling of the community, but they may also be important considerations as climate change continues to have affects.

Quality Educational Opportunities
Many participants expressed that they moved to Madison specifically for the quality of education.

Full copies of all of these reports are available online at www.madisonct.org/strategicplan
For more information about your Strategic Plan please visit www.madisonct.org/strategic plan or contact:

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