



BOARD OF TRUSTEES
August 6, 2024
7:00 PM

Leeper Center, 3800 Wilson Avenue, Wellington, CO

Work Session Agenda

The Zoom information below is for online viewing and listening only.

Please click the link below to join the webinar:

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Webinar ID: 848 7116 2393

A. ITEMS

1. Strategic Plan Draft

The Town of Wellington will make reasonable accommodations for access to Town services, programs, and activities and special communication arrangements. Individuals needing special accommodation may request assistance by contacting at Town Hall or at 970-568-3380 ext. 110 at least 24 hours in advance.

Board of Trustees Meeting

Date: August 6, 2024
Subject: Strategic Plan Draft

- **Presentation: Patti Garcia, Town Administrator and Otowi Group, LLC**

BACKGROUND / DISCUSSION

In July 2024, the Board of Trustees embarked on a comprehensive board development and strategic planning initiative. This effort has been facilitated by The Otowi Group, leading to the creation of the attached draft document for Trustee review.

The strategic planning process commenced in March 2024, beginning with a community town hall meeting and online participation from over 116 residents. To gain a deeper understanding of Wellington and its future aspirations, The Otowi Group conducted interviews with Trustees and members of the senior staff. The feedback from the community, combined with insights from Trustees and staff collected during the meetings in July has been synthesized into the draft document.

This work session will provide an opportunity for the Trustees to:

- Consider the Vision Statement
- Review and agree on the strategic areas and high level goals for the 2025-2029 Strategic Plan

The strategic plan is set to be considered by the Board of Trustees for adoption at the August 13, 2024 meeting.

STAFF RECOMMENDATION

For Board discussion.

ATTACHMENTS

1. Otowi Group July 26 2024 DRAFT Wellington strategic plan report

Town of Wellington Strategic Plan Report 2025-2029

July 2024



In collaboration with



School of Public Affairs
UNIVERSITY OF COLORADO **DENVER**

Consultants

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Overview

This report provides 1) an overview of the strategic planning process undertaken by the Town of Wellington with support from Otowi Group and 2) proposed components of the plan. Each section includes information about the approach and current status, next steps, and recommendations from Otowi Group.

Otowi Group intends this report to help the Town of Wellington Board of Trustees take the next steps in preparing to produce a final strategic plan document.

Vision

Approach And Current Status

During the in-person session review of the current vision, it became clear that the trustees were interested in reviewing and refreshing the vision to ensure it was emblematic of the current direction and approach of the trustees and Town staff. The entire group discussed the current vision, brainstormed potential rewrites, and then worked in small, trustee-led groups to propose a variety of options. After the in-person session, two trustees spent additional time with Otowi Group to refine the vision. The two proposed versions are:

OPTION A

Welcome to Wellington, where deep-rooted values and a rich heritage unite to forge paths that honor our past, ignite a legacy of unity, and create a welcoming community for all.

OPTION B

Welcome to Wellington, where deep-rooted family values and a rich heritage unite to forge paths that honor our past, ignite a legacy of unity, and create a welcoming community for all, brimming with tightly knit connections ringing through our storied streets.

Next Steps And Recommendations

Trustees should discuss and vote on the final wording. Town communications staff may wish to review the vision for brand standard alignment.

Otowi Group recommends that Town staff leadership discuss with the full staff the process and output of the new vision. After the trustees vote on the final version, town staff leaders should take inventory of the places in which the current vision is displayed (signs, websites, forms, etc.) and prepare a plan to replace the vision.

Mission

Approach And Current Status

The group reviewed and discussed the current mission. They decided to keep the current mission without any edits.

Provide outstanding municipal services for our community of today and tomorrow.

Next Steps And Recommendations

n/a

Guiding Principles

Approach And Current Status

During the early stages of the strategic planning process, trustees developed the principles they will use as they make decisions about priorities and implementation of the plan. These principles were built from past Wellington strategic plans, core values of trustees and staff leaders, and discussions and preference voting during the planning process. Otowi Group refined the descriptions of the guiding principles.

Community-centered – Providing a safe space for all community members to share their perspectives, actively seeking underrepresented or missing voices to help inform decisions, and being intentional about seeking participation and ideas to move to action and achieve goals

Relationships – Being a collaborative partner through mutual understanding, communication, honesty, and respect

Fiscal responsibility – Strictly complying with municipal financial standards and ensuring stable and predictable resources for sustainable municipal services

Accountability – Creating effective feedback loops about achieving goals by being goal-driven and action-oriented, making well-informed decisions, and communicating clearly and fully

Next Steps And Recommendations

The next step on the guiding principles is for Wellington communications staff to review for brand alignment and standards (including grammar and language) and for the trustees to review and discuss. Otowi Group recommends that the trustees adopt the guiding principles through a formal resolution.

Strategic Directions

Approach And Current Status

Based on past plans and interviews with staff leaders and trustees, Otowi Group proposed four strategic areas within which goals and tactics could be built. The Otowi team intentionally used the wording “strategic areas” to remain neutral and non-specific about the categories during the process. During the strategic planning session, staff leaders and trustees brainstormed and discussed potential approaches, goals, and tactics within each strategic area. These approaches were categorized into high-level goal areas within each strategic area. The group used a few lenses to assess and better understand the potential goal areas, including strategy screens, level of effort and level of impact, and overall priority preferences.

Grow responsibly

- Proactively maintain and improve utilities, streets, and built environment
- Improve housing diversity
- Advance cohesive and holistic new developments
- Reinforce and align plans for corridors and jurisdiction boundaries
- Explore financing options for development

Cultivate and nurture community spaces

- Align needs and vision for community spaces
- Explore creating a community center
- Retain, revitalize, and invest in meeting and gathering spaces
- Increase revenues for town facilities

Foster economic vibrancy

- Retain and expand current local businesses
- Recruit new businesses
- Identify funding opportunities for economic development
- Align and develop visions

Ensure strong town operations

- Communicate strategically to community audiences
- Invest in, retain, and hire skilled staff
- Cultivate effective staff and trustee interactions
- Ensure safety and security, including emergency response
- Improve physical spaces and systems for staff efficiency and collaboration
- Leverage and expand external relationships

Next Steps And Recommendations

Review the strategic directions with staff leaders to discuss connections to existing plans and draft measurable goal statements, action steps, responsibilities, roles, and timelines.

Plan Visual - DRAFT

This visual is an example and optional. The final visual is dependent upon the approval of vision, principles, and strategic directions. The Town's communications team may wish to provide input or design it themselves.



Methods

.The process of developing this strategic plan report included several initial discussions with the Town Manager and Deputy Town Manager to identify goals and opportunities. Multiple documents and plans from the Town of Wellington were referenced to develop the strategic plan (Table 1), followed by activities to directly engage residents, trustees, and staff in strategy development (Table 2).

Table 1: Documents referenced throughout the strategic planning process

Document	Link
Wellington Comprehensive Plan	https://wellingtoncolorado.gov/DocumentCenter/View/3492/Wellington-2021-Comprehensive-Plan_Adopted-Aug-22021
Fiscal Year 2024 Adopted Budget	https://wellingtoncolorado.gov/DocumentCenter/View/4413/2024-Adopted-Budget?bidId=
March 2024 Strategic Plan Virtual Results	
2023 National Community Survey	https://www.wellingtoncolorado.gov/DocumentCenter/View/4254/Wellington-National-Community-Survey-Results-2023
Downtown Wellington Strategic Plan 2023	https://wellingtonmainstreet.org/wp-content/uploads/2024/02/WCMSP-Strategic-Plan-Public.pdf
Wellington, Colorado Market Analysis & Opportunity Assessment, February 2019	https://www.wellingtoncolorado.gov/DocumentCenter/View/4500/2019-Market-Leakage-Analysis
Town of Wellington 2018 Municipal Water Efficiency Plan	https://www.wellingtoncolorado.gov/DocumentCenter/View/2256/Municipal-Water-Efficiency-Plan_-Final-
Town of Wellington Wastewater Treatment Masterplan July 13, 2021	https://wellingtoncolorado.gov/DocumentCenter/View/3440/Wellington-Wastewater-Treatment-Plant-Masterplan
Town of Wellington Collection System Masterplan July 27, 2021	https://wellingtoncolorado.gov/DocumentCenter/View/3451/Wellington-Collection-System-Masterplan

Town of Wellington Fiscal Year 2024 Budget and Capital Improvement Plan	https://wellingtoncolorado.gov/DocumentCenter/View/4413/2024-Adopted-Budget
Town of Wellington Parks and Trails Master Plan 2015	https://www.wellingtoncolorado.gov/DocumentCenter/View/113/2015-Parks-and-Trails-Master-Plan-Update-PDF

Table 2: Resident, trustee, and staff engagement

* Preceded contract with The Otowi Group

Timeframe	Activity
Ongoing	* Daily interaction: Trustees and staff live and work in the community, speaking with residents every day.
April-May 2023	* Resident survey: A representative sample of 502 residents of the Town of Wellington participated in The National Community Survey by the National Research Center and Polco.
March 2024	* Community town hall event: The Town of Wellington held an interactive evening at the Leeper Center in which community members shared their vision and priorities through facilitated small group discussions. 15 people attended in person and 101 participated online.
May-June 2024	Interviews: Otowi Group interviewed trustees and senior staff to ask about the Town of Wellington's strengths, opportunities, and challenges and their vision for the future.
July 2024	Strategy sessions: Trustees and senior staff crafted a vision for the future of Wellington. They updated the mission and vision and chose guiding principles and strategic directions.
July 2024	Plan writing: Otowi Group compiled the priorities from the strategy sessions into a draft document for the trustees.
August 2024	Adoption: Trustees will discuss the draft at a public meeting

August 2024	Implementation: Staff will develop work plans, budgets, and dashboards.
2025 - 2029	Monitoring and reporting: • Public dashboard • Monthly or quarterly updates at Board of Trustee meetings • Annual retreat to review, refresh, and recommit to the plan

Next Steps And Recommendations

After the trustees review and approve the elements of this document, Otowi Group will create a final draft document that does not include the process and next steps narrative.

Implementing, monitoring, and updating the plan

After the Board of Trustees adopts the plan, Wellington staff will convene to identify the tactics, timeframes, responsible person(s), potential metrics, and budgets. Staff will also identify and create any desired templates for tracking progress over time.

Otowi Group suggests identifying champions for each strategic direction who will be responsible for monitoring progress and bringing any challenges to the full group.

Staff will review progress and provide updates to the Board of Trustees on a quarterly basis. The implementation leadership team will also discuss opportunities and challenges and make revisions to the work plan as needed.

Next Steps And Recommendations

Otowi Group recommends an annual retreat to review, refresh, and recommit to the plan.