

# ***Town of Winchester***

Strategic Plan – March, 2016

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Town of  
*Winchester*  
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## **Introduction**

Developing a well thought out strategic plan is one of most important tasks an organization undertakes. Unfortunately, these plans are often created halfheartedly and ultimately end up untouched. When effectively designed, the strategic plan serves as a road map which efficiently guides the entire organization along the path toward achieving business objectives, managing risk and achieving goals. This plan will employ the traditional strategic planning philosophies – Situational or SWOT Analysis, Mission, Vision, Goals and Objectives, Strategies, and Monitoring.

The Strategic Planning exercise was a systematic process by which the Board of Selectmen were able to identify:

- why our local government exists,
- whom it serves,
- what benefits will be derived from the services it provides, and
- the vision our administration has regarding how citizens needs can best be served

This Strategic Plan is the deliverable as the result of that process, and serves as a blueprint for how the Board of Selectmen will achieve their vision. This plan will focus on the remainder of the Board's two year period.

During the initial planning the following sessions were conducted:

- **SWOT Analysis:** A Situational Analysis covering strengths, weaknesses, opportunities and threats, both internal and external.
- **Peer Analysis:** A review of municipal data among similar towns to identify differences, both positive and negative.
- **Mission:** Review of the current Mission Statement, discuss potential revisions. A good mission statement will declare a purpose, why the organization exists and whom it serves.
- **Vision:** Formulate a Vision that represents a future to aspire to; a picture crafted today of what local government's future will look like over the next two years.
- **Goals:** Results-oriented, broad statements of policy or intention and represent particular aspects of the vision. Goals are created in tandem with the vision statement. They are the desired results or deliverables that fulfill the Board's mission and also contribute to attaining the vision.
- **Objectives:** Expand the goals one step further by setting specific and measurable plans so that the goals may be accomplished.
- **Strategies:** Tactical, key steps (milestones) in achieving an objective. Strategies are the detailed milestones used to implement the objectives. Strategies will eventually require evaluation of costs and benefits, consequences of each approach, and the appropriate course of action.

Out of scope of our planning sessions were the following, which will need to be conducted by the Board using this plan as a guide.

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- **Action Plans:** Break down strategies into the formulation of action plans, assign ownership and begin to consider requests for resource allocation (budget, grants, volunteers, town officials, etc).
- **Monitoring:** Agree on methodology and ownership for ongoing monitoring and progress tracking.

## SWOT Analysis

The SWOT Analysis conducted by the group is summarized in the following tables:

	Recreation	Tourism	Infrastructure	Education	Economy	Location
Strengths	Highland Lake Lake Winchester  Park Pond YMCA Camp Wahnee Greenwoods NWSporting Ice Fishing	Monument History Architecture  Churches Cemetery Fountain Green Tort Museum AMP Whiting Mills Mad River Walkability	Fire PD EMT Library  Water Supply Community People Health Ctr VA DMV	NCCC Gilbert HS  8 Schools	Aerospace Law Firms NW Comm Bank Gilson Morsel Munk NWGymnastics Industrial Park	NW Corner Rts 8 44 Not far from NYC
Weaknesses	Not well publicized	Winsted Image	Mayor v Town Mgr Communications Tax Neighborhoods Road Conditions Lack of Continuity Limited Resources Fire Houses (3) No IT Expertise 5 Unions Lack of Policies Civil Service Budget Approval	Too many Schools BOE Issues	Mill Buildings Brownfields	

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	Recreation	Tourism	Infrastructure	Education	Economy	Location
Opportunities	Use lake fees YMCA Rec Dept Winsted Trails Walker & Rowley	River Walk  History Tours "Pub" Crawl  Trolley  Branding Promotion Expand Walkability	Engage Community High Speed Internet EDC Consultant  New Planner  Regionalization Restore Reputation  New Town Manager Tax Advantages	Consolidation Engage College Tort Museum Add more trades  Internships	Hotel Dorms  Develop Mills Aerospace Growth Farmers Market Main St Market Arts	Traffic to Infiniti Traffic to Skiing
Threats			Lack of Funding  Folks lose interest Slow government Communication Diverted resources Lack of Continuity Silos Agreement New Town Manager	State Mandates	Not enough volume Property values Regional economy	

Key observations:

- There are a number of tourist and recreational opportunities in town
- Strengths are primarily external, weaknesses are primarily internal
- Many of the opportunities require funding, some require volunteers

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## **Peer Analysis**

The following data was reviewed to look at how Winchester lines up with similar and/or nearby towns:

<b>Category</b>	<b>Winchester</b>	<b>Plymouth</b>	<b>Thomaston</b>	<b>Torrington</b>	<b>New Hartford</b>	<b>Canton</b>	<b>Burlington</b>
Population	11,013	12,047	7,761	35,611	6,886	10,357	9,494
New housing Starts (2013)	27	5	6	2	6	11	43
Per Pupil Spending	\$16,561	\$12,825	\$12,993	\$14,542	\$14,063	\$13,666	\$12,645
Unemployment (Nov 2014)	6.1%	7.0%	5.4%	6.7%	5.6%	3.9%	4.6%
Per Capita Income	29,382	30,527	33,870	28,899	37,461	44,830	43,049
% of State Average	77.5%	80.6%	89.4%	76.3%	98.9%	118.3%	113.6%
TANF Recipients as % of population (FY 2013-2014)	0.96%	0.62%	0.22%	0.84%	0.20%	0.14%	0.12%
Bond Rating	A1	Aa3	Aa3	Aa3	Aa3	Aa2	Aa2
Debt per Capita	\$442	\$1,980	\$3,283	\$842	\$1,400	\$826	\$1,859
Ratio of Debt to NGL	0.6%	3.2%	4.8%	1.3%	1.3%	0.8%	1.9%
Net Grand List	\$688,379,460	\$757,086,852	\$527,643,734	\$2,360,288,625	\$715,256,311	\$1,135,939,550	\$941,466,651
Grand List Components							
Residential	69.4%	72.7%	62.9%	65.1%	78.3%	76.2%	83.8%
Commercial	11.9%	7.3%	12.6%	17.4%	5.0%	12.9%	1.8%
Motor Vehicle	9.3%	10.7%	10.0%	8.6%	7.6%	7.0%	8.4%

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Category	Winchester	Plymouth	Thomaston	Torrington	New Hartford	Canton	Burlington
Personal	6.9%	3.6%	10.7%	7.2%	4.4%	3.6%	1.3%
Other	2.5%	5.6%	3.8%	1.7%	4.7%	0.2%	4.8%
Mill Rate (FY 2014-2015)	31.91	34.85	33.63	36.32	27.68	28.56	29.85
Tax Collection Rate (% of Total Outstanding)	96.7%	90.1%	96.3%	100.0%	97.2%	97.1%	97.8%
Total Revenues	\$31,235,493	\$40,810,009	\$26,319,519	\$120,661,061	\$23,170,098	\$37,164,314	\$31,330,297
Ratio of Revenue to NGL	4.5%	5.4%	5.0%	5.1%	3.2%	3.3%	3.3%
Total Operating Expenditure	\$9,638,428	\$13,560,457	\$6,769,092	\$47,530,357	\$5,464,727	\$10,040,170	\$7,289,610
Op Exp as % of Revenue	30.9%	33.2%	25.7%	39.4%	23.6%	27.0%	23.3%
Property Tax as % of Revenue	66.9%	64.8%	68.1%	65.0%	76.7%	81.1%	80.5%
Tax Levy per Capita 2013	\$1,890	\$2,188	\$2,274	\$2,217	\$2,584	\$2,891	\$2,648

## Key Observations:

- Debt per capita is quite a bit lower than similar towns in the area. Perhaps conservative lending options could be leveraged to achieve some of the initial goals that require funding (marketing, promotion, website, initiatives to attract businesses, etc.)
- Operating expense as a percent of revenue could be lower. May be room for some efficiencies.

The Board was also challenged to think of other towns that model what they would like to see for Winchester/Winsted. The following towns were mentioned in the discussion:

Great Barrington, Mass.  
Lee, Mass.  
Grants Pass, Oregon

Millerton, NY  
Guilford, CT  
Putnam, CT

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## **Mission | Vision**

The Board reviewed the town's current mission statement and revised its structure to include instead, guiding principles as follows:

Guiding Principles of the Board of Selectmen:

- Provide a safe community and high quality of life for all.
- Continually improve all areas of the community.
- Create an open and creative atmosphere for growth.
- Inspire a community that respects and cohesively involves its citizens.

## **Vision Statement adopted:**

The Town of Winchester seeks sustainable growth that protects our natural and historic resources, while preserving our values, qualities, and culture.

## **Mission Statement Adopted:**

The Town of Winchester strives to promote and improve quality of life, enhancing a sense of community, and preserving the integrity of our small-town identity and heritage. We are committed to fostering respect, decorum, and hospitality. Town government supports initiatives that create a welcoming and affordable environment for residents, businesses and visitors alike. We strive to provide excellence through a responsible and accessible Town government. We encourage public participation and collaboration from our citizens and businesses. Winchester welcomes all to join in our renaissance.

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## **Goals**

From the process leading up to this point, the Board determined that the following Goals were important for them in order to achieve success:

- Establish comprehensive and interactive collaboration among all of the town's educational organizations.
- Encourage the development of commercial and industrial growth in all sectors of the town.
- Streamline the internal processes of local government to achieve cost-saving efficiencies.
- Cultivate a service-oriented leadership style among all town employees, boards, commissions, and volunteers.
- Communicate information to all residents in a timely manner through a variety of mediums.
- Cooperate with regional governments in operations and promotions.

## **Objectives**

The following Objectives were created from the Goals and the Guiding Principles.

1. Create Working Partnership with BOE
2. Participate in Regional Economy
3. Attract Business | Families to Stay
4. Prudent Financial Growth
5. Use Professional Help to Fill Empty Real Estate
6. Unified Town-wide Communications
7. Streamline Internal Procedures
8. Take Advantage of Regional Initiatives and Operations
9. Create MBOs for Town Manager that reflect these Objectives

The prioritization of these Objectives is meant to reflect the cyclical nature of any good development plan. The Schools must be a priority, jobs must be available and there must be community activities for families to stay. If there are families here, then businesses will stay based on the potential for customers and the ability to access human resources for staffing.

## **BOS Objectives June 2016**

- Establish revenue map for current and potential residential or commercial areas of development including lots available from private ownership and town owned : current and potential industrial parks including lots available from private ownership and town owned : businesses in Downtown commercial buildings and storefronts including empty, private owned or town owned and publish on websites and social media these areas as offerings for sale, rent, or development.
- Engage a commission-paid consultant to work with the town in developing
- Review and amend all town collected fees to ensure related expenses are covered.
- Investigate and Create a program to reduce or rebate building permits for new construction and renovation.
- Review and enforce policies for personal property assessments.

### **Strategies**

The steps necessary for completing these objectives are covered here in detail:

#### **1. Create Working Partnership with BOE**

The Board of Selectman's role is to support and promote the school system in town, provide the structure in terms of buildings and finances and to share the town's resources. In order to build a working partnership with the BOE, it was agreed that the Town Manager needs to have regular meetings with the Superintendent to establish rapport and build trust. To be effective the following steps were outlined:

- Define the purpose of the meetings, agendas and content to be agreed upon
- Agree on the schedule and frequency
- Request financial reporting updates at meeting. This allows the details to be reviewed and question regarding accuracy, gaps, concerns, etc. to be addressed.
- Discuss how things are going in general
- Invite Superintendent to Town Manager meetings to provide broader updates

While the focus of this discussion was on the BOE of the Gilbert School and the existing issues, it was agreed that the Town Manager should spend time with all educational entities in town to determine how the Town can support their needs, foster trust and collaborate on ways to help the local economy.

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## 2. Participate in Regional Economy

The Board spent time discussing a number of regional initiatives in the area including agro-tourism, the arts, event planning and weddings. It was felt that Winsted/Winchester could compliment a number of these initiatives and that our location at the intersection of Routes 8 and 44 made the town almost a “gateway” to the Northwest Corner. In order to participate in the regional economy the following should be considered:

- Showcase and promote what Winsted has to offer through events, **website promotion**, video tours, tours of available real estate by the EDC and appropriate signage.
- Appoint representation from the BOS to **attend regional Council of Government and Transportation meetings**. This allows Winsted/Winchester to be seen as an interested party.
- Hold a “summit” with all appropriate town agencies/boards to convey the goal to be involved regionally and brainstorm on how.
- Develop a communication plan for the Town, perhaps using a professional PR firm to support branding and marketing of a positive image.
- **Invite the head of the Council of Governments to quarterly BOS meetings to exchange updates.**

## 3. Attract Business | Families to Stay

This particular topic created some challenges for the group as jobs, recreation, schools, etc. must be in good shape for the town to be attractive to families moving into the area, but the families need to be here for the businesses to survive and subsequently provide jobs. This is the typical economic development cyclical issue. If the town can continue to make strides in terms of tackling blight, resolving the education issues as noted in Strategy #1 above, and promote the town as a destination as mentioned in Strategy #2 there would be a renewed interest in the town as a place to live. Hand in hand with this is the work to attract businesses through promotion of our low cost, available real estate and providing incentives for them to invest in our town, through tax abatements and planning and permitting processes that are not overly restrictive. The following strategies should be considered:

- Research and find grants for housing rehab, which would fund the town granting tax rebates for those who improve their properties
- Partner with Northwest Community Bank for special loan rehab program for town residents and businesses
- **Seek grants for improvements to the town’s infrastructure such as sidewalks, town buildings and projects that improve the walkability of the Town.**
- Create a program to reduce or rebate building permits to encourage new construction and renovation Create a program for tax incentives, for both new and existing businesses, for expansion, hiring, renovation, etc.

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Goal	Create and advertise a program to reduce or rebate building permits for new construction and renovation
Objective	Investigate other towns in the COG or through CCM regarding incentive programs for building; review our current program
Person(s) Responsible:	Town Manager, Building Dept.
Timeline	June 1, 2017
Assessment	Local Program Established

Goal	Develop and advertise a program for tax incentives for new and existing buildings for expansion, renovation, and hiring
Objective	Review current tax abatements including but not limited to the Enterprise Zone, state programs, and local programs
Person(s) Responsible:	Town Manager, Town Planner, EDC, Staff
Timeline	On or before April 15, 2017
Assessment	To have the tax abatement information readily available on the town website

## 4. Prudent Financial Growth

In order for any of the town initiatives to succeed, it must have adequate revenue to fund them. Prudent financial growth was defined as an appropriate mix of both business and residential tax base revenue, service and fee income opportunities and reducing expenses through efficiency and judicious management. Some strategies to increase revenue are as follows:

- **Create revenue map** by establishment on Main Street, Industrial Park, etc. to understand impact of the towns efforts and where it can get the most “bang for the buck”.
- **Review a report of revenue**, by location
- Partnership with the BOE to understand their financial needs, force legitimacy and provide checks and balance
- Review all Town fees to make sure they are covering expenses, then create plan for regular review and necessary cost increases to cover any rising expenses
- Create plan for enforcement and collection of outstanding fees
- **Investigate borrowing options** to fund short term initiatives

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- Create investment goals for revenue, review and look for improvements in return or reduction in fees

Goal	Review and amend all town-collected fees to ensure related expenses are covered.
Objective	Building Permits, Recreation, Parking Passes,
Person(s) Responsible:	Town Manager, Related Staff by Department
Timeline	On or before March 1, 2017
Assessment	Fee Schedules Updated

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## 5. Use Professional Help to Fill Empty Real Estate

The Town has recently engaged an EDC consultant and hired a full time Planner. These resources should work closely with the BOS to determine what types of business the Town would like to attract such as a brewery, hotel and so on that compliments the Regional tourism goals and positions Winsted/Winchester for controlled growth. The Town would also like to “get out of the real estate business” as it is not the best use of their time. This means that any town owned properties should be made available for sale and/or development. To start this process:

- Inventory what real estate is empty within town, both town owned and general public, identify key properties and create a pipeline report of available real estate
- Create plan for Town Planner and EDC so that they are working in unison with the BOS goals for the town. Plan shall include a mechanism for monitoring of their efforts and progress.
- Develop a plan for the 120 acre parcel of land and seek the right partner to carry it out
- Work with Town Planner to identify ways to attract the type of industry, type of citizen, type of services that fit with the BOS Strategic Plan
- Meet with EDC and Planning Board to develop model, review pipeline report, discuss options for properties and so on

Goal	To encourage the development of commercial and industrial growth in all sectors of the town.
Objective	To foster prudent financial growth
	Establish revenue map for current and potential residential or commercial areas of development including lots available from private ownership and town owned : current and potential industrial parks including lots available from private ownership and town owned : businesses in Downtown commercial buildings and storefronts including empty, private owned or town owned and publish on websites and social media these areas as offerings for sale, rent, or development.
Person(s) Responsible:	Town Manager, Town Planner, Staff
Timeline	On or before March 1, 2017
Assessment	Revenue Map complete; published on town website

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Goal	Engage a commission-paid consultant to work with the town in developing grant funding and merchandising marketing for economic growth.
Objective	Revenue Map, Tourism, Marketing
Person(s) Responsible:	BOS, Town Manager, EDC
Timeline	January 15, 2017
Assessment	Consultant under contract and results from work in June 2017

Assessment – A Report/Review of meetings held, attendance of participants and progress of any significant action that is a result of those meetings.

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## 6. Unified Town-wide Communications

In order for the Town to march in one direction, as one community with one mission, their must be unified Town-wide communications, both internal and external. This means across boards and commissions, and then out to the citizens.

- Appoint FTE under Town Manager’s leadership to own communications
- Board and commission agendas and minutes must be reviewed for thorough content, and posted in a timely manner
- Create a communication plan that outlines expected content, available tools (web site, email, facebook, etc.), policies to cover disasters, town events, public notification and so on, and an accountability list of who owns what such as Police, Fire, Mayor, Town Manager etc.
- Create schedule for Board/Commission discussions at BOS meetings to update Board and citizens to include Planning and Zoning, Wetland, Town Planner, EDC, and Recreation Committee. Help define content initially to keep at high level, not detailed.
- Schedule time to review Strategic Plan and outcomes with Boards and Commissions

## 7. Streamline Internal Procedures

- Review forms, processes, filings, reports, etc. to determine if necessary and useful
- Review technology tools and consolidate across departments where possible to create ability to share
- Eliminate redundant steps wherever possible
- Follow thorough requirements definition and vendor selection steps to ensure that proper services and/or software is purchased to eliminate wasteful or duplicative purchasing across town departments

Goal	Review and enforce policies for personal property assessments.
Objective	To fund & use property audits and other means to insure that we are up to date on assessments
Person(s) Responsible:	Town Manager, Tax Assessor, Building Department
Timeline	April 1 , 2017
Assessment	Report from the assessor on progress

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## 8. Take Advantage of Regional Initiatives and Operations

- Review Council of Governments communications to look for opportunities to participate in shared resources and take advantage of regional volume purchasing discounts
- Spearhead effort to create shared IT position across several towns to share cost of employment

## 9. Create MBOs for Town Manager that reflect these Objectives

Many of these initiatives fall to the Town Manager to carry out. As the Town Manager reports to the BOS, they should provide clear direction to the Town Manager on their expectations for his|her participation in the Strategic Plan. The following Management Business Objectives are suggested for the Town Manager, along with a formal review process to occur yearly to discuss and compare progress.

- Reduce blight in town through discussions with property owners, town departments and others who contribute. Utilize town resources to repair, clean, maintain as necessary all town properties.
- Create working partnership with BOE through regular meetings and discussions on how the town and BOE can work together to regain the town's confidence.
- Develop and distribute goals for the Town Planner which align with the BOS's strategic direction
- Create enforcement plan for town fees to ensure fees are billed and collected as appropriate
- Research and apply for grants in support of Town initiatives at a minimum of once quarterly
- Create efficiencies within Town Operations through streamlined operations and use of appropriate technology
- Generate and provide ongoing updates to a town Revenue Map
- Create a formal recognition program for town staff that encourages and acknowledges efficiency, revenue generation, blight reduction professionalism and so on

The Town Manager's yearly compensation revenue should be "pay for performance" and an increase to salary should be relative to the quantity and quality of goals completed.

### **In Summary**

By following the strategies outlined herein over the remaining term of the BOS, and keeping the goals and objectives set forth by the Board in mind as all discussions are had and decisions are made, the Town should begin to move in a singular direction with more focus.

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It is recommended that this strategic document, the goals, objectives and strategies be reviewed quarterly by the Board and course corrections made as necessary. Each successive Board will want to review the existing plan and make adjustments for their own objectives, keeping in mind the overall Guiding Principles.

Adopted December 5, 2016  
BOS Meeting 7-0