

TOWN *of* PITTSBORO
North Carolina

2016
Board of Commissioners
Planning Retreat
February 11, 2016

Summary Report

February 16, 2016

DAVID LONG CONSULTING

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February 16, 2016

Cindy Perry, Mayor
Bryan Gruesbeck, Manager
Town of Pittsboro
635 East Street
Pittsboro, NC 27312

Dear Mayor Perry and Mr. Gruesbeck:

I was honored to be asked to work with the Board of Commissioners for its 2016 Planning Retreat and appreciate very much the opportunity to serve. It has been a genuine pleasure working with everyone involved. The Board made much progress in expressing its ideas, shaping a sense of strategic direction and arriving at a common understanding of its long-range priorities. My impression is that the session was very positive and that the discussion was both energetic and constructive.

Please extend my gratitude to the members of both the Board and staff for their cooperation, assistance, enthusiasm and skills in making sure that everything operated smoothly—it is sincerely appreciated.

I hope that everyone will find the attached report to be accurate and satisfactory in all respects. If there are any deficiencies or needs for revision, please let me know as soon as possible so these can be addressed.

Thanks very much! I have enjoyed working with the Town of Pittsboro. If called upon, I would look forward to continuing our work together in any way possible.

Sincerely,

David Long MPA
Consultant/Facilitator

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1.0- INTRODUCTION

The Board of Commissioners of the Town of Pittsboro conducted its 2016 Planning Retreat on February 11, 2016 at the Pittsboro Town Hall. The retreat focused on the Board with the support of the manager and key staff. Attending and participating from the Board were Mayor Cindy Perry and Commissioners Pamela Baldwin, John Bonitz, J. A. Farrell, Michael Fiocco, and Bett Wilson Foley.

David Long, a planning consultant based in Greensboro with 42 years' experience serving local governments throughout North Carolina, served as facilitator and prepared this summary report. The consultant's bio is included as [Attachment 1](#).

The summary report includes brief narratives describing selected elements of the retreat agenda and activities. (Additional elements may be included later as they become available from key staff.)

The consultant conferred with the Town Manager in advance of the retreat to plan the session and to develop the agenda. The retreat agenda is included as [Attachment 2](#). This summary roughly parallels the sequence of retreat agenda items.

2.0- MANAGER'S BUDGET & ORGANIZATIONAL REVIEW/DEPARTMENT HEAD REPORTS

Town Manager Bryan Gruesbeck prepared and presented an excellent *Budget and Organizational Review*.

Key department heads also made excellent presentations. These presentations, which were commended by the Board for their thoroughness and focused approach, are incorporated by reference as [Attachment 3](#) to this report. Presenters included (in order):

Water –	Adam Pickett
Wastewater –	Randy Heard

Utility Services – John Poteat
 Engineering – Fred Royal
 Parks – Paul Horne
 Planning – Jeff Jones
 Police – Percy Crutchfield

3.0 - STRUCTURED BRAINSTORMING

The Board engaged in a structured brainstorming process led by facilitator David Long. The purpose of the process was to assist the Board in developing a consensus-based prioritization of goals for the long-term.

The focus question for the session was:

What are the most important issues, needs and opportunities facing the Town of Pittsboro over the next 1-3 years?

The process allows for maximum individual creativity and respects the individual’s right to voice opinions in an unpressured manner, while gradually building consensus and arriving at common ground among the group, specifically a set of priorities that is ‘owned’ in a unified manner by the Board. The structured process is a proven and tested method that consistently delivers results and very positive reviews from participants.

Many key pieces of information were generated from the session—a series of Excel spreadsheets were developed summarizing this information and are embodied in [Attachments 4.1 through 4.3](#).

The facilitator interacted one-on-one with each participant until all ideas had been expressed and recorded on flip chart sheets. The participants voiced a total of 44 responses. Participants then prioritized these 44 items individually using a system in which a) their top nine priorities were selected and b) these top nine were further refined by assigning nine points to the highest item, eight to the next highest and so forth until the ninth item then received one point.

- [Attachment 4.1](#) lists the 44 items in the order originally generated.
- [Attachment 4.2](#) lists the 44 items sorted by the Board’s priorities—in descending order by points received. The top items follow (*points in red and item numbers in black*):

- 28** 5 Extension of sewer capacity
- 26** 11 Development and completion of UDO and other standards that define/reinforce Pittsboro's character; walkable/bikeable; supports the arts; mix of uses; density; parks and recreation

- 22** 35 Affordable housing for a wide array of incomes
- 20** 2 Wastewater treatment facility or plan
- 16** 3 Long term plan for addressing water needs
- 15** 10 Sanford wastewater line
- 14** 27 Financial analysis and review impact of growth on Town's ability to deliver quality sustainable services

- [Attachment 4.3](#) lists the 44 items sorted by **themes** in descending order of aggregate points assigned by the group.

The themes were developed by the facilitator and items assigned to each theme several days following the session. The themes are intended simply as a method to better grasp the results, and in no way to supersede or challenge any other decision-making processes in place.

It is a conceptual tool, not an end product—unscientific and imperfect but hopefully a helpful piece of information in charting a course forward. It is also somewhat subjective on the part of the facilitator, although the general intent was to follow as closely as possible the themes identified by the Board during the retreat. Others might observe completely different themes and/or assignment of items to themes (due to overlap, gray areas, etc.) and are encouraged to do so. The themes can best be thought of as a tool for achieving a division of labor, for example, if multi-disciplinary task forces were to be established, each might address a priority theme.

The themes and aggregate points (in **red**) of each follow (*total points=270*):

- Utilities/Infrastructure **99**
- Quality development/Planning **65**
- Economic development/Downtown revitalization **27**
- Housing/Human Services/Quality of Life **22**
- Facilities/Equipment/Technology **17**
- Budget/Finance/Impacts **14**
- Staff issues/Public safety **12**
- Education/Schools **10**
- Community cohesion/Public relations **4**

There is nothing binding about the themes and the points attributed to each. The most important fact is that each idea was voiced, and is therefore important regardless of the points received. At best, the rankings provide a *rough* idea of the relative weight of each theme. Much more insightful analysis by those closest to the issues (Board, staff,

residents, etc.) is required to convert these rankings into a meaningful basis for action.

4.0 – POTENTIAL NEXT STEPS

Strategic Planning

The work generated at the retreat could easily form the foundation for a strategic planning initiative by building on the momentum generated at the retreat and continuing to move forward in an energetic manner. For example, it would be a relatively simple step to convert the results of the retreat into a hierarchy of goals, strategies and actions.

Action Planning

Action planning involves a detailed breakdown of the broader goals and strategies into action steps—or the ‘nuts and bolts’ of implementation for top priorities. This process is designed to ensure that ideas move beyond just words, and are instead converted into accountable action.

Formal action planning would conform roughly to the following template:

Action Plan #1

Goal –

Strategy –

Action –

Resources Needed –

Who is Involved –

Who Takes the Lead –

Potential Obstacles –

Potential Allies –

Target Date –

Report Back from Lead –