



# Town Council Retreat Meeting Report

## January 2024



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# PARTICIPANTS, WELCOME, AND EXPECTATIONS

Mayor Roger Bourke opened the meeting by welcoming everyone, thanking them for their dedication to the Town, and inviting them to find consensus around long-term planning themes for the Town of Alta.

Participants were asked to introduce themselves and share their expectations for the session.

Chris Cawley, the Town Manager, talked about being the only municipality at the top of Little Cottonwood Canyon (LCC). As you can see by the comments from everyone, the themes meet around finding shared agreement around short and long-term planning, clarity around roles & responsibilities, clear action items to productively move forward, creative thinking and new ways of working together. Council members expressed interest in hearing and learning from the staff.

**WELCOME** ❄️

Introductions & Expectations ~

Roger Theme for today: LONG-TERM  
• Consensus on progress steps

CHRIS  
We are the only org at the top of LCC.  
Energy for Alta!

Jen  
• List of action items

CHRIS O. Craig Dan: Advance teamwork Long-term potential!

• Learn more about town & role. • Process to resolve conflicts.

Molly Mike  
• Town identity

• Thinking of things in new ways

Carolyn  
• Learn how to better support staff.

John Elise John  
• Staff perspective & insights  
• Productivity more than a meeting.  
• Leave with definitions & knowing what's next.

# PARTICIPANTS, WELCOME, AND EXPECTATIONS

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Roger Bourke, Mayor  
Carolyn Anctil, Council  
John Byrne, Council  
Elise Morgan, Council  
Dan Schilling, Council

Chris Cawley, Town Manager  
Jen Clancy, Town Clerk  
Molly Austin, Deputy Town Clerk  
Craig Heimark, Town Treasurer  
Chris Otto, Asst Town Manager  
Mike Morey, Town Marshal  
John Guldner, Town Administrator Emeritus

The retreat was publicly noticed. Participants included the town Mayor and Council, and leadership staff. John Guldner, Town Administrator Emeritus, attended the retreat at the request of the Town Manager, Chris Cawley.



# PURPOSE AND DESIRED OUTCOMES

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The Purpose and desired Outcomes of the Council Retreat on January 11, 2024:

To review an assessment and future vision of the Town of Alta with town staff and elected officials.

By the end of the day, we will have...

1. Completed the Strategic Assessment by reviewing the interview and survey information and creating a SWOT
2. Listened to each other, a lot.
3. Articulated a shared vision of success.
4. Identified strategic themes and shared agreement around next steps.

# Town of Alta Retreat Detailed Agenda



**Wednesday, January 11, 2024**

**Location: Our Lady of the Snows Center**

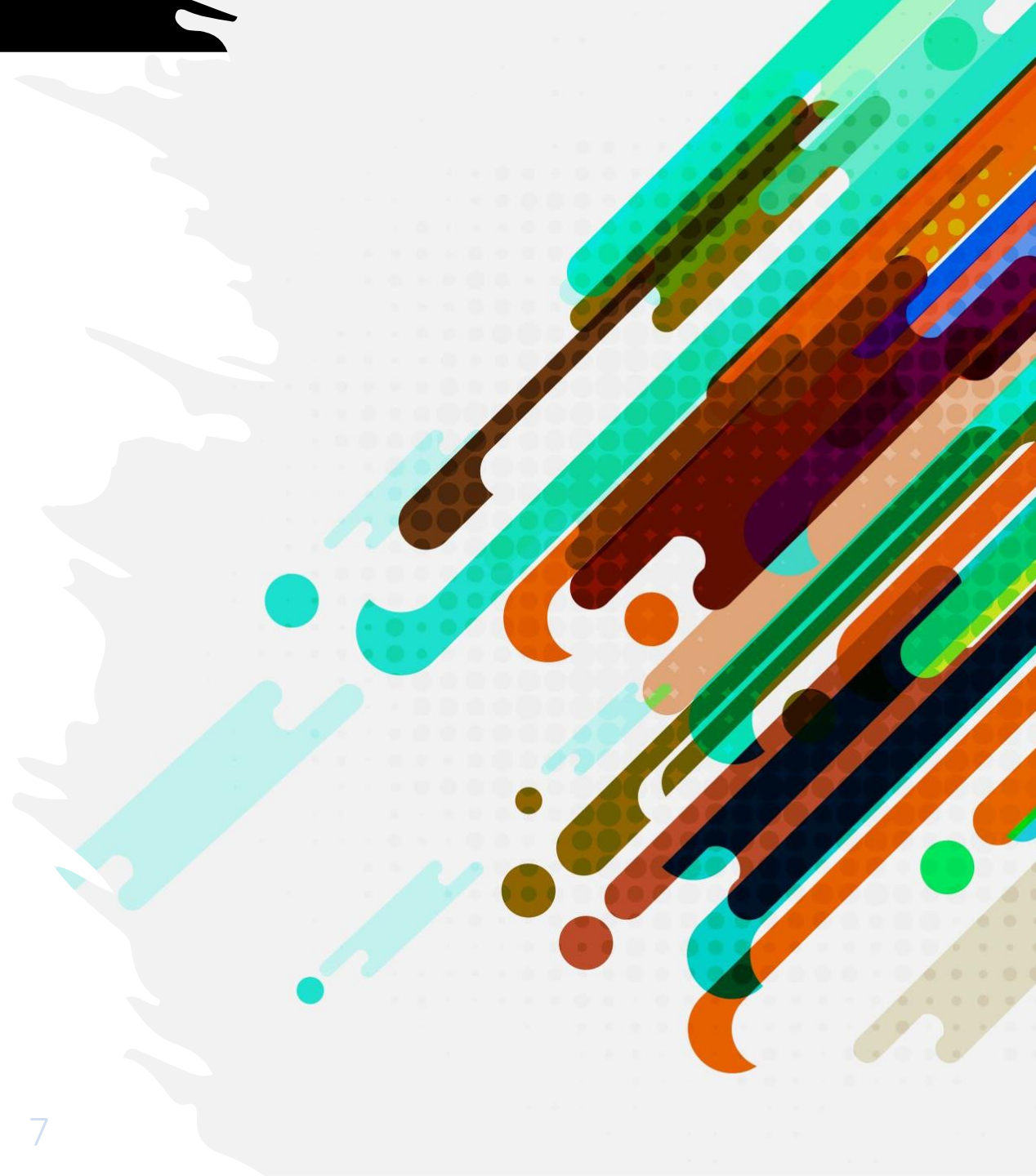
10:00	Gathering	1:00	Group Vision of Success for 2030 <ul style="list-style-type: none"><li>- Draft development</li><li>- Vision statement</li><li>- Team Breakouts / report out</li></ul>
10:30	<u>Opening</u> <ul style="list-style-type: none"><li>- Welcome – Roger</li><li>- Agenda, Introductions &amp; Expectations - Julie</li><li>- Ground rules and Communications</li></ul>	2:00	<u>What is the shift we are making?</u> <ul style="list-style-type: none"><li>- From - To , Rank</li><li>- Confirm top priorities</li><li>- Cluster the initiative, re-cluster as necessary</li></ul>
11:00	<u>Strategic Assessment: Where are we Today?</u> <ul style="list-style-type: none"><li>- Review of Interview &amp; Survey Findings</li><li>- Questions/Comments captured during presentation</li></ul>	2:30	BREAK
11:45	<u>Strategic Assessment Summary</u> <ul style="list-style-type: none"><li>- Small group discussion<ul style="list-style-type: none"><li>➤ Strengths, weaknesses, opportunities, threats</li><li>➤ Most critical issues/areas to address in planning</li></ul></li><li>- Report out and synthesis</li></ul>	2:45	<u>Core Strategies, Short-term goals</u> <ul style="list-style-type: none"><li>- Generate/Group/Rank</li><li>- Questions/Form Teams</li><li>- Team Breakouts</li><li>- Gallery Walk</li></ul>
12:15	LUNCH	3:30	<u>Next steps &amp; Wrap-up</u> <ul style="list-style-type: none"><li>- Communications</li><li>- Meeting Evaluation</li><li>- Closing</li></ul>
12:30	<u>Vision of Success</u> <ul style="list-style-type: none"><li>- Set Context – Julie</li><li>- Vision Primer - Chris</li></ul>	3:45	<u>Adjourn</u>



The following pages include an assessment of the information provided in advance of the retreat as well as written notes and comments from the retreat session.

The additional pages include comments and notes made by the note taker on flip charts, as well as text box additions (light blue as in this example) to memorialize the retreat and help the team identify next steps.

## Strategic Assessment: Where are we today?



# Assessment Review

## Participants:

### Staff

Molly Austin, Deputy Town Clerk

Chris Cawley, Town Manager

Jen Clancy, Town Clerk

Craig Heimark, Treasurer

Mike Morey, Town Marshal

Chris Otto, Assistant Town Manager

John Guldner, Town Administrator Emeritus

### Elected Officials

Roger Bourke, Mayor

Carolyn Anctil, Council

John Byrne, Council

Elise Morgan, Council

Dan Schilling, Council

Sheridan Davis, Council Member Emeritus

### SOURCES OF INFORMATION:

- Survey of staff and elected officials
- Individual interviews with six staff and elected leaders

The assessment information gathered in advance was from the same people that attended the retreat, except for former Council member Sheridan Davis who participated in the survey.



# Assessment Review

## What do you view as the greatest contributors to success of the municipality?



### STAFF LEADERS

- Shared vision and expectations (5)
  - Strong sense of community and place among elected officials, staff, residents, voters, seasonal residents/employees, visitors, etc.
  - Broad stakeholder participation
  - Defined mission and core values
  - 53 yrs of experience since incorporation as a municipality
  - Credible delivery of services
- Dedicated staff (3)
- Strong partnerships
- Community loves Alta
- A well-maintained budget
- Leadership
- Availability to the citizenry

### ELECTED LEADERS

- Elected leaders mesh very well
- The professionalism and commitment of our full-time staff
- Local leadership that is grassroots oriented with a vibrant, engaged constituency
- Maintaining the character of Alta

# STRATEGIC ASSESSMENT Themes

## Vision of Success

### **Shared agreement around themes:**

- Planning and prioritizing
- Provision of essential public/municipal services
- Community-centric
- Self-determination

“An efficient well-run town, responsive to the needs of its constituents.”



# From your perspective, describe the vision of success for the town as a public service agency - What are you ultimately striving to achieve?

## STAFF LEADERS

- Financial sustainability, infrastructure resilience, watershed stewardship
- Success would be realizing we are a small town and concentrating on the essential public services to serve the public. Focus and prioritizing are key. Have not had any clear direction in the past. Direction of activities has been all over the map.
- Town has good relationships with local constituents and relationships with collaborative agencies
- Provide services that enhance quality of life for residents and ensure safe, harmonious, and life for residents
- Generational burden for capital replacement
- Trust
- Transparency and inclusion of the community in decision making. Alta is a very small town and community. It should not IMO be difficult to get more meaningful community input to create a cohesive long-term direction
- Delivery of credible and reliable municipal services
- The municipal government is: nimble, efficient, and pragmatic; focused on services within
- The Town of Alta provides the structure that allows Alta to remain governed at the local (vs county) level - including local elected officials, utilities, and municipal services (post office, local police department, etc). Alta residents and businesses get the advantage of working with familiar and friendly faces right here in Little Cottonwood Canyon. Without the Town, all of those services would be diverted to Salt Lake County which has wildly different needs and priorities. Another shared value is "Keeping Alta, Alta" - as a Town, we have more agency in preserving (or changing) Alta in ways that would be impossible if governed by Salt Lake County

## ELECTED LEADERS

- A cleaner, greener, quieter Alta, the Mountain Town that chooses not to race to the bottom as so many have with development and environmental degradation, but embraces being different. This difference is in fact a business advantage.
- Transportation - hindering success
- Long-term healthy sewer, water, transportation infrastructure to ensure the town is best prepared for continued increase in human impact and to avoid catastrophes due to insufficient planning on the part of our administration
- Resist the outside forces trying to change us into something we aren't

## Shared agreement around themes:

- Planning and prioritizing
- Provision of essential public/municipal services
- Community-centric, self-determination

**“ We are doing our job to the extent that we have long term invisibility – no one will see how well it is all being managed -- no crises because we did our job well”**



## Strategic Assessment Notes

### Shared Agreement

- Plan & prioritize
- Switch to proactive rather than reactive
- Understand resource capabilities and limitations
- Focus on essential services

Alta thrives on “less is more” (but staff may not be thriving)

Protect the pristine nature of Alta

### Questions that were asked:

- ✓ How to navigate valley growth challenges?
- ✓ Do we survive as a community if the gondola is built?
- ✓ What are our goals?
- ✓ What do we want Alta to be?
- ✓ How will the new town government structure impact decision-making?
- ✓ What is needed to sustain the Marshal's office?

### What we need to identify:

- Understand what keeping Alta Alta entails
- We need a formal master plan / facilities study

### What we value:

- Inclusion is important
- Say YES more
- Services must be accessible but prioritized
- Disagreement leads to better decision-making

### What we know and said out loud:

- COVID highlighted need for bathrooms
- Providing services isn't always convenient – we need to understand our obligations to the public
- Constituency goes beyond residents
- Focus on tackling staff challenges
- Sometimes waiting for consensus leads to getting stuck
- We are under-spending – depreciation is under calculated (need more \$\$\$)
- Changing police protocols create big challenges for a small force

# Strategic Assessment

## Highlights

### Shared agreements:

- Plan & prioritize
- Switch to proactive rather than reactive
- Understand resource capabilities & limitations
- Focus on essential services

### Services

Understand what "keeping Alta Alta" entails

Need for many facilities (shops)

Say YES more

Services must be accessible but prioritized

Disagreements lead to better decision making

COVID highlighted need for bathrooms

Alta thrives on less is more. \*staff may not be thriving\*

Protect pristine nature of Alta

Q: How to navigate valley growth challenges?

Q: Do we survive as a community if the gondola is built?

Q: What are our goals? What do we want Alta to be?

Q: How will new structure impact decision-making?

Q: What is needed to sustain Marshall's office?

Need more info to prioritize capital improvements

Providing services isn't always convenient. We need to understand our obligations to the public.

Focus on tackling staff challenges

Sometimes waiting for consensus leads to getting stuck

We are under-spending depreciation & depreciation is under calculated (need more \$)

Changing police protocols create big challenges for a small force.



# STRATEGIC ASSESSMENT Themes

## Obstacles Hindering Success

### STAFF

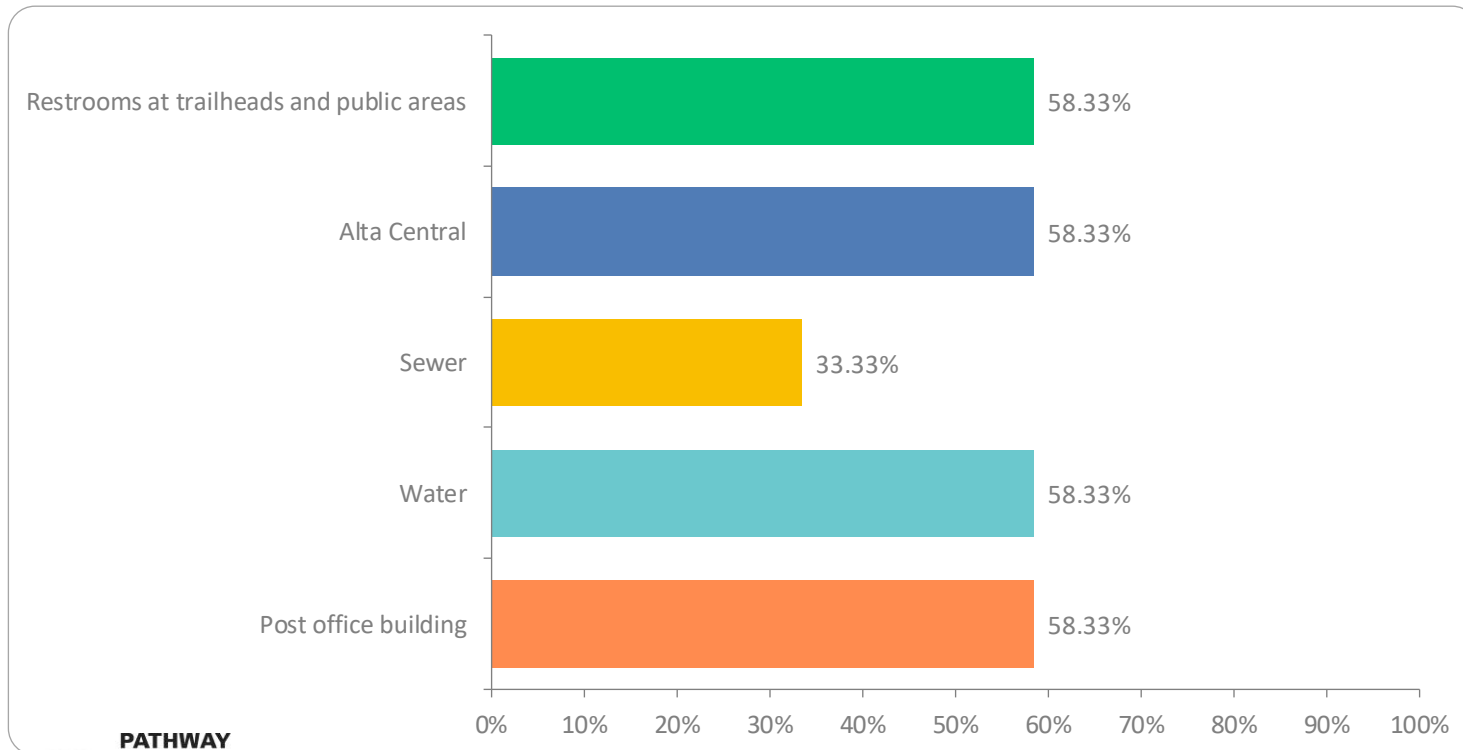
- Limited budget / lack of financial resources, revenue / lack of capital (5)
- Lack of clear-cut goals: priorities must be established and well defined / Limited future and long-term planning (4)
  - Urgent crowds out the strategic, too many short-term challenges to clarify a future path
- Staff size (3)
  - Everyone is always putting out the "fire of the day" while bigger issues smolder
- Resistance to change (2)
  - Risk-averse culture and information reporting that favors insiders only - meaning it is too complex for outsiders to easily digest

### COUNCIL

- Flow of information / communication (4)
  - Circular arguments that can distract our elected officials and hired staff
  - Practicing true democracy with transparency and effective communication is time consuming and not everyone's natural style of leadership
  - Rules of order are not followed as much as they should
  - Lack of effective communication as well as no consensus building.
- Boundaries between council with staff (2)



## From your perspective, what are the town's greatest capital improvement needs?



- Staff overwhelmingly identified Restrooms, Alta Central and Post Office Building
- Staff chose more than the elected overall
- One staff and one elected chose every option on the list

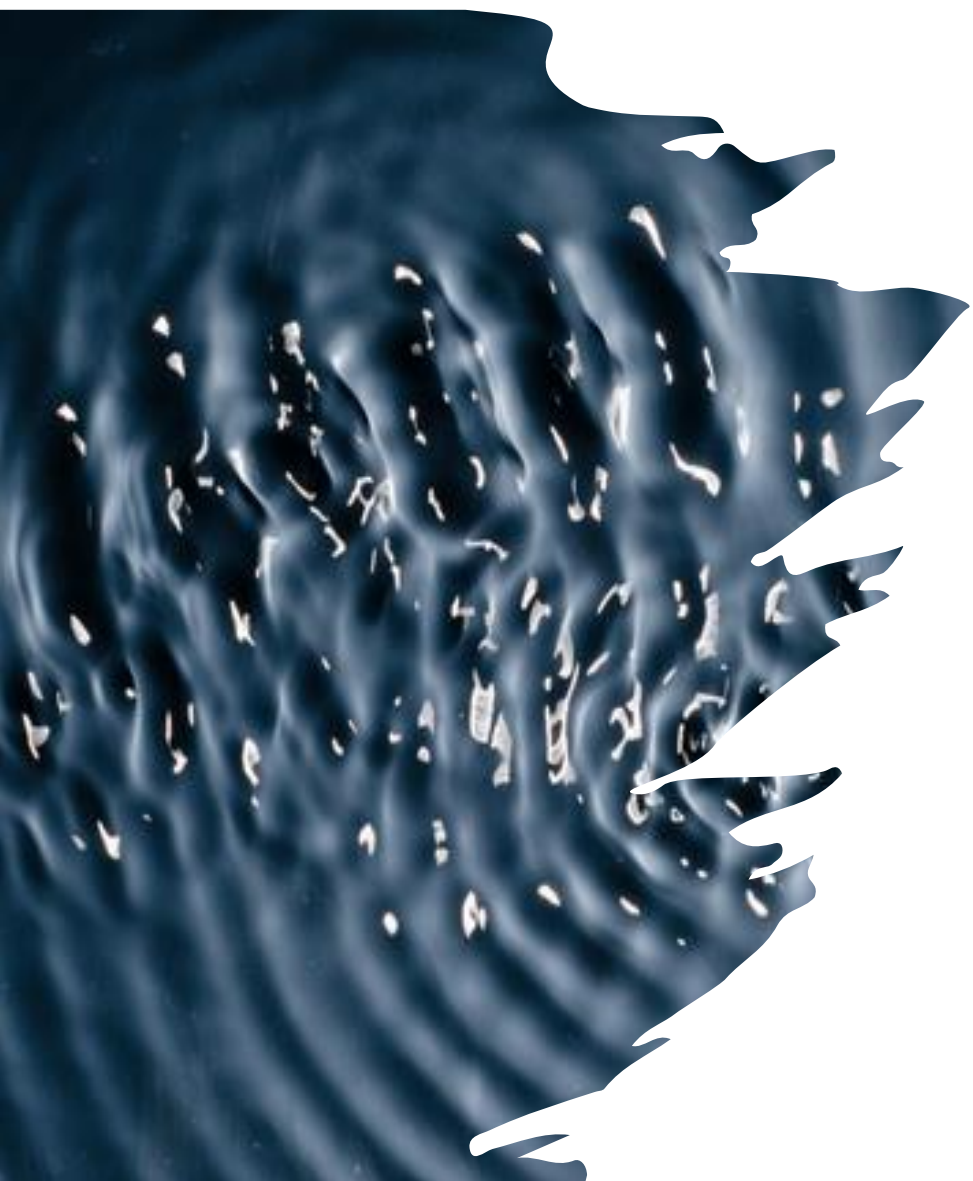


## How should we prioritize these needs?

- Planning and evaluation (5)
  - We should do a formal facilities study to help in prioritizing our needs.
  - Rank projects
  - This would include input from the staff and public comment (limited) in meetings
    - Taxpayer input
- Someone outlined a process:
  - ✓ 1-Create an infrastructure master plan giving each department the opportunity to address their critical needs;
  - ✓ 2-Identify funding/bonding opportunities;
  - ✓ 3-Agree on design;
  - ✓ 4-Break ground and get it done

# Strategic Assessment

## Trends & Realities Impacting Success



### INTERNAL

- Concentrate on the essentials, police, fire, sewer, water administration
- A new community center
- Affordable housing
- Limited eligible/available candidates for public office, especially Mayor - does ToA have a reliable future as a Town as we know it?
- Losing local Police and Dispatch services
- Public bathrooms

### EXTERNAL

- Visitation
- Traffic/Transportation/Gondola
- Population Growth
- Climate Change
- Construction/Development
- Alta Ski Area ownership
- Tightening labor market





# When you take the long view, what do you define as the greatest assets that will be depended on for success?

Shared Agreement:

- Staff
- Long term plan for the Town
- Identity and reputation
- Well informed and unbiased community leaders and elected officials



# Greatest Vulnerabilities

## Most common responses:

- Vulnerability to natural disasters, box canyon, one road
- Lack of planning
  - Lack of defined priorities and understanding of what a small town is supposed to do - - The Town is too scattered and the citizens and especially the employees suffer
  - Narrowness of scope and shortness of time horizon that is the default position of the ToA council.
  - Existing assets are in urgent need of maintenance or replacement
- Climate change
- Conflicts between council, and staff and appointed officials

## Other comments:

- Concentrated, seasonal economy
- Public safety failures
- Large scale infrastructure failures
- Civil liability for failure to perform at best practice standards
- Communication / interference
- Climate change - our success relies disproportionately on the weather and the ski industry
- Maintaining a community of year-round residents
- Maintaining qualified staff
- Confidence around how we run the town council meeting – rules of operation
- Transportation, canyon
- Elites making decisions for elites at the expense of workers and our fragile Alta environment
- Commercial interests that want to exploit our natural environment for their own benefit-- They are willing to kill the goose to get the golden egg



# What will be critical to optimize for future success?

## SHARED AGREEMENT:

- **Long-term vision and planning**

- Leadership and direction
- Medium-term unifying roadmap to guide decision making
- Shared goals
- New town manager position
- Cohesive and collaborative teamwork among the staff and elected officials
- Focus on attainable outcomes, topics within Town's jurisdiction
- Focus on defined priorities of public service
- Focus on resilience and sustainability: financial, environmental, social

v

- **Flow of information / communication**

- Don't waste staff time
- Go through mayor and town manager
- Small staff and they work hard
- The emergence of a consensus builder on the staff

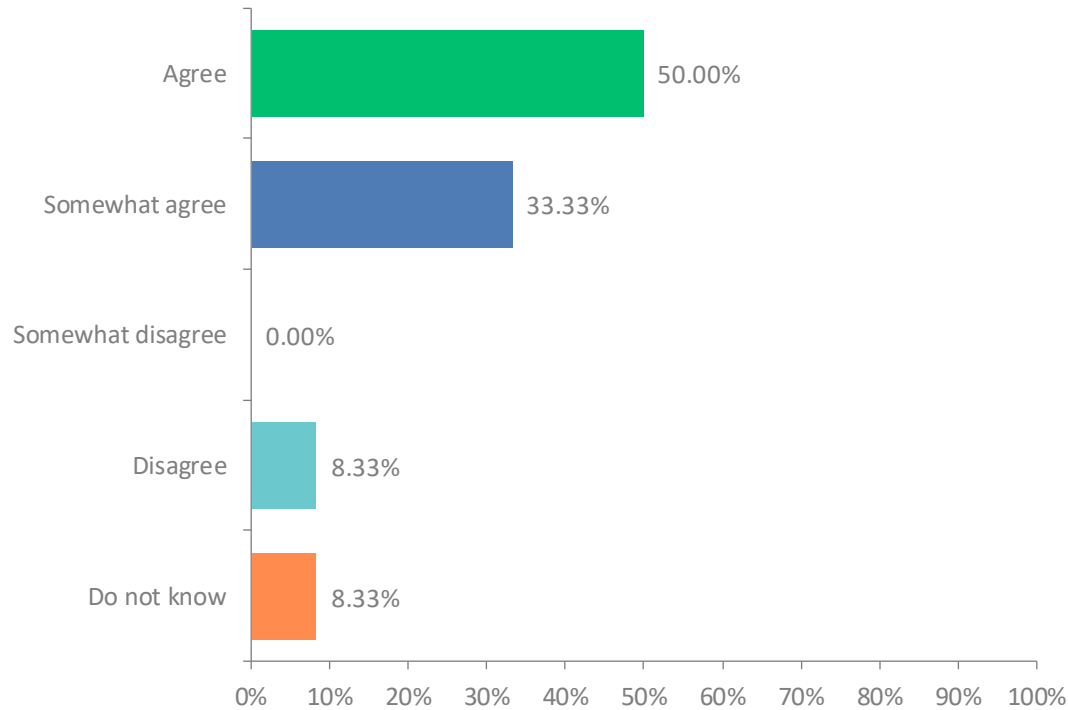
## Other comments:

- Allies on the side of keeping the unique beauty of this area
- Wider representation of the workers of Alta in leadership and decision making
- Maintaining and continuing to leverage strong partnerships



# The Town of Alta is fiscally responsible with its resources

Overall, elected leaders “Agree” while staff leaders more often “Somewhat agree”



## Comments:

### STAFF LEADERS

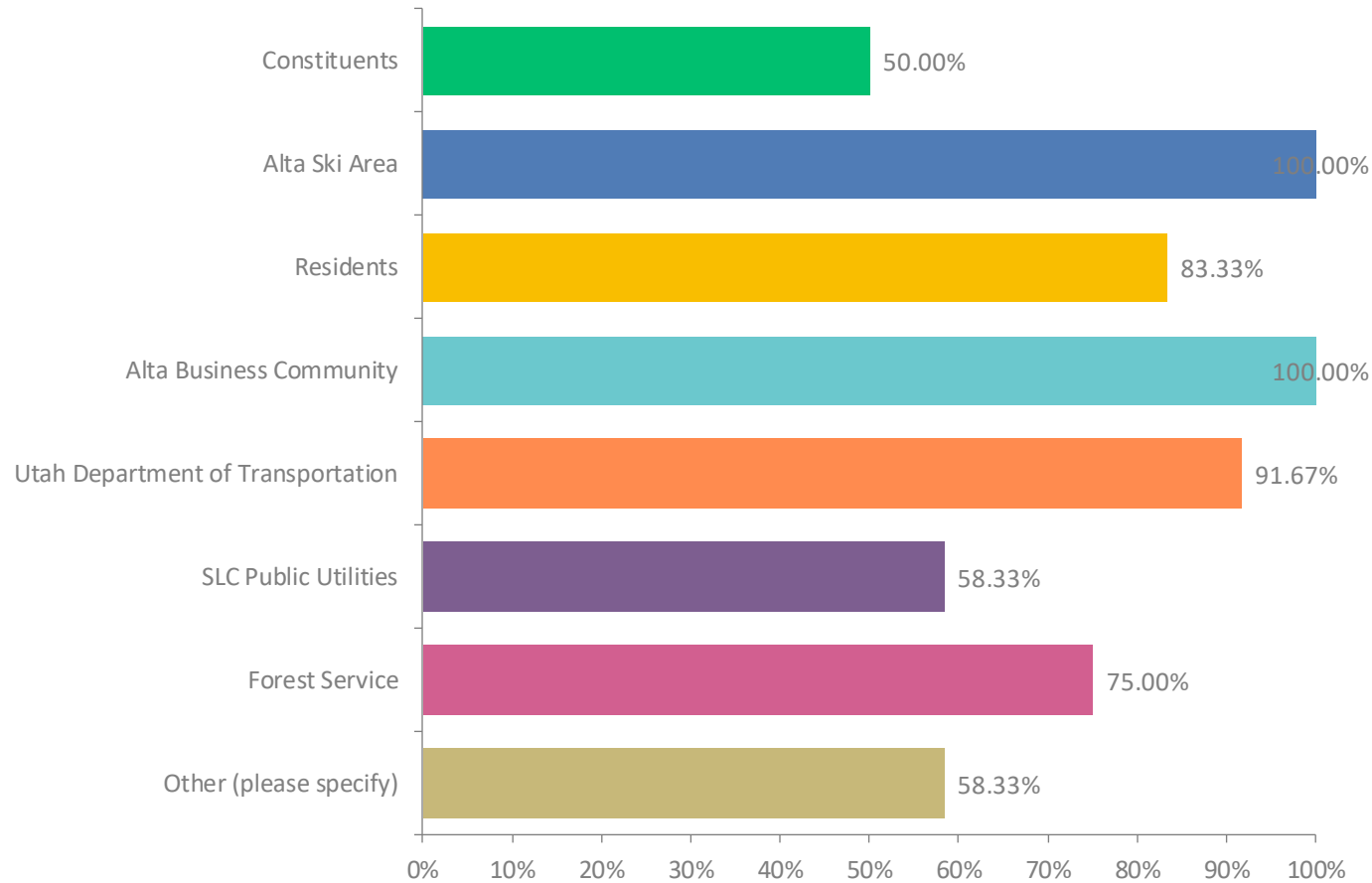
- Great job of micromanaging but that doesn't matter – there is no attention to strategic allocation of resources over time
- We budget conservatively and make smart expense decisions - - We need to improve project delivery and expedite plans for major capital replacement

### ELECTED LEADERS

- We are sales tax dependent
- Budgets are moral documents. Do all Alta voters scrutinize and agree with the morality behind our expenditure priorities and amounts? If labor creates tax revenue, where is the reinvestment in labor?
- Hard question -- Don't know



# Who do you define as partners? These entities, in some way, add value to what you are accomplishing. (Check all that apply and add to the list as needed)



## Other partners mentioned:

- Friends of LCC
- Local and regional nonprofits
- Salt Lake City
- Salt Lake County
- Salt Lake County Emergency Management
- Salt Lake County Service Area #3
- Salt Lake Valley Emergency Communications Center
- Salt Lake Valley Health Department
- Save Our Canyons
- Snowbird Ski and Summer Resort
- State of Utah, esp Division of Drinking Water
- Students for the Wasatch
- UFA
- Unified Fire
- Unified Police/SLCO Sheriff
- Utah Transit Authority
- Visitors/tourists

## Comments:

- UDOT might be a foe! Delicate balance with them. If town ran a transportation service I would support that
- All who live Alta, the place and the concept



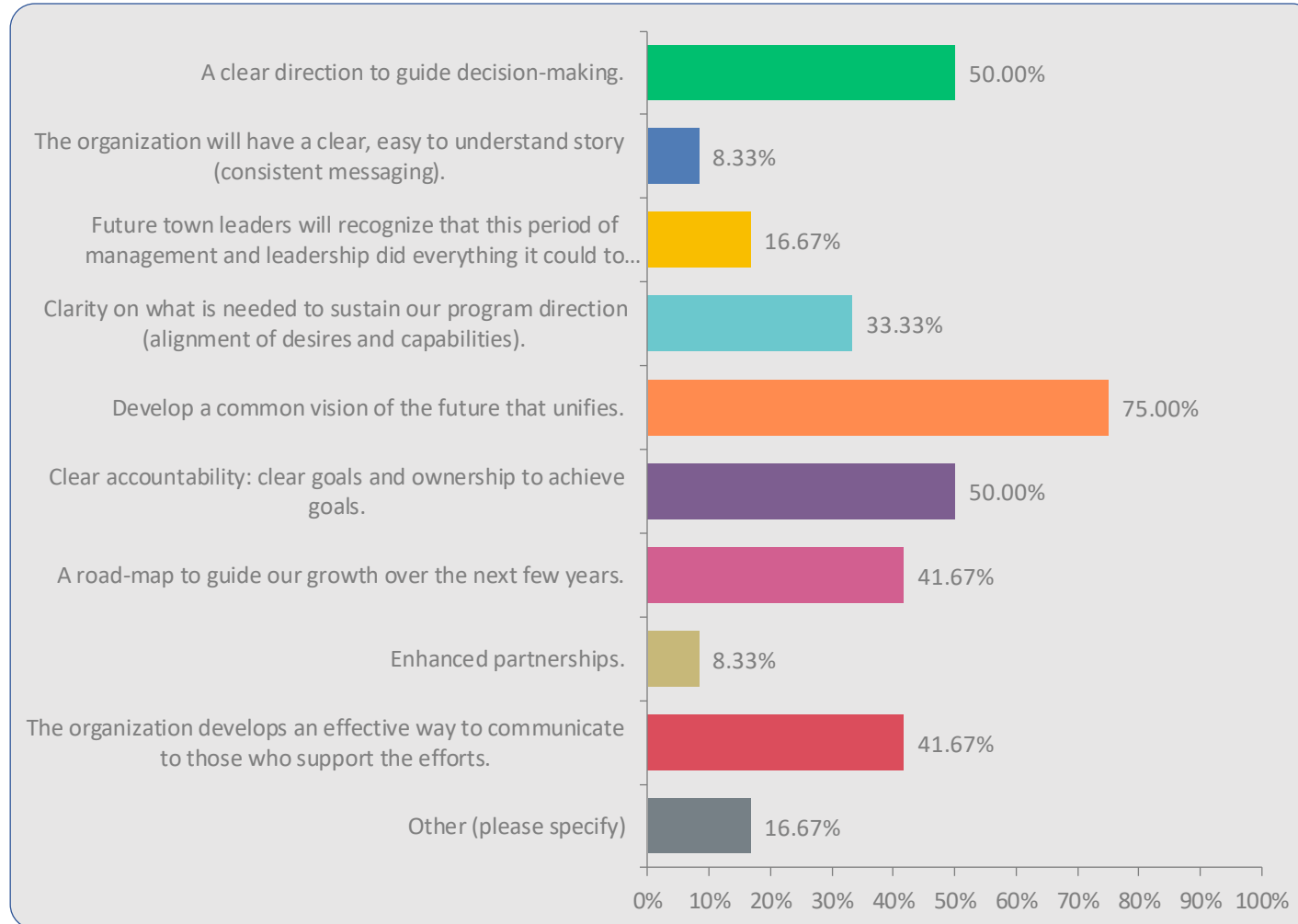
# What are the critical issues that must be discussed in this planning process?

**Shared agreement around key themes of setting priorities and a vision for the town and clarifying roles and responsibilities for staff and elected leaders.**

- Setting priorities
- Vision for the Town – are we aligned?
- Process and procedure, roles and responsibilities
  - We need an org chart! Clear guidance on who is responsible for what
- Building consensus
- Staff recruiting and retention
- Roles and responsibilities



# Success for this planning process...



## TOP THREE RESPONSES:

1. Develop a common vision of the future that unifies.
2. A clear direction to guide decision-making
3. Clear accountability; clear goals and ownership to achieve goals



# Strategic Assessment Template

Broad and shared compilation of facts, beliefs, and perceptions



## Strengths

- Strengths of your current business model
- Core competencies
- Competitive advantage
- Brand heritage and reputation
- People, processes & relationships

After reviewing the assessment, the group developed a SWOT analysis working in small groups. The SWOT notes were agreed upon in group process. The notes and typed version detail are included on the following pages.



## Weaknesses

- Issues, obstacles, trends or realities that you know you must plan to overcome to achieve success.
- Typically, well known



## Opportunities

- The trends, innovations, shifts in values that can enhance your success if you take advantage of them.



## Threats

- The trends, innovations, shifts in values that could become obstacles to your success.
- Typically, little knowledge about them



# STRATEGIC ASSESSMENT SWOT DEVELOPED IN GROUP SESSION



## Strengths



## Weaknesses

S W O T	
<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Experience, dedication of staff</li> <li>• Financial position <i>★ Location</i></li> <li>• Small size allows for nimbleness</li> <li>• Resilience &amp; strong partnerships</li> <li>• Barrier to communication is low.</li> <li>• Engaged leadership.</li> </ul>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• Hyper attuned to threats</li> <li>• Resources available to tackle challenges <i>UDOT + Forrest ★ strength of partnerships</i></li> <li>• Change <i>Relationships with external leaders can be strengthened + leveraged</i></li> <li>• Increased visitation <i>Increased summer activity</i></li> <li>• Budget of partners <i>resources</i></li> </ul>
<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Deadend canyon + one road</li> <li>• Town's lack of land ownership</li> <li>• Subject to politics outside canyon</li> <li>• Finding + retaining staff</li> <li>• Intense weather variability</li> <li>• Reliant on visitors + tourism</li> <li>• Avalanche treats</li> <li>• Town building maintenance</li> <li>• Lost relationships with external leaders</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Increased strain on resources</li> <li>• Emergency + law enforcement <i>changing</i> <i>unlike roads</i></li> <li>• External jurisdiction - decisions by others <i>greatly impact Alta</i></li> <li>• Climate Change</li> </ul>



## Opportunities



## Threats

# Strategic Assessment Template

Broad and shared compilation of facts, beliefs, and perceptions



## Strengths

- Experience, dedication of staff
- Financial position
- Location
- Small size allows for nimbleness
- Resilience and strong partnerships
- Barrier to communication is low
- Engaged leadership



## Opportunities

- Hyper-attuned to threats
  - Resources available to tackle challenges
    - UDOT and Forest Service
- Relationships with external leaders can be strengthened and leveraged
- Change
- Increased visitation
- Increased summer activity
- Budget and resources of partners

This is the final SWOT with minor edits after final review.



## Weaknesses



- Setting priorities within current structure
- Lack of clarity around governance
- Short planning horizon
- Dead-end canyon and one road
- Town's lack of land ownership
- Subject to politics outside canyon
- Finding and retaining staff
- Weather, avalanche threats
- Town building maintenance
- Lost relationships with ext

## Threats



- Increased strain on resources
- Emergency and law enforcement changing
- Unique needs of our law enforcement team
- External jurisdiction – decisions by others greatly impact Alta
- Climate change



Council and staff working together in small groups.

# TOWN OF ALTA VISION OF SUCCESS

Chris Cawley came to the meeting having prepared his Vision of Success as the newly appointed Town Manager. He began with a nod to the past and acknowledged predecessors and their successes. He talked about the challenges they faces and those that continue. Chris reviewed roles and responsibilities and presented an organizational chart that he developed. His Vision of Success outlined a path to get there, what he and the staff need to do their job and serve the Town well.

Participants then worked in small groups to articulate a group vision of Success for the Town. Pathway offered a framework of six major themes for the group to use. See Chris's presentation and the notes and work accomplished on the following pages.



# Roles and Responsibilities, Vision of Success

Alta Town Council Retreat  
January 11, 2024





Let's  
Acknowledge  
Our  
Predecessors



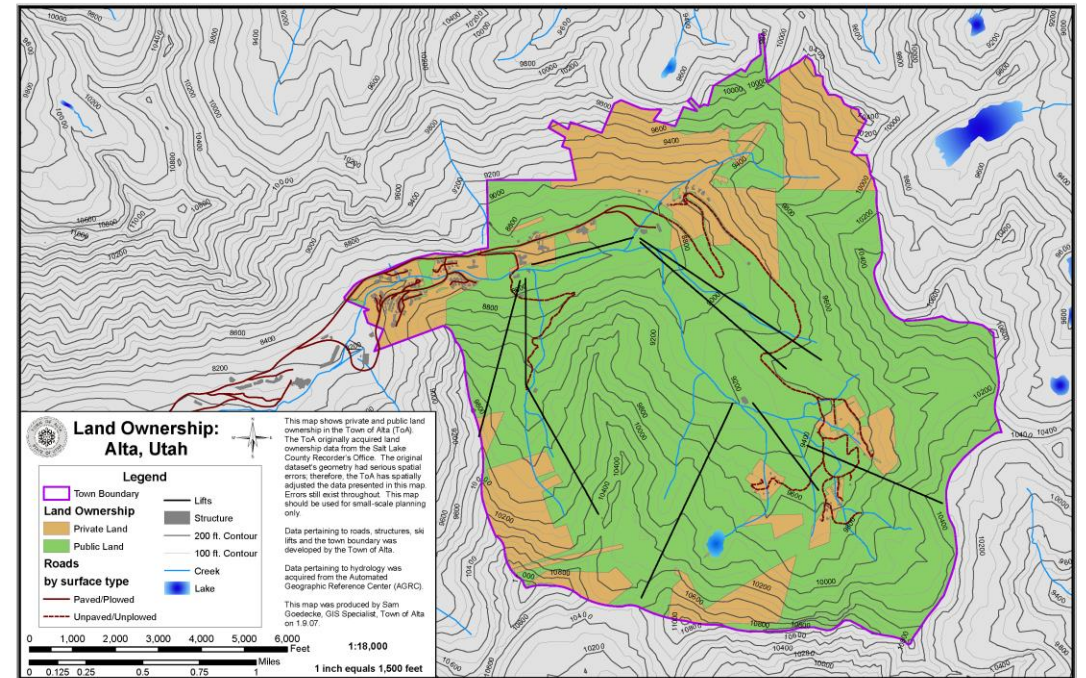
# ...and their successes

- Just look at Alta!
  - Healthy environment, landscape dominates
  - Alta's been thoughtfully developed
  - People are passionate about Alta despite its challenges
- Just look at our budgets
  - Stable, growing revenues
- Town has provided consistent, reliable services over time in a radical, constrained environment
- Alta property tax rates are competitive
  - 8 percent lower than Brighton
  - 10 percent lower than Snowbird
- Outstanding relationships with partners



# ...and the challenges they faced – and that we face...

- Town of Alta has limited jurisdiction or direct control
  - Federal land, other overlapping jurisdictions
- Limited resources
  - Budget, land ownership
- Extremely challenging environment
- Concentrated, seasonal economy
- Constant litigation with developers
- Population growth and increased visitation
- Climate change





# ...continued!

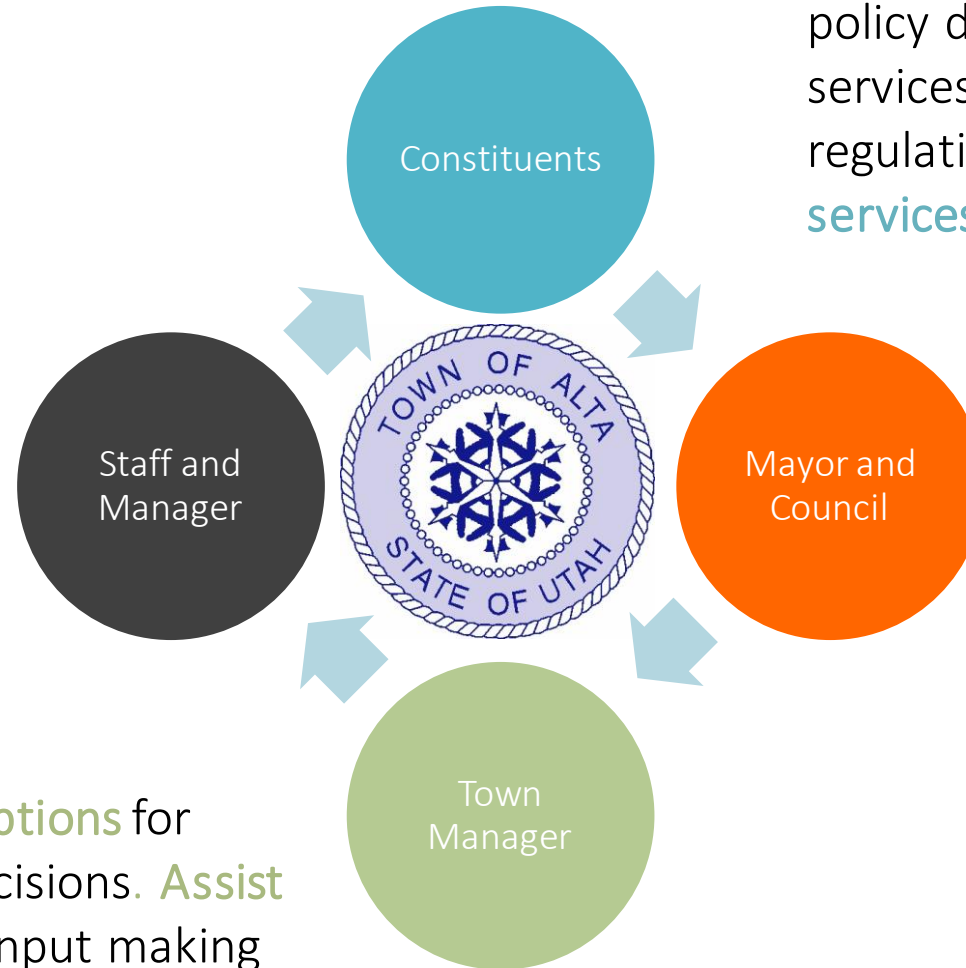
- Revenues have grown faster than our capacity to plan and implement
- Crisis focus: Development, Mountain Accord, Gondola, Covid, Parking, Dogs...
- Inconsistent direction
- Working in Alta is a blessing but also a burden
- Unclear roles and responsibilities, disregard for them



# Roles and Responsibilities

**Implement** policy decisions, **manage** town services, programs, and regulations. **Serve** constituents.

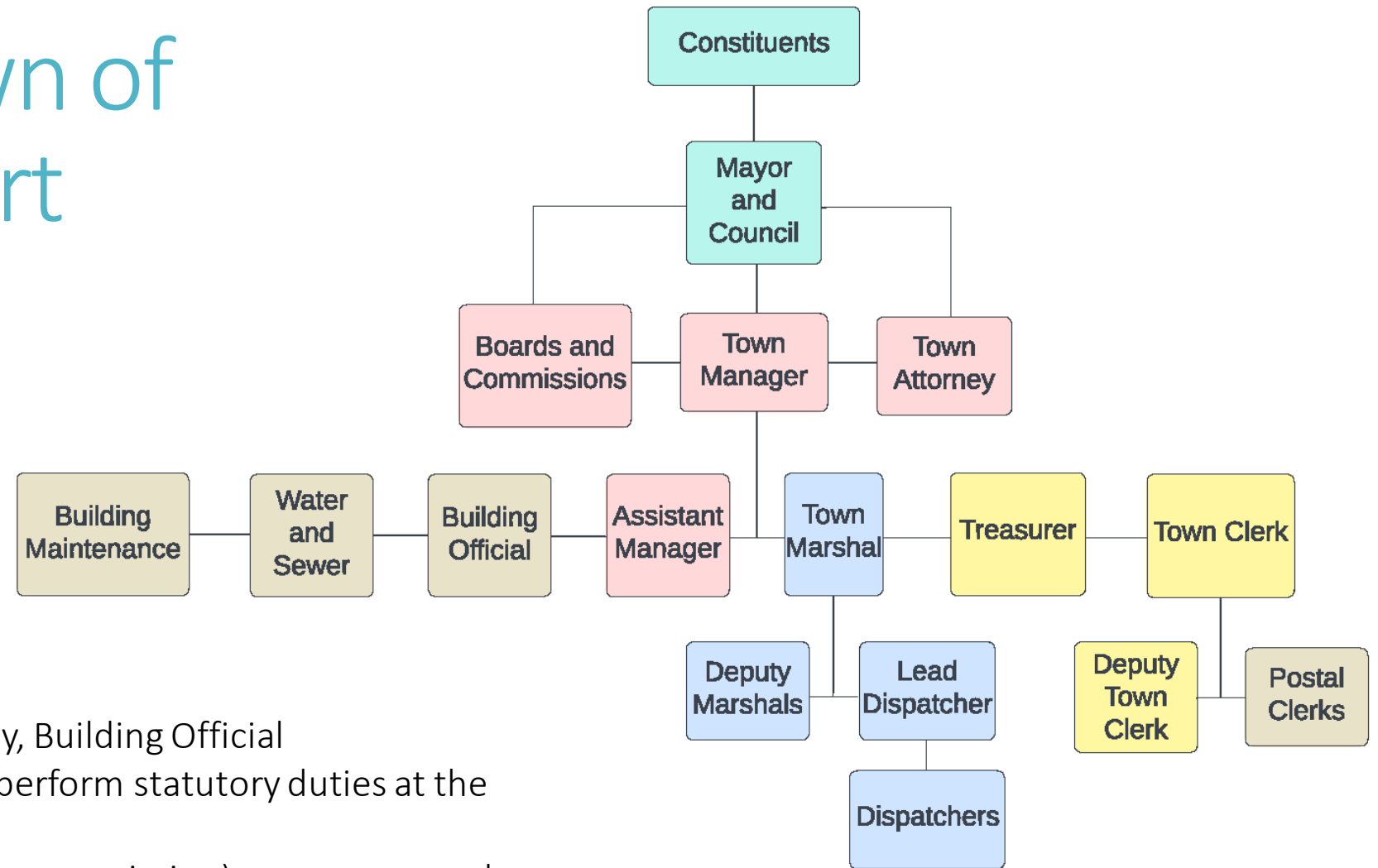
Work with staff to **present options** for implementation of policy decisions. **Assist mayor and council** in taking input making policy decisions. Direct staff.



Elect mayor and council members to take input and make policy decisions about Town services, programs, and regulations. **Receive, consume services.** Participate!

**Take input and make policy decisions** about Town services, programs, and regulations. **Represent community and make decisions on their behalf.**

# Behold - Town of Alta Org Chart



- Clerk, Treasurer, Marshal, Attorney, Building Official
  - Appointed by the council to perform statutory duties at the direction of the manager
- Boards and commissions (planning commission) are empowered by state code and town ordinance

# Town Manager

- *A Brave New World...hopefully not 1984*
- Statutory mayoral duties delegated
- Manage internal affairs
- Primary conduit between elected officials and staff
- Carry out policies, provide reports
- Supervise TOA assets
- Execute and enforce laws and ordinances,
- observe contracts etc.



# Vision of success

The Town of Alta is:

- High performance
- Unified, linear
- Modern, future oriented
- Sustainable, resilient
- Transparent, legible, understood, appreciated
- Calm, cool, collected
- Coalition of the willing? Competitive and selective
- Open minded
- We have a plan!



# How do we get there?

## Improve Capacity

- Optimize
- Embrace and Invest in technology
- Internal process improvement
- Reporting and accountability
- Prioritize attainable goals

## Communication, Engagement

- Engage community in planning
- Does community understand the town's role and our limitations?

## Lengthen Planning Horizon

- Short/medium/long term plans:
  - Capital improvements
  - Programs and projects
    - Land Use
  - Community Vision

## Improve Governance

- Clarify council-staff roles & relationships
- Council focuses on policy and priorities
- Planning and decision-making process

# What do I need? What does staff need?

- *A plan, and a planning process*
  - *Where do we go after today? 2 years? 10 years?*
- *Town Council Direction*
  - *What outcomes does the council want to see?*
  - *What resources will be devoted to achieve the outcomes?*
    - *Staff proposes pathways to implement policy*
    - *Works with council to determine presentation, communication*

# Thank you for your service!!





## Town Manager Vision of Success

- ✓ High performance organization
- ✓ Unified and linear
- ✓ Operating according to a plan
- ✓ Future oriented and technologically empowered
- ✓ Sustainable and resilient in terms of revenue and as an employer
- ✓ Enhance transparency through streamlined communications
- ✓ Reactive to proactive – no more “hair on fire”
- ✓ Open-minded, open to improvement and change
- ✓ Short, medium, and long-term plans
- ✓ Community engagement in planning
- ✓ Role clarity across the board

# VISION

- High performance organization
- Unified & linear
- Operating according to a plan
- Future oriented & technologically empowered
- Sustainable & resilient in terms of revenue & as an employer
- Enhance transparency through streamlined ~~process~~ communications.
- Proactive > reactive – no more hair on fire
- Open minded, open to improvements & change
- Short, medium & long-term plans
- Community engagement in planning
- Role clarity across the board

# LONG-RANGE VISION OF SUCCESS

## **Core Competencies**

*What will you be known for? What do you want to be best at to achieve your vision? What are your core competencies?*

## **Fiscal Strength and Focus**

*How will you manage revenue and finances? How does the budget process align with our strategies?*

## **Organizational Model**

*How our leadership manages accountability, role clarity, and responsibilities? How does our use of technology support this model?*

## **Summary Vision Statement**



## **Key Collaborators & Partners**

*Who will your key partners be? What advocacy or policy activities will you take up with others? What relevant competition must be considered? How have they shifted or evolved? How do you depend on them?*

## **People and culture**

*What will set your organization apart? How will you attract and retain staff, and make engaging with your organization unique?*

## **Results and Performance Measures**

*How will you know you are succeeding?  
What metrics/objectives/impacts will you use? What technology will help us manage the dashboard and the details?*

After Chris Cawley spoke on a vision of success for the town, participants worked in small groups to articulate and write the draft Town vision of success using this worksheet. Pathway offered these six major themes as a way to develop the vision.

## VISION OF SUCCESS

Our financial sustainability is...

- Comprised of diverse revenue streams
- enhanced by careful expense management

Partners and allies contributed to our success by...

- Expanding our offerings
- Advocating for our vision of Alta
- Being powerful allies and having influence
- Helping us to bypass red tape

## VISION OF SUCCESS

Our services are known for...

- Responsiveness
- Welcoming
- Dedicated
- Smooth services
- high performing
- Accessibility + reliability

Our success is measured by...

- Public acknowledgment of our services
- Financial audits, financial strength
- Technological advancements leading to efficiencies
- Increased transparency + streamlined communications
- Self assessment of achievements
- Our longevity
- updated + well-maintained infrastructure

## VISION OF SUCCESS

Our model or structure is...

- based in consensus decision making
- consistent for staff support + management
- open to continuous improvement

Our people and culture are distinguished by...

- Stability as an employer
- Competitive compensation + benefits
- High-functioning team
- Having incredible vision
- Happiness to be here!
- Passion for recreation and outdoors

This is the draft Town of Alta Vision of Success developed in the retreat. The next page offers a typed version of the draft vision.

# DRAFT VISION OF SUCCESS

REFLECT upon your wishes and dreams for the future.  
What would you like to have helped build; what will be your legacy?

## ***Our financial sustainability is ...***

- *Comprised of diverse revenue streams*
- *Enhanced by careful expense management*

## ***Our services are known for...***

- *Responsiveness*
- *Welcoming*
- *Dedicated*
- *Smooth running*
- *High performing*
- *Accessibility and reliability*

## ***Our model or structure is...***

- *Based in consensus decision-making*
- *Consistency for staff support and management*
- *Open to continuous improvement*

## ***Summary Vision Statement***

## ***Partners and allies contributed to our success by ...***

- *Expanding our offerings*
- *Advocating for our vision of Alta*
- *Being powerful allies and having influence*
- *Helping us to bypass red tape*

## ***Our success is measured by...***

- *Public acknowledgement of our services*
- *Financial audits, financial strength*
- *Technological advancements leading to efficiencies*
- *Increased transparency and streamlined communicators*
- *Self-assessment of achievements*
- *Our longevity*
- *Updated and well-maintained infrastructure*

## ***Our people and culture are distinguished by...***

- *Stability as an employer*
- *Competitive compensation and benefits*
- *High-functioning team*
- *Having incredible vision*
- *Happiness to be here!*
- *Passion for recreation and outdoors*

## VISION STATEMENT WORK

- ❑ The agenda scheduled time for the group to review and update the Town of Alta Vision Statement. After a brief discussion the council requested that the staff team work on a suggested Vision Statement to bring back to the council at a future date. Chris agreed and the group left the topic.

## Why are we in business? (Vision)

- Vision is a compelling verbal image that forms a picture for the future. It should define what the organization seeks to become, yet also describe something realistic.
- What is our dream and the loftiest picture?
- What will be different for those we serve?

## EXERCISE:

Who do we serve?

What end do we seek?

## CURRENT VISION

# MARSHAL'S OFFICE DISCUSSION

## MARSHAL'S OFFICE

As part of the assessment, a specific discussion around the Marshal's office surfaced. Key needs identified were around challenges with staffing and recruiting, facilities, and more recent needs to adapt to complex investigations.

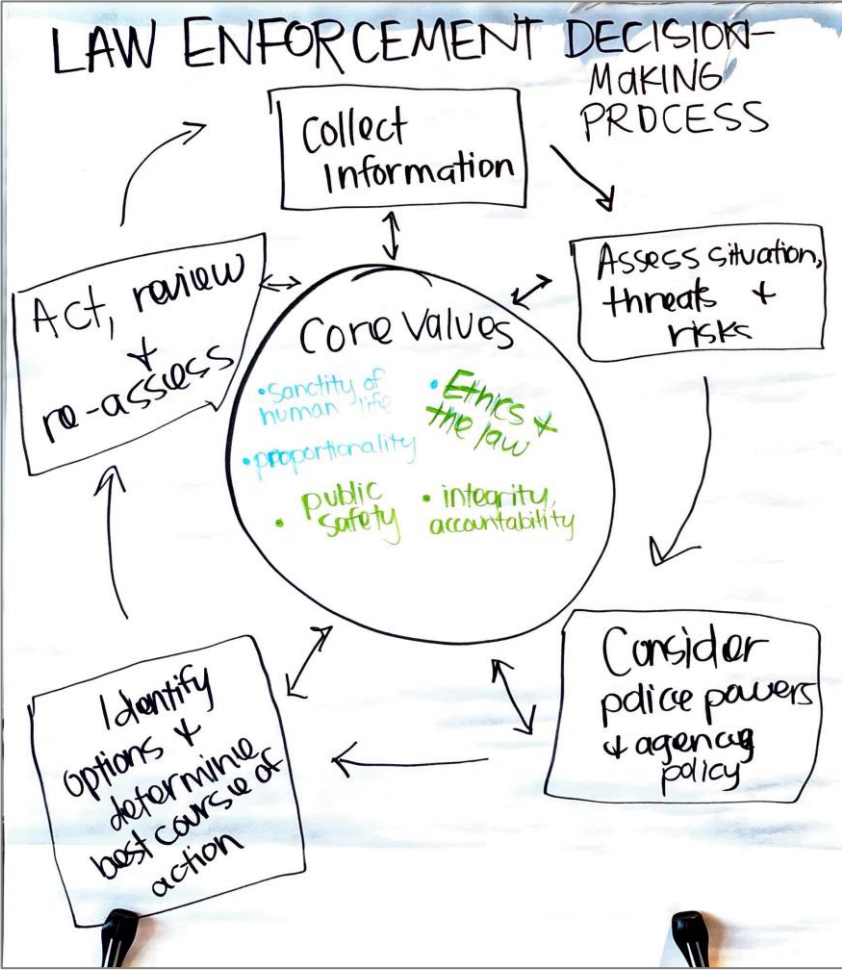
### Needs:

- Staffing and recruiting with valley PD competition
- Facilities and tools to do Marshall work
- Adapting to complex investigations
  
- ✓ Staffing
- ✓ Housing
- ✓ Staff decision-making empowerment

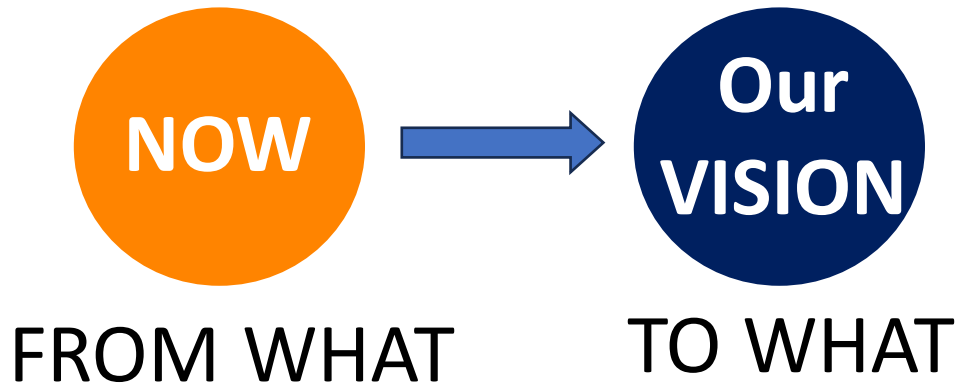
### Marshall Office needs:

- Staffing & recruiting with valley PD competition.
- Facilities & tools to do Marshall work.
- Adapting to complex investigations.
  
- Concerned about long-term ability to recruit & retain staff.
  - Use surplus to address staffing challenges.
- Maintaining or growing affordable residences is challenged by road & general housing cost increases.
- Town Manager should be empowered to make decisions necessary to carry out town policies.

# MARSHAL'S OFFICE: LAW ENFORCEMENT DECISION-MAKING PROCESS



# WHAT PRIORITIES MUST WE ADDRESS?



## FROM – TO EXERCISE

The group was asked to work on an exercise to outline priorities from the perspective of where we see ourselves NOW, and what our VISION would be for the future. The team built a list of FROM and TO, and then prioritized their choices with votes using sticky dots.

See the following page to review the list and priorities.

## FROM... → TO...

- Reactive responses
- Confusion on roles + priorities
- Deficiencies
- Threats
- Dogmatic
- Analog
- General concensus
- Unknown condition
- Annual planning
- Supposed/assumed
- Varied information delivery
- Purly consent agenda
- Staff presenting challenges

- Proactive planning
- Clarity on roles + priorities
- Capabilities
- Opportunities - embrace + leverage change
- Flexible
- Digital/modern
- Consistent plan
- Well-maintained, updated infrastructure
- Multi-year planning
- Informed
- Clear communication channels + regular updates
- Dialogue around staff-led agenda items
- Staff presenting proposed solutions



# DETERMINING TOP PRIORITIES

Two top priorities emerged in this abbreviated format which begins to form the development of a strategic plan. In a full strategic planning process, more detail would surface in multiple priorities identified. Through the survey, interviews, and retreat to this point, two key priorities were agreed upon by the group:

1. Long-term planning
2. Governance and clarity around roles and responsibilities

Participants were asked to work on one of these in small groups for about thirty minutes. After that, they reported on their progress. Note the following pages.

## FROM

## TO

Reactive responses	→	Proactive planning
Confusion on roles & priorities	→	Clarity on roles & priorities
Deficiencies	→	Capabilities
Threats	→	Opportunities – embrace and leverage change
Dogmatic	→	Flexible
Analog	→	Digital / modern
<u>General consensus</u>	→	Consistent plan
Unknown condition	→	Well-maintained, updated infrastructure
Annual planning	→	Multi-year planning
Supposed / assumed	→	Informed
Varied information delivery	→	Clear communication channels & regular
Purely consent agenda	→	Dialogue around staff-led agenda items
Staff presenting challenges	→	Staff presenting proposed solutions

# TOP PRIORITIES SMALL GROUP WORK

These are the original worksheets from the small group work in the retreat. The following pages are the typed versions of the worksheets.

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**WORKING TITLE: IMPROVED GOVERNANCE** SELECT a note taker and a timekeeper. Names:

1. Clarify the scope of your core strategic focus area.

What is IN scope? **COMMUNICATION** What is OUT of scope?

- STATUTORY RESP.
- ORG CHART
- SHARE GOALS
- STAFF - COUNCIL-PUBLIC RELATION

Who makes what decisions? - ADMIN VS. LEGISL. - CODE UPDATES

- IMPLEMENTATION (POST 6)
- OPERATION
- PRIORITIZATION / (PRE-6)
- PLANNING

2. Define success: What will happen as a result of your initiative realizing its full potential?  
How will you measure success?

EFFICIENT DECISIONS = PROJECTS DONE SERVICES ENHANCED  
CLEAR ROLES/RESP HAPPY  
CITIZENS KNOW/APPRECIATE WHAT THEY GET EMPOWERED STAFF

3. Generate a list of what actions need to be done/must happen to achieve success as defined.

- I.D. CLEAR VISION/VALUES
- STRENGTH/WEAKNESS ASSESSMENT
- IMPROVE INFO. TO COUNCIL
- TOWN MANAGER INVOLVED ALWAYS.
- PLAN TO IMPLEMENT
- REPORTING

4. Cluster/Group your list into three timeframes.

NOW (Short Term: 12-18 months)	NEXT (Longer Term: 24-36 months)	THEN (ultimately)
- CAPABILITIES ASSESS → COUNCIL BRINGING - REPORT CORRECTING ACTIONS - MISSION VALUES - TOWN MGR INVOLV - ROLCS/RESP	- "PLAN" IN PLACE - IMPROVE INFO TO COUNCIL - CODE UPDATES - CONTINUITY/SUCCESSION	- REPORTING, UPDATE

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**WORKING TITLE: LONG TERM PLANNING** SELECT a note taker and a timekeeper. Names:

1. Clarify the scope of your core strategic focus area.

What is IN scope? **Infrastructure Projects** What is OUT of scope?

- Engineering
- Timeliness - Realistic
- Cost

What is OUT of scope?

- Town management
- Staff planning/mgmt

2. Define success: What will happen as a result of your initiative realizing its full potential?  
How will you measure success?

- more project completion
- Resilient infra structure
- plan utilization

3. Generate a list of what actions need to be done/must happen to achieve success as defined.

- Conducting studies
- Facilities plan
- Long Term Plan

4. Cluster/Group your list into three timeframes.

NOW (Short Term: 12-18 months)	NEXT (Longer Term: 24-36 months)	THEN (ultimately)
* Facilities Plans/Needs Assessment Land planning Asset management	Project execution Land Acquisition New Funding Opportunities	generational equity



1. Clarify the scope of your initiative: What do you want to do?

What is IN scope?

- Statutory responsibility
- Organizational chart
- Shared goals
- Staff, council, public relations
- Decision-making process
- Updated CODE
- Administrative vs legislative

What is OUT of scope?

- Implementation
- Operation
- Prioritization planning

2. Define success: What will happen as a result of your initiative realizing its full potential?

How will you measure success?

- Efficient decisions = projects COMPLETE, Services rendered
- Clear roles and responsibilities
- Citizens know and appreciate what they get
- Happy, empowered staff

3. Generate a list of what needs to be done/has to happen to achieve success as you have defined it.

- Clear Mission and Values
- Strengths and weakness assessment
- Improved information to Council
- Town Manager is always in the loop
- Plan to implement
- Reporting

4. Cluster/Group your list into three timeframes.

**Now**

The next 12 months

- Capacity/needs assessment – council briefing
- ... Corrective actions
- ID Mission / values
- Town Manager in the loop
- Roles and responsibilities

**Next**

Medium Term: 12+ to 36 months

- ”Plan” in place
- Improve information to Council
- Code updates
- Continuity, succession

**Then**

Longer Term: 36+ “ultimately”

- Reporting, updates

1. Clarify the scope of your initiative: What do you want to do?

What is IN scope?

- Infrastructure projects
- Engineering
- Timelines, realistic
- Cost
- Town management
- Staff planning / management

What is OUT of s cope?

2. Define success: What will happen as a result of your initiative realizing its full potential?

How will you measure success?

- More project completion
- Resilient infrastructure
- Plan utilization

3. Generate a list of what needs to be done/has to happen to achieve success as you have defined it.

- Conducting studies
- Facilities plan
- Long-term plan

4. Cluster/Group your list into three timeframes.

**Now**

The next 12 months

- Facilities needs assessment\*
- Land planning
- Asset management

**Next**

Medium Term: 12+ to 36 months

- Project execution
- Land acquisition
- New funding opportunities

**Then**

Longer Term: 36+ “ultimately”

Generational equity

# EVALUATION AND WRAP UP

Julie provided an overview of the work accomplished and the group weighed in with an evaluation citing what they liked and thought worked well, and what they would have changed. There was general appreciation for the commitment of each of the participants, staff and elected officials, to the Town of Alta.

## EVALUATION

### What did you like?

- Individual interviews and surveys in advance
- Facilitation (independent, neutral)
- New format allowed for new alignment
- Lots of listening
- Comfortable venue
- Equal opportunity for participation
- Manageable group size

### What would you change:

- More time
- Do this more routinely
- Less snowy time of year
- Expand invite list by a few
- Public involvement?

**+**  
What did you like?

- Preparation
- Individual interviews + survey that allow multiple points of feedback
- Facilitation <sup>\*independent+neutral</sup>
- New format allowed for new alignment
- Lots of listening
- Comfortable venue
- Equal opportunity for participation
- Manageable group size

**△**  
What would you change?

- More time
- Do this more routinely
- Less snowy time of year
- Expand invite list by a few
- Public involvement?

# APPENDIX



# PHOTOS FROM THE RETREAT



# PHOTOS FROM THE RETREAT





# PHOTOS FROM THE RETREAT





Thank you for the opportunity to work with you on behalf of the future of the Town of Alta. This report includes the responses and assessment of those surveyed and interviewed, and in the retreat session.

As individuals, you express deep commitment to the Town. As a group, you embody a community with shared agreement in every key measure. We hope you feel empowered to continue this important work. Pathway is confident that your continued work in strategy and planning will yield excellent results.

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