



Town Council Meeting
Fall Strategic Planning Work Session
Thursday, October 08, 2026 | 12:00 PM
Apex Town Hall | 73 Hunter Street, Apex, NC
3rd Floor Training Rooms A and B

English	Spanish	Chinese (Simplified)
ANNOUNCEMENTS Members of the public can access and view the meeting on the Town's YouTube Channel https://www.youtube.com/c/TownofApexGov or attend in-person. The meeting date, start time, and location details are included at the top of this agenda document.	ANUNCIOS Las personas interesadas pueden acceder y ver la reunión a través del canal de YouTube de la Ciudad en https://www.youtube.com/c/TownofApexGov o asistir en persona. En la parte superior de este documento de agenda se indican la fecha, la hora de inicio y la ubicación de la reunión.	公告 公众可通过镇政府的YouTube频道 https://www.youtube.com/c/TownofApexGov 在线旁听会议，或选择现场参与。会议日期、开始时间及地点详情见本议程文件顶部。
Accommodation Statement: Anyone needing special accommodations to attend this meeting and/or if this information is needed in an alternative format, please contact the Town Clerk's Office. The Town Clerk is located at 73 Hunter Street in Apex Town Hall on the 2nd Floor, (email) allen.coleman@apexnc.org or (phone) 919-249-1260.	Aviso sobre adaptaciones: Si necesita adaptaciones especiales para asistir a esta reunión o requiere esta información en un formato alternativo, comuníquese con la Oficina del Secretario Municipal, ubicada en el segundo piso del Ayuntamiento de Apex, en 73 Hunter Street, por correo electrónico a través de allen.coleman@apexnc.org o llamando al 919-249-1260.	便利服务声明: 如需特殊便利服务以参加本次会议，或需要将本信息提供为其他格式，请联系镇书记官办公室。 办公地址：Apex镇政务厅二楼（Hunter街73号） 邮箱： allen.coleman@apexnc.org 电话：919-249-1260

AGENDA

- 1. Call to Order | Pledge of Allegiance**
Mayor, Jacques K. Gilbert
- 2. Fiscal Year 2026 in Review – Estimated 30 minutes**
Randy Vosburg, Town Manager, Town Manager's Office
- 3. Strategic Plan Refresh Kickoff – Estimated 30 minutes**
Jessica Hoffman, Director, Budget and Performance Management Department
David Schexnayder, Strategic Plng and Perf. Analyst, Budget and Perf. Mgmt. Dept.
Olivia Stark, Public Service Intern, Budget and Performance Management Department



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AGENDA CONTINUED

- 4. Strategic Plan Refresh Facilitated by Fountain Works – Estimated 1.25 hours**
Julie Brenman, Chief Operating Officer/Senior Consultant, Fountain Works
Sharmel Genthon, Senior Advisor, Fountain Works
Alevtina Newman, Project Coordinator, Fountain Works
 - a) Welcome and Strategic Planning Process Overview – 15 minutes**
 - b) Introduction Activity – 15 minutes**
 - c) Game Plan Apex Strategic Plan Overview – 25 minutes**
 - d) Town of Apex Content – 20 minutes**
- 5. BREAK – 5 MINUTES**
- 6. Strategic Plan Refresh Facilitated by Fountain Works – Estimated 1 hour**
Julie Brenman, Chief Operating Officer/Senior Consultant, Fountain Works
Sharmel Genthon, Senior Advisor, Fountain Works
Alevtina Newman, Project Coordinator, Fountain Works
 - e) Strategic Goal Review Activity – 50 minutes**
 - f) Apex's Strategic Goals – 15 minutes**
- 7. BREAK – 5 minutes**
- 8. Strategic Plan Refresh Facilitated by Fountain Works – Estimated 1.25 hours**
Julie Brenman, Chief Operating Officer/Senior Consultant, Fountain Works
Sharmel Genthon, Senior Advisor, Fountain Works
Alevtina Newman, Project Coordinator, Fountain Works
 - g) Visioning for Success – 70 minutes**
 - h) Wrap-Up / Next Steps – 15 minutes**
- 9. Adjournment**

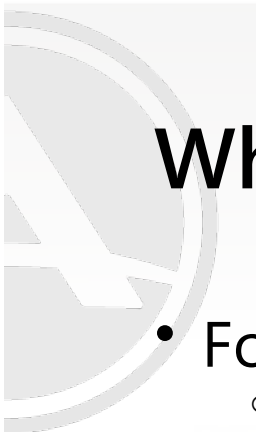


October 8, 2026
Game Plan Apex Refresh

AGENDA

- Updates to Game Plan Apex
 - Refresh of Council Priorities
 - Expanded Reporting Structure
- Summary of Work So Far
 - Department Business Plans
 - Council Initiatives Exercise
- Introduction to Fountainworks





Why Have a Strategic Plan?

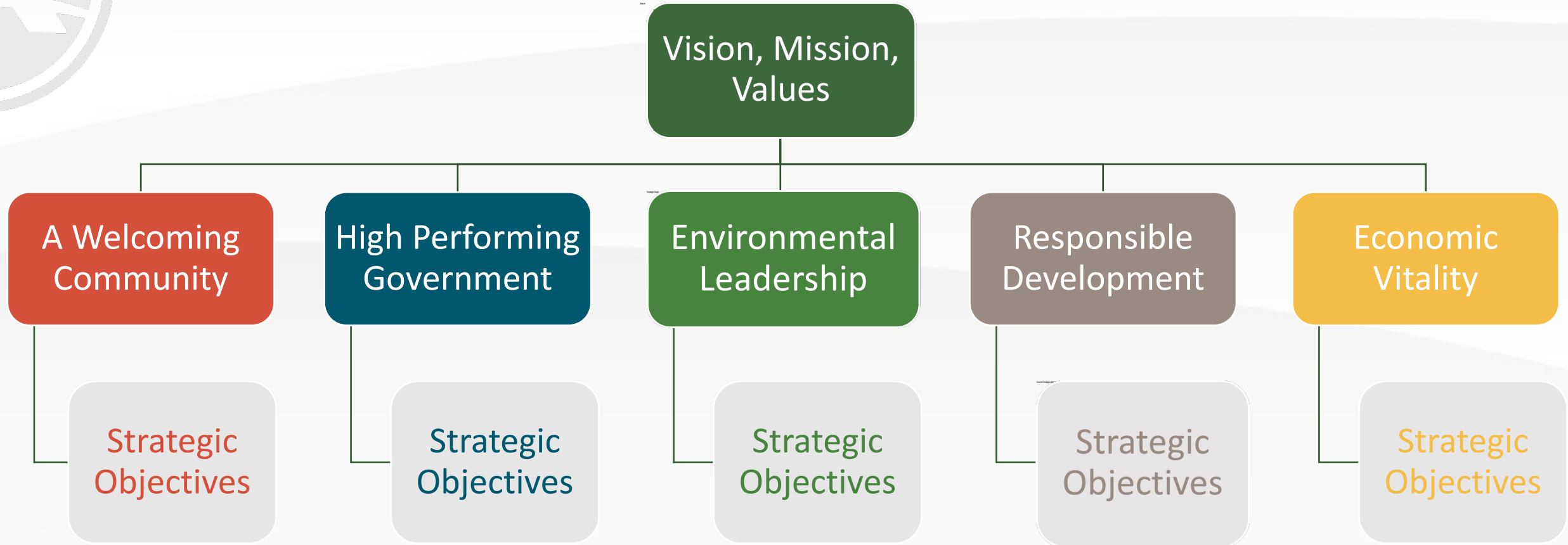
- For the Town:
 - Establishes shared community values
 - Matches resources to identified priorities
 - Outlines how we respond to external pressures and demands
 - For elected officials:
 - Displays a clear set of shared priorities
 - Allows for structured progress reporting and accountability
 - Supports communication with residents: "Here's what we're doing, why we're doing it, and how well we're doing it."
 - For staff:
 - Aligns capital planning, budgeting, and focus with identified priorities
 - Creates an agreed-upon decision-making framework
 - Establishes teams and workflows to tackle complicated, cross-departmental issues
- 



Refreshing Game Plan Apex

- Step 1: Refining priorities established five years ago
 - Three new Council Members
 - Ever-changing political and social landscape
 - Local revenue uncertainty
 - Step 2: Staff-level expansion
 - More specific strategic objectives
 - Clearly defined cross-departmental workflows
 - Robust and regular reporting structure
- 

Game Plan Apex: Current Structure





Vision, Mission, Values

Our Vision

A community unified in the stewardship of our small-town character and natural environment, for a future where all succeed.

Peak Principles

Performance
Empowerment
Accountability
Knowledge

Our Mission

Provide exceptional public service that fosters opportunity for the individual and community to live, thrive, and reach their peak.



Strategic Goals

A Welcoming Community

Create a safe and welcoming environment fostering community connections and high quality recreational and cultural experiences supporting a sense of belonging

High Performing Government

Deliver exceptional service valuing an engaged workforce with an emphasis on efficiency, collaboration, and innovation

Environmental Leadership

Commit to sustaining natural resources and environmental well-being

Economic Vitality

Improve and sustain an environment that invites and retains a variety of residents, employment opportunities, and businesses

Responsible Development

Encourage equitable and sustainable development that provides accessibility and connectivity throughout the community



Current Strategic Objectives

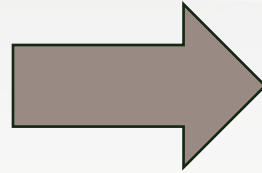
Responsible Development

- Plan for and invest in infrastructure
- Provide and promote mobility
- Support diverse housing options
- Balance impacts of growth and development

More Specific Objectives

Responsible Development

Balance impacts of growth
& development

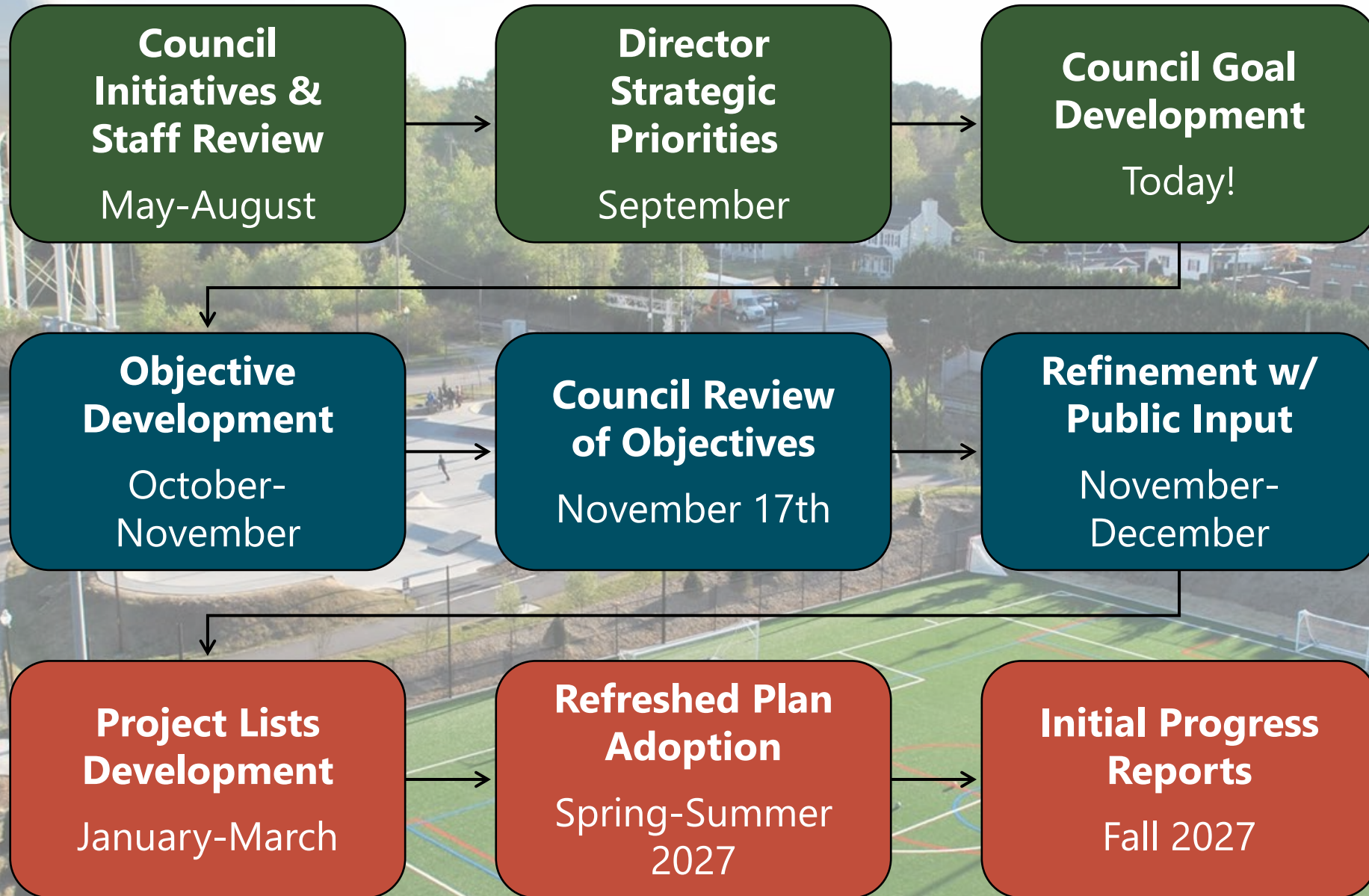


Reduce the burden on residents
by increasing the ratio of
commercial and industrial
property in the tax base.

Layers of the Plan



Game Plan Apex Refresh Timeline



Questions on Plan Structure?

Ongoing Updates to Department Business Plans

- Facilitating department by department revisions
 - Focused on core service delivery
 - The why, the what, and the how behind departmental work
- Refining key performance metrics for trend analysis and benchmarking
- Ongoing cycle of planning, evaluation, and improvement to support informed decisions and resource requests

Strategic Business Plan Budget & Performance Management

Goal 1: Provide strategic financial stewardship that balances current service delivery needs, long-term obligations, and organizational resilience.

Objective 1	Activities
Develop a sustainable budget that aligns with organizational values and community priorities.	i. Responsibly forecast revenues using multi-year trends and economic indicators. ii. Capture community priorities, organizational values, and organizational needs. iii. Conduct trend analysis of prior year budgets to anticipate department needs. iv. Assist departments in the development of operating budget expansion requests. v. Develop and maintain multi-year financial forecasts to evaluate future operating pressures, revenue trends, and fiscal sustainability.

Measure(s):

- Percentage of revenue categories with greater than 5% variance.

Objective 2	Activities
Execute a balanced, strategic, and responsible operating budget.	i. Evaluate potential mid-year budget adjustments by balancing evolving departmental needs and priorities with the impact on current and future budgets. ii. Proactively manage evolving financial needs. iii. Advise departments on the budgetary impact of operational decisions and provide supporting resources and analysis.

Measure(s):

- Percentage of departments with 5% variance from adopted budget for 3 consecutive years.

Council Initiative Exercise: Activity One & Two

1

Collect initiative ideas from **Council** by understanding:

Hopes

- Vision for Apex in 1-4 years

Concerns

- What keeps them up at night

Interest

- Any ideas they already have

2

Directors assessed initiative feasibility through:

Redundancy

- Overlap with existing programs/services

Operational Considerations

- How would this look in practice

Resource Needs

- What would be needed

Summary of Data Analysis

Council-Designed Initiatives

- Grouped ideas based on similarities in ideas, focus, and language.

Qualitatively Coded Themes:

Welcoming Community

Intentional & Inclusive Outreach (7)

Community Connection (6)

High Performing Government

Proactive Resident Communication (8)

Workforce Wellness & Stability (7)

Environmental Leadership

Tree Canopy Preservation (10)

Water Resource Management (8)

Responsible Development

Infrastructure Capacity (8)

Transparent Development Communication (7)

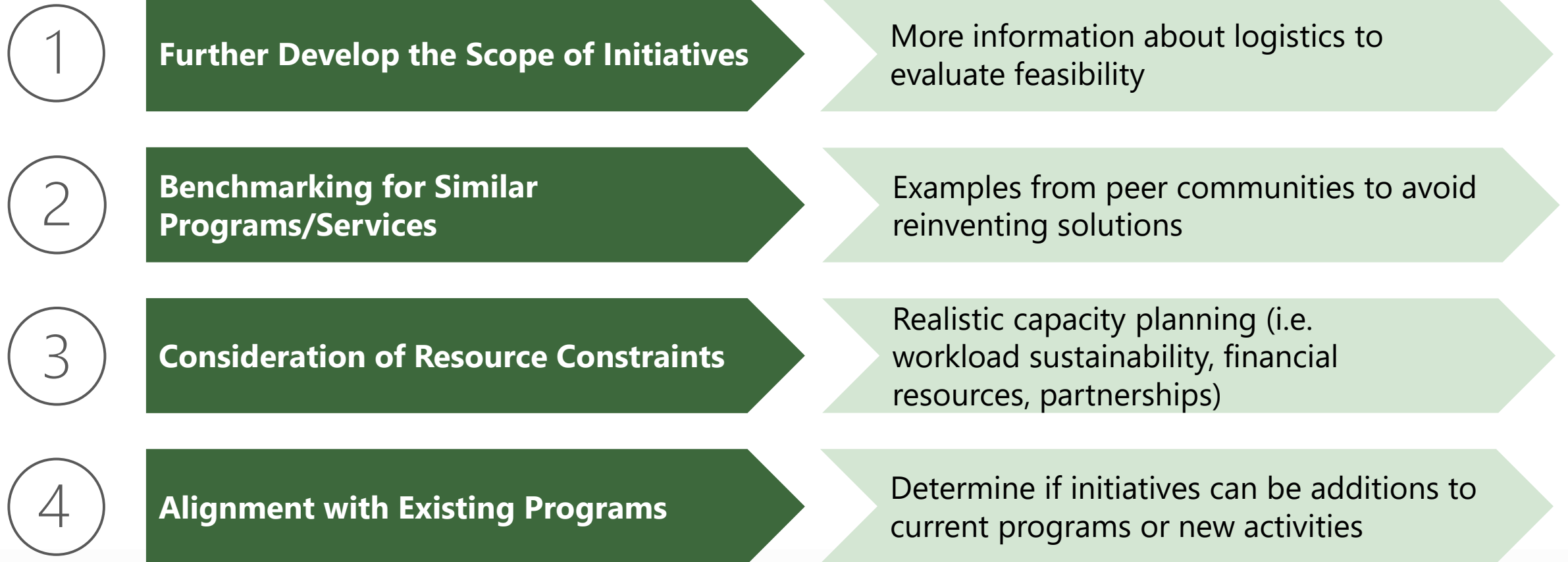
Economic Vitality

Non-Residential Growth & Tax Base Expansion (8)

Economic Ecosystem & Business Support (7)

Summary of Data Analysis

- **Staff Feedback on Initiatives**



Any Questions?



Town Council Strategic Planning Retreat

October 8, 2026



Welcome



Julie Brenman
Sharmel Genthon
Alev Newman

Agenda

- Welcome
- Apex Vision/Mission Overview
- Apex's Context
- Strategic Goal Review
- Apex's Strategic Goals
- Visioning for Success
- Next Steps
- Adjourn

Objectives

- Consider the broader contextual trends impacting Apex
- Confirm the Game Plan Apex Strategic Goals

Strategic Planning

Process Overview

THRIVING COMMUNITIES & EFFECTIVE ORGANIZATIONS



COMPREHENSIVE PLAN

20-30 years

Establishes a long-term vision for the organization, guiding land use, development, and community priorities to ensure sustainable growth.



CIP & MASTER PLANS

5-10 years

Identifies and schedules investments in critical infrastructure and facilities to meet the current and future needs of the community.



STRATEGIC PLAN

3-5 years

Aligns the organization's resources and initiatives with its mission and vision, outlining measurable goals and objectives for achieving long-term priorities.



GOVERNING BODY PRIORITIES & BUDGET

1-2 years

Allocates financial resources based on the elected officials' policy goals to address community needs and deliver essential services effectively.



OPERATIONAL WORKPLANS

1-2 years

Details specific actions, processes, and responsibilities for implementing day-to-day operations and achieving departmental objectives in support of broader strategic goals.



THRIVING COMMUNITIES & EFFECTIVE ORGANIZATIONS



COMPREHENSIVE PLAN

20-30 years

**Advance Apex
2045 (to be
superseded
by Peak Plan
2055)**

**Community
Readiness
Plan (CRP)**



CIP & MASTER PLANS

5-10 years

- Affordable Housing Plan Update (from 2021)
- Capital Improvement Plan (2027-2031)
- Master Plan for Parks, Recreation, Cultural Resources, Greenways, and Open Space (PRGOS) (2023-2033)



STRATEGIC PLAN

3-5 years

**Game Plan Apex
(what we're
updating)**



GOVERNING BODY PRIORITIES & BUDGET

1-2 years

Allocates financial resources based on the elected officials' policy goals to address community needs and deliver essential services effectively.



OPERATIONAL WORKPLANS

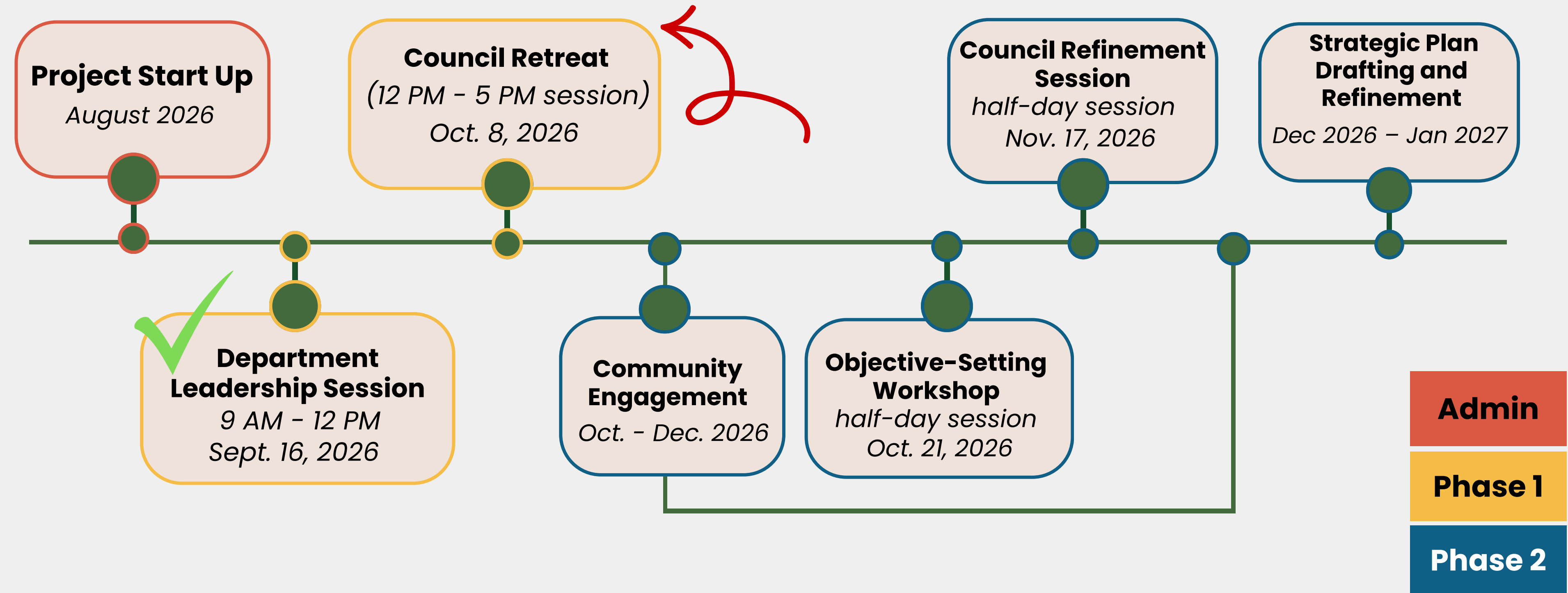
1-2 years

Details specific actions, processes, and responsibilities for implementing day-to-day operations and achieving departmental objectives in support of broader strategic goals.

Organizational Strategic Plan Elements

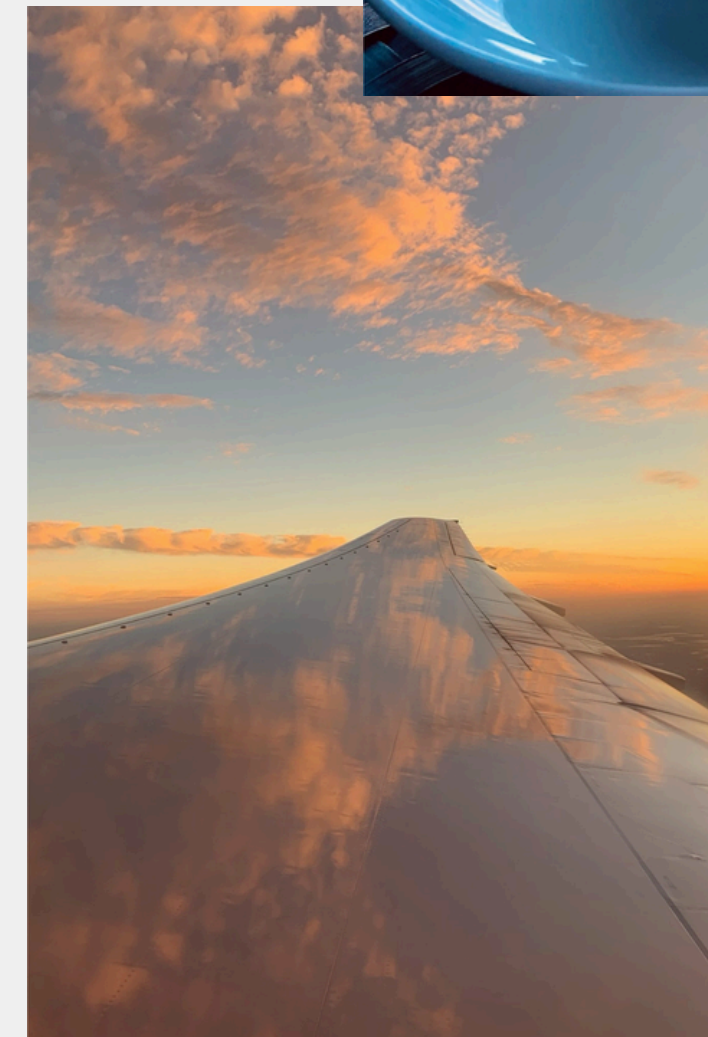


Project Timeline



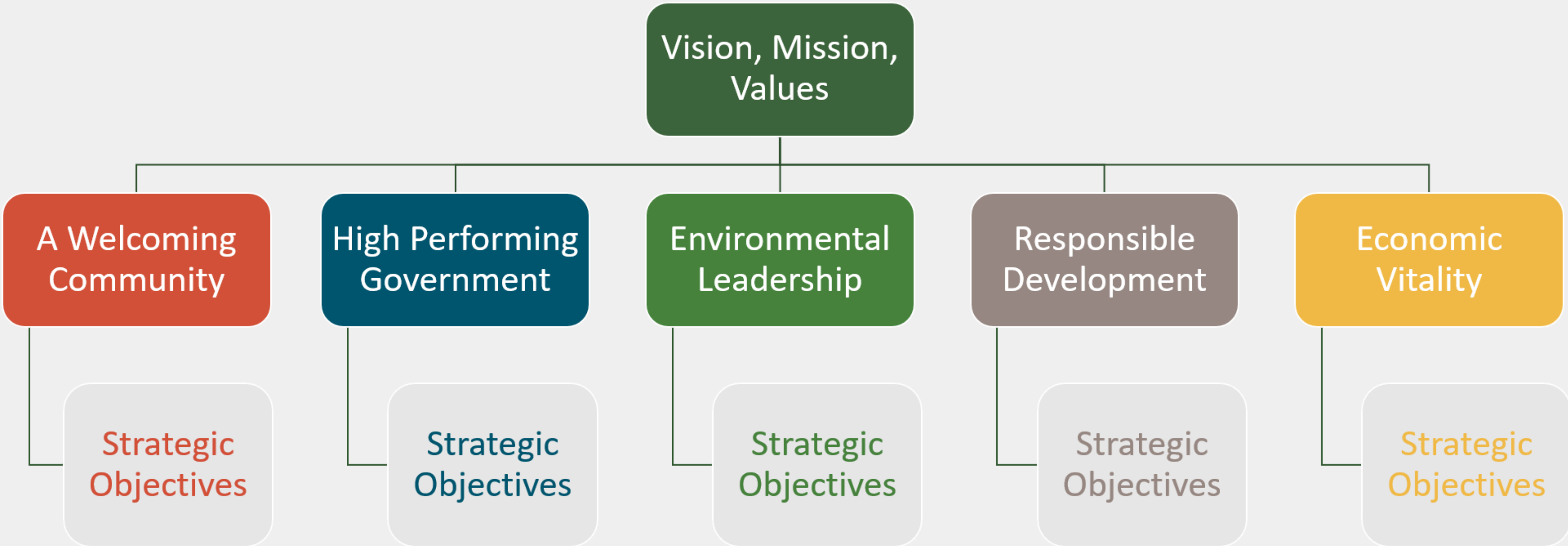
Introductions

- You each have **2 minutes** to:
 - Introduce yourself
 - Use the picture card to describe what you're hoping to get out of the Strategic Planning process



Apex Vision/Mission

Overview



Vision & Mission Statements

A **Vision Statement** outlines what an *organization* wants to be or how it wants the *world in which it operates* to be.

Successful vision statements communicate both the **purpose** and **values** of an organization.

A **Mission Statement** defines the organization's *fundamental purpose* and *primary objectives*, **succinctly** describing why it exists and **what it does** to achieve its vision. Its prime function is internal – to define the key to the organization's success.

Town of Apex Vision & Mission

Our Vision

A community unified in the stewardship of our small-town character and natural environment, for a future where all succeed.

Our Mission

Provide exceptional public service that fosters opportunity for the individual and community to live, thrive, and reach their peak.

Town of Apex Vision

Our Vision

A community unified in the stewardship of our small-town character and natural environment, for a future where all succeed.

Council Feedback

- “United” in place of “unified”?
- Add "diverse and inclusive"?
- "Future where all succeed" too generic?
 - “For a future where residents thrive” instead?

Town of Apex Mission

Our Mission

Provide exceptional public service that fosters opportunity for the individual and community to live, thrive, and reach their peak.

Council Feedback

- Include economic vitality?
- Use "diverse community" instead of "community"?
- Should the mission be less narrow?
 - *Does the mission encompass all you want it to?*

Town of Apex Vision & Mission

Our Vision

A community unified in the stewardship of our small-town character and natural environment, for a future where all succeed.

Our Mission

Provide exceptional public service that fosters opportunity for the individual and community to live, thrive, and reach their peak.

Do you want staff to consider any of the provided suggestions or are you comfortable with the current vision/mission?

Apex's Context

Apex's Context



Consider:

- *Do these trends resonate?*
- *Were there any trends that surprised to you?*
- *Are there any questions?*
- *Is there anything missing?*



Break

5 minutes

Strategic Goal

Review

Strategic Goals

A Welcoming Community

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High Performing Government

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Environmental Leadership

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Economic Vitality

Improve and sustain an environment that invites and retains a variety of residents, employment opportunities, and businesses

Responsible Development

Encourage equitable and sustainable development that provides accessibility and connectivity throughout the community

Strategic Goal Review

Instructions

Five Stations:

- A Welcoming Community
- High Performing Government
- Environmental Leadership
- Responsible Development
- Economic Vitality

Strategic Goal Review

Instructions

- In pairs, you will have **10 minutes** at each station to review the content and ask any questions
- Staff will be at each station to answer questions

Strategic Goal Review

Council Pairings

Group 1 - *A Welcoming Community*

- Gilbert
- Reese

Group 2 - *High Performing Government*

- Mahaffey
- Grey

Group 3 - *Environmental Leadership*

- Zegerman
- Mu

Strategic Goal Review

Station Hosts

Welcoming Community

- Tim Herman
- Ryan Johansen
- Craig Setzer
- Demetria John

High Performing Government

- Karmen McGee
- Linda Jones
- Jon Griffin
- Erika Sacco
- Allen Coleman

Environmental Leadership

- Jonathan Jacobs
- John Mullis
- Stacie Galloway
- Randy Vosburg

Responsible Development

- Dianne Kihn
- Chris Johnson
- Rudy Baker
- Marty Stone

Economic Vitality

- Joanna Helms
- Kathy Moyer
- Jessica Hoffman
- Shawn Purvis
- Brian Meyer



Station

Debrief

Any quick reactions to what you saw at the stations?

Apex's Strategic Goals

How do we feel about the current Strategic Goals?



Break

5 minutes

Visioning for Success

Visioning for Success



Instructions

- It's 3-5 years from now:
 - *How do you want staff to show success in each of the Strategic Goals?*
 - *What progress has been made?*

Visioning for Success



Instructions

- You will have **3 minutes** to individually jot down initial thoughts
- In pairs, you will have **7 minutes** to:
 - Share what you individually wrote
 - Write 6 visions for success
- Afterwards, you will have **5 minutes** to share out what your pair wrote

Visioning for Success



Council Pairings

Council Group 1

- Gilbert
- Reese

Council Group 2

- Mahaffey
- Grey

Council Group 3

- Zegerman
- Mu

Visioning for Success



Report Outs

- It's 3-5 years from now:
 - *How do you want staff to show success in each of the Strategic Goals?*
 - *What progress has been made?*

Visioning for Success

Debrief

Next Steps

- Share what we heard with Department Directors
 - They will begin developing draft objectives in alignment with the Strategic Goals on October 21
- We will reconvene with Council on **November 17**