Town Council Work Session
November 17, 2026 | 3:30 PM
Apex Town Hall | 73 Hunter Street, Apex, NC
3rd Floor Training Rooms A and B

AGENDA

1. **Call to Order | Pledge of Allegiance**
   Mayor, Jacques K. Gilbert

2. **Strategic Planning Session – 3 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 Overview – 15 Minutes
   B) Confirming Our Vision – 15 Minutes (may vary)
   C) Department Session Recap – 10 Minutes
   D) Reviewing Draft Subgoals – 1 Hour and 50 Minutes
   E) Community Input Next Steps – 25 Minutes
   F) Wrap-Up – 5 minutes

3. **Adjournment**

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

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Town Council

Strategic Planning Retreat

November 17, 2026



Welcome



Julie Brenman
Sharmel Genthon
Alev Newman

Agenda

- Welcome and Overview
- Confirming Our Vision
- Department Session Recap
- Reviewing Goals
- Next Steps - Community Input
- Adjourn

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Agenda

- Welcome and Overview
- Confirming Our Vision
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- Adjourn

Objectives

- Confirm the vision statement
- Review and confirm the draft goals and subgoals

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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



The vision statement articulates a long-term view of the ideal for your organization

Council responsibility

The mission statement describes why your organization exists and what it will do to help achieve its vision

Goals for each of the organizational focus areas are positive and end state oriented (i.e., it is a goal rather than a strategy)

Key performance measures provide an indication of how well the goals are being met

Staff responsibility

Strategies and tactics describe detailed steps that will be taken to achieve each of the goals

Project Timeline

Project Start Up
August 2026

Department Leadership Session
9 AM - 12 PM
Sept. 16, 2026

Council Retreat
(12 PM - 5 PM session)
Oct. 8, 2026

Objective-Setting Workshop
half-day session
Oct. 21, 2026

Council Refinement Session
half-day session
Nov. 17, 2026

Community Engagement
Dec. - Jan. 2026

Strategic Plan Drafting and Refinement
Dec 2026 – Jan 2027

Admin

Phase 1

Phase 2

Confirming Our Vision

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.

Current 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 Current Vision

Our Vision

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

10/8 Council Feedback

- “All” to encompass diversity
- Refer to all five Game Plan Apex Strategic Goals to be in line with the current plan
- Have “united” instead of “unified”

Town of Apex Revised Vision Options

Current Vision

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

Option 1:

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

Option 2:

A welcoming community united in the stewardship of our safe, small-town character and natural environment, for a future where all of Apex thrives.

Option 3 *(preferred)*:

A community united in the stewardship of our small-town character, natural environment, and shared prosperity for all.

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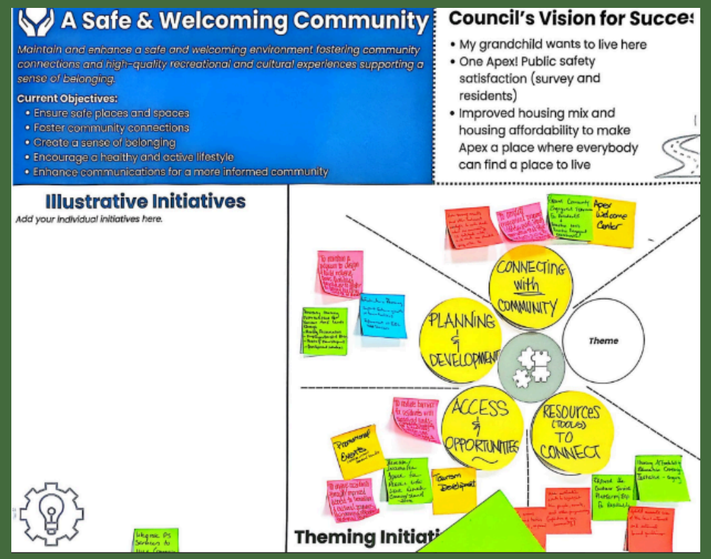
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10/21 Department Session Recap

10/21 Department Session Recap



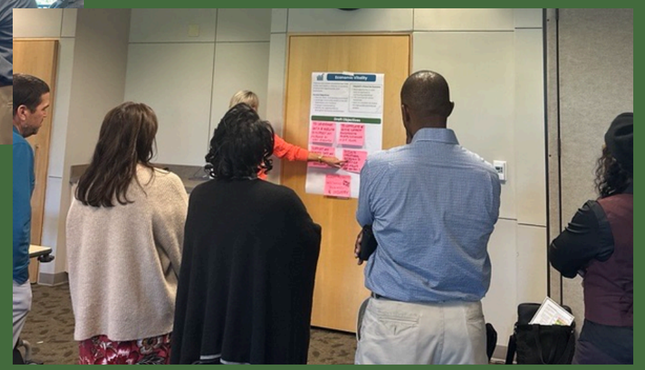
Department Directors reviewed:

- The visions of success for each Strategic Goal Town Council identified at 10/8 session
- The current objectives

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10/21 Department Session Recap





Subsequently they:

- Identified initiatives (work they do) within each Strategic Goal
- Themed those initiatives with their cross-departmental groups
- Created draft objectives from the themes they identified
- Peer reviewed one another's work

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Reviewing Goals

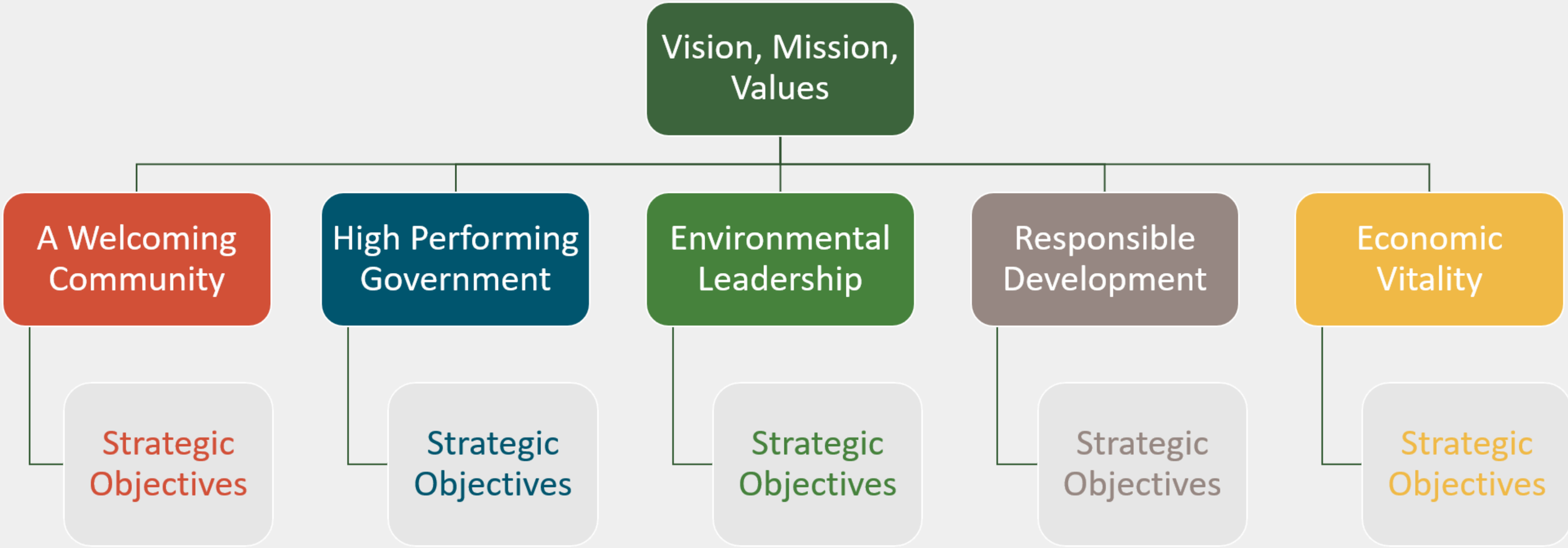
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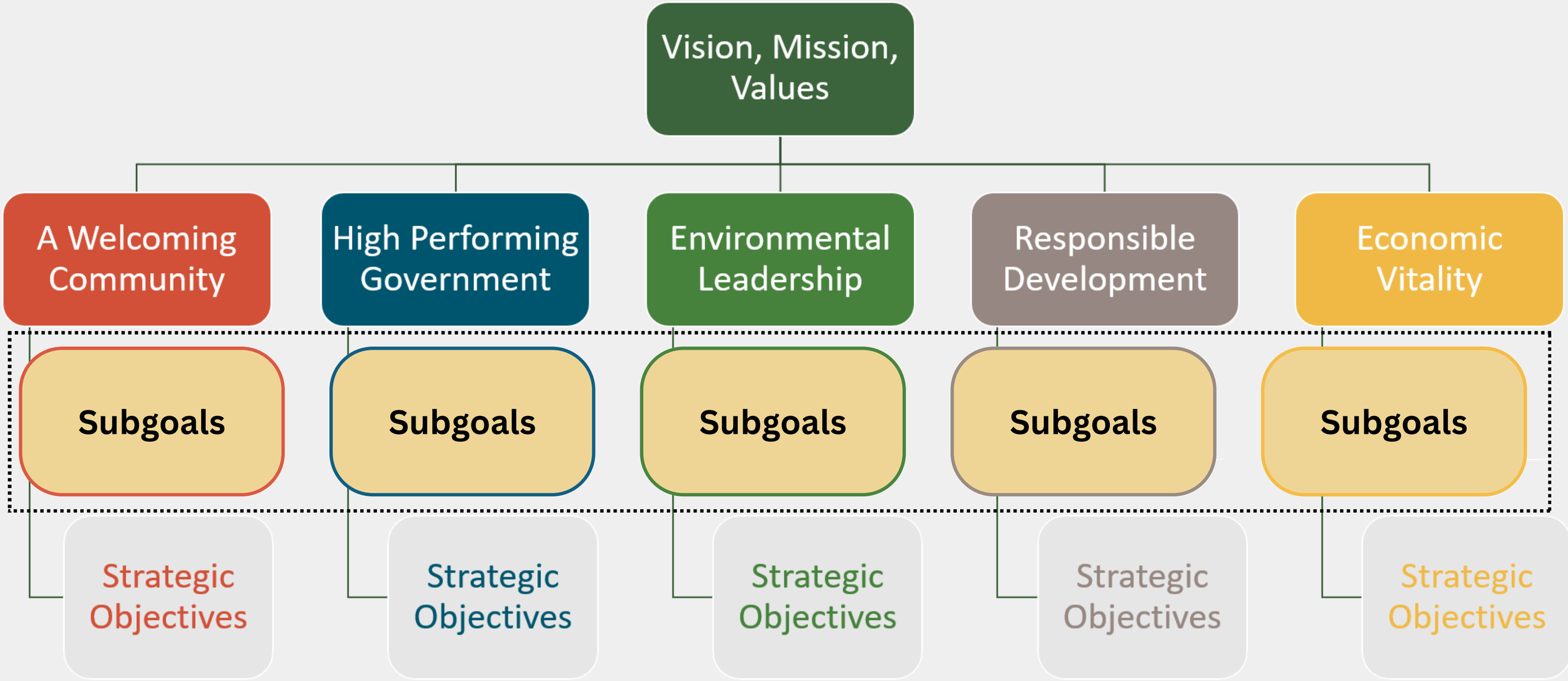
- Worked with Steering Committee to draft subgoals using:
  - 10/7 Town Council's visions for success
  - 10/21 Dept. Director info

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Current Strategic Plan Structure



Proposed Strategic Plan Structure



Reviewing Goals



- Worked with Steering Committee to draft subgoals using:
  - 10/7 Town Council's visions for success
  - 10/21 Dept. Director info
- Today: reviewing the subgoals
  - *Staff will follow up with specific objectives at a later date*

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Reviewing Goals



- Worked with Steering Committee to draft subgoals using:
  - 10/7 Town Council's visions for success
  - 10/21 Dept. Director info
- Today: reviewing the subgoals
  - *Staff will follow up with specific objectives at a later date*
- Have a non-exhaustive list of example objectives

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Reviewing Goals

Questions?

Draft

Subgoals

Draft Subgoals

Safe and Welcoming Community

1. Strengthen community connections and belonging
2. Supply access to varied, ample, and engaging programs, places, and experiences
3. Facilitate a safe and supportive community

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Draft Subgoals

High Performing Government

1. Ensure careful and transparent stewardship of public resources
2. Prioritize reliable and responsive delivery of core departmental services
3. Support the Town workforce

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Draft Subgoals

Environmental Leadership

1. Accelerate the integration of sustainability practices into Town operations
2. Enhance community awareness of resiliency and sustainability practices
3. Encourage natural resource preservation and enhancement

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Responsible Development

Draft Subgoals

1. Position Apex to grow intentionally
2. Ensure a connected safe and efficient multi-modal transportation system
3. Continue effective maintenance and expansion of infrastructure
4. Support attainable housing options

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Economic Vitality

1. Attract, retain, and develop small businesses and entrepreneurs
2. Recruit high-profile industries
3. Position Apex as attractive for living, working, and playing

Subgoal

Review

Subgoal Review



Instructions

- There is a station for each Strategic Goal with the associated subgoals
  - *Beside each template are non-exhaustive lists of example objectives for each subgoal*
- In pairs, you will have **10 minutes** at each station to review the subgoals

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Subgoal Review



Instructions

- Consider and note:
  - *What resonates about each subgoal?*
  - *What questions do you have?*
- If you do not have comments on the subgoal, put your initials in the indicated box

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Subgoal Review



Council Pairings

Group 1 - *A Welcoming Community*

- Gilbert
- Zegerman

Group 2 - *High Performing Government*

- Mahaffey
- Reese

Group 3 - *Environmental Leadership*

- Gray
- Mu

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Break

Subgoal Debrief

Community Input Sessions

Community Input Sessions



Our Plan

Inform the community on:

- What strategic planning is
- How it fits into (and differs) from comprehensive planning
- How staff work plans operationalize the plan
- The updated SP goals and subgoals

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Community Input Sessions

Beyond what we have proposed, what would be most useful to hear from the community on the strategic goals and subgoals?

Next Steps

- Update the strategic goals and subgoals based on your feedback
- Conduct community input sessions
    - Summarize our findings and share with staff
- Updated information at Council’s February retreat

Draft Vision Statements

Mission *(For reference)*
Provide exceptional public service that fosters opportunity for the individual and community to live, thrive, and reach their peak.

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

Desired changes	• "All" to encompass diversity • Potentially refer to all five Game Plan Apex Strategic Goals to be in line with the current plan • Have "united" instead of "unified"

Revised Options

Revised option 1 *(just adds "united" in place of unified")*	A community united in the stewardship of our small-town character and natural environment, for a future where all succeed.
Revised option 2 *(incorporates all 5 SP goals but is less streamlined)*	A welcoming community united in the stewardship of our safe, small-town character and natural environment, for a future where all of Apex thrives.
Revised option 3 *(preferred)*	A community united in the stewardship of our small-town character, natural environment, and shared prosperity for all.

**Red* text indicates additions.

Draft Subgoals

Safe and Welcoming Community: *Maintain and enhance a safe and welcoming environment fostering community connections and high-quality recreational and cultural experiences supporting a sense of belonging*	
Subgoals (3)	**Example work that belongs in each subgoal (*not exhaustive*)**
Strengthen community connections and belonging	• Expand resident connection opportunities • Increase participation in engagement and volunteer efforts • Increase awareness of community events
Supply access to varied, ample, and engaging programs, places, and experiences	• Expand the availability and utilization of public spaces • Increase access to recreation, cultural, and wellness programming • Provide varied programming and events
Facilitate a safe and supportive community	• Maintain and improve emergency response times • Enhance regional safety partnerships • Provide mental health support

High Performing Government: *Deliver exceptional service valuing an engaged workforce with an emphasis on efficiency, collaboration, innovation, and inclusion*	
Subgoals (3)	**Example work that belongs in each subgoal (*not exhaustive*)**
Ensure careful and transparent stewardship of public resources	• Match funding to identified priority areas • Accurately report and share all financial records • Strengthen management of long-term assets and investments
Prioritize reliable and responsive delivery of core departmental services	• Proactively maintain facilities and equipment • Invest in process improvement options • Increase awareness and understanding of town services
Support the Town workforce	• Invest in workforce training and development • Encourage and leverage staff innovation and creativity • Drive continuous improvement through employee survey findings and implementation

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Environmental Leadership: *Commit to sustaining natural resources, environmental well-being, and resilience.*	
Subgoals (3)	**Example work that belongs in each subgoal (*not exhaustive*)**
Accelarate the integration of sustainability practices into Town operations	• Expand solar generation • Reduce greenhouse gas emissions from town facilities • Increase town use of low emission vehicles
Enhance community awareness of resiliency and sustainability practices	• Encourage community adoption of clean energy practices • Support conservation and stewardship volunteer programs • Increase community sustainability education
Encourage natural resource preservation and enhancement	• Increase tree planting and Pollinator Gardens • Adopt policies to promote sustainable development • Implement water conservation practices

Responsible Development: *Encourage equitable and sustainable development that improves accessibility and connectivity throughout the community*	
Subgoals (4)	**Example work that belongs in each subgoal (*not exhaustive*)**
Position Apex to grow intentionally	• Align ordinances with community needs • Identify and execute strategic land purchases • Expand non-residential tax base
Ensure a connected safe and efficient multi-modal transportation system	• Continue expansion and enhancement of bike route network • Improve and update pedestrian infrastructure • Expand bus service
Continue effective maintenance and expansion of infrastructure	• Assess sustainable and equitable fees • Continue long range planning for utility and infrastructure needs • Invest in upkeep of existing infrastructure
Support attainable housing options	• Support housing preservation • Expand housing development incentives for varied income levels

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	• Update ordinances to encourage missing middle housing

Economic Vitality: *Improve and sustain an environment that invites and retains a diversity of residents, employment opportunities, and businesses.*	
Subgoals (3)	**Example work that belongs in each subgoal (*not exhaustive*)**
Attract, retain, and develop small businesses and entrepreneurs	• Enhance entrepreneur/small business programs • Deliver public safety and utility services tailored to the business community • Continue downtown improvements
Recruit high-profile industries	• Be location of choice for commercial development • Develop sites for new businesses • Build and maintain key industry relationships
Position Apex as attractive for living, working, and playing	• Enhance entertainment experiences • Increase number of residents that work in Apex • Connect people to places of business

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