TOWN OF APEX
TOWN COUNCIL STRATEGIC PLANNING WORK SESSION
THURSDAY, OCTOBER 08, 2026
12:00 PM

The Apex Town Council met for a Strategic Planning Work Session on Thursday, October 8th, 2026, at 12:00 p.m. in Training Room A and B at Apex Town Hall, located at 73 Hunter Street in Apex, North Carolina.

This meeting was open to the public. Members of the public were able to attend this meeting in-person or watch online via the livestream on the Town's YouTube Channel. The recording of this meeting can be viewed here:
https://www.youtube.com/watch?v=yQxxScCWwu8

[ATTENDANCE]

Elected Body

Mayor Jacques K. Gilbert (presiding)
Mayor Pro Tempore Terry Mahaffey
Councilmember Ed Gray *(arrived late – see note below)*
Councilmember Arno Zegerman
Councilmember Shane Reese
Councilmember Sue Mu *(arrived late – see note below)*

Town Staff

Town Manager Randy Vosburg
Interim Town Attorney Brian Meyer
Town Clerk Allen Coleman
Deputy Town Manager Shawn Purvis
Deputy Town Manager Marty Stone
Deputy Town Manager Demetria John
All other staff members will be identified appropriately below

[CALL TO ORDER | PLEDGE OF ALLEGIANCE]

Mayor Gilbert called the meeting to order at 12:00 p.m. and led everyone in the pledge of allegiance.

[FISCAL YEAR 2026 IN REVIEW]

Town Manager Vosburg provided an overview of the work session agenda, which included the annual Year in Review presentations, the strategic planning kickoff, and the

strategic plan refresh with consultant Fountain Works. He explained that the Extended Leadership Team (ELT) had compiled departmental accomplishments from FY2025–2026, covering July 1, 2025, through June 30, 2026. He noted that the accomplishments were displayed throughout the room and encouraged the Elected Body to review them. He stated that each portfolio would provide a brief overview of key accomplishments, with directors highlighting significant projects and initiatives completed during the fiscal year.

Assistant Town Manager Stone said the departments within his portfolio will highlight departmental achievements and their alignment with the Town's Strategic Plan.

Water Resources Director Jonathan Jacobs highlighted departmental accomplishments, including the near completion of a water tower and completion of the 30-million-gallon-per-day (MGD) Master Plan.

Public Works Director John Mullis highlighted the department's accomplishments over the past fiscal year, emphasizing the integration of the Town's Sustainability Action Plan into daily operations. Key achievements included the installation of six new electric vehicle charging stations, implementation of fleet telematics and predictive maintenance technology, expansion of software systems to support departmental operations and utility billing, roadway and sidewalk improvements to enhance ADA accessibility, and modernization of solid waste services through technology and route optimization to improve operational efficiency.

Electric Utilities Director Kathy Moyer highlighted the Electric Department's accomplishments, including the near completion of the Advanced Metering Infrastructure (AMI) implementation and continued expansion of electrical infrastructure through additional substation capacity and distribution improvements to accommodate growth and future development.

Transportation & Infrastructure Development Director Chris Johnson highlighted the Department's accomplishments, emphasizing infrastructure investments, responsible development, and improved mobility. He noted the completion of the Saunders Street parking lot expansion, which added 150 parking spaces, electric vehicle charging stations, and stormwater improvements. He provided an update on the Salem Street Streetscape Project, discussing construction challenges associated with maintaining pedestrian access and minimizing disruptions to downtown businesses. He stated that staff and contractors continued to make progress despite utility and construction challenges. He also reported that the Apex Peakway Connector Project was entering its final stages, with paving operations underway and completion anticipated by December, approximately 10 months ahead of the original schedule.

Planning Director Dianne Khin highlighted the Planning Department's accomplishments, noting its contributions to all five categories of the Town's Game Plan Apex Strategic Plan. Key achievements included staff participation in Town-wide initiatives, research and policy development related to data centers, improvements to employee onboarding and professional certifications, and continued progress on the Peak Plan 2055 initiative. She also discussed expanded transit services, the Pleasant Park Access Study, zoning compliance

efforts resulting in the removal of more than 2,500 unauthorized signs, and collaboration on major economic development projects such as the NC Children's Hospital. Additional accomplishments included increased public access to census data, support for the Environmental Advisory Board's Data Center Subcommittee, and ongoing efforts to develop the Town's first Heat Action Plan.

Assistant Building Inspections & Permits Director Samantha Ewens highlighted the Building Inspections & Permit Department's focus on employee development, including the implementation of in-house training courses to meet required continuing education hours for inspectors. She noted that these courses reduced training costs and were also made available to neighboring jurisdictions. She emphasized that these efforts supported workforce development and retention, responsible use of public resources, and improved customer service.

Town Manager Vosburg acknowledged the leadership transitions that occurred during the fiscal year, including the addition and promotion of Directors and Assistant Directors. He recognized staff for their accomplishments despite these organizational changes and expressed appreciation for their efforts.

Assistant Town Manager Stone recognized the departments within his portfolio for their continued involvement in development projects throughout the Town. He emphasized that, in addition to managing ongoing development responsibilities, staff continued to take on new initiatives and projects and commended their efforts and accomplishments.

Assistant Town Manager John introduced the Community & Safety portfolio and outlined the order of departmental presentations highlighting accomplishments from the past fiscal year.

Parks, Recreation, & Cultural Resources Director Craig Setzer highlighted the Parks, Recreation and Cultural Resources Department's accomplishments, recognizing the contributions of 2,077 volunteers who provided more than 57,000 service hours, valued at approximately $1.8 million. Additional achievements included increased participation in recreational programs and special events, implementation of a website chatbot to improve public access to information, and development of a new pricing policy to promote equitable and sustainable services. He also discussed ongoing park and playground design projects, completion of the Beaver Creek and Middle Creek greenway extensions, the promotion of Angela Reincke to Assistant Director, the hiring of Assistant Director Jamila Godfrey, and five employees earning Certified Parks and Recreation Professional certifications.

Police Chief Ryan Johansen highlighted the Police Department's accomplishments, including the development of updated departmental purpose statements and completion of an organizational restructuring to better align resources with community needs. Key initiatives included establishing dedicated training and special events units and implementing a new patrol schedule that increased officer coverage during peak demand periods while providing additional training opportunities without increased overtime costs. He reported significant

recruitment progress, reducing vacancies from 24 to 4, with full staffing anticipated by January 1. Additional achievements included securing grant funding for officer safety and wellness initiatives, formalizing mutual aid agreements with neighboring law enforcement agencies to ensure response capabilities, maintaining CALEA accreditation, and implementing employee wellness, professional development, and succession planning programs. He also highlighted the deployment of an LTE backup communication system to maintain reliable radio communications during system outages, enhancing officer safety and emergency response capabilities.

Deputy Town Manager John introduced Assistant Fire Chief Michael Frickman, recognizing his leadership in the Fire Department's accreditation process. She noted that Assistant Chief Frickman was presenting on behalf of Chief Herman, who was traveling.

Assistant Fire Chief Michael Frickman highlighted the Fire Department's accomplishments, including continued progress in staffing, infrastructure, and accreditation. He reported the recent graduation of seven recruits from the Fire Academy, bringing the department closer to full staffing. Additional achievements included progress on Fire Station 3 and the administration building, along with the acquisition of new fire apparatus. He also recognized the department's successful achievement of international accreditation through the Center for Public Safety Excellence, acknowledging the significant efforts of staff throughout the accreditation process.

Deputy Town Manager John provided an overview of the Community Development and Neighborhood Connections Department's accomplishments and ongoing initiatives. She discussed the department's leadership transition, noting that more than 270 applications had been received and the recruitment process was underway. Key accomplishments included increased participation in the Apex Cares housing assistance program, expanded assistance for manufactured homes, continued planning and design efforts for the North Hughes Street project, and incorporation of the Peak City Land Trust. She also highlighted community engagement initiatives, including CommUniversity, the Neighborhood Leaders Program, neighborhood registry participation, Think Apex Day, and continued development of the Ask Apex customer service platform. She recognized staff for maintaining services during the leadership transition and thanked departments within the portfolio for their continued efforts in serving the community.

Deputy Town Manager Purvis highlighted his portfolio's accomplishments over the past fiscal year, emphasizing organizational restructuring, process improvements, and efforts to align departmental operations with the Town's strategic priorities. He recognized the challenges associated with these transitions and the importance of collaboration across departments. He also acknowledged the Communications Department's efforts in coordinating more than 60 communications initiatives throughout the year.

Budget & Performance Management Director Jessica Hoffman highlighted the Budget and Performance Management Department's accomplishments, including the development and adoption of the FY2026–2027 Budget, filling key staff positions, and transitioning budget processes to automated software. Additional achievements included

increased departmental participation in budget development, preparation of a fiscally sound five-year Capital Improvement Plan, and initiation of a departmental business plan redesign focused on organizational excellence.

Organizational Excellence Director Linda Jones highlighted the Organizational Excellence Department's accomplishments, including work on the employee engagement survey, expansion of language access services for residents and employees, and implementation of the Town's first yearlong leadership development program. She emphasized the program's focus on strengthening leadership skills, building trust, and promoting collaboration among directors and assistant directors. She noted that participant feedback had been overwhelmingly positive and expressed appreciation for the Town's investment in leadership development.

Human Resources Director Karmen McGee highlighted the Human Resources Department's accomplishments, emphasizing employee recruitment and retention efforts that brought the department close to full staffing. Additional achievements included revitalizing the Employee Wellness Committee, expanding employee health insurance options, updating the training program for managers and supervisors, and implementing performance reviews updates. She also reported approximately $100,000 in savings on health insurance stop-loss premiums and securing $30,000 in funding for employee wellness initiatives.

Finance Director Jon Griffin highlighted the Finance Department's accomplishments, noting significant transitions involving staffing and financial software systems. Despite these changes, the department successfully completed and published the Town's financial statements.

Economic Development Director Joanna Helms highlighted the Economic Development Department's accomplishments, including the selection of Apex for the NC Children's Hospital, expansion of staff, implementation of a new economic development CRM system, and continued support for local businesses through the Launch Apex program. She noted the graduation of 19 businesses from the program, its largest cohort to date, and the establishment of a Launch Apex alumni committee. Additional achievements included increased participation in Apex Restaurant Week, downtown promotional events, development of an interactive business directory, and continued tourism and marketing initiatives. She also recognized the Town's receipt of a Large Market Deal of the Year award for the North Carolina Children's Hospital project and reported increased economic development project activity and business recruitment opportunities.

IT Manager Conrad Sain highlighted the Information Technology Department's accomplishments, emphasizing the volume of daily technical support requests and the department's role in maintaining Town operations. Key achievements included expanding services to support public-facing technology, providing staff training and artificial intelligence workshops, replacing network firewalls, and transitioning from traditional VPN access to a more secure zero-trust network architecture. He also discussed implementation of a CRM portal and chatbot technology to improve customer service and access to Town resources.

Town Manager Vosburg thanked the Extended Leadership Team for their accomplishments and noted that a comprehensive summary would be provided to Council. As the discussion transitioned from the Year in Review to strategic planning, he highlighted the importance of workforce succession planning by asking directors who were eligible for retirement within the next six years to stand, illustrating potential leadership transitions facing the organization. He emphasized the importance of organization-wide succession planning in anticipation of upcoming retirements and leadership transitions. He noted that maintaining the Town's accomplishments and continuity of services would require preparing future leaders and retaining institutional knowledge. He thanked the leadership team for their contributions and recognized their role in the Town's continued success.

[STRATEGIC PLAN REFRESH KICKOFF]

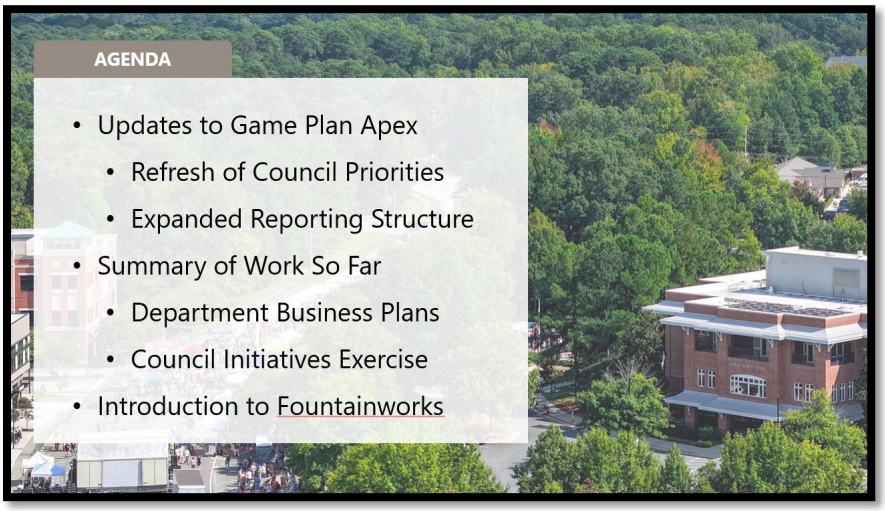
Director Hoffman introduced the strategic planning refresh process, noting that the Town was entering the fifth year of Game Plan Apex. She introduced Fountain Works, the consultant facilitating the refresh, and turned the presentation over to Strategic Planning and Performance Management Analyst, David Schexnayder to provide an overview of the Strategic Plan's structure and the work completed in preparation for the refresh.

Councilmember Mu arrived at **12:44 p.m.**

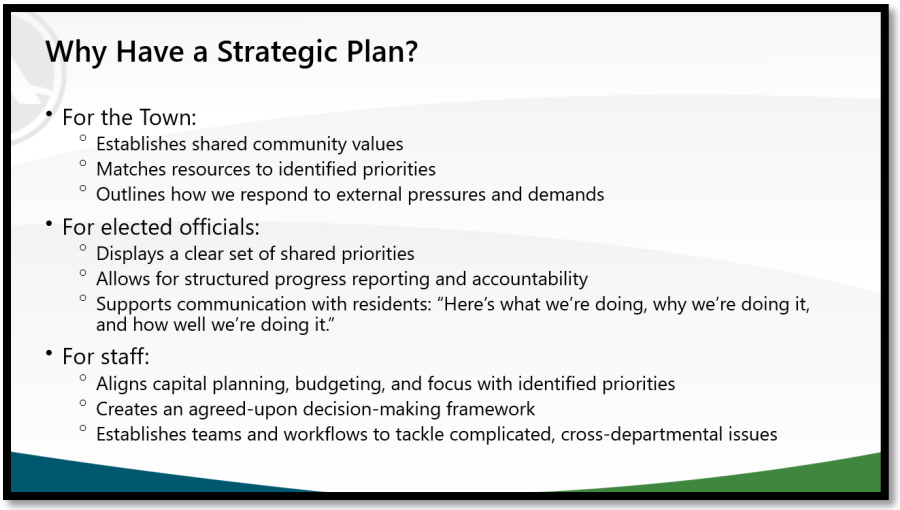
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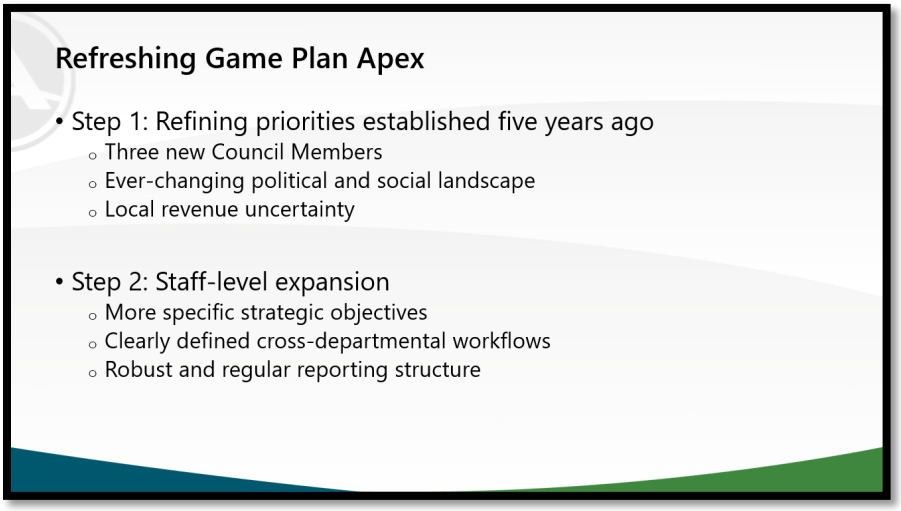
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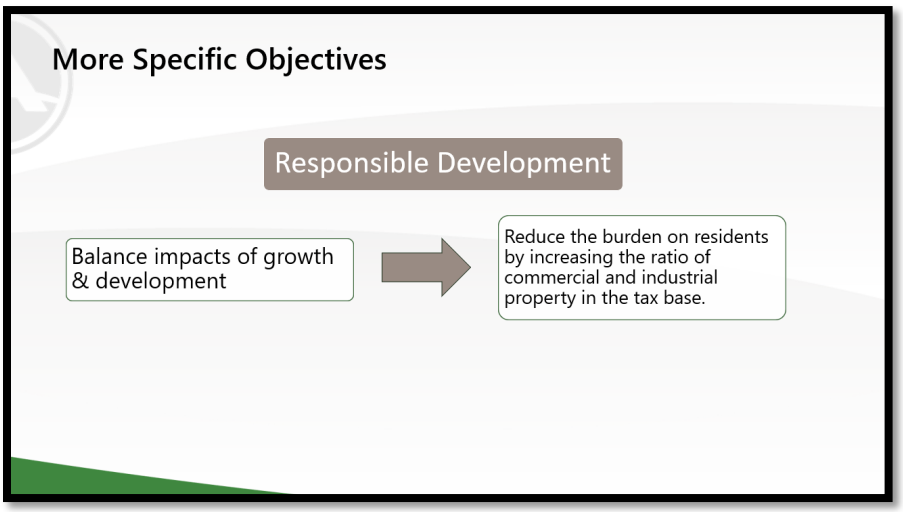
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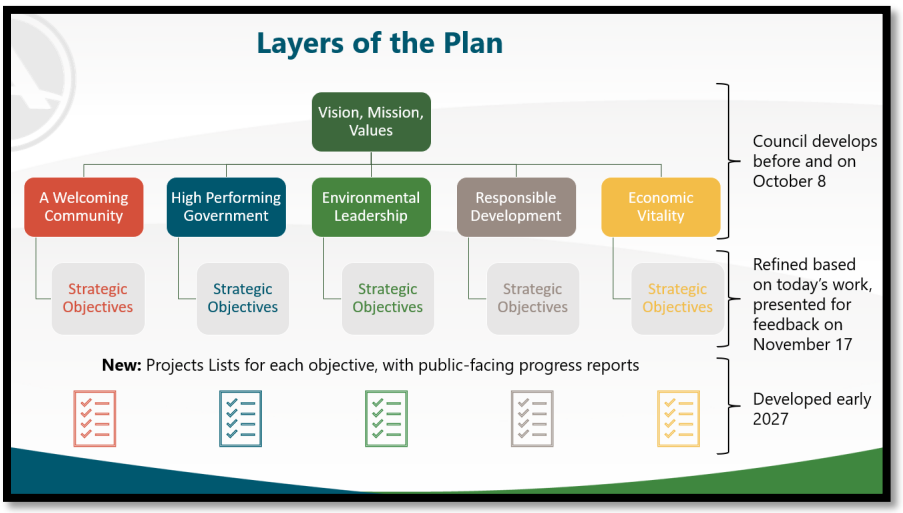
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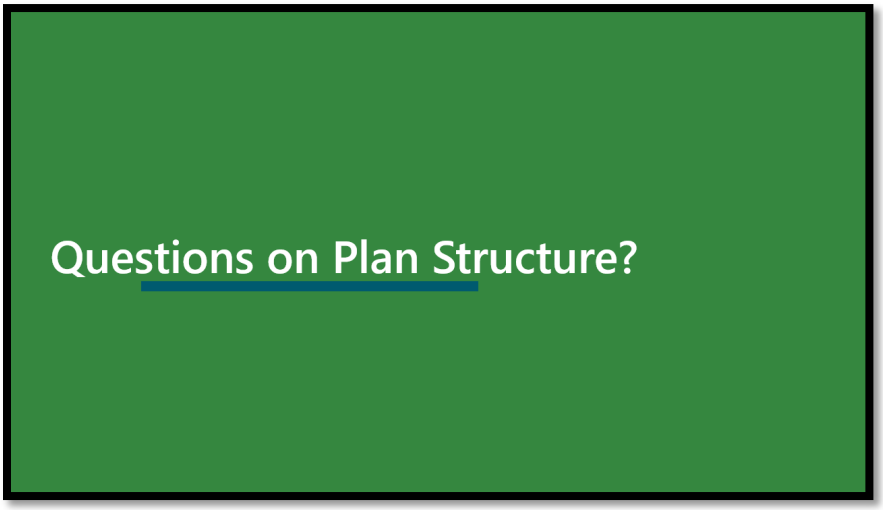
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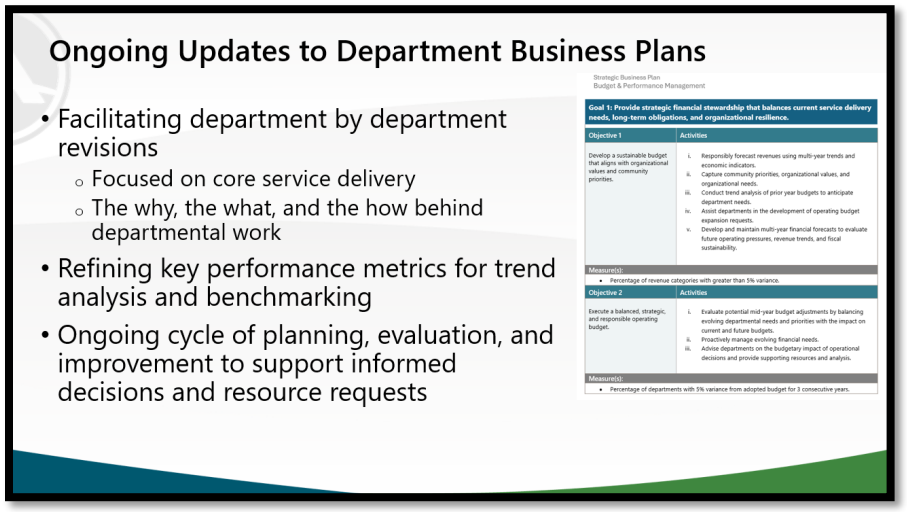
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Mayor Gilbert asked if the Town Clerk's Office and Legal were included in the process even though they were direct reports to the elected body.

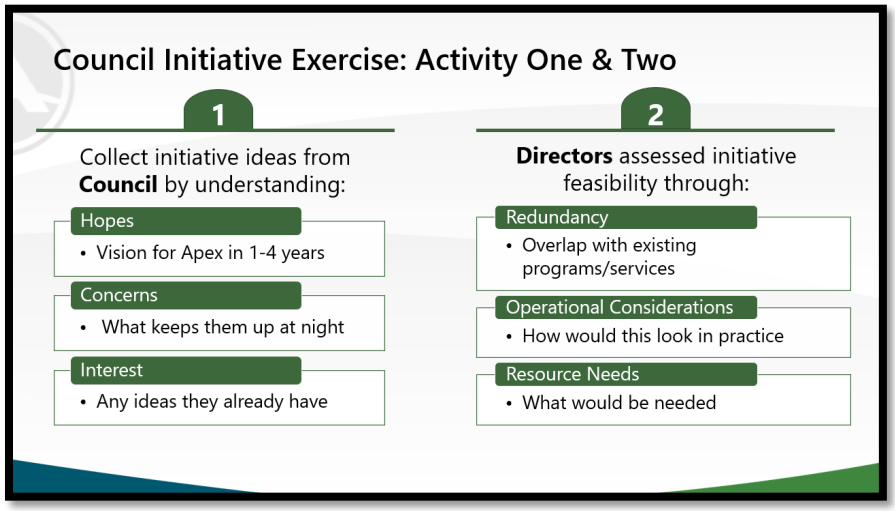
Town Manager Vosburg said yes, they had been included in the strategic planning process with all directors.

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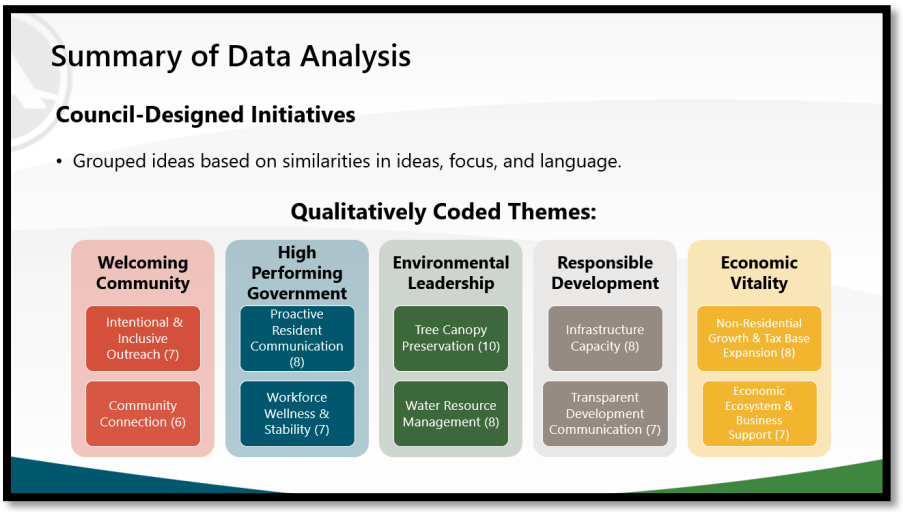


Olivia Stark, Public Services Intern, provided a recap of the activity and summarized the feedback and key outcomes.

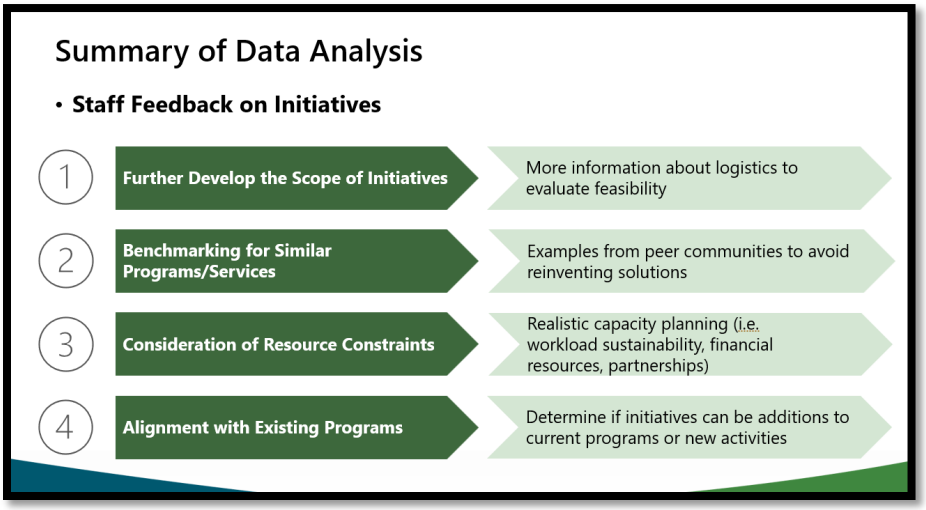
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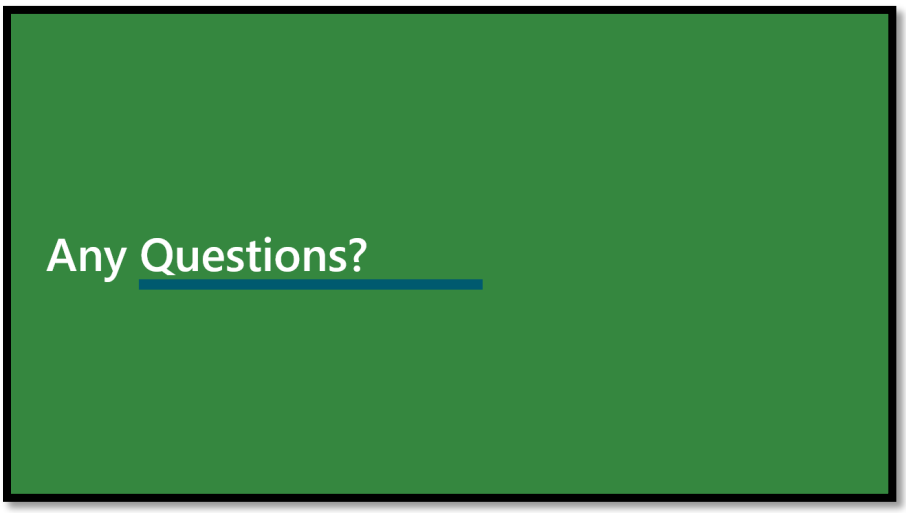
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Councilmember Reese asked whether there would be an additional opportunity to refine and clarify the initiatives to ensure Council's original intent was accurately reflected.

Mr. Schexnayder explained that the strategic planning refresh process would provide opportunities to clarify Council's priorities, beginning with the development of high-level strategic goals and followed by more detailed objectives. He noted that additional refinement would occur throughout the process to better reflect Council's intent.

Councilmember Mu asked whether the Town's current tree canopy requirement was 40 percent.

Assistant Planning Director Amanda Bunce explained that the Town's tree canopy protection requirements vary depending on location and applicable resource conservation area standards, with requirements reaching up to 35 percent. She noted that staff is working with the Environmental Advisory Board's Tree Canopy Subcommittee to evaluate potential amendments and improvements to the Town's existing standards.

Mayor Gilbert asked whether Councilmember Gray, who was participating remotely via livestream, had any questions. Councilmember Gray indicated that he had none.

Mr. Schexnayder explained that feedback from Council initiatives, vision and mission survey results, and preliminary work completed by department directors had been incorporated into the strategic planning exercises. He then introduced the Fountain Works consulting team, highlighting its extensive experience in municipal strategic planning, and welcomed Julie Brenman to facilitate the next portion of the work session.

[STRATEGIC PLAN REFRESH FACILITED BY FOUNTAIN WORKS]

Julie Brenman, representing Fountain Works, introduced herself and explained that she would co-facilitate the presentation with fellow team member Sharmel Genthon. She provided an overview of the strategic planning process and encouraged Council to reflect on the current Strategic Plan and consider potential areas for refinement as part of the update.

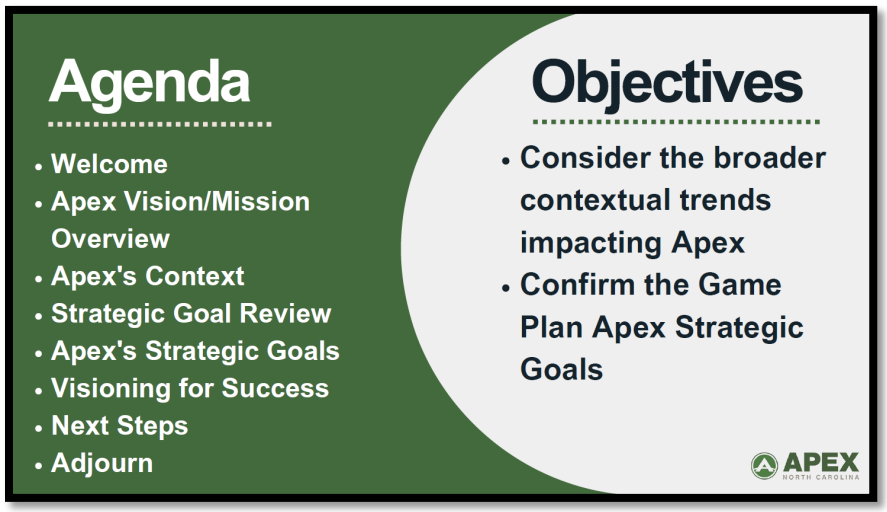
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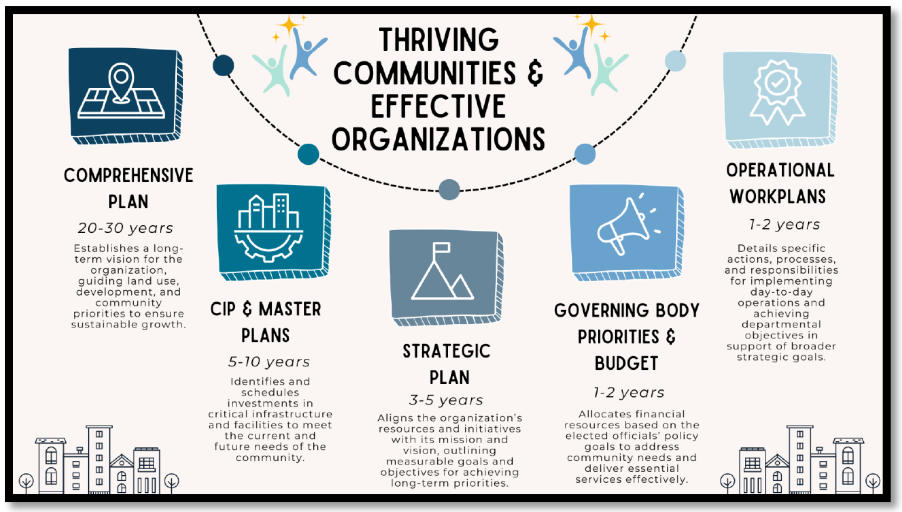
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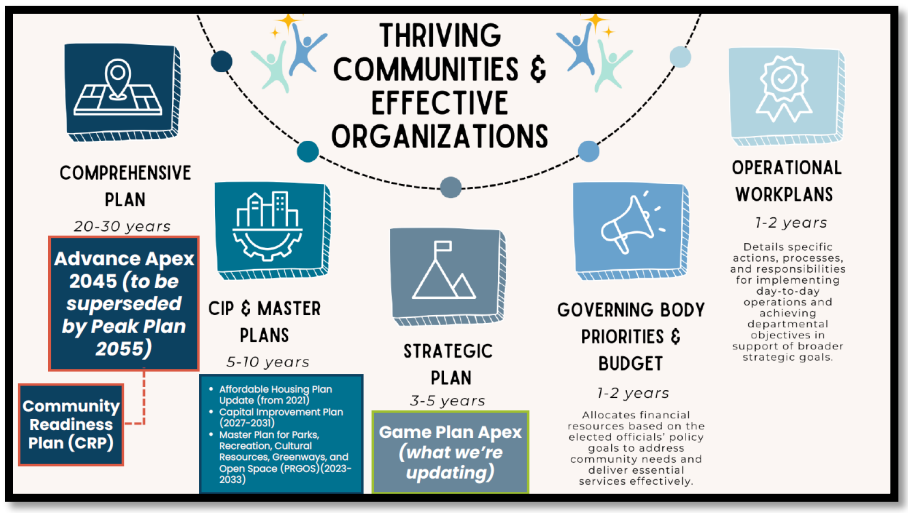
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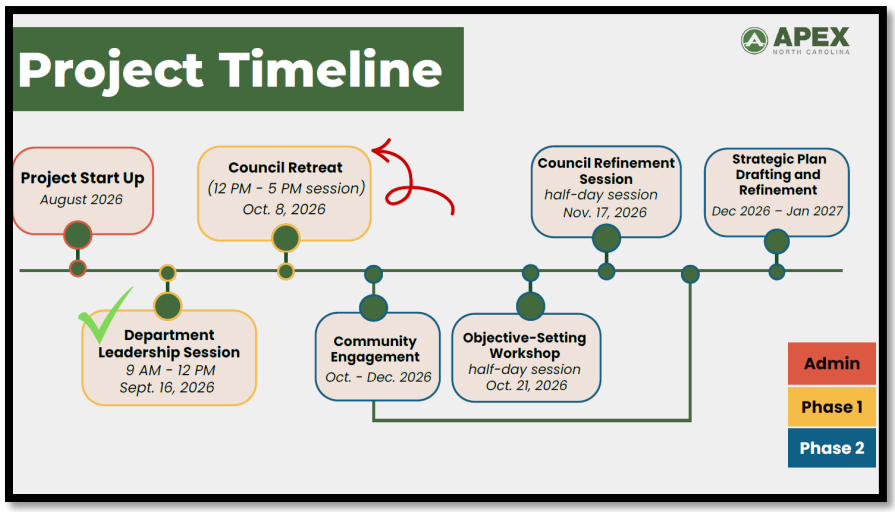
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Councilmember Reese asked to give an example of what Council could get out of this exercise.

Ms. Brenman used Councilmember Reese's card and used the northern lights as an analogy for strategic planning, explaining that the process would help identify and make visible the Town's priorities and opportunities that might not otherwise be immediately apparent.

Mayor Pro Tempore Mahaffey described his selected image as representing the importance of aligning the Town's efforts toward a common direction. He emphasized that strategic planning should provide a shared focus while recognizing the needs and priorities of the Town's residents.

Mayor Gilbert described his selected image as representing the importance of collaboration and collective effort in the strategic planning process. He emphasized that everyone brings a unique perspective and contribution and that meaningful engagement should include Town staff, department directors, and the broader community to ensure a shared vision for the Town's future.

Councilmember Reese described his selected image as representing a vibrant, inclusive, and unified community. He emphasized the importance of ensuring that residents from all walks of life and backgrounds feel included and that the Strategic Plan reflects the diversity of perspectives, ideas, and experiences throughout the Town.

Councilmember Gray described his selected image of a mountaintop as representing the importance of long-term vision in the strategic planning process. He emphasized that the Strategic Plan should be forward-thinking and sustainable, with goals and priorities that anticipate and address the Town's needs over the next 10, 15, and 20+ years.

Councilmember Mu described her two selected images as representing the importance of environmental stewardship and responsible development. She emphasized the Town's responsibility to preserve trees, improve the tree canopy, and protect natural resources. She also discussed the importance of maintaining Apex's small-town character while balancing the economic benefits of growth and development with the need for infrastructure improvements. She noted that continued development places additional pressure on the Town's infrastructure and stressed the importance of incorporating these priorities into the Strategic Plan.

Councilmember Zegerman described his selected image of rugged mountains and rocky terrain as representing the challenges and obstacles the Town may encounter as it plans for the future. He emphasized the importance of establishing a unified vision and working collaboratively to navigate those challenges. He expressed hope that the strategic planning process would provide a clearer, more manageable path forward for the Town.

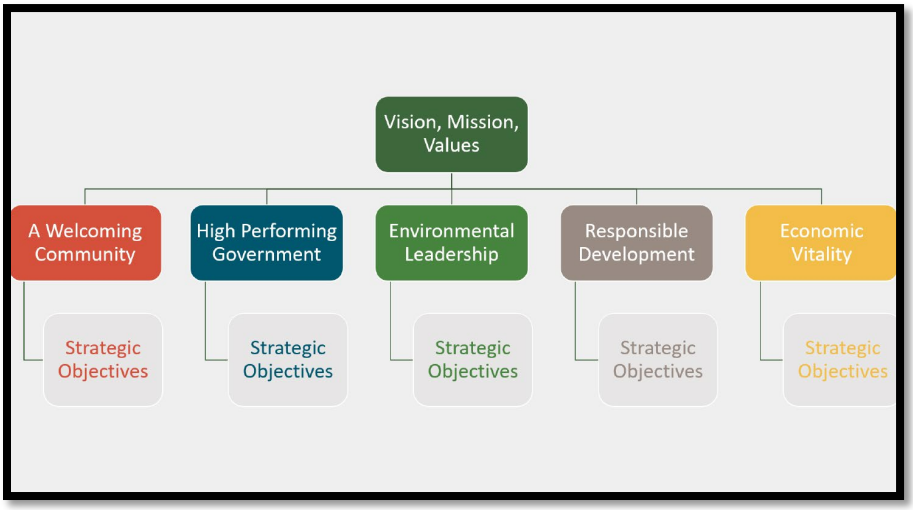
Mayor Gilbert called for a 7-minute break and announced, without objection, the meeting in recess at **1:20 p.m.**

Mayor Gilbert reconvened the meeting at **1:34 p.m.**

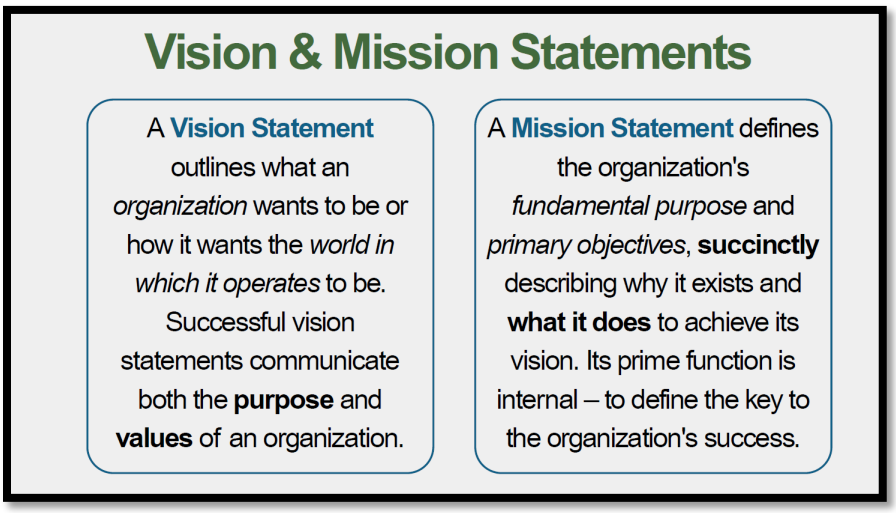
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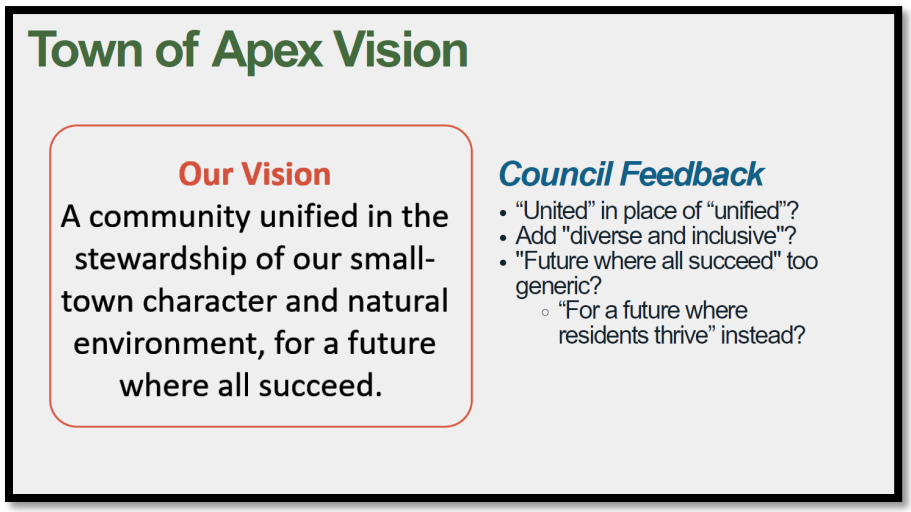
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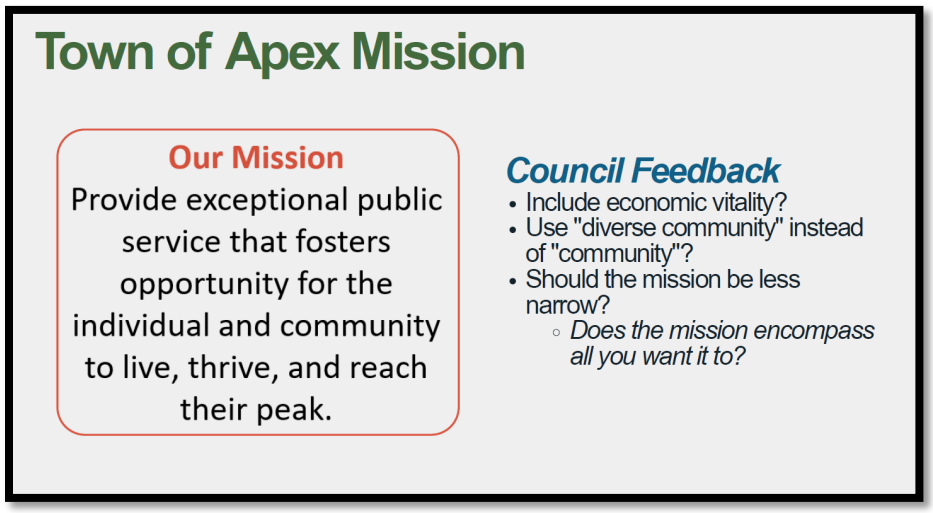
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Mayor Pro Tempore Mahaffey discussed the importance of establishing an appropriate balance in the Town's vision and mission statements. He expressed concern that statements that are too broad may lack meaningful direction, while those that are too specific may limit their intended purpose. He asked Town Manager Vosburg whether the current vision and mission statements effectively provide organizational direction while maintaining sufficient flexibility to guide the Town's long-term goals.

Town Manager Vosburg stated that the Town's current vision and mission statements provide an appropriate overarching framework for the organization. He explained that staff responsibilities are further defined through specific goals, objectives, and tasks that align with the broader vision and mission. He noted that, from a staff perspective, the Town's current work fits within this framework and encouraged Council to consider whether the statements adequately reflect their priorities.

Councilmember Mu suggested incorporating diversity into either the Town's vision or mission statement to better reflect its importance as an organizational value.

Town Manager Vosburg asked for further clarification regarding the suggestion to include diversity in the Town's vision or mission statement. He referenced recent state and federal legislative actions affecting diversity-related programs and terminology and explained that Council could consider whether the existing language adequately conveys the intended values without explicitly using the term "diversity," or whether Council preferred to include the term directly.

Councilmember Zegerman expressed concern that the Town's vision statement should be more outwardly focused on residents rather than the organization itself. He explained that the use of terms such as "we" could suggest an internal focus and recommended language that more clearly reflects the community. He also questioned whether the statement was too narrowly defined, noting that it appeared to emphasize only certain aspects of the Town's five strategic planning priorities rather than encompassing the full scope of the Strategic Plan.

Mayor Pro Tempore Mahaffey recalled that the natural environment had been elevated as a priority within the Town's vision statement during a strategic planning exercise approximately four to five years earlier. He noted that the statement had evolved through ongoing discussions and revisions over time to reflect changing priorities.

Mayor Gilbert noted that the vision statement had been influenced by community feedback, particularly the desire to preserve Apex's small-town character

Councilmember Reese asked whether Council would have an opportunity to review and discuss the feedback included on the following slide as part of the strategic planning discussion.

Ms. Brenman encouraged Council to identify any additional priorities or concepts it wanted reflected in the Town's vision statement, such as economic vitality or diversity. She explained that, similar to the previous emphasis on small-town character and the natural environment, Council's feedback would help determine which priorities should be elevated. She noted that the consulting team would work with staff to develop revised language for Council's consideration, emphasizing that the discussion should focus on broader priorities rather than specific wording or sentence structure.

Councilmember Reese clarified that he had previously suggested incorporating the concepts of "united" versus "unified" and economic vitality into the vision statement but was not strongly committed to either recommendation. He expressed reluctance to make unnecessary revisions if staff believed the current statement was effective, emphasizing the importance of avoiding changes solely for the sake of modifying existing language.

Ms. Brenman asked Council whether there was general agreement to retain the existing vision statement with minimal changes or whether members believed additional concepts or priorities should be incorporated.

Councilmember Zegerman expressed general support for the Town's existing vision and mission statements and indicated that he did not have significant concerns with either. He suggested reviewing the statements in relation to the Strategic Plan's five goal categories to ensure they adequately reflect the Town's broader priorities and overall direction.

Town Manager Vosburg indicated that the existing mission statement appeared appropriate, while the vision statement could benefit from minor revisions. He suggested considering whether the vision should be broadened to encompass additional priorities or retain its current areas of emphasis, along with reviewing the terminology used.

Councilmember Reese observed that Council appeared generally comfortable with the existing vision and mission statements. He asked whether Town leadership, staff, or the community had provided significant feedback indicating a need for revisions, noting that he had not heard substantial concerns with the current language.

Town Manager Vosburg suggested developing a few alternative versions of the vision statement, using the existing language as a foundation, for Council to review and determine which version best reflects the Town's priorities.

Councilmember Mu expressed concern that the current vision statement was too general and suggested incorporating language that more specifically emphasizes the well-being of residents. She recommended considering the addition of resident well-being

alongside the Town's existing priorities of preserving its small-town character and natural environment.

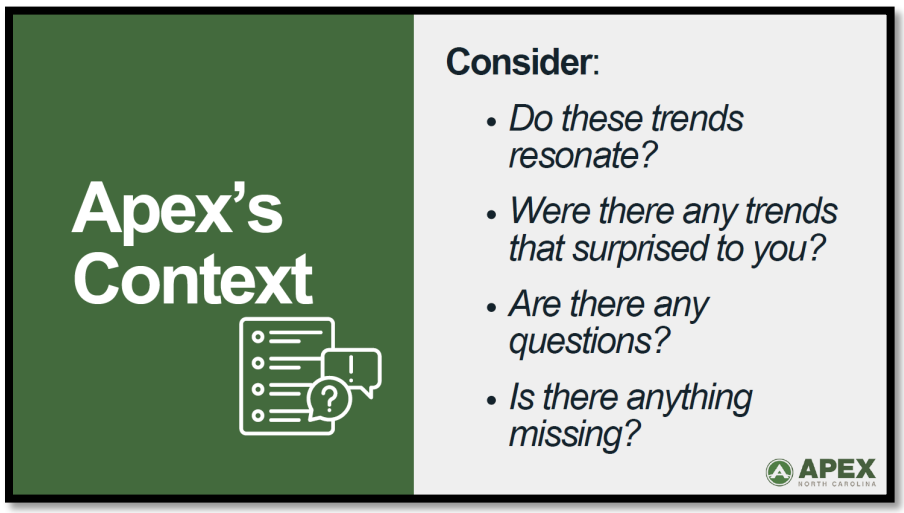
Town Manager Vosburg explained that the vision and mission statements are intended to provide broad, overarching direction for the Town, while the strategic goals and objectives developed beneath them provide greater specificity. He emphasized the importance of maintaining a broader perspective within the vision statement.

Ms. Brenman summarized the discussion and proposed retaining the existing mission statement while developing a few options for minor revisions to the vision statement for Council's consideration in November. She noted that Council could ultimately choose to retain the current vision statement and asked whether members had any additional concepts or priorities they wanted considered in the proposed revisions.

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Councilmember Reese asked whether Council would have opportunities to explore individual comments on the document in greater detail, including the reasoning behind them, rather than simply reviewing the document as presented. He acknowledged the limited time available to discuss each item individually.

Ms. Brenman encouraged Councilmembers to identify specific areas of the feedback that required clarification and offered to facilitate further discussion to provide additional context and a better understanding of those items.

Councilmember Zegerman asked for clarification regarding the source of the feedback presented and whether the comments had been provided directly by Town staff.

Ms. Brenman explained that the feedback was developed through discussions with Town department directors as part of a broader process to identify emerging trends and issues relevant to the Town. She noted that the purpose was to provide Council with additional perspectives, including trends that may not be immediately apparent through routine communications or resident feedback, before establishing strategic goals.

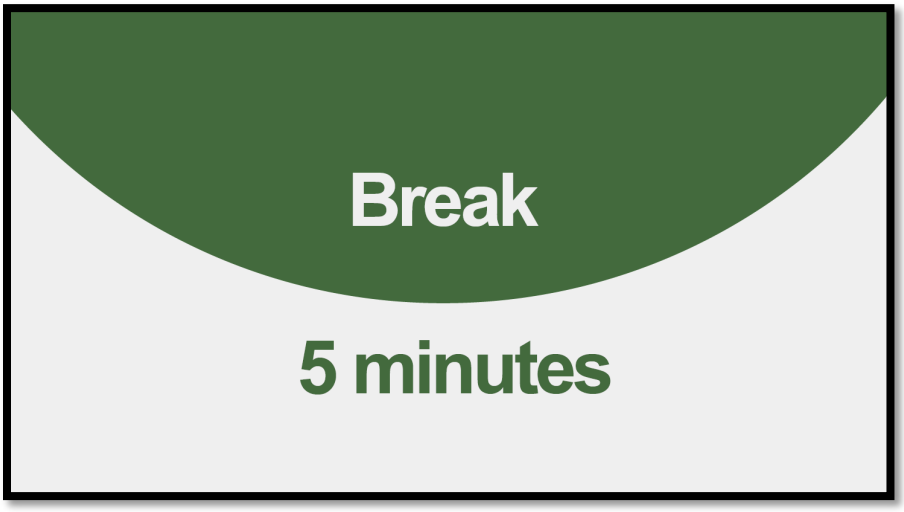
Councilmember Zegerman expressed interest in further exploring the trends and issues identified by staff but acknowledged that reviewing each item individually would exceed the scope of the work session. He suggested that some topics warranted more in-depth discussion at a later time and noted that many of the concerns were consistent with issues Council had previously heard.

Mayor Pro Tempore Mahaffey requested additional clarification regarding the zoning challenges and environmental concerns Council should be aware of as part of the strategic planning process.

Director Khin said a lot of it is from state law, and it would be taking away the Town's ability to do things and make their own decisions.

Councilmember Reese expressed interest in further reviewing the identified trends to better understand their context, intended meaning, and potential implications for the Town's action plan.

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[SLIDE-20]



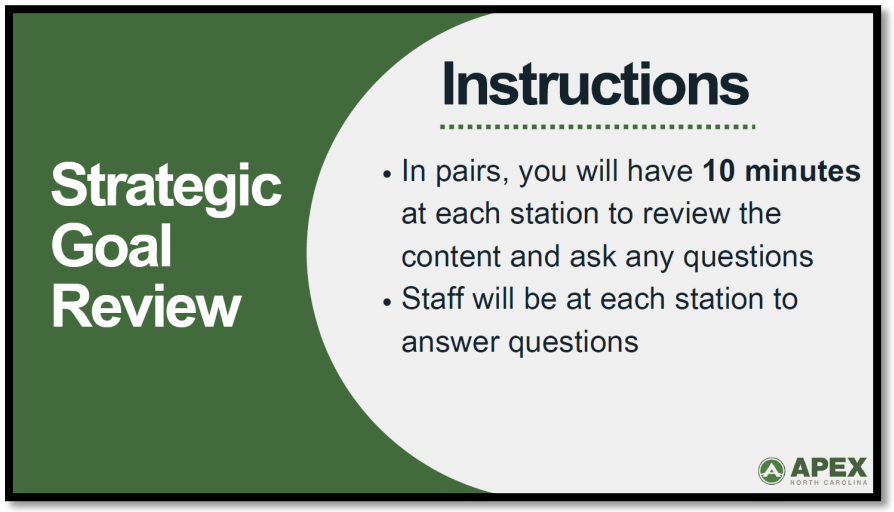
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Ms. Genthon introduced an interactive exercise designed to provide Council with a more detailed understanding of the Town's five existing strategic goals. She explained that Councilmembers would be divided into small groups and rotate through five stations, each representing a strategic goal. Each station included information provided by staff regarding ongoing initiatives, emerging issues, and additional considerations. Staff representatives would be available at each station to answer questions and provide clarification. She emphasized that the exercise was intended for information gathering and discussion rather than making decisions or establishing new goals. Each group was allotted 10 minutes per station before rotating clockwise to the next station.

Councilmember Gray arrived at **2:27 p.m.**

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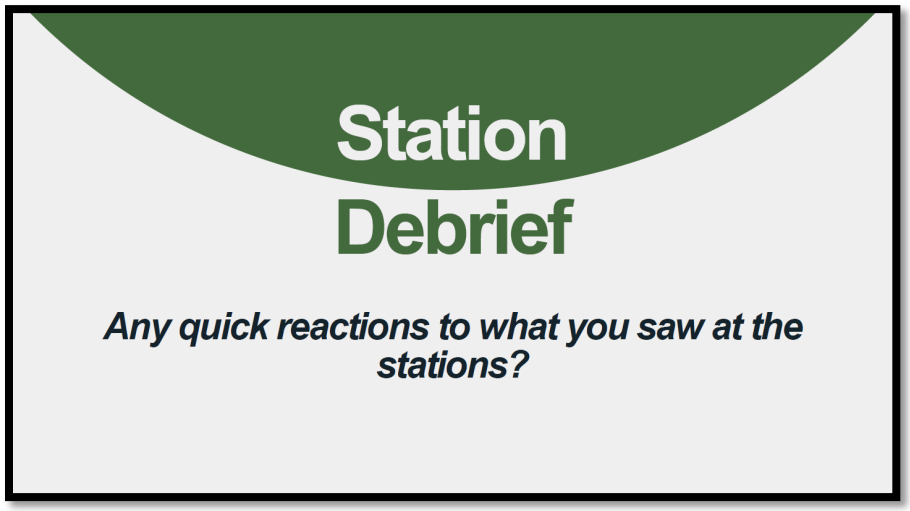
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Mayor Gilbert called for a 10-minute break and announced, without objection, the meeting in recess at **3:02 p.m.**

Mayor Gilbert reconvened the meeting at **3:12 p.m.**

[SLIDE-26]



[SLIDE-27]



Councilmember Zegerman asked the consulting team, based on its experience working with other municipalities, whether there were any significant priorities or areas that the Town's current Strategic Plan adequately addressed or may have overlooked.

Ms. Brenman stated that the Town's five existing strategic goals provided a strong framework and appeared to be working well for Apex, based on feedback from staff. She emphasized that the goals should continue to reflect the Town's specific needs and priorities. She proposed reviewing observations from the exercise and invited Councilmembers to share their overall impressions before addressing potential changes to the Strategic Plan. She mentioned comments she had heard regarding the wording and categories of the current Strategic goals.

Councilmember Zegerman expressed that additional discussion and consideration were needed before Council could determine whether the existing strategic goals should be revised and asked what other municipalities and communities are doing. He said to him they feel right, but wanted to have further analysis and discussion.

Councilmember Gray emphasized that the Town's strategic goals should remain broad, aspirational, and ongoing rather than serve as tasks to be completed and removed once certain objectives are achieved. He noted that the goals were established approximately five years ago and that circumstances had changed since that time. He suggested focusing on refining the existing goals and identifying opportunities to strengthen or expand their objectives to address current challenges and emerging priorities, rather than necessarily replacing the five strategic goal categories.

Mayor Pro Tempore Mahaffey said that while some of the Town's strategic goals were more specific, the five goals collectively provided a broad framework for guiding the Town's priorities.

Ms. Brenman asked whether the difference in scope among the five strategic goals, with some being broader and others more specific, presented a concern or was simply an observation for Council to consider.

Mayor Pro Tempore Mahaffey clarified that when strategic goals are too broad or all-encompassing, they may become more like general categories rather than meaningful goals that provide clear direction for the Town's priorities and decision-making.

Mayor Gilbert emphasized the importance of explicitly recognizing public safety within the Town's strategic goals, particularly under the Welcoming Community category. He noted that while residents value Apex as a welcoming place to live, the existing goal did not clearly identify public safety as a priority. He suggested incorporating language that more intentionally reflects the Town's commitment to maintaining a safe community.

Councilmember Mu suggested revising the language under the Responsible Development strategic goal to emphasize improving accessibility and connectivity throughout the community rather than simply providing them. She explained that the term "improve" would better reflect the Town's commitment to making continued progress in these areas.

Councilmember Reese agreed that strategic goals should remain ongoing and aspirational rather than be considered completed once specific objectives are achieved. He acknowledged that some of the Town's existing goals were more narrowly focused than others and expressed interest in understanding how Apex's vision, mission, and strategic goals compare with those of other municipalities. He requested the consulting team's assessment of the current framework and any initial recommendations for improvement.

Ms. Brenman said some communities choose not to include a goal similar to a High-Performing Government, however the ones that do use it as a way to emphasize the importance of their staff and internal facilities/functions. She said she likes having it included and believe it aligns with what she has learned of how Apex operates. She said most other Municipalities are also dealing with many more safety issues than Apex, but it could be added to ensure that safety was a part of a welcoming community.

Councilmember Gray explained that the term "safe" had been intentionally included in earlier strategic planning discussions to reflect both traditional public safety and the importance of ensuring that all residents feel safe and welcome, regardless of their background, identity, or economic status. He emphasized that safety extends beyond law enforcement and suggested maintaining a clear emphasis on creating a safe and welcoming community within the Town's strategic goals.

Councilmember Reese acknowledged that the Town's strategic goals were developed approximately five years ago under different circumstances. He expressed support for emphasizing a "safe and welcoming community," noting that the language could more clearly communicate the Town's commitment to inclusion and diversity.

Councilmember Gray provided historical context regarding the Town's emphasis on maintaining its small-town character, explaining that the terminology was intentionally selected to distinguish the community's identity and sense of connection from its physical size. He noted that while Apex continued to grow, preserving the charm, character, and

relationships associated with a small-town atmosphere remained an important priority. He explained that these considerations were incorporated into the Welcoming Community strategic goal rather than Responsible Development, recognizing that growth and maintaining a small-town feel could be perceived as competing priorities. He emphasized that the intent was to preserve Apex's sense of community regardless of its future population or development.

Ms. Brenman asked if they would want to change the title from "Welcoming Community" to "Safe and Welcoming Community"

Councilmember Mu said she felt that was a better idea.

Councilmember Reese said a Safe and Welcoming community helps capture all the ideas more clearly.

Ms. Brenman wondered whether incorporating a small-town feel in one of the strategic goals would be something Council would want to consider, since she had heard it mentioned so often.

Councilmember Gray said the small-town feel was an important aspect of the discussion, even with Apex acknowledging they are no longer a small town internally. He said the "feel" was a vision, but including it in the strategic goals could make it seem contradictory to the development aspect.

Ms. Brenman agreed it could be analyzed along with the vision.

Mayor Gilbert raised concerns regarding the wording of the Welcoming Community strategic goal, particularly the use of language emphasizing the creation of a safe community. He noted that describing Apex as an already safe community could unintentionally suggest that additional public safety resources were unnecessary, despite ongoing and evolving needs. He questioned whether the language should be reconsidered to better reflect the Town's continued commitment to maintaining and strengthening public safety.

Councilmember Reese recommended the wording of "maintain and enhance" for a safe and welcoming community.

Town Manager Vosburg suggested revisiting the proposed changes to the strategic goals during the November meeting, when the consulting team would return with a more comprehensive package that could also include potential revisions to the Town's vision statement. He noted that the existing five strategic goals were broad enough to encompass the Town's various initiatives and services, with some priorities, such as public safety and maintaining small-town character, aligning with multiple goals. He acknowledged the importance of ensuring that the goals serve as meaningful guidance for Council and staff in establishing priorities and evaluating future initiatives, rather than functioning solely as categories for organizing Town activities.

Councilmember Zegerman questioned whether the existing strategic goals had ever been used to evaluate a proposed initiative and determine that it did not align with the Town's priorities or should not be pursued.

Town Manager Vosburg referenced the Town's previous discussions regarding grass maintenance as an example of how proposed policies may align with multiple strategic goals while also presenting competing priorities. He explained that staff's policy recommendation

supported both Environmental Leadership and High-Performing Government; however, an alternative approach focused on providing a higher level of service could raise concerns regarding fiscal responsibility and environmental sustainability. He noted that the example illustrated how Council may need to weigh competing strategic priorities when evaluating policy decisions.

Councilmember Gray suggested that the Town's strategic goals should be viewed as guiding principles for evaluating alignment rather than categories into which individual initiatives or services are placed. He explained that Town operations and decisions often support multiple strategic goals simultaneously, using public safety services and vehicle purchases as examples of activities that may involve considerations related to government performance, environmental responsibility, and community well-being. He emphasized that Town initiatives should align with the objectives of at least one strategic goal while considering their relationship with the others. He noted that maintaining this approach would promote consistency and cohesion in decision-making and help ensure that Town actions collectively advance Apex's long-term vision and priorities.

Director Hoffman explained that following Council's direction on overarching strategic goals, staff would use the feedback and discussions from the work session to develop more specific initiatives and priorities. She noted that these items would be presented to Council in November, providing an opportunity to review the next level of detail within the strategic planning framework.

Councilmember Reese suggested incorporating the term "resilience" into the Environmental Leadership strategic goal to further emphasize the Town's commitment to environmental sustainability and long-term resilience.

Ms. Brenman said that was something coming up across the state more often as well.

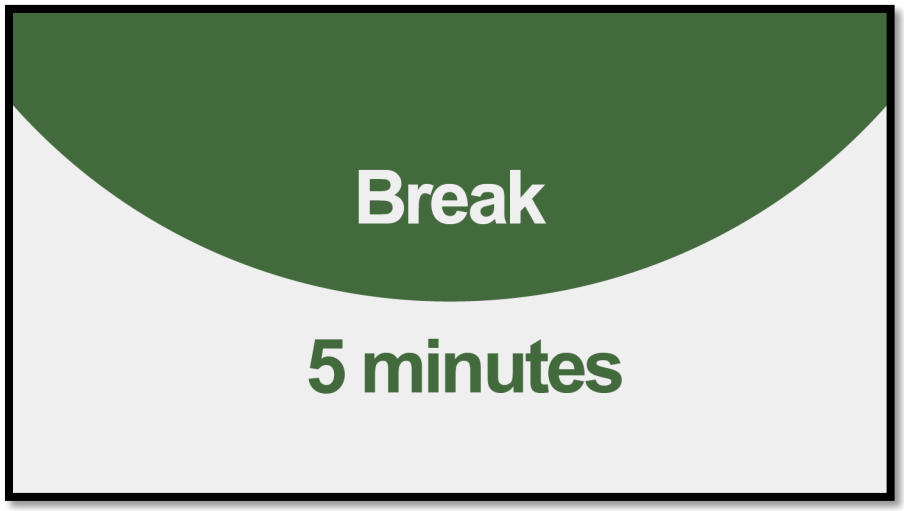
Councilmember Reese emphasized the importance of using the strategic planning framework to clearly communicate what the Town is doing, why those actions are being undertaken, and how effective services and initiatives are being delivered. Referring to the earlier discussion regarding grass maintenance, he questioned how competing priorities and policy considerations are evaluated within the strategic planning process and how that evaluation helps demonstrate the purpose and effectiveness of Town decisions. He suggested incorporating this approach into the strategic planning framework in a way that simplifies decision-making and provides clearer direction without adding unnecessary complexity.

Councilmember Gray referenced the organizational pyramid discussed earlier in the work session, emphasizing that Council's responsibility is to establish a clear strategic direction while allowing staff to determine the most effective methods for implementation. He noted that employees directly involved in daily operations often have the practical knowledge necessary to identify appropriate solutions, while Council provides the broader vision and priorities. He emphasized that the more clearly Council defines its strategic direction, the better equipped staff will be to make consistent, informed decisions that align with the Town's goals.

Councilmember Reese agreed with Councilmember Gray's distinction between Council establishing the strategic vision and staff determining how best to implement it. However, he emphasized the importance of having a mechanism to evaluate outcomes and determine whether Town initiatives achieved their intended objectives. He questioned how the Town could assess its performance against the previously discussed measures of what was accomplished, why it was undertaken, and how effectively it was delivered.

Ms. Brenman said it was built into the structure at the staff level, but not on the strategic goal level.

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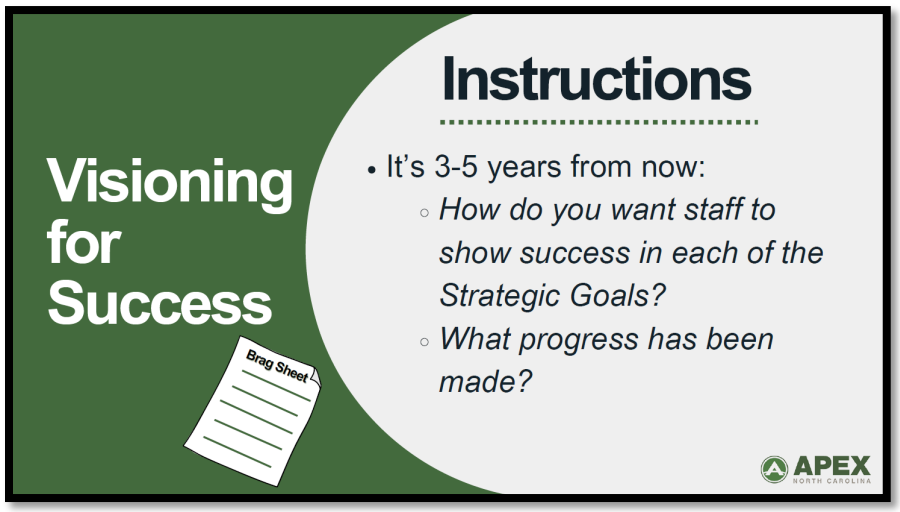


Ms. Genthon facilitated the next strategic planning exercise by asking Council to consider what success would look like within each of the Town's five strategic goals. She encouraged members to envision Apex in 2029, assuming the Town had made significant progress toward achieving its goals, and identify the accomplishments, improvements, and outcomes that would demonstrate success. She emphasized that exercise should focus on broader measures of progress rather than specific projects or initiatives. Council members were instructed to begin by independently recording their thoughts on what success would mean for each strategic goal, with the option to focus on particular goals of interest. She explained that the responses would be reviewed and discussed collectively during subsequent rounds of the exercise to help identify shared priorities and desired outcomes.

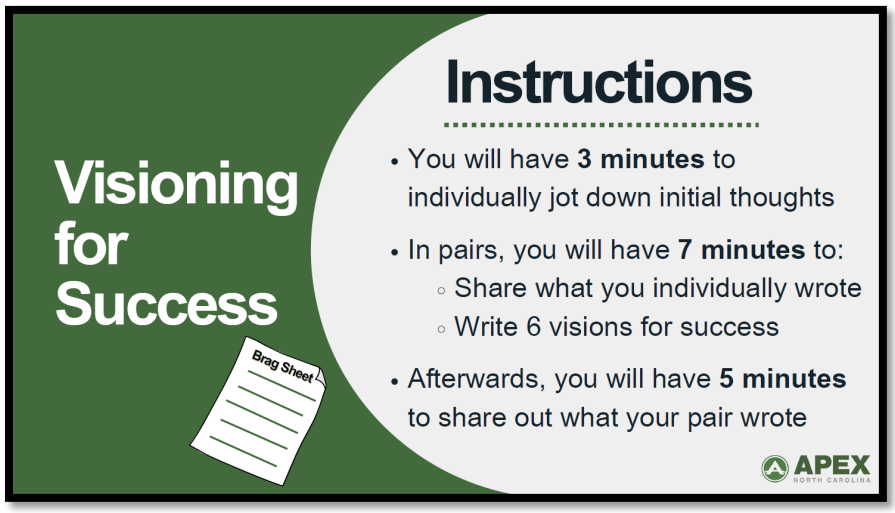
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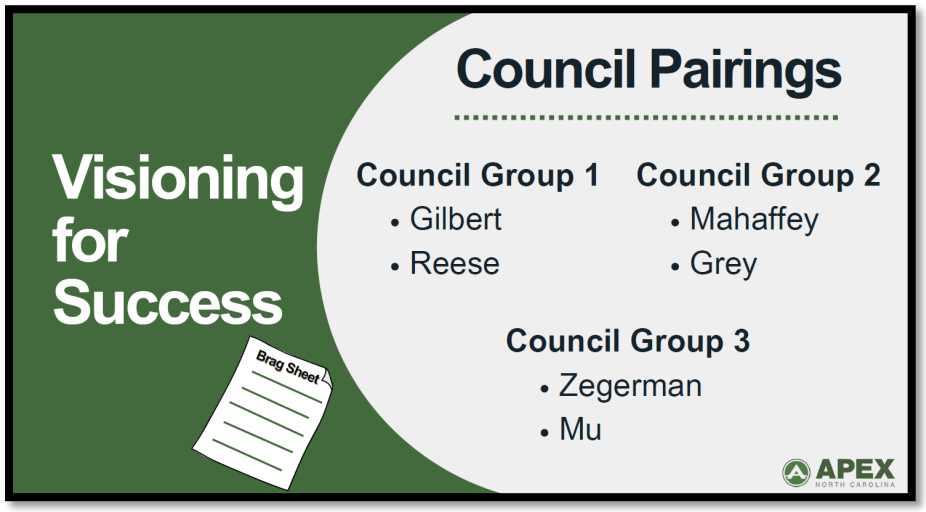
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Councilmember Gray shared two measures of success identified during the strategic planning exercise. For the Welcoming Community goal, he stated that success would mean creating a community where future generations, including their grandchildren, would want to live. For Responsible Development, he emphasized preserving Apex's small-town character and sense of community despite continued growth, describing success as a Town that becomes larger while continuing to feel small. He also identified increased local employment opportunities as a measure of success for Economic Vitality, emphasizing the importance of providing residents with more opportunities to work within Apex rather than commuting outside the community for employment

Councilmember Reese described success in Environmental Leadership as maintaining a community where green spaces and natural landscapes remain more prominent than concrete and developed areas, reflecting the importance of preserving the Town's natural environment as growth continues. He also identified efficient government operations and the ability for all residents to participate in youth sports programs as measures of success for the High-Performing Government strategic goal.

Mayor Gilbert identified the concept of "One Apex," emphasizing a unified community, along with public safety satisfaction as measures of success within the Town's strategic goals.

Mayor Pro Tempore Mahaffey identified establishing responsible development through Town ordinances as a measure of success, emphasizing the importance of having regulations in place that establish clear standards and help prevent irresponsible development.

Mayor Gilbert said the Economic Vitality objective was listed as increase commercial development by 50% within the Town.

Councilmembers and staff engaged in laughter.

Mayor Gilbert said the concept was to double the commercial development footprint from where it is now to help with the tax burden on residents.

Mayor Pro Tempore Mahaffey identified strong tree protection measures as an indicator of success for the Environmental Leadership strategic goal, emphasizing the importance of preserving the Town's tree canopy. He also identified positive trends in employee retention, turnover, and satisfaction.

Councilmember Mu identified improving housing options and increasing housing affordability as measures of success for the Welcoming Community strategic goal.

Councilmember Zegerman identified addressing key traffic problem areas as a measure of success for the Responsible Development strategic goal.

Councilmember Mu emphasized the importance of improving transportation infrastructure through roadway improvements, expanded public transit options, and complete streets designs to enhance connectivity and mobility throughout the community.

Councilmember Mu identified positioning Apex as a preferred location for high-profile companies, particularly commercial businesses, as a measure of success for the Economic Vitality strategic goal.

Councilmember Zegerman identified expanding access to alternative energy sources as a measure of success for the Environmental Leadership strategic goal. He emphasized the importance of exploring a broader range of energy options beyond traditional electricity and natural gas, including potential renewable energy sources such as wind power, to provide greater flexibility and support the Town's environmental priorities.

Councilmember Mu identified high resident satisfaction and a decrease in complaints as measures of success for the High-Performing Government strategic goal.

Ms. Brenman said this helps to set the overall goals and provide the "dream" for staff to work in helping to achieve.

Councilmember Mu said balance was an important component as well. In cases of a goal for affordable housing, that may lead to higher density and traffic concerns, so increased public transit options may need to come along with it to help balance things.

Town Manager Vosburg commented on the definition of success and emphasized that achieving the Town's strategic goals is a shared responsibility between Town Council and staff. He explained that while staff may develop recommendations they believe will contribute to success, Town Council may ultimately choose a different direction, which should not necessarily be viewed as a failure on the part of staff.

Town Manager Vosburg further noted that success is often a moving target and should be recognized as an evolving process rather than a fixed destination. He explained that even when specific goals are established and achieved, additional expectations and priorities will likely emerge. Using examples such as expanding alternative energy options and maintaining a favorable employee turnover rate, he emphasized the importance of defining measurable outcomes while acknowledging that achieving those outcomes does not necessarily mean the work is complete. He encouraged Town Council to consider how success would be defined, measured, and recognized as priorities continue to evolve.

Councilmember Gray expressed agreement with Town Manager Vosburg's comments, emphasizing that while specific tasks and priorities may change over time, the desired outcomes should remain the primary focus. He explained that there are often multiple approaches to achieving the same objective and that Town Council should focus on establishing the desired results while empowering staff to determine the most effective methods for accomplishing them.

Councilmember Gray noted that Town staff possess the professional knowledge and expertise necessary to identify appropriate strategies and implement solutions. He emphasized that Town Council's responsibility is to provide staff with the tools, personnel, incentives, and resources needed to achieve established goals rather than directing every step of the process. He further acknowledged that priorities and expectations may evolve frequently and encouraged flexibility, understanding, and continued communication between Town Council and staff. He emphasized the importance of maintaining an open dialogue as objectives change, recognizing that shifting expectations can create challenges and frustrations while working toward the Town's overall strategic goals.

Ms. Brenman clarified that the overarching goals and general framework of the strategic plan would remain consistent, while the specific initiatives and action items

developed to achieve those goals may change over time as priorities and circumstances evolve.

Councilmember Gray responded that while the strategic goals would provide overall direction, even long-term goals should be periodically reviewed and reassessed. He noted that Town Council was revisiting the strategic plan five years after its development to determine whether the Town's goals and priorities had changed, emphasizing that reevaluating long-term objectives over time was a reasonable and necessary part of the strategic planning process.

Councilmember Reese acknowledged that the number of goals and priorities discussed could be overwhelming and emphasized the importance of open communication between Town Council and staff. He noted that continued dialogue would help clarify expectations, simplify objectives, and empower staff to determine the best approaches for achieving desired outcomes. He further explained that specific actions and strategies would be addressed during the initiative development phase of the strategic planning process.

Ms. Brenman gave an overview of the next steps in the process and asked if there were any additional questions.

Councilmember Mu asked how the Town could increase ridership and community participation in the GoApex public transit system. She compared the high volume of passengers she observed using public transit in Raleigh to the relatively low ridership on GoApex buses, noting that she often sees only one to three passengers at a time.

Town Manager Vosburg responded that the Town was already taking steps to improve public transit by adding an additional bus to reduce route travel times. He noted that discussions regarding future route expansions were ongoing and emphasized that increasing the number of destinations and transportation options could encourage greater ridership. He acknowledged that increasing public transit participation would take time.

Shannon Cox added that it will take a while, and said there are multiple considerations behind growing a desire to use public transit within a community.

Councilmember Gray emphasized that developing a successful public transportation system is a long-term investment that requires time, infrastructure, resources, and public awareness. He recalled earlier discussions recognizing that GoApex would require approximately 10 years to become fully established. He compared Apex's developing system to Raleigh's more established transit network, noting that ridership would likely increase as the Town continued investing in and expanding its public transportation services.

Councilmember Zegerman noted that GoApex ridership had increased since the addition of the second route. He explained that the Multimodal Transportation Advisory Board continues to monitor ridership statistics and explore public outreach opportunities to increase awareness of the transit system. He acknowledged that the current loop system limits connectivity and emphasized that expanding routes and improving connections to larger regional transit networks would provide residents with more transportation options and encourage increased ridership.

Mayor Gilbert thanked the consultants and staff for all of their hard work with this.

[SLIDE-35]



[ADJOURNMENT]

With no additional business being presented before the Council, **Mayor Gilbert** adjourned the meeting at **4:32 p.m.**

Jacques K. Gilbert
Mayor

Ashley Gentry, CMC, NCCMC
Deputy Town Clerk

Submitted for approval by Town Clerk Allen Coleman and approved on _____.