

# Northern Middlesex Council of Governments

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Strategic Planning Retreat  
Chelmsford Public Library  
June 24, 2023



# Retreat Agenda

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- 10:00-10:05**      **Welcome**
- 10:05-10:15**      **Pair and Share - Getting to Know You!**
- 10:15-10:20**      **Group Agreement**
- 10:20-10:30**      **What We've Learned to Date**  
Summary from January Session  
Strategic Planning framework/ timeline  
Review of Key Regional Issues and Priorities  
Mission, Values, Hopes, Concerns  
Existing Conditions (NMCOG Projects and Priorities  
and Staff Survey Summary)
- 10:30-11:45**      **Small Group Exercise: Community Priorities and  
Local/ Regional Movers and Motivators**
- 11:45-12:00**      **Q&A | Next Steps | Closing Remarks**

# Getting to know you!



**Please share (10 minutes total):**

- 1. Who you are** (Name/ City/ Town + Board you are representing).
- 2. In a few words describe what you hope NMCOG achieves through this strategic planning process.**
- 3. Your favorite summer activity.**
- 4. Find a common theme (or two!) between you and who you are paired with and report out that common theme to the full group.**

# Group Agreement



**How will we work together today?**

**How should people conduct themselves at the meeting today?**

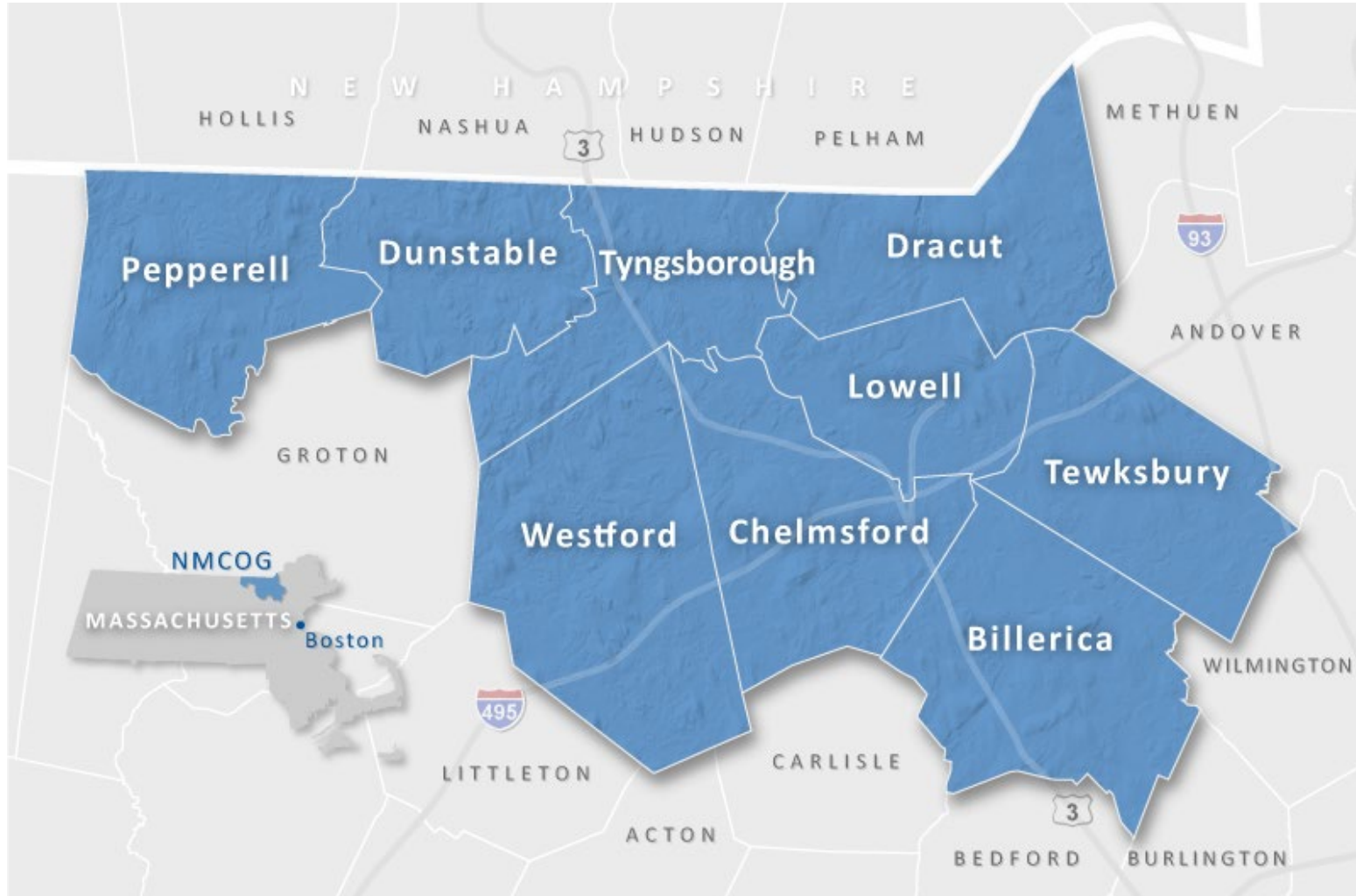
**What behaviors do you want participants to exhibit or not?**

# Group Agreement

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- Be honest
- One person talk at a time
- Be free flowing in discussions
- Stay on target
- Break down acronyms
- All ideas are valued
- Think regionally
- Be open-minded to working with other communities and working together

# About NMCOG



# About NMCOG

January 1961	1st formal meeting to organize
1963	<b>Lowell Area Planning Committee</b> established to study enabling legislation for regional planning districts
1963	MGL c. 40B, ss. 1-8 Regional Planning enacted <b>Greater Lowell Area Planning Commission</b> established
1965	First member community assessments collected to support operations
1966	First Planning Director <b>Harold Kramer</b> hired with funds from US HUD
1967	Dunstable and Pepperell join GLAPC
1969	Changed name to <b>Northern Middlesex Area Commission</b>
1970	Hired <b>Joseph P. Hannon</b> , Executive Director, plans in the works to form the LRTA
1972	Legislation filed to change NMAC governing board (CEO, PB member, and one alternate)
1974	Lowell Regional Transit Authority established
1976	Northern Middlesex Metropolitan Planning Organization established
1987	Promoted <b>Robert W. Flynn</b> to become Executive Director
1990	Changed name to <b>Northern Middlesex Council of Governments</b>
1999	<i>2020 Vision: Planning for Growth in the Northern Middlesex Region</i>
2007	Promoted <b>Beverly A. Woods</b> to Executive Director
2011	<i>Regional Strategic Plan for Greater Lowell</i>
2022	<b>Jennifer M. Raitt</b> hired as Executive Director

# About NMCOG - Council

## **Billerica**

Chris Tribou - *Assistant Clerk*  
 Andrew Deslaurier – *Chair*  
 Mary McBride - *Clerk*

## **Chelmsford**

Annita Tanini  
 Pat Wojtas - *NMMPO Rep.*  
 Douglas Bruce

## **Dracut**

Michael Pestana  
 Heather Santiago-Hutchings  
 Phillippe Thibault

## **Dunstable**

Ron Mikol  
 Jim Wilkie  
 Jason Silva

## **Lowell**

Gerard Frechette – *Treasurer*  
 Daniel Rourke  
 Alternate - Vacant

## **Pepperell**

Joan Ladik  
 Chuck Walkovich  
 Stephen Themelis – *Vice Chair*

## **Tewksbury**

James Duffy  
 Jayne Wellman - *Assistant Treasurer*  
 Alexandra Lowder

## **Tyngsborough**

Steven O'Neill  
 Ronald Keohane  
 Katerina Kalabokis

## **Westford**

Darrin Wizst  
 Bruce Rosenberg  
 James Silva



# About NMCOG - Staff

## Executive / Administration

Jennifer Raitt  
Executive Director

Kelly Lynema, AICP  
Deputy Director

Sara Paz  
Finance and Benefits Manager

Lesley Shahbazian  
Executive Assistant

## Transportation Planning

Jessica Boulanger  
Transportation Mobility Specialist

Shravanthi Gopalan Narayanan  
Transportation Planner

(Positions to be filled: Transportation Planning Program Manager, Regional Transit Planner I/ II, Transportation Planner)

## Housing, Economic Development, Sustainability, GIS and Data

Christopher Glenn Hayes, AICP  
Housing and Economic Development  
Planner

Michael Asciola, AICP  
Senior Planner – Housing and Land Use

Isabel Emmet, AICP  
Regional Land Use Planner II

Daniela Garcia Moreno  
Sustainability Planner

Carlin Andrus, *GISP*  
GIS Specialist

## Weight and Measures Program

Mark Normandin  
Sealer of Weights and Measures

Ricardo Machado  
Sealer of Weights and Measures

# About NMCOG

- One of 13 Regional Planning Agencies within the Commonwealth, NMCOG is a public agency governed by an 18-member policy board comprised of local elected officials from the City of Lowell and the eight surrounding Towns of Billerica, Chelmsford, Dracut, Dunstable, Pepperell, Tewksbury, Tyngsborough, and Westford.
- Goal is to increase the capacity of municipalities and foster regional cooperation and coordination.
- 13 person staff providing comprehensive planning services to its member communities in transportation, economic development, land use, housing, environmental protection, public safety, public health, geographic information systems, and historic preservation.
  - » Hiring three transportation planners

# About NMCOG

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- Technical staff for the Northern Middlesex Metropolitan Planning Organization, providing comprehensive transportation planning services for the region under contract with MassDOT and LRTA.
- Partner for the Economic Development Administration (EDA) of the U.S. Department of Commerce, the Executive Office of Housing and Livable Communities (EOHLC) and local communities to address housing and economic development issues on a regional and community-level basis.
- Funded by municipal assessments, federal transportation and economic development funding, state grants, local fees for services, and special assessments.

# Selected Current Projects and Activities

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- Assistance to designated Green Communities with net zero action planning, including GHG inventories, net zero municipal operations, and compliance activities
- Facilitation of the Northern Middlesex Stormwater Collaborative to help municipalities comply with stormwater rules and regulations and provide guidance on initiatives to educate the public about stormwater
- Weights and Measures Program
- Assistance to municipalities to comply with MGL 40A Section 3A, MBTA Communities requirement
- Envision 2050 (Long-Range Transportation Plan) and increasing mode shift
- Housing production plans, regional economic development activities, and other local planning technical assistance

# Key Regional Issues and Priorities

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- Housing (all types, income levels/ needs, creating and preserving, housing stability, supportive housing)
- Infrastructure (water quality and capacity and sewer capacity and combined sewer overflows)
- Regionalization (municipal services and collaboration)

# SOAR Model Analysis (Appreciative Inquiry)

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## **Strengths:** *What can we build on?*

- What are we most proud of as an organization?
- What makes us unique?
- What is our proudest achievement in the last year or two?
- How do we use our strengths to get results?
- How do our strengths fit with the realities of the marketplace?
- What do we do or provide that is world class for our customers, our industry, and other potential stakeholders?

## **Aspirations:** *What do we care deeply about?*

- *When we explore our values and aspirations, “what are we deeply passionate about?”*
- *Reflecting on our Strengths and Opportunities conversations, who are we, who should we become, and where should we go in the future?*
- *What is our most compelling aspiration?*
- *What strategic initiatives (projects, programs and processes) would support our aspirations?*

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## **Opportunities:** *What are our stakeholders asking for?*

- How do we make sense of opportunities provided by the external forces and trends?
- What are the top three opportunities on which we should focus our efforts?
- How can we best meet the needs of our stakeholders?
- Who are possible new customers?
- How can we distinctively differentiate ourselves from existing or potential competitors?
- What are possible new markets, products, services or processes?
- How can we reframe challenges to be seen as exciting opportunities?
- What new skills do we need to move forward?

## **Results:** *How do we know we are succeeding?*

- Considering our Strengths, Opportunities, and Aspirations, what meaningful measures would indicate that we are on track to achieving our goals?
- What are 3 to 5 indicators that would create a scorecard that addresses a triple bottom line of profit, people, and planet?
- What resources are needed to implement vital projects?
- What are the best rewards to support those who achieve our goals?

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# Council Strategic Planning Hopes

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Council members expressed the following hopes for the strategic plan and process:

- A realistic plan with smaller incremental goals that are achievable over time, an actionable plan
- Communities know to lean on NMCOG for assistance when resources are not available at the community level
- Improved marketing of NMCOG
- The plan will be the organization's "North Star"
- Clear strategic direction for the organization
- Fostering cooperation within communities while balancing everyday roles such as providing local technical assistance (individualized)
- Increased dollars to support activities, actionable goals, comradeship
- Better communication
- Expression of shared goals

# Council Strategic Planning Concerns

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Council members expressed the following concerns for the strategic plan and process:

- Community involvement levels, e.g. how to include all communities in the planning process (more buy in is needed from all communities and how to balance sizes of different communities)
- Can NMCOG staff handle these ambitious strategic planning efforts and is adequate funding available?
- Identification of roles of each staff member, who has what expertise?
- How to get the communities to know NMCOG and what we do (under the radar)
- Councilor participation (acceptance by community not participating)
- Follow up...implementation
- Communities not viewing NMCOG as a strategic partner
- Clarity - do communities understand NMCOG role?
- Buy in from communities and public in actual planning work



# Council Mission

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Words that captured  
NMCOG's mission were:

Cooperation  
Collaborative  
Expertise  
Ambitious  
Organized  
Transparency  
Acceptance  
Straight forward  
Digestible planning  
Openness

Clear vision  
Supportive  
Inclusion  
Equity  
Regional initiatives  
Relatable  
Champion  
Aid and assist all  
communities  
Coordination

Shared resources  
Forward thinking  
Strategic  
Addressing communities  
needs and wants  
Regionalization  
Mutual respect

# Council Core Values

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The following core values were shared:

Equity  
Transparency  
Ambitious  
Regionally focused  
Practical  
Communication  
Dialogue

Leadership  
Collaboration  
Leveraging resources  
Viewed as a partner  
Inclusivity  
Cooperation  
Collaboration

Shared resources  
Service  
Teamwork  
Responsiveness  
Availability (staff),  
Financial support  
(grants)

# Council Strategic Planning Process and Priorities 1/2

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The priorities for the strategic planning process and the following key questions to be answered:

- Funding? Do we have funding for priorities?
- What is current staff capacity and skillsets?
- What would implementation process look? Who will do it? Committee, staff, councilors?
- What is the Council members' roles? What will they bring to the table?
- What are the new initiatives that are in the pipeline? What Initiatives do we have funding for?
- What projects are in process?
- How do we get buy-in from all nine communities?

# Council Strategic Planning Process and Priorities 2/2

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The priorities for the strategic planning process and the following key questions to be answered:

- What are community expectations of NMCOG?
- What are key initiatives at the state/federal level?
- Do the staff have the skillset necessary to engage with future initiatives?
- Do the member communities have these skills? If not, NMCOG?
- What are the improvements in technology that NMCOG needs to assist communities with?
- What is grant funding that communities can be directed to?
- Can we do an annual event/educational process once a year - an orientation?
- Who is accountable for strategic plan implementation?
- How will plan be communicated with communities?
- How do we change perceptions on what NMCOG can do for member communities?

# Small Group Exercise: Aspirations, Movers, Motivators

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- **Aspirations:**

What does your community care about deeply and what do you believe our region cares about deeply?

- **Partners:**

Who are possible local and regional new partners?  
(individuals, organizations, funders)

- **Motivators:**

What should be motivating NMCOG moving forward?

## Q&A | Next Steps | Closing Remarks

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- Provide update on strategic planning work in next newsletter
- Executive Director will debrief this session with staff in attendance, share summary with full staff
- Strategic Planning Committee will meet and debrief the results of this session and work on additional elements in the Environmental Scan
- Strategic Planning Committee will provide a summary of this session and next steps in process at the next full Council Meeting (8/2/23)

# Thank You!

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## **NMCOG Officers:**

Andrew Deslaurier, Chair  
Steve Themelis, Vice Chair  
Gerard Frechette, Treasurer  
Mary McBride, Clerk

## **Support for today's meeting provided by:**

Pat Wojtas  
Mary McBride  
Kelly Lynema  
Lesley Shahbazian  
Executive Assistant  
Anita Tonakarn-Nguyen  
(former Vice-Chair)

## **Strategic Planning Committee:**

Andrew Deslaurier  
Gerard Frechette  
Mary McBride  
Chuck Walkovich  
Jayne Wellman  
Pat Wojtas  
Jessica Boulanger  
Transportation Mobility Specialist  
Kelly Lynema, Deputy Director  
Jennifer Raitt, Executive Director