

Environmental Scan

- Aging population - need to plan for this for access & safety
- % of 5 ↓ kids is decreasing
 - cost of living issues for families
- Balancing ~~#~~ for the demographic trends/changes
- Preserving community character while allowing for needed progress / affordability
- Benchmark to similar communities that have done it well

Strengths

- Interest in engaging the community & all voices
- Community showing up as a whole
- City gets a lot of sales tax
- Cooperation/collaboration among city departments
- Resiliency/ability to adapt

Opportunities

- ~~Matt vs~~ • Economic development
- Small business attraction
- Tourism
- City infrastructure
- Transportation/Connectivity
- Maintaining State & federal partnerships
- City relationship w/ business community
- Segment 10

Challenges

- Insurance coverage for businesses
 - how to support businesses
- RTC

Weaknesses

- Sales tax hasn't kept up with inflation
- Celebration & acknowledgment of City staff
- Compensation (had to go to ballot measure to increase)
- Reactive
- Not addressing the 41st Ave Corridor
- Revisit zoning
- City relationship w/ business community

Guidelines for Effective Participation



Speak from your own perspective using “I” statements.



Respect others’ viewpoints while listening respectfully and intently.



Stay focused on the discussion at hand.



Ask questions.

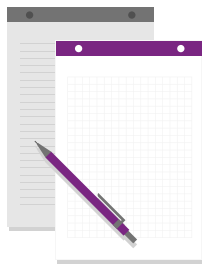


Speak in “we” statements when reporting out from breakout discussions.

Consensus Building and Brainstorming

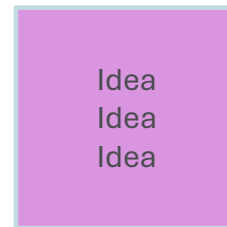
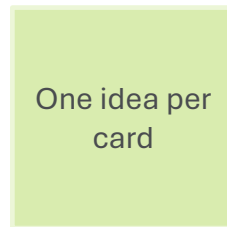
Individually

- ▲ Reflect individually on the focused question for a few moments.
- ▲ Write down your initial thoughts.
- ▲ Decide on the ideas you want to share with the small group.



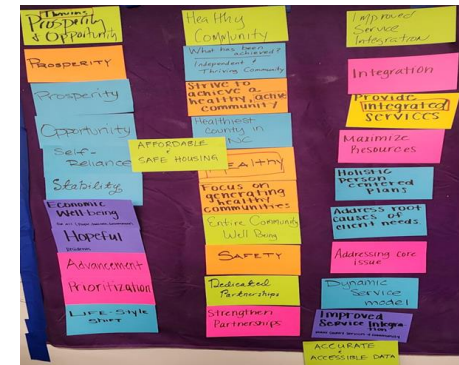
Small Groups

- ▲ Discuss individual ideas and check for understanding and meaning of each idea.
- ▲ Use a marker and a sticky note to write one idea (3 – 5 words) on each note card.
- ▲ Write BIG.



Large Group

- ▲ Affirm the group's understanding of the meaning and focus of each idea.
- ▲ Organize the ideas into thematic categories.
- ▲ Name the categories.



Current Strategic Plan

Mission Statement

- ▲ The mission of Capitola City Council is to represent the community and establish policy to provide the highest quality services to or residents, visitors, and businesses.

Vision Statement

- ▲ The City Council's vision is for the City of Capitola to be the most desirable place to live, work, and play.



Current Strategic Plan

Core Values

- ▲ We value to quality of life in Capitola and are committed to maintaining and enhancing the unique character of our City.
- ▲ We value an environment that creates the maximum opportunities for success.
- ▲ We value an accessible, participatory, and responsive government.
- ▲ We value the preservation of our natural environment and resources through responsible land use planning.
- ▲ We value our cultural and historical heritage.
- ▲ We value ethical and professional conduct.
- ▲ We believe in fostering a sustainable community.
- ▲ We believe in ensuring a safe community.



Mission



A **mission statement** describes an organization's purpose or reason for existing.

- ▲ It is the public statement of the contribution it promises to make to help accomplish the community vision.

It answers the questions:

- ▲ Why do we exist?
- ▲ What do we do?

Mission Statement Examples



- ▲ The City of Creswell exists to provide quality, reliable, and affordable city services to city residents and businesses, creating a safe, livable, attractive community with a unique small-town atmosphere.
- ▲ Provide exceptional services and support for Lake County's people, communities, and environments.
- ▲ We responsibly manage available resources to deliver vital, community-centered services with passion, drive and focus.

Current Mission Statement



- ▲ The mission of Capitola City Council is to represent the community and establish policy to provide the highest quality services to or residents, visitors, and businesses.

MISSION

The City of
Capitola Strives
to....

Ensure high
quality of life
for all residents

Provide high quality
of life and services
to all...

INCLUSIVITY
and
ACCESSIBILITY

Increase
Inclusivity

Power
to the
People

Collaborative
active
partnership

Policies &
governance



Activity



Refine Mission Statement Conversation

- Did the participant's in day one capture what the purpose of the City is?
- What's missing or needs to be refined?
- Capture staff's insights, perspectives, and ideas.
- Synthesize and check for understanding and agreement.
- Collect necessary ideas and content to produce a short, concise statement that clearly defines the scope of the organization.

Vision



A **vision statement** defines your desired future state and provides directions for where you are going as an organization.

Vision Statement Examples



- ▲ Waukesha is an accessible, vibrant, and desirable community where diversity is celebrated, and sustainably sound and innovative practices are prioritized.
- ▲ An engaged community with a sense of place and belonging where everyone is welcome.
- ▲ The City of New Braunfels is a vibrant and inviting place where people enjoy meaningful community connections, unique cultural opportunities, and an exceptional quality of life surrounded by world class natural resources.

Current Vision Statement



- ▲ The City Council's vision is for the City of Capitola to be the most desirable place to live, work, and play.

VISION

RESILIENCE
and
ADAPTABILITY

Village
vibrance

The city
is ...

tourism &
Protect residents

Vibrant

Sense of
belonging,
welcoming

Community
Well Being

Family
Friendly

"You can be
you"
Diverse:
tourism/
access-beach

Opportunities
to
thrive

Economic
opportunity
jobs, housing,
can raise a family

environmental
health &
Stewardship

Sea-side
community or
Village town
city



Activity

Refine Vision Statement Conversation

- Reflect on the day one participant's vision for the City's future.
- Is it clear? What's missing or needs to be refined?
- Capture staff's insights, perspectives, and ideas.
- Synthesize and check for understanding and agreement.
- Collect necessary ideas and content to produce a short, concise statement that outlines the vision for the organization.

Core Values/ Guiding Principles



Core values/guiding principles are the precepts that guide an organization throughout its life in all circumstances, irrespective of changes in its goals, strategies, type of work, or the top management.

They are expectations for how the City will conduct its business, make decisions, and deliver programs and services to the community.

Core Value/Guiding Principles Examples



- ▲ **Integrity:** We operate with integrity, holding ourselves to the highest standards of performance, transparency, accountability, and ethical conduct.
- ▲ **Service:** We are responsive and respectful to those we serve with an attitude that everything is worth our best effort.
- ▲ **Visionary Leadership:** We anticipate needs, look to our community's future, and execute to achieve our goals.
- ▲ **Stewardship of Resources:** We use our resources responsibly. We treasure our unique heritage and natural environment and wish to preserve them for future generations.
- ▲ **Fiscal Responsibility:** Our decisions reflect sound fiscal management and prudence.



Current Core Values



- ▲ We value to quality of life in Capitola and are committed to maintaining and enhancing the unique character of our City.
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Values

Community -
- heart - represented
- safe

^{fiscal}
Stewardship
of
resources

Service &
responsiveness

striving, adaptable
Constantly
improving

Open,
honest &
ethical

- respect all
- variations
- dignity

Cultivate
Community
Identity

~~Goal~~:
Balance:
historic and
increase

Historic
Preservation

(Identity)
Adaptability +
Culture (city)
- changes



Activity



Refine Core Values Conversation

- Reflect on the day one participant's identified core values.
- Are they clear? What's missing or needs to be refined?
- Capture staff's insights, perspectives, and ideas.
- Synthesize and check for understanding and agreement.
- Collect necessary ideas and content to produce a list that clearly defines how the organization will carry out its mission and vision.

Strategic Priorities



Strategic priorities are the most important areas your organization needs to focus on.

They are the small number of focal points, typically **four to six**, that are critical in achieving your mission and realizing your vision.

Strategic Priorities Examples



- ▲ Building Trust
- ▲ Safe and Healthy Community
- ▲ Vibrant Lifestyle
- ▲ Thriving Economy
- ▲ Exceptional Public Services

Strategic
Priorities

Building
Community
Trust

More housing
options

opportunities

Attainable
Housing
options
alternatives

Planned
housing
development

Economic
Opportunity

Thriving
Economy

Economic
Development

Tourism

Fiscal
Sustainability
of the
org.

Community
Safety
mainten

Public
Safety

Public
health+safety

Alternative
transportation



Activity



Strategic Priorities Conversation

- Reflect on the day one participant's focus areas.
- Are the identified priorities the right areas of focus to make progress toward the vision? If not, what would you add or refine?
- What's missing or needs to be refined?
- Capture staff's insights, perspectives, and ideas.
- Synthesize and check for understanding and agreement.
- Collect necessary ideas and content to produce a short, concise statement that clearly defines the scope of the organization.

Strategic Goal Statements



Strategic goal statements are long-term, broad, continuous statements that define the strategic priority and how you will make progress toward your vision.

Strategic Goal Statement Examples



- ▲ **Economic Development:** Foster and promote a resilient economy that encourages growth to attract and retain diverse businesses, creating opportunities for prosperity and enhanced quality of life.
- ▲ **Community Identity:** Establish a distinct and recognizable identity for the City that fosters community pride and increases commercial marketability.

with coverage
development within
the project to
be

Attainable Housing

~~Careful thought~~

- Clear plan through housing element to meet housing goals & maintain community character
- Implementing the housing element w/ design principles / standards
- ~~Inclusionary housing ordinance for rentals~~
- Balance rent/own
- Enough range of options to support different/diverse needs of individuals & families

Housing Affordability

- low income and moderate income projects in the same area (development)
- create an ordinance to support ↑
- Streamlining administrative approvals
 - ↳ improve efficiency similar to state (regional needs assess.)
- meet goals in development terms ~~ADUs~~
 - ↳ encourage development → % ↑
- Community + property owners are ready/prepared for the increased housing
 - ↳ infrastructure & staffing to support housing increase
- review objective standards by Planning Commission

Economic Opportunity

- ~~improve commutetetimes~~ → "over the hill"
- Thriving businesses
- Revisit the rules ^{zoning} ordinances in the village for businesses
- Policies and effects of bike paths and impacts on businesses
- Support + small business ◦ regional partnerships + plans
- revision 41st Ave → All
- no empty stone fronts
- economic development committee ~~for~~ 1 FTE
- good jobs in the city - living wage vs. livable wage
- infrastructure for tourism
- reduced congestion
- hotel → space for conference
- tourism is valued → optimize the industry

Fiscal Sustainability

- ~~thoughtful~~ taxes
- not pass new tax measure → what steps are 'we' taking before more tax?
- look at policy choices / more resources or diversified options
- saving up for the next disaster - save \$ in fund
- more sales tax in 41st corridor
- surplus of revenue → increase goal of emergency funds
- prioritize economic development
- more short-term rentals out of the river areas
- fiscal analysis → save \$ → effective areas
- maintaining staffing ↓ shared services?
- maintaining programming
- pension costs
- focus on the next stream of income
- prioritize projects and be responsible
- clear communication on tax measure - measure Y

~~Community Safety~~

Public Health +

Community Safety
well-being

- family friendly — take care of families + kids
- take care of seniors
- cliff drive resiliency
- river - improve flooding
- create a long-term safety plan
- climate change
- programming → parks + tree
 - hire park rangers
 - increase staffing
 - partnerships
- take care of our people
 - feed seniors - prepare for reduced CBG
- leveraging partnerships
- mental health support — PD programs + dogs
- PD is staying ahead of changes + policing strategies
- diversity of city leadership

• maintain + expand community spaces - green spaces



Building Trust

- Community trusts Council & Staff to make informed & proper decisions
 - Outreach & engagement
- All commissions & boards have full membership & involvement, ↑ attendance
- Open & competitive procurement process
- More public engagement
- Meeting our strategic goals
- "Doing our jobs / being effective"

Improved Connectivity

- Completion of segment 10
- less single occupant cars
- buses - mail to "over the hill" → improve over time
- more options for transportation
- bike lanes - network for schools - protected
 - wider bike lanes - e-bikes - bars/planters
- ADA compliance and uniform
- e-bike use policy - licensure program / youth
- access to the beaches - temp. shuttle - parking is limited
- opportunity for more shuttles
- continuing non-profit grant funding
- safer vehicle infrastructure - roundabouts
- bus stations
- pedestrian zone in the village - less cars (esp. in od)
- partner w/ school 7mph ← → road closures district on programs and awareness



Activity

Refine Strategic Goals Conversation

- Reflect on day one participant's goal statements for each priority.
- Do these goal statements accurately describe what you hope to achieve for each strategic priority?
- If not, what would you add or refine?
- Capture staff's insights, perspectives, and ideas.
- Synthesize and check for understanding and agreement.
- Collect necessary ideas and content to produce a list that clearly defines how the organization will carry out its mission and vision.

Strategic Objectives



- ▲ **Strategic objectives** are the precise actions or measurable steps you will take to move closer to the goal. They are usually time-bound with a milestone or schedule for completion.

Strategic Objective Examples



▲ For example, if a strategic priority is “Improved Mobility” and the goal is “Getting around the city is easier for people who live, work, and play here.” some examples of objectives could include:

- Establish additional bus routes with expanded schedules
- Alleviate traffic congestion to reduce travel time and speed of traffic throughout Capitola.
- Improve sidewalk connectivity in (name the specific locations).
- Develop a plan for bike paths connecting neighborhoods to workplaces, downtown, parks, and community/city services.

Develop Objectives



Individual Reflection:

- ▲ As you discuss each objective, consider the following questions:
- ▲ If we achieve this objective, does it move us closer to the goal?
- ▲ If the answer is “no,” what objectives will move us closer to the goal?
- ▲ Is the objective achievable within the five-year period of the Strategic Plan?
- ▲ Write one idea on each note card.



Activity



Develop Strategic Objectives

- ▲ Individually reflect on possible objectives for each strategic goal.
- ▲ Form small groups to discuss objectives for each goal and achieve consensus on the ideas to put forward to the large group.
- ▲ As you discuss each objective, consider the following questions:
 - If we achieve this objective, does it move us closer to the goal?
 - If the answer is “no,” what objectives will move us closer to the goal?
 - Is the objective achievable within the five-year period of the Strategic Plan?

What Is Performance Management?



- **Performance management** is an integrated set of tools and practices used to improve performance and connect to the Strategic Plan.

What Is Performance Measurement?



- ▲ An ongoing, systematic process to include selection, collection, and reporting of performance data and is central to several management techniques.

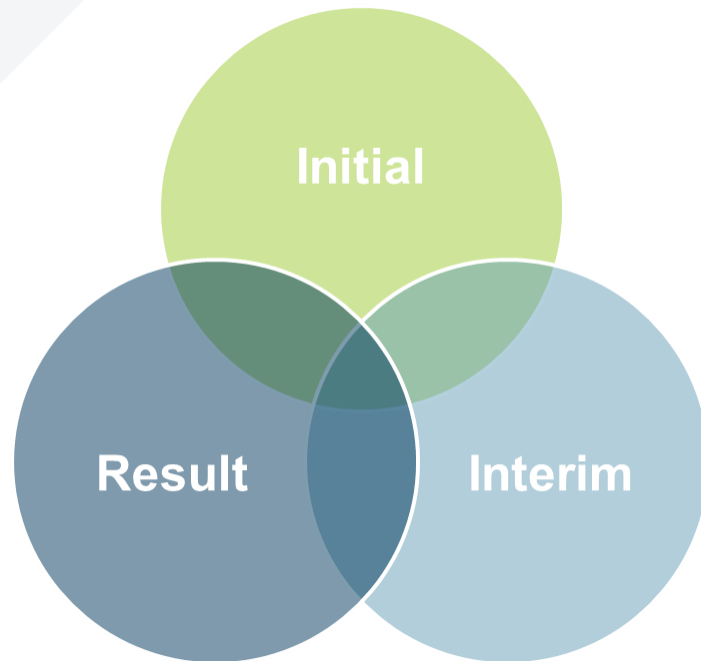


Performance Measurement Terminology

- ▲ **Outcomes** relate to the conditions that an organization is working to create, change, or build.
- ▲ **Measures** track the use of inputs and the production of outputs, gauge efficiency, and assess the achievement of outcomes.



Outcomes



Typical characteristics:

- ▲ Require internal and sometimes external collaboration to achieve
- ▲ Are long-term and unchanging unless there is a fundamental change in the organization's mission
- ▲ Difficult to measure using only a single metric
- ▲ Include a description of the intended outcome, to help the organization understand whether it is making the right investments
- ▲ Differentiated by time or significance – three types



Performance Measures

▲ Operational Measures – Inputs and Activities

- How is the work done, how much is invested, how long did it take to complete?

▲ Process Measures – Outputs

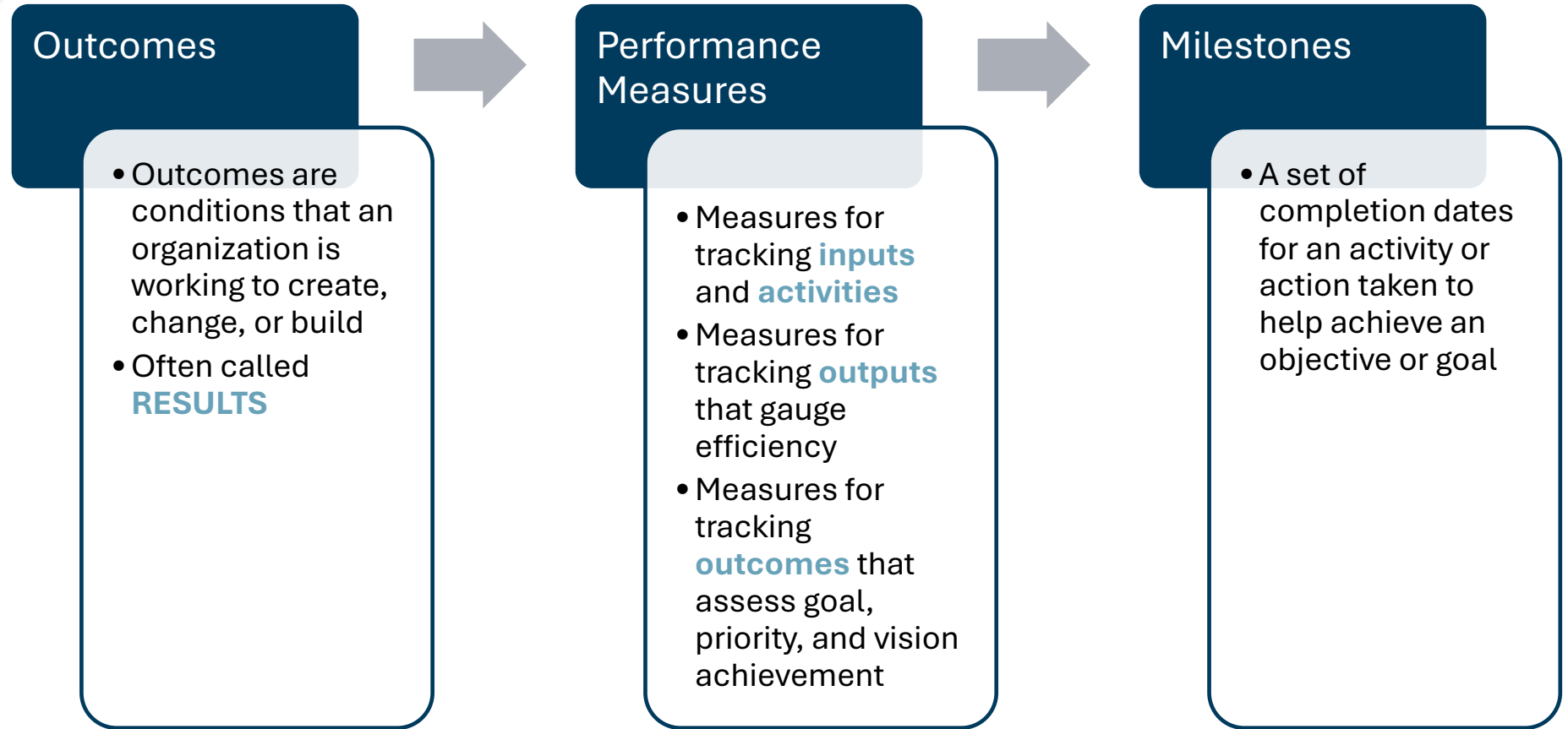
- What activities did we complete?
- What process did we use and can we find efficiencies and improvements in the process to deliver services?

▲ Results Measures – Outcomes

- Specific metrics used to quantify or verify outcome achievement



Building Blocks for Performance Measurement



Handout:
Examples of Local
Government
Performance
Measures



To effectively make progress toward strategic priorities and goals, you need a mixture of all three



Activity



Develop Outcomes and Performance Measures

- ▲ Individually reflect on possible outcomes for each strategic objective.
- ▲ Form small groups to discuss outcomes for each objective and achieve consensus on the ideas to put forward to the large group.
- ▲ As you discuss each outcome, consider the following questions:
 - What outcomes and performance measurements will let us know the City of Capitola is making progress and achieving the outcome articulated in the goal statements?
 - What are you trying to achieve?
 - What are the initial, interim, and result outcomes that will show change and progress toward strategic goals and goal statements?
 - How will you measure each outcome?
 - For which measures is data readily available or relatively easy to generate? Which measures best tell the story of the City's progress toward the vision and strategic priorities/goals?

Performance Reporting



- ▲ Regular **performance reporting** is how you achieve transparency and accountability.
- ▲ Helps the community know how and why the City is investing resources to achieve results or benefits for the community.



Performance Reporting Methods

- ▲ Implementation Plan continually updated to reflect progress
- ▲ Annual or other periodic report produced to report on progress
- ▲ Visual methods, such as spotlight on accomplishments through performance dashboard or reports



Activity

Develop Reporting and Evaluating Processes



- ▲ Discuss as a group reporting and evaluating methods and reach consensus on the ideas to put forward to the large group.
- ▲ As you discuss, consider the following questions:
 - What structure will you put in place for working and monitoring progress on the plan?
 - What criteria should the City use to determine whether or not to add something to the plan?
 - How frequently should the City update the plan? What are the process steps?
 - How often should the City report progress on the plan? In what format?



Process for Updating, Evaluating, and Reporting Progress

- What criteria should the City use to determine whether to add something to the plan?
- How frequently should the City update the plan? What are the process steps?
- How often should the City report progress on the plan? Internally? Externally?

Capture group's insights/perspectives/ideas, synthesize, and check for understanding and agreement.

Outcome: Determine how to maintain the City's Strategic Plan as a living and actionable document.

Reflection and Closure



What worked well today? Is there anything we could have done differently to make the experience better?



How did this retreat contribute to your ability to work together collaboratively?



Is there any additional guidance you would give the consulting team and the City leadership team in preparation for completing the first draft of the **Strategic Plan**?

Next Steps

- ▶ BerryDunn will prepare a first draft of the Strategic Plan document.
- ▶ As needed, BerryDunn will facilitate follow-up sessions with City department leadership and key staff to refine objectives and performance measures.
- ▶ BerryDunn will facilitate a review of the Draft Strategic Plan with the City Council in a work session.
- ▶ There will be a community review of the initial draft of the Strategic Plan.
- ▶ City Council will adopt final Strategic Plan.

