

C I T Y O F S A N J O S E

**CITY COUNCIL/MANAGEMENT TEAM  
PRIORITY SETTING/STRATEGIC PLANNING RETREAT**

**20 February 2007 \* City Hall Community Meeting Room**

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**MISSION STATEMENT**

**The Mission of the City of San Jose is to provide quality public services, facilities and opportunities that  
create, sustain and enhance a safe, livable and vibrant community  
for its diverse residents, businesses and visitors.**

**THREE-YEAR GOALS**

2007-2010 - not in priority order

- ? **Maintain our status as the safest big city in America**
- ? **Eliminate the structural budget deficit**
- ? **Reduce deferred maintenance and the infrastructure backlog and develop a strategy to improve the infrastructure**
- ? **Increase economic vitality**
- ? **Provide full funding for parks, pools, community centers and libraries, including maintenance, operation and development**

**NEXT STEPS/FOLLOW-UP PROCESS**

<b>WHEN</b>	<b>WHO</b>	<b>WHAT</b>
Wed., February 21	Nadine	Distribute the retreat record to those unable to attend.
Within 48 hours of receipt	All recipients	Read the retreat record.
March 1, 2007	Department Heads	Share and discuss the Strategic Plan with staff.
March 7, 2007	Management Team (City Manager - lead)	Review the "What's Not Going As Well As You'd Like" list for possible action items.
At the March 13, 2007 City Council meeting	City Council Mayor - lead	Consider the adoption of the Strategic Plan.
May 2007	Management Team (City Manager - lead)	Analyze Strategic Objectives for budget implications and report to the Council through the budget process.
Monthly	Mayor City Council City Manager	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	Nadine	Prepare and distribute the updated Strategic Plan monitoring matrix.
Sept. 4, 2007	Mayor, City Council City Manager Management Team	Strategic Planning Retreat to: <ul style="list-style-type: none"> <li>- assess progress on the Goals and Objectives</li> <li>- identify Core Values</li> <li>- develop Strategic Objectives for the next 6 months</li> </ul>

## S.W.O.T. ANALYSIS

Strengths – Weaknesses - Opportunities - Threats

The S.W.O.T. Analysis includes input from the Community Telephone Survey, the Neighborhood Associations' Priority Setting Session and the public hearings.

### WHAT ARE THE STRENGTHS OF THE CITY OF SAN JOSE?

#### Brainstormed List of Perceptions

- Outstanding workforce
- Strong neighborhood involvement
- Very diverse population
- Intellectual Capital of the Universe
- We're innovative and creative
- Internally, we handle pressure and crises well
- Dedication of senior staff
- Compassionate senior staff
- Embrace change
- Strong Mayor-Council staff
- Respect the public
- We're a leading recycling city
- Strong supporter of industry
- Meaningful work
- We make data-driven decisions
- High credit rating
- Focus on pedestrian safety
- Building relationships with outside organizations
- It's a well managed city
- We've been a leader in providing services for youth
- Gang Prevention Program
- Our Council speaks with one voice, unlike others that are fractured
- Anti-Graffiti Program
- Focus on protecting streams and providing trails
- Progressive policies
- We focus on quality of life
- Balanced budget on time
- We plan communities for the future
- Use of performance measures
- History of decorum and open communication on the part of the City Council
- High performance in the context of using resources
- 25 years of investment in the downtown is paying off in how it looks
- Council support of affordable housing
- Community support of affordable housing
- Neighborhood empowerment
- Individual departments seek input from the community
- Commitment to the arts
- Safe city
- Educated population
- Environmental awareness
- Good fiscal management

- Superior corporations
- A lot of cross departmental teamwork
- Making capital investments
- High customer satisfaction
- Long-term employees
- Council seeks input
- We resolve conflict
- Empower the minority community
- Cash revenues are growing as a result of attracting businesses
- Collaborative relationships with educational institutions
- Some of our functions have achieved national recognition, e.g., library, police, parks & rec
- Innovative things in economic development
- New airport
- Increased transparency in city government

## **WHAT ARE THE CITY OF SAN JOSE'S INTERNAL WEAKNESSES/CHALLENGES?**

Brainstormed List of Perceptions'  
 [NOTE: Duplicate ideas were recorded]

- Call center functions
- Structural deficits
- Deferred maintenance of city facilities and buildings
- Imbalance in budget: more to public safety, less to everything else
- Processes take too long
- We do not improve or preserve assets
- Lack of resources to finish capital projects
- Lack of computer resources and replacements
- Deferred infrastructure maintenance of facilities
- Unfunded aging infrastructure
- Lack of resources
- Age of the workforce
- Union contracts
- Perception that we're not meeting the needs of the minority community
- We often eat our seed corn
- Fragmented IT
- Lack of ability to overcome self interest
- Outreach limited by resources
- Process over product
- Excessive pension liability
- Overhead too high
- Insufficient staffing
- Not strategic enough - we put out fires
- Lack of resources for maintaining infrastructure
- Insufficient resources to avoid all the potholes
- Increased community expectations; decreased resources
- Significant admin.
- Structural deficit in the General Fund
- Don't spend enough time thinking of new revenue sources
- The volume of administrative projects and lack of priorities
- Inherent structural charter conflicts

- Lack of trust by constituents
- Grant contract management is a problem
- Traffic congestion
- Lack of positive recognition of employees
- Not enough money coming in
- Not enough enforcement officers
- Poor employee appraisal process; we don't communicate as well as we should
- Traffic lights aren't synchronized
- Budget process is too time consuming
- Many policies lack context
- Lack of a work-life balance
- Reaching out to other communities causes problems - cultural awareness (lack of)
- Limited workforce diversity
- Lack of resources for back of house functions
- Population outpacing staff
- Shortage of staffing
- Cuts in IT, Human Resources and General Services
- Work rules for public safety are outdated
- Too many expectations
- Crumbling infrastructure
- Insufficient funding of bond-funded projects
- Lack of support for risk-taking
- Lack of public transportation opportunities
- Lack of information to neighborhoods regarding limited resources
- Rising costs of salaries and benefits
- RDA-City relationship (problem)
- Failure to follow a process
- No reserve funds for facilities
- High reliance on managers to do the work of lower staff
- Lack of flexibility due to bargaining agreements
- Lack of maintenance of infrastructure
- Weak long-term operational planning
- Emphasis of process over outcome
- Too many potholes
- Downtown is perceived as not clean or safe
- Staff shortage to respond to community needs
- Demands exceed resources
- Perception of police profiling
- Structural deficit
- Internal city rules stifle creative staff work
- Weak technology infrastructure
- Slow response to code enforcement problems
- Lack of maintenance
- Across the board reductions in non-public safety areas
- Unfunded liabilities

## EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON THE CITY OF SAN JOSE IN THE NEXT THREE YEARS

### Brainstormed List of Perceptions

- The economy is improving
- More emphasis on environmental improvement
- Partnerships with outside organizations
- Industrial partnerships
- Convergence of arts and technology
- Bipartisan cooperation at the state level
- Increased global connections
- Continued diversity of the community
- Clean energy
- Our ability to attract capital from all parts of the country to do SMART growth
- Our geographic location
- Pelosi's role in the House
- Strong strategic leadership at San Jose State
- Improved sister city relationships
- Changing demographics
- First Act Initiative
- More professional sports coming to the region
- 01 Festival in '08
- New occupant in the White House
- Early primary in California
- More air flights in and out of San Jose Airport
- More housing in the downtown
- Improved emergency preparedness from outside resources
- Continued venture capital investment in the valley
- More state bond money available
- Increased high rise residential development
- Employment growth
- Educational institutions in the area
- New technology innovations
- Increased diversity in leadership positions
- Great weather
- Increasing sophistication of neighborhood leadership
- Historically low interest rates
- Increased transparency in city government
- Mike Honda's and Zoe Lofgren's committee assignments in the new Congress
- Convergence of nanotechnology, biotechnology, technology, information technology and storage and computing power
- Silicon Valley continues to reinvent itself
- GASB 45
- Carl Guardino's role in transportation (CTC)
- Increasing interest in corporate leadership to support the city
- Positive payback on current capital investments
- BART is coming to San Jose
- Reengagement with the education community
- Foreign immigration
- Advancements in biotechnology
- Rising test scores in the public schools
- Many multi-agency/multi-cultural collaborations

## EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON THE CITY OF SAN JOSE IN THE NEXT THREE YEARS

Brainstormed List of Perceptions

- Hetch Hetchy floods or breaks
- Natural disaster
- High cost of living
- Terrorism
- Continued outsourcing of high tech jobs
- Economy is shifting away from tax generating activity
- Competition from other cities
- High high school drop out rate
- Demand for skills from employers exceeds the educational attainment of the schools
- Global warming
- Drought
- Rising unemployment
- Earthquake
- Unfunded mandates
- Lack of seismic retrofits for homes and businesses
- Increased statewide competition for new employees
- Immigration
- Foreclosures and defaults
- Recession
- GASB 43 and 45
- Freeway congestion
- Gang activity
- Continued escalation in the cost of raw materials
- Housing is not affordable
- Declining federal government support of domestic programs
- Aging population
- Increase in population
- Shrinking middle class
- Worsening air quality
- Global competition
- Rising health care costs
- New, more stringent regulations
- State and federal deficits
- Decline in significance of the U.S. in the global economy
- The cost of war
- Large number of pending retirements
- Employment growth
- Voters unwilling to pay increased taxes and fees
- State taking our money again
- Potential interest rate increases



## IDENTIFY THREE-YEAR GOALS:

Brainstormed list of potential goals from which the Three-Year Goals were developed

- Maintain our status as the safest big city in America
- Increase economic viability
- Eliminate the structural budget deficit
- Provide adequate staffing
- Strengthen city support services
- Attract major corporations to San Jose
- Hire, develop and recognize workforce
- Complete the General Plan
- Create a safe and vibrant downtown
- Maintain public facilities
- Increase revenue
- Consolidate and coordinate with other public agencies and the private sector to maximize services and resources
- Improve and build neighborhood organization capacity
- Reduce deferred maintenance and the infrastructure backlog
- Attract quality employees
- Improve communication and outreach of the city's services and activities
- Improve city streets
- Develop a long-range fiscal plan
- Expand parks and recreational programs
- Increase retail choices
- Improve services to small business
- Improve the quality of the natural habitat
- Improve Council-staff relationships
- Implement Core Values
- Improve the permitting process
- Reduce gang membership
- Increase the number of jobs
- Enable small business
- Reduce global warming
- Protect the green line
- Become more family-friendly
- Improve disaster readiness and long-term planning
- Increase tourism
- Provide full funding for parks, pools, community centers and libraries, including maintenance, operation and development
- Maintain excellent credit ratings
- Improve open government
- Enhance the urban forest
- Increase sports facilities
- Increase responsiveness to constituents
- Develop a data-driven decision process
- Provide affordable housing and reduce homelessness
- Provide courteous, equitable police services
- Improve the infrastructure
- Establish long-term funding strategies for infrastructure maintenance and repairs
- Provide for current and future IT needs and access
- Mitigate transportation problems
- Make San Jose more walkable
- Improve proactive code enforcement

## **STRATEGIC PLANNING ELEMENTS**

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### **"SWOT" ANALYSIS**

Assess the organization's:

- Internal Strengths      - Internal Weaknesses
- External Opportunities      - External Threats

### **MISSION/PURPOSE STATEMENT**

States WHY the organization exists and WHOM it serves

### **VISION STATEMENT**

A vivid, descriptive image of the future – what the organization will BECOME

### **CORE VALUES**

What the organization values, recognizes and rewards – strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

### **THREE YEAR GOALS**

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) - usually limited to 4 or 5 key areas

### **KEY PERFORMANCE MEASURES**

What success will look like upon achievement of the goal

### **SIX MONTH STRATEGIC OBJECTIVES**

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

### **FOLLOW-UP PROCESS**

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months with the next check-in on September 4, 2007.

**CITY OF SAN JOSE**    ⚙    **SIX-MONTH STRATEGIC OBJECTIVES**  
 February 20, 2007 through August 15, 2007

**THREE-YEAR GOAL: MAINTAIN OUR STATUS AS THE SAFEST BIG CITY IN AMERICA**

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. June 30, 2007	City Manager, working with the City Council	Identify funds to implement, at a cost of \$4.9 million, Tier 1 of the first 4 tiers of the SJPD 2007-2008 Five-Year Staffing Plan without impacting the funding of other departments.				
2. June 30, 2007	Police Chief – lead, Public Information Officer, members of the SJPD Video Unit, representatives of the Strong Neighborhood Initiative and other neighborhood representatives	Create and distribute an educational video aimed at reducing auto thefts and residential burglaries for potential use at neighborhood meetings for PSAs and for insurance companies.				
3. August 1 2007	Fire Chief	Review the 2000 SJFD Strategic Plan and its response time data and provide to PSFSS (Public Safety Finance and Strategic Support) Committee an analysis that will be used for future staffing needs and service delivery models.				
4. August 15, 2007	Fire Chief	Develop a plan to meet the criteria for San Jose to become a Heart Safe City and present to the PSFSS Committee.				

**THREE-YEAR GOAL: *ELIMINATE THE STRUCTURAL BUDGET DEFICIT***

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. March 15, 2007	Labor Contracts Task Force (created by Employee Relations Dir.)	Look at upcoming labor contracts and review those items inside the labor contracts that contribute to the structural deficit and present to the City Manager.				
2. June 1, 2007	City Manager	Evaluate CitiStat or a comparable performance measuring system to determine if it can be used to save us a lot of money and report the results to the City Council.				
3. June 30, 2007	City Manager	Identify all elements of General Fund cost expenditures that are growing faster than our projected revenues.				
4. June 30, 2007	Finance Director	Evaluate the city's Accounts Receivables and develop a collection strategy and present the results to the PSFSS (Public Safety Finance and Strategic Support) Committee				
5. June 30, 2007	Finance Director	Develop options for a citywide Revenue Amnesty Program to waive penalties and interest, but not taxes or fees, and present to the City Council for action.				
6. August 15, 2007	HR Director and Finance Director	Evaluate opportunities to streamline, automate or eliminate labor-intensive business processes and report results to the City Manager and the PSFSS (Public Safety Finance and Strategic Support) Committee				
7. August 15, 2007	Chief Development Officer	Review the city's retail strategy and conduct a cost-benefit analysis of putting more resources behind the 14-point Retail Strategy and present the results to the Economic Development Committee.				

**THREE-YEAR GOAL: *REDUCE DEFERRED MAINTENANCE AND THE INFRASTRUCTURE BACKLOG AND DEVELOP A STRATEGY TO IMPROVE THE INFRASTRUCTURE***

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. May 15, 2007	Deputy City Manager Shikada, working with the Infrastructure Dept. Heads (Environmental Services, IT, General Services, Public Works, Transportation, Airport, and Parks, Recreation and Neighborhood Services)	Create a Two-Year Infrastructure Work Plan to identify prioritized needs and potential funding mechanisms and present to the Transportation and Environment Committee.				
2. August 15, 2007	Deputy City Manager Shikada, working with the Infrastructure Dept. Heads	Inventory all of the elements of the City's infrastructure, propose standards for the condition of those elements and present to the Transportation and Environment Committee.				
3. August 15, 2007	Deputy City Manager Shikada, working with the Infrastructure Dept. Heads	Evaluate existing and potential funding sources for infrastructure maintenance and present the results of the evaluation to the Transportation and Environment Committee.				
4. August 15, 2007	Deputy City Manager Shikada, working with the Infrastructure Dept. Heads	Evaluate the feasibility of proposing voter-approved funding for infrastructure needs and present the results to the Transportation and Environment Committee.				

**THREE-YEAR GOAL: *INCREASE ECONOMIC VITALITY***

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. April 1, 2007	Director of Planning, Building and Code Enforcement (PBCE)	Draft an ordinance for minor modifications to the industrial and commercial sign ordinance and present to the City Council for action.				
2. May 1, 2007	Director of PBCE, working with the City Attorney	Develop the scope and a proposal for a rewrite of the sign ordinance and present it to the City Council for action.				
3. May 1, 2007	Chief Development Officer. and RDA Director	Be successful in preventing the state from using Agnews as temporary prison site.				
4. June 1, 2007	Director of PBCE	Present to the City Council for consideration a process for early consideration of development proposals.				
5. June 1, 2007	Chief Development Officer – lead, RDA Dir., PBCE Dir.	Present to the City Council for action sites for retail development (e.g., mixed use development sites or retail sites).				
6. June 1, 2007	Airport Director	Identify new and/or existing resources to attract new flights to the San Jose Airport and present to the City Manager.				
7. June 1, 2007	RDA Director	Develop and present to the City Council for action incentives for high rise residential development downtown.				

8. June 30, 2007	Chief Development Officer.	Present to the City Council for action a new Shopping Center Improvement Program (non-SNI related).				
9. June 30, 2007	Housing Director	Present to the City Council for action an updated Five-Year Housing Implementation Plan, including funding.				
10. August 15, 2007	RDA Dir. and PBCE Dir.	Present to the City Council for action a Pilot Permit "Holiday" Program for downtown and neighborhood business districts' small businesses, with General Fund reimbursement coming from the RDA.				
11. August 15, 2007	PBCE Director and Finance Director	Develop and present to the City Council for action a Business License Amnesty Program as part of the development permitting process.				

**THREE-YEAR GOAL: *PROVIDE FULL FUNDING FOR PARKS, POOLS, COMMUNITY CENTERS AND LIBRARIES, INCLUDING MAINTENANCE, OPERATIONS AND DEVELOPMENT***

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. On Feb. 27, '07	Director of Parks, Recreation and Neighborhood Services (PRNS)	Present to the City Council for action optional aquatic models in order to complete the Aquatics Master Plan.				
2. On April 3, 2007	Director PRNS	Present to the City Council for action an option on reuse of community centers so that a PRNS budget proposal can be developed.				
3. May 15, 2007	Library Director	Present to the City Council for action a plan for completing library bond projects, including revised budgets and schedules that fit within the funding availability.				
4. Aug. 15, 2007	Director of PRNS, working with the Budget Office	Allocate remaining enhanced Park Maintenance Reserve Funds to restore basic functions for park maintenance.				