



COUNCIL AGENDA: 09-25-07

ITEM: 2.6

## Memorandum

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**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Lee Price, MMC  
City Clerk

**SUBJECT:** STRATEGIC PLANNING  
RETREAT REPORT

**DATE:** September 21, 2007

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### RECOMMENDATION

As recommended by the Rules and Open Government Committee on September 19, 2007 approve Strategic Planning Retreat Report as outlined in the attached memo previously submitted to and approved by the Rules & Open Government Committee.



# Memorandum

**TO:** CITY COUNCIL  
**SUBJECT:** STRATEGIC PLANNING  
RETREAT REPORT

**FROM:** Mayor Chuck Reed

**DATE:** September 13, 2007

Approved

*Chuck Reed*

Date

*9/13/07*

## RECOMMENDATION

- (a) Accept the staff report on the September 4, 2007 Priority Setting Follow-up Session.
- (b) Approve the following Core Values, as developed by the Employee Values Project Team and reaffirmed at the retreat:
  - (1) Integrity
  - (2) Innovation
  - (3) Excellence
  - (4) Collaboration
  - (5) Respect
  - (6) Celebration
- (c) Approve the following three-year goals as reaffirmed at the retreat on September 4, 2007:
  - (1) Maintain our status as the safest big city in America.
  - (2) Eliminate the structural budget deficit.
  - (3) Reduce deferred maintenance and the infrastructure backlog and develop a strategy to improve the infrastructure.
  - (4) Increase economic vitality
  - (5) Provide full funding for parks, pools, community centers and libraries, including maintenance, operation and development
- (d) Approve the six-month objectives, as noted in the attached matrix, for the period of September 2007 – February 2007.

## OUTCOME

To provide an overview of the September 4, 2007 City Council/Management Team Strategic Planning Retreat, including the approval of the City's Core Values, three-year goals, and six-month objectives.

## BACKGROUND

On February 20, 2007 the City Council, Council Appointees, and Senior Management Staff participated in an all day retreat to develop and discuss the City's three-year goals and six-month objectives. This session was facilitated by Marilyn Snider of Snider and Associates.

With input from the January 20, 2007 Neighborhood Association Priority Setting Session and the January 17-21, 2007 Telephone Community Survey, the group engaged in identifying the following:

- (a) What are the strengths of the City of San José (e.g., what is going well)?
- (b) What are the City of San José's Internal Weaknesses/Challenges?
- (c) What are the external factors/trends (e.g., economic, demographic, political, environmental, social, technological) that will/might have an impact on the City of San José in the next three years:
  - (1) Positively (opportunities)?
  - (2) Negatively (threats)?
- (d) Developing a mission/purpose statement (why the City government exists and for whom)
- (e) Identifying three-year goals for the City (what needs to be accomplished):
  - (1) Brainstorm Goals
  - (2) By consensus of the Mayor and City Council, select 4 or 5 goals
- (f) Identifying six-month strategic objectives for each of the three-year goals
- (g) Reviewing a process for next steps/follow-up to monitor progress on the goals and objectives

After a lengthy process, the group produced a mission statement and three-year goals for the City.

**Mission Statement:**

The Mission of the City of San José 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:**

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

Following the process to establish three year goals, the group developed strategic six-month objectives to correspond to each of the above goals.

This information guided the February 22, 2007 New Initiatives/Unfunded Programs Study Session and was used in the development of the Mayor's March Budget Message and June Budget Message.

### ANALYSIS

On September 4, the Council and Senior Staff held their 6-month Priority Setting Process Follow-up Session. During the retreat, the group reviewed the Strengths, Weaknesses, Opportunities, and Threats (S.W.O.T. analysis) facing the City, reviewed and reaffirmed the values developed by the Employee Values Project as the Core Values of the City, reviewed the Council adopted three-year goals, and reevaluated the current six-month objectives.

The September 4, 2007 Priority Setting Follow-up Session report (Attachment A) and the six-month strategic objectives (Attachment B) are attached.

### PUBLIC OUTREACH

- Criterion 1:** Requires Council action on the use of public funds equal to \$1 million or greater. **(Required: Website Posting)**
- Criterion 2:** Adoption of a new or revised policy that may have implications for public health, safety, quality of life, or financial/economic vitality of the City. **(Required: E-mail and Website Posting)**
- Criterion 3:** Consideration of proposed changes to service delivery, programs, staffing that may have impacts to community services and have been identified by staff, Councilor or a Community group that requires special outreach. **(Required: E-mail, Website Posting, Community Meetings, Notice in appropriate newspapers)**

The City conducted extensive outreach for the January 20, 2007 meeting, the February 13 City Council Meeting, as well as the February 20 Priority Setting Process. At that meeting, it was made public that the follow-up session would occur on September 4, 2007. Additionally, staff formally submitted a request to set the September session during the Rules Committee on August 8, 2007.

### COORDINATION

This memorandum was coordinated with the City Manager's Office.

### CEQA

Not a project

**CITY OF SAN JOSE    ✪    SIX-MONTH STRATEGIC OBJECTIVES**  
 September 4, 2007 through February 15, 2008

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

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. Sept. 30, 2007	City Manager and Police Chief	Report to the City Council on the necessary actions to maintain the City's ranking as the Safest Big City in America.				
2. Sept. 30, 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.				
3. Nov. 7, 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. Feb. 29, 2008	City Manager – lead, Police Chief, Budget Director	Identify Public Safety Funding Strategy to implement the San Jose Police Dept. 5-Year Staffing Plan without impacting other city departments.				
5. March 1, 2008	City Attorney – lead, City Manager, and Police Chief, working with other relevant departments	Develop a permitting process with a recommended ordinance that will require entertainment promoters at night clubs to be licensed and present to the City Council for action.				
FOR FUTURE CONSIDERATION: _____	Police Chief	Develop a plan to update and distribute educational materials in various languages to assist parents and others to recognize youth involved in gang activity.				

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

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. Jan. 7, 2008	City Manager's General Fund Structural Deficit Task Force	<p>Define the General Fund structural deficit and develop both short-term and long-term alternatives and strategies to address the deficit within three years with full stakeholder input. These strategies will be presented to the Mayor's Budget Shortfall Advisory Group and the City Council for consideration and development on the 2008-2009 Mayor's March Budget Message and the 2008-2009 City Manager's Proposed Budget.</p> <p>Also, the Task Force shall evaluate opportunities to streamline, automate or eliminate labor intensive business processes to create capacity within the city organization.</p>				
2. Feb. 1, 2008	City Manager's Retiree Health Care Team (HR Director – lead)	Carry out the direction given by the City Council (a the 28 Aug. 2008 meeting) regarding the retiree health care benefits.				
3. On Feb. 12, 2008	Mayor's Budget Shortfall Advisory Group (Mayor-lead)	Present a report to the City Council, including a three-year strategy recommendation to eliminate the General Fund structural budget deficit.				

**C 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. Oct. 1, 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)	Identify existing and potential funding sources for infrastructure maintenance and present the results of the evaluation to the City Council's Transportation and Environment Committee.				
2. At a Nov. 2007 City Council study session	Deputy City Manager Shikada, working with infrastructure dept. heads	Present the Infrastructure Report to the City Council and get input from the Council and community to shape final recommendations to the City Council.				
3. Dec. 18, 2007	Deputy City Manager Shikada	Present a comprehensive funding and implementation strategy to the City Council for consideration that includes alternatives associated with various funding scenarios, one of which should reflect no increased funding.				
4. Feb. 15, 2008	Deputy City Manager Shikada, guided by Council direction	Complete initial community surveys, complete work to better describe how well maintenance and infrastructure services are performed now and describe the specific impacts of different funding scenarios on deferred infrastructure maintenance.				

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

WHEN	WHO	WHAT	STATUS			COMMENTS
			DONE	ON TARGET	REVISED	
1. Sept. 30, 2007	Chief Development Officer – lead, SJRA Exec. Dir., PBCE Dir.	Present to the City Council for action sites for retail development (e.g., mixed use development sites or retail sites).				
2. Sept. 30, 2007	Chief Development Officer.	Present to the City Council for action a new Shopping Center Improvement Program (non-SNI related).				
3. Oct. 15, 2007	Director of PBCE	Present to the City Council for consideration a process for early consideration of development proposals.				
4. Nov. 27, 2007	Director of PBCE and the SJRA Executive Director	Present to the City Council for action a Pilot Permit Program for downtown and neighborhood business districts to attract and expand small business by funding city fees for sidewalk cafes, signs and improvements.				
5. Nov. 30, 2007	Director of PBCE and the Finance Director	Develop and present to the City Council for action a Business Tax Outreach Program as part of the development permitting process.				
6. Nov. 30, 2007	Director of PBCE and the Finance Director	Develop and present to the City Council for action a Business Tax Outreach Program as part of the development permitting process.				

7. Dec. 31, 2007	Director of Aviation – lead, Dir. of PBCE, Dir. of Economic Development	Complete the Downtown/Airport Height Strategy and present to the City Council for consideration.				
8. Dec. 31, 2007	Airport Director and Chief Development Officer, working with the Convention and Visitors Bureau	Develop and present to the City Council's Economic Development Committee a private/public funding strategy and proposal targeted to promoting San Jose in strategic locations where we want to increase airline services (e.g., Tokyo, London, Paris).				
9. Jan. 1, 2008	Chief Development Officer and Director of ESD	Present to the City Council for consideration a Clean-Tech and Renewable Energy Strategic Plan.				
10. Feb. 15, 2008	RDA Director and the Chief Development Officer	Initiate build-out of the Bio Center 1 <sup>st</sup> floor expansion and hire a consultant to prepare a plan for Biotech Manufacturing Initiative.				
11. Feb. 15, 2008	SJRA Executive Director and the Chief Development Officer, working with the Convention Center Expansion Team and the Convention and Visitors Bureau	Determine and recommend to the City Council for action the scope and funding mechanisms for a convention center expansion and modernization.				

**E 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. Dec. 1, 2007	Deputy City Manager Linder – lead, City Manager, with input from the Library Dir. and PRNS Dir.	Identify standards and measures that define minimal and adequate citywide service levels for parks, pools, community centers and libraries, in order to have them validated by the community at the Jan. 19, 2008 Neighborhood Assn and Youth Commission Community meeting.				
2. Feb. 15, 2008	Director of PRNS	Initiate one planning study (Council District 2) to begin implementation of the Council-approved Aquatics Master Plan and begin to identify the funding needed and sources of funding.				
3. Feb. 15, 2008	Director of PRNS	Provide a progress report to the Council's Neighborhood Services and Education (NSE) Committee on the reuse of the community centers and the funding needed and sources of funding.				
4. Feb. 15, 2008	Library Director	Present to the NSE Committee a status report on the progress of the Library Bond Program and the funding needed and sources of funding.				
5. Feb. 15, 2008	Director of PRNS	Present to the NSE Committee a status report regarding the use and results of the enhanced Park Maintenance Reserve Funds.				
6. Feb. 15, 2008	Director of PRNS	Present to the NSE Committee a status report on the progress of the Parks Bond Program and the funding needed and sources of funding.				
7. Feb. 15, 2008	Police Chief and Fire Chief	Present to the City Council's Public Safety Finance and Strategic Support Committee a status report on the Progress of the Public Safety Bond Program and the funding needed and sources of funding.				

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

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

**4 September 2007 \* City Hall Community Meeting Room**

Marilyn Snider, Facilitator – Snider and Associates (510) 531-2904 or (916) 483-9802  
Gail Tsuboi, Recorder – Tsuboi Design (925) 376-9151

**MISSION STATEMENT**

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

**CORE VALUES**

*not in priority order*

**The City of San Jose values . . .**

**♦ INTEGRITY**

Uphold the highest work ethic - Be open, honest and accountable - Demonstrate fiscal responsibility

**♦ INNOVATION**

Challenge boundaries - Make tough decisions - Build on successes and failures - Encourage creativity

**♦ EXCELLENCE**

Focus on all customers - Provide outstanding service - Support professional development - Promote continuous improvement

**♦ COLLABORATION**

Foster teamwork - Support partnerships - Promote cooperation and win-win solutions - Communicate openly and positively - Listen

**♦ RESPECT**

Treat everyone fairly - Honor diverse views and backgrounds - Empower people to do their best -Protect the environment

**♦ CELEBRATION**

Recognize accomplishments - Create an enjoyable workplace - Reward excellence - Balance family and work

**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>
Wednesday, Sept. 5	Nadine	Distribute the retreat record to those unable to attend.
Within 48 hours of receipt	All recipients	Read the retreat record.
By Sept. 15, 2007	Department Heads	Share and discuss the Strategic Plan with senior staff.
September 27-28, 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 Sept. 25, 2007 City Council meeting	City Council Mayor - lead	Consider the adoption of the Strategic Plan.
Monthly  Bi-monthly	Management Team (City Manager – lead) and City Council (Mayor – lead)	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	Nadine	Prepare the updated Strategic Plan monitoring matrix. Distribute monthly to the Management Team. Distribute bi-monthly to the City Council.
January 19, 2008 9:00 am to 1:00 pm	City Council, Mayor Community Groups and Members	Neighborhood Assn and Youth Commission Community meeting.
By Feb. 15, 2008	City Manager and Director of HR, with input from employees	Review and recommend revisions to the Core Values, if needed, to the City Council and Management Team  [Note: consider adding ‘consistency’ to INTEGRITY and ‘risk taking’ to INNOVATION]
Feb. 15, 2008	Mayor, City Council City Manager Management Team	Strategic Planning Retreat to: - assess progress on the Goals and Objectives - develop a Vision Statement - develop Strategic Objectives for the next 6 months

## S.W.O.T. ANALYSIS

Strengths – Weaknesses - Opportunities - Threats

### WHAT ARE THE ACCOMPLISHMENTS OF THE CITY OF SAN JOSE SINCE THE FEBRUARY 20, 2007 RETREAT?

#### Brainstormed List of Perceptions

- Balanced budget
- Six areas of San Jose were recognized as “Best Places to Live” in San Jose Magazine
- Utility rates increased to start to cover infrastructure needs
- Major downtown events (e.g., Mardi Gras, Cinco de Mayo, Grand Prix) without any major incidents
- Another new high rise tower got started downtown
- Rating agencies reaffirmed the city’s excellent credit rating
- Held the second annual joint city-county meeting
- Took a look at our parking and decided to assess a small fee for lighting, security, etc.
- Opened a new fire station, with two more to open before year’s end
- Lots of emphasis on environmental initiatives
- Council approved a policy to halt conversion of industrial land
- Our Traffic Enforcement Unit won first place in a state Traffic Enforcement Strategies competition
- The Budget Dept. presented the City Council with a report showing General Fund cost elements growing faster than revenue
- New Shopping Center Improvement Program
- City adopted aggressive greenhouse gas reduction goals
- Completed spending on two urban area security initiative grants that benefited many departments (e.g., fire, police, airport, transportation)
- Completed freeway projects at 880/Coleman and 87
- Formed the General Plan Update Committee
- Some veteran city employees agreed to come out of retirement (e.g., Budget, Chief Dep. City Manager)
- Approved a new City Public Art Master Plan
- Successfully completed a pilot program for the Revenue Collection Strategic Plan
- The Community Center Reuse Plan was approved
- Presented the Council a plan to complete the Library Bond Project
- City Manager’s General Fund Structural Deficit Task Force Work Plan was developed and a team was formed
- Several key General Fund adds were approved for high priority areas
- Conducted three special elections after a very busy general election
- Successful fledging of the peregrine falcons
- Reopened the Guadalupe Park River Trail
- Launched a new heat warming system in partnership with the National Weather Service
- We were instrumental in the passage of SB 641, which will help fund the airport rental car garage
- Focused on deferred maintenance
- City was recognized with an award for creative use of webstreaming of the peregrine falcon
- Increased airport passenger traffic
- Completed the employee parking garage
- Council approved high rise housing incentives including a revised inclusionary program
- We won an award from California for the best long range plan for North San Jose
- National Civilian Oversight Conference already has more attendees registered than ever before
- Passed a series of ethical initiatives and put our ethical issues behind us

- Infrastructure Backlog Report to the Council's Transportation and Environment Committee
- Council approved the hiring of 15 additional police officers
- Completed a Transportation Maintenance Master Plan and will present it in October to the Council's Transportation and Environment Committee
- Citistat evaluation completed
- New corporate headquarters downtown
- Despite challenges, there is hope and optimism in the workforce
- City had soft closings of night clubs without incident
- Council passed the Sunshine Task Force Phase I recommendations
- Economic recovery is underway, revenue is up and a five-year forecast shows continued growth
- Had a successful meeting with the Water District
- Strengthening our partnership with First Act
- Overwhelming investors' interest in the City's largest bond issue for the airport
- Completed videos that address auto thefts and residential burglaries
- Began a conversation about retiree health care
- Two of our internal and external newsletters were recognized in a competition
- Organization is taking on some of the tough challenges
- Balanced budget includes some of the top priority goals
- Mayor and new Council members were successfully transitioned in
- Recycle Plus transition went smoothly
- Successful transition of a new City Manager
- New and growing clean tech companies
- Central Service Yare Phase II allowed us to bring people together
- New center to recycle household hazardous products and waste
- Council approved a five-year housing plan
- National League of Cities adopted San Jose's anti-gang strategies for a statewide effort
- Secured positive stories in the national media about San Jose
- Citizen Task Force appointed/created to oversee development in North San Jose
- Agreed to have the Zero One Festival come back to San Jose
- Amgen Event is returning to San Jose
- Independent report states that strong neighborhoods had greater property values than the rest of the city
- Airport modernization is well underway
- Adopted an Aquatics Master Plan
- San Jose's Incubator Program
- Opened 5 new parks
- Formed a Downtown Property-Business Improvement District

## WHAT'S NOT GOING AS WELL AS YOU WOULD LIKE INTERNALLY?

### Brainstormed List of Perceptions'

- Limited progress on the citywide Pandemic Flu Program
- Still have the unfunded retiree health care liabilities
- Lack of resources for the RDA, infrastructure, roads and services
- Inconsistent policies and standards applied to development
- Concern about upcoming retirements – replacement workers
- Don't have traction on unfunded obligations
- Lack of understanding by employees of the structural budget deficit
- Inadequate supply of public safety resources
- Budget shortfalls still forecasted for the next five years
- Undercommitment to retail sales tax generation
- Management is thinned, stretched and burned out
- Not coordinating tech projects between departments
- Committee workload is very large
- Community Center Reuse Policy is unresolved
- Employee perception of inequitable labor contracts
- Disconnect between the Planning Dept. and the community
- Still have various management positions unfilled
- Lack of sufficient technology
- City is too risk adverse
- Too many priorities
- Administrative workload is stretched beyond capacity affecting the ability to deliver services
- Don't have a good enough strategy and consensus for a vibrant downtown
- Sales tax leakage
- Change not happening fast enough to meet expectations
- Accomplishments not being well described to the media
- Available technology is inadequate
- Not enough staff
- Still have a number of cumbersome administrative processes that cost and have no value
- Increased workload due to Sunshine Reform Task Force without additional resources
- Labor groups/city at odds in reaching agreement
- Full funding for community centers, parks, pools cannot be achieved
- Demands exceed resources
- Expenses going up faster than resources
- Structural deficit still looms
- Permit process review is too slow
- Processes are still too cumbersome
- Growth of personnel costs exceed revenue
- Bureaucratic processes are too slow and cumbersome
- Risk taking is not a corporate value
- Lack of control over the media
- Traffic Unit is still too small despite concerns about traffic speeding and accidents
- Difficult to compete for qualified candidates in this job market
- Master plans without funding
- Employees are fearful of losses
- Organization focus is fragmented
- Not enough space to think and be creative

## EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON THE CITY OF SAN JOSE IN 2007/2008

### Brainstormed List of Perceptions

- Increased diversity
- Great reputation
- Caliber of new hires
- Proximity to higher education institutions
- Economy is still growing
- More engaged neighborhoods
- Capacity to involve
- Growing list of volunteers
- Community with high expectations of city government
- High speed rail is still on the ballot for 2008
- Significant infrastructure funding from voter-approved bond measures
- Creative people from around the world still want to come here
- A lot of sun for solar technology
- Desire of industry to cluster together
- Global thinking
- Strong environmental ethics
- Residential growth downtown
- High social conscience
- The use of diversity in everything we do here gives us synergy
- Sound real estate values
- Due to the environmental/green movement, we'll get a certain amount of new jobs here
- Beautiful natural setting
- Fabulous weather
- Increased demand for commercial space downtown
- Access to great entertainment
- Low crime environment
- Good government
- Visibility (worldwide) of the companies we have here
- Improving test scores
- Historically low interest rates
- Strong community based organizations (CBOs)
- Corporate presence in the community
- Appreciation for art
- Attention to health care reform in Sacramento
- Strong legislative delegation
- The next new thing
- Focus on clean energy
- State has contributed to funding for BART in San Jose
- Willingness of companies to invest in San Jose
- Most educated city in America
- A vast pool of non-profit organizations

## EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON THE CITY OF SAN JOSE IN 2007/2008

### Brainstormed List of Perceptions

- High cost of living
- San Jose Mercury News
- Non-profits are struggling
- State budget problems
- Down mortgage industry
- A high high school drop out rate
- Limited philanthropy
- Tightening rental market
- Loss of the middle class
- College graduation rate is not high enough
- Transitions in Washington D.C.
- Global warming
- Lack of land available for development
- Global unrest
- Tax structure shifts from manufacturing to the service industry
- Offshoring and locating jobs in other countries
- National failure to address health care
- Generation Y workforce expects tech-savvy cities
- The War
- Terrorism
- Short attention span of the population
- Tight competitive labor force
- Feds changing interest rates
- Housing costs
- Earthquake country
- More commerce over the Internet resulting in less sales tax revenues
- Increase in foreclosures
- Poor quality of K-12 education
- Rising gang activity
- National failure to address immigration policy
- Possible water shortage
- Increasing gaps from low to high income families
- Gas prices
- Increasing global competition
- Actions by surrounding cities to locate shopping near our boundaries, thus capturing sales tax revenues from us
- Growing economy equals growing congestion on our roadways
- Changing demographics in the workplace – an aging workforce
- Aging population
- Not enough direct flights to the “spike cities” of the world
- Increased competition statewide for employees (e.g., the State of California)
- Lack of CalTrans maintenance of landscaping, litter, graffiti
- NIMBYism
- Rising cost of health care
- Increasing expectations for speed and responsiveness
- Low interest in public service as a career



## **STRATEGIC PLANNING ELEMENTS**

Marilyn Snider, Strategic Planning Facilitator \* Snider and Associates (510) 531-2904

### **"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