



City of San Juan Bautista

The “City of History”

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CITY COUNCIL STRATEGIC PLANNING SESSION

FRIDAY, APRIL 14, 2023

9:30 A.M. – 5:00 P.M.

Veterans of Foreign Wars (VFW)
58 Monterey Street, San Juan Bautista, California

AGENDA

1. WELCOME AND CALL TO ORDER

Facilitators: Don Reynolds, City Manager with Citygate’s

Stacey Bristow, Andy Green, and Gary Elliot

Pledge of Allegiance

Roll Call

Public Comment- Only on items on the Agenda

PUBLIC COMMENT

Public comments are restricted to items on the special meeting agenda pursuant to California Government Code section § 54954.3(b). Public comments generally are limited to three (3) minutes per speaker; the Mayor may further limit the time for public comments depending on the agenda schedule. Public Comment may also be submitted via email at deputycityclerk@san-juan-bautista.ca.us and will be entered into the record.

2. ACTION ITEMS

A. Approve the Affidavit of Posting Agenda

3. DISCUSSION ITEMS

2023 STRATEGIC PLAN

- a. Welcome and Introductions (9:00 – 10:00)
- b. Survey Results (“SWOT”) (10:00 – 11:00 AM)
 - Community and Staff
 - Key Takeaways
 - Fiscal Overview
 - Public Safety Overview

Establishing Recreation

- c. Core Values-Vision and Mission Statements (11:00 AM – 12:00 PM)
- d. Lunch 12-1230
- e. Developing the Road Map – Strategies and Implementation 12:30 – 5 PM
- f. Questions

4. ADJOURNMENT 5 PM

AGENDA MATERIAL / ADDENDUM

Any addendums will be posted within 72 hours of regular meetings or 24 hours of special meetings, unless otherwise allowed under the Brown Act. City Council reports may be viewed at the City of San Juan Bautista City Hall at 311 Second Street San Juan Bautista, and are posted on the City website www.san-juan-bautista.ca.us subject to Staff's ability to post the documents before the meeting, or by emailing deputycityclerk@san-juan-bautista.ca.us or calling the Deputy Clerk (831) 623-4661 during normal business hours.

In compliance with the Americans with Disabilities Act, and Govt. Code 54953(e)(1)(A), the City will make reasonable arrangements to ensure accessibility to this meeting. If you need special assistance to participate in this meeting, please contact the Deputy City Clerk a minimum of 48 hours prior to the meeting at (831) 623-4661.

PUBLIC NOTIFICATION

This agenda was posted on Thursday, April 13, 2023, on the bulletin board at City Hall, 311 Second Street, the bulletin board at the City Library, 801 Second Street, the bulletin board at the entrance to the United States Post Office, 301 The Alameda, and the City's website.

AFFIDAVIT OF POSTING

I, Elizabeth Soto, Do Now Declare, Under the Penalties of Perjury That I Am the Deputy City Clerk / Administrative Services Manager in The City of San Juan Bautista and That I Posted Three (3) True Copies of the attached Community Town Hall Meeting Agenda. I Further Declare That I Posted Said Agenda on the 13th day of April 2023, and in the Following Locations in Said City of San Juan Bautista, County of San Benito, California.

1. On The Bulletin Board at City Hall, 311 Second Street.
2. On The Bulletin Board at The City Library, 801 Second Street.
3. On The Bulletin Board at The Entrance to The United States Post Office, 301 The Alameda

Signed At San Juan Bautista, County of San Benito, California, On the 13th day of April 2023.

Veronica Munoz-Noriega

Elizabeth Soto

Deputy City Clerk / Administrative Services Manager



PLEASE JOIN US!

Strategic Planning Session April 14, 2023 9 AM - 5:30 PM

Citygate will provide an update on community and staff input received via interviews and surveys, review elements of the previous City General Plan, provide a financial assessment of the City, and facilitate strategic goal-setting. Event will be held at the VFW (58 Monterey Street).

The community is welcome to attend and provide feedback at both meetings

Complementary food and beverages

FOR MORE INFORMATION PLEASE CALL (831) 623-4661

Community Town Hall Meeting

April 15, 2023 9 AM - 11:00 AM

The City and Citygate will collaboratively facilitate an update on stakeholder input, financial projections, Council goal-setting priorities, and seek input from the community. Event will be held at the City Library (801 Second Street).





CITY GATE
ASSOCIATES

STRATEGIC PLANNING WORKSHOP

CITY OF SAN JUAN BAUTISTA

APRIL 14TH, 2023



Welcome | Introductions | Overview

Who is Citygate?

- Over three decades in operation
- Virtual City Hall
- Hundreds of strategic planning projects
- 50+ experienced retired local government consultants
- Project Team presenters
 - Stacey Bristow, Local Government Specialist, Project Manager
 - Andy Green, Local Government Finance Specialist
 - Gary Elliott, Police Services Specialist

Agenda Review

- 9:00am–10:00am—Welcome | Intros | Overview
 - Welcome, Intros | City Manager & Andy
 - Overview, Agenda | Stacey
 - Define Strategic Planning | Stacey
- 10:00am–11:00am—Review of S.W.O.T.
 - Community & Staff | Stacey
 - Key Takeaways | Stacey
 - High-Level Fiscal Overview | Andy
 - Public Safety Overview | Gary

Agenda Review (cont.)

- 11:00am–12:00pm
 - Core Values | Vision & Mission Statements
 - What's the difference | Stacey
 - Who are we? Where do we want to be? Our brand/message
- 12:00pm–12:30pm | Lunch
- 12:30pm–5:00pm | Developing the Road Map
 - Strategic Goals Worksheet; Guiding Priorities; Fail Facts & Myth; Accountability, Updates, Implementation | Stacey
- 5:00pm–5:30pm | Wrap-Up & Questions

What is Strategic Planning?

The process where the company leaders define their vision for the future and identify their goals, objectives, and expectations.



Today (Status GP / Surveys) | *Prioritize Data (Today Session) & Develop Plan* |
Implement and Manage (Our Report Post Session) | Future City Council and
Staff Review & Revise

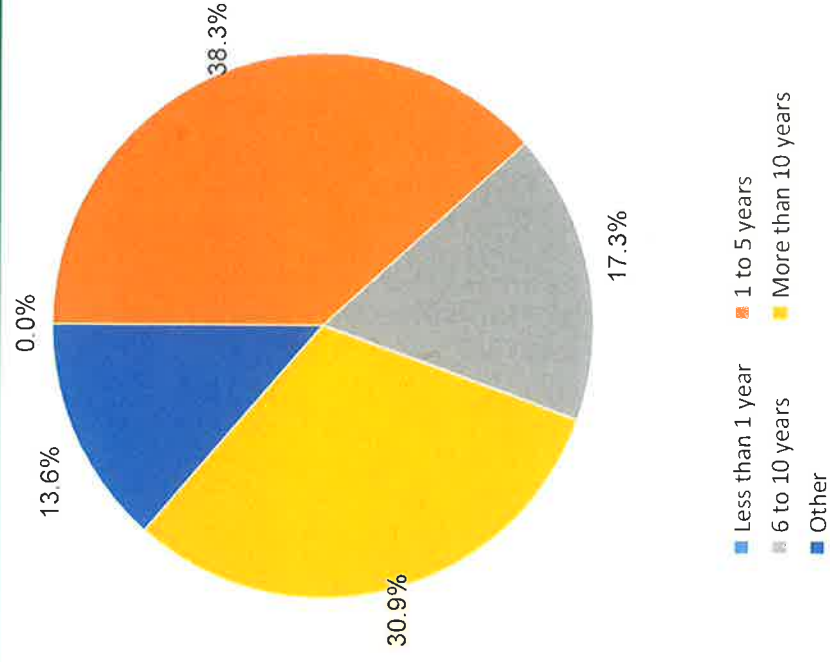
Survey Data

- Both quantitative and qualitative questions
- Community 3.8% return (Above Average)
- Staff 75% return (Well Above Average)
- Neutral Responses (Above Average)
- Confidential
- 81 responses as of 4/7/23

Community Survey Data

Community Survey Results

How long have you lived in San Juan Bautista?

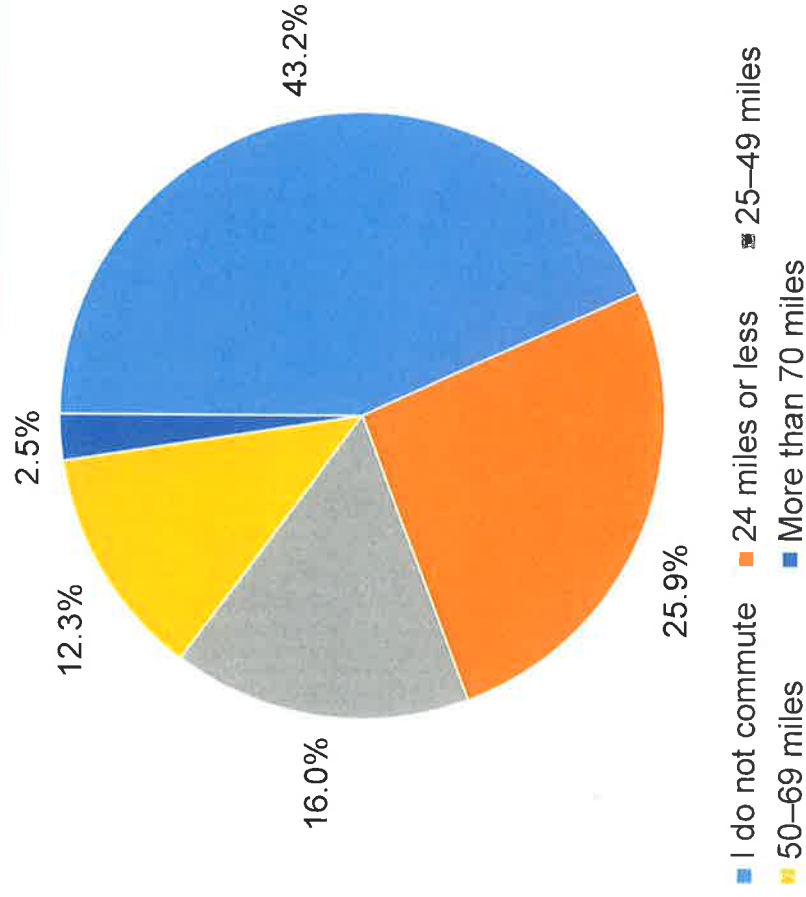


Community Survey Results (cont.)

Statement	Yes	Response Ratio	No	Response Ratio
I own a business in the City of San Juan Bautista.	16	19.8%	65	80.2%
I work in the City of San Juan Bautista.	22	27.2%	59	72.8%

Community Survey Results (cont.)

I commute to work:



Community Survey Results (cont.)

Top 5 Most Agreed-To Statements	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
The City needs to re-engage the community to discuss the General Plan and potential development and growth impacts	1.5	0.6	0.0%	1.2%	3.7%	37.0%	56.8%	1.2%
The City is generally a safe place to live and/or work	1.1	0.8	0.0%	3.7%	12.3%	51.9%	32.1%	0.0%
Vacant properties in the downtown should be a top priority	0.8	1.1	3.7%	7.4%	21.0%	37.0%	29.6%	1.2%
The City is a good place to raise children	0.7	0.9	1.2%	4.9%	33.3%	40.7%	18.5%	1.2%
I feel a strong sense of community in the City	0.6	1.1	4.9%	12.3%	19.8%	43.2%	19.8%	0.0%

Community Survey Results (cont.)

Top 8 Least Agreed-To Statements	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
The City has an ample number of restaurant options	-0.4	1.2	21.0%	32.1%	17.3%	22.2%	6.2%	1.2%
The downtown has adequate parking for big events	-0.6	1.2	29.6%	28.4%	16.0%	22.2%	2.5%	1.2%
The City provides plenty of opportunities to enjoy the nightlife	-0.7	1.1	29.6%	32.1%	17.3%	14.8%	2.5%	3.7%
The City's economy is sound	-0.8	0.9	21.0%	32.1%	29.6%	3.7%	1.2%	12.3%
The City draws good business investments	-0.9	1.0	28.4%	33.3%	24.7%	4.9%	1.2%	7.4%
The City has an ample number of choices for shopping	-0.9	1.1	33.3%	42.0%	9.9%	11.1%	2.5%	1.2%
There is good business and economic development planning within City government	-0.9	0.9	33.3%	25.9%	28.4%	4.9%	0.0%	7.4%
There are adequate employment opportunities in the City	-1.2	0.8	40.7%	37.0%	12.3%	3.7%	0.0%	6.2%

Community Survey Results (cont.)

Top 6 Service Satisfaction		Mean	Std. Dev.	% Very Dissatisfied (-2)	% Dissatisfied (-1)	% Neither Satisfied nor Dissatisfied (0)	% Satisfied (1)	% Very Satisfied (2)	% Don't Know / N/A
Public library services		0.9	0.9	1.2%	4.9%	21.0%	39.5%	24.7%	8.6%
Trash collection		0.9	0.9	1.2%	3.7%	27.2%	44.4%	23.5%	0.0%
Fire emergency response		0.8	0.8	1.2%	2.5%	29.6%	39.5%	17.3%	9.9%
Park maintenance		0.6	1.0	3.7%	11.1%	23.5%	48.1%	13.6%	0.0%
Historic preservation efforts and services		0.5	1.0	3.7%	9.9%	29.6%	43.2%	11.1%	2.5%
Special events sponsored by the City		0.4	1.1	8.6%	8.6%	24.7%	43.2%	11.1%	3.7%
Crime prevention		0.0	1.1	11.1%	19.8%	32.1%	29.6%	6.2%	1.2%

Community Survey Results (cont.)

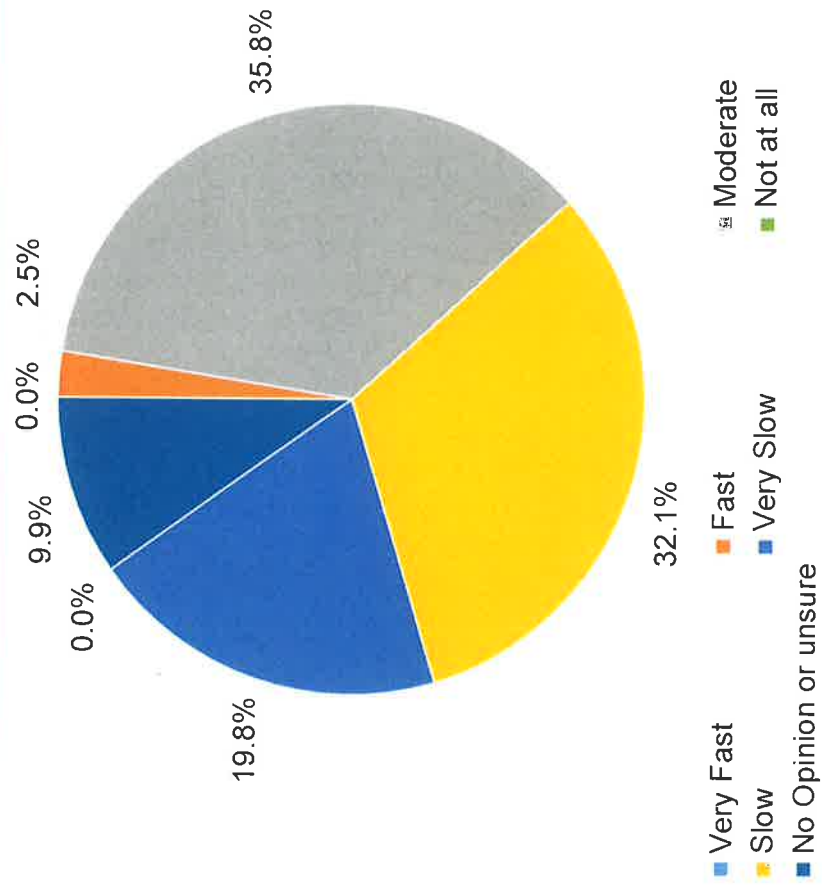
Top 7 Service Dissatisfaction	Mean	Std. Dev.	% Very Dissatisfied (-2)	% Dissatisfied (-1)	% Neither Satisfied nor Dissatisfied (0)	% Satisfied (1)	% Very Satisfied (2)	% Don't Know / N/A
Community housing programs	-0.7	0.9	16.0%	14.8%	35.8%	1.2%	0.0%	32.1%
Maintenance of sidewalks	-0.7	1.2	33.3%	27.2%	18.5%	18.5%	2.5%	0.0%
Transit services	-0.7	0.9	14.8%	22.2%	33.3%	3.7%	0.0%	25.9%
Community redevelopment programs	-0.9	0.8	21.0%	19.8%	29.6%	0.0%	0.0%	29.6%
Water service	-1.0	1.0	39.5%	28.4%	22.2%	9.9%	0.0%	0.0%
Children's and teens' recreation programs	-1.1	0.9	32.1%	27.2%	16.0%	4.9%	0.0%	19.8%
Water quality	-1.5	0.7	63.0%	24.7%	9.9%	1.2%	0.0%	1.2%

Community Survey Results (cont.)

Citywide Operations		Mean	Std. Dev.	% Very Bad (-2)	% Bad (-1)	% Neutral (0)	% Good (1)	% Very Good (2)	% Don't Know / N/A
Direction, guidance, and vision of City leaders		-0.5	1.1	21.0%	24.7%	27.2%	18.5%	1.2%	7.4%
Overall, City's government services in meeting my expectations		-0.5	1.1	23.5%	17.3%	39.5%	11.1%	3.7%	4.9%
City as a well-run, efficient operation		-0.6	1.2	27.2%	19.8%	30.9%	11.1%	4.9%	6.2%
City communications that provide key information and issues to community members and business owners		-0.6	1.1	23.5%	24.7%	24.7%	16.0%	2.5%	8.6%
Opportunities for community member and business owner input into City processes and decisions		-0.6	1.2	28.4%	14.8%	33.3%	8.6%	3.7%	11.1%
City government's overall ability to meet the City's needs now and in the future		-0.7	1.1	29.6%	17.3%	32.1%	11.1%	1.2%	8.6%
The level of City fees and taxes		-0.7	1.1	25.9%	23.5%	29.6%	12.3%	1.2%	7.4%
Overall, City services in comparison to services in other cities		-0.8	1.1	32.1%	22.2%	25.9%	7.4%	2.5%	9.9%

Community Survey Results (cont.)

Desired population growth speed



Community Survey Results (cont.)

- **Top 10 Priorities**
 - **Water Quality (29) – Most significant as #1/#2**
 - Roads and Streets (23) and Sidewalks and Curbs (11)
 - Economic Development (14)
 - Water Costs (10) + Water (unspecified) (7)
 - Business Friendliness (10) + Downtown Improvement (11)
 - Schools (12)
 - Youth Recreation (10)
 - Cleanliness / Vacant Lots / Blight (9)
 - Sewers Service Quality (8) + Sewers (unspecified) (3)
 - Communications/Responsiveness w/City (8)

Community Survey Results (cont.)

- **Top 10 Biggest Concerns**
 - *Staff or Leadership Capability (15)*
 - Water Quality (14) + Water Unspecified (3)
 - Growing too fast (11)
 - Water Cost (6)
 - Infrastructure (4)
 - Sewer Services Costs (3)
 - Schools (2)
 - Growing to slow (2)
 - Economic Development (2)

Community Survey Results (cont.)

- Top 10 Likes about San Juan Bautista
 - *Small Town Feel* (29)
 - Sense of Community (20)
 - Historic Allure (10)
 - Safety (10)
 - Quiet (7)
 - Location (6)
 - Weather (4)
 - Beauty (4)
 - Charm (3)
 - Rural (2)

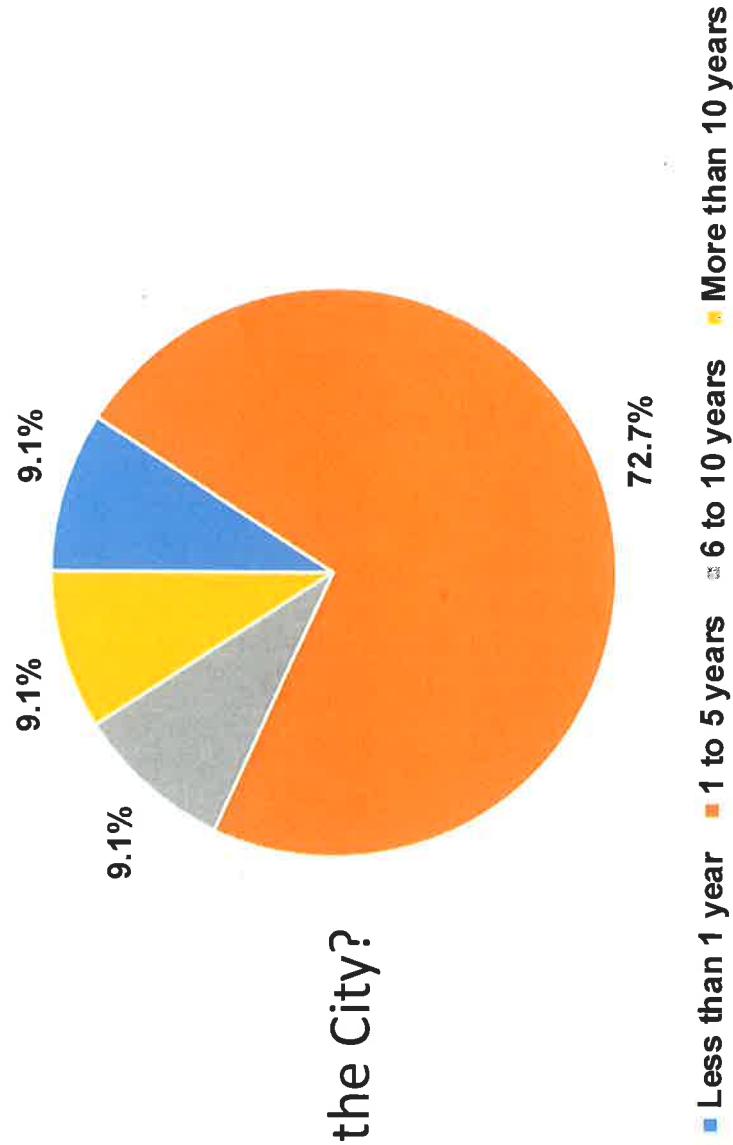
Community Survey Results (cont.)

Count	Preferred Method Of Communication
40	Email newsletter
21	City website
20	Printed newsletter
19	City Manager's Mission Village Voice article
16	Facebook
12	Attending City Council meetings
11	Nextdoor
4	Twitter
3	All of the above
1	All media platforms
1	Instagram
1	Informal meetings
1	MVV
1	City Council Meetings Remotely

Employee Survey Data

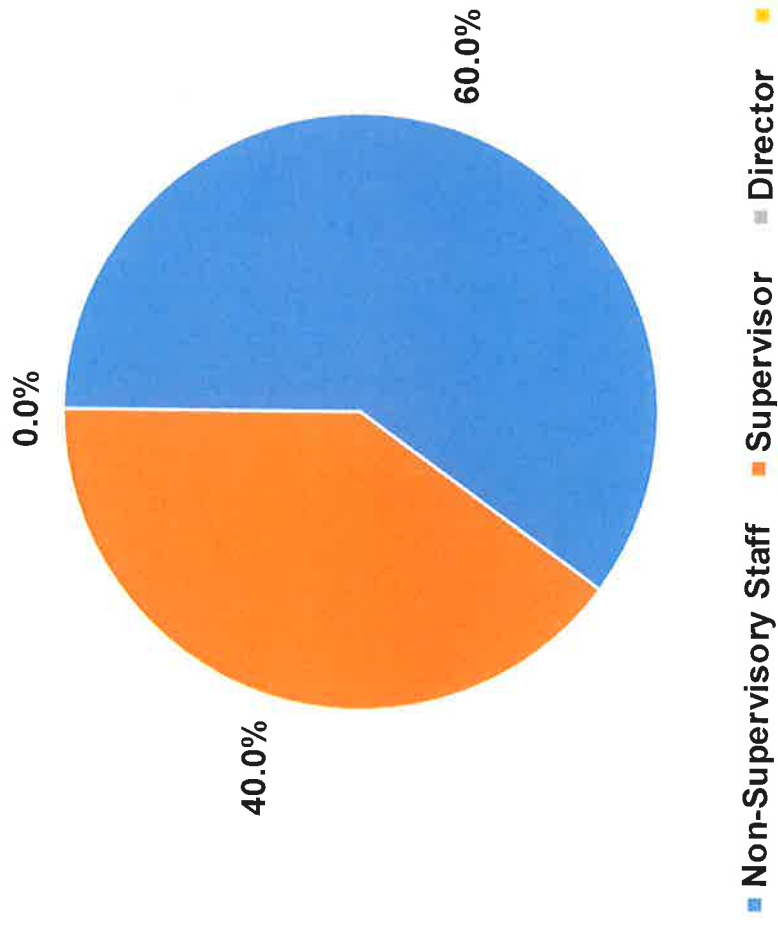
Employee Survey Results

How long have you worked for the City?



Employee Survey Results (cont.)

What is your job function?



Employee Survey Results (cont.)

Top 5 Most Agreed-To Statements	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
The City supports diversity.	1.3	0.8	0.0%	0.0%	16.7%	41.7%	41.7%	0.0%
I believe good teamwork exists in my department.	1.3	1.0	0.0%	8.3%	8.3%	33.3%	50.0%	0.0%
Customer inquiries are responded to in a reasonable amount of time.	1.3	0.6	0.0%	0.0%	8.3%	58.3%	33.3%	0.0%
The work environment in my department is supportive and positive.	1.2	1.0	0.0%	8.3%	16.7%	25.0%	50.0%	0.0%
It is clear to me what my role is and how it contributes to the larger purpose of my department.	1.2	0.6	0.0%	0.0%	8.3%	66.7%	25.0%	0.0%

Employee Survey Results (cont.)

Least Agreed-To Statements	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
I receive sufficient training for the effective completion of my job responsibilities.	0.3	1.0	0.0%	25.0%	33.3%	33.3%	8.3%	0.0%
There is good coordination of projects and functions between my department and other departments in the City.	0.2	1.2	16.7%	0.0%	41.7%	33.3%	8.3%	0.0%
The current compensation and promotion process rewards me for higher than average levels of performance.	0.2	1.4	16.7%	8.3%	25.0%	25.0%	16.7%	8.3%
I have sufficient opportunities for advancement and promotional upward mobility.	0.0	1.3	16.7%	0.0%	58.3%	0.0%	16.7%	8.3%
Compared to similar organizations, I am satisfied with the salary and benefit package I receive.	0.0	1.4	25.0%	0.0%	41.7%	16.7%	16.7%	0.0%
Clear, written policies and procedures are in place to assist me in the performance of my job responsibilities.	0.0	1.0	8.3%	16.7%	50.0%	16.7%	8.3%	0.0%
The performance evaluations I have received have been completed in a timely manner and according to schedule.	-0.2	1.2	8.3%	25.0%	25.0%	8.3%	8.3%	25.0%

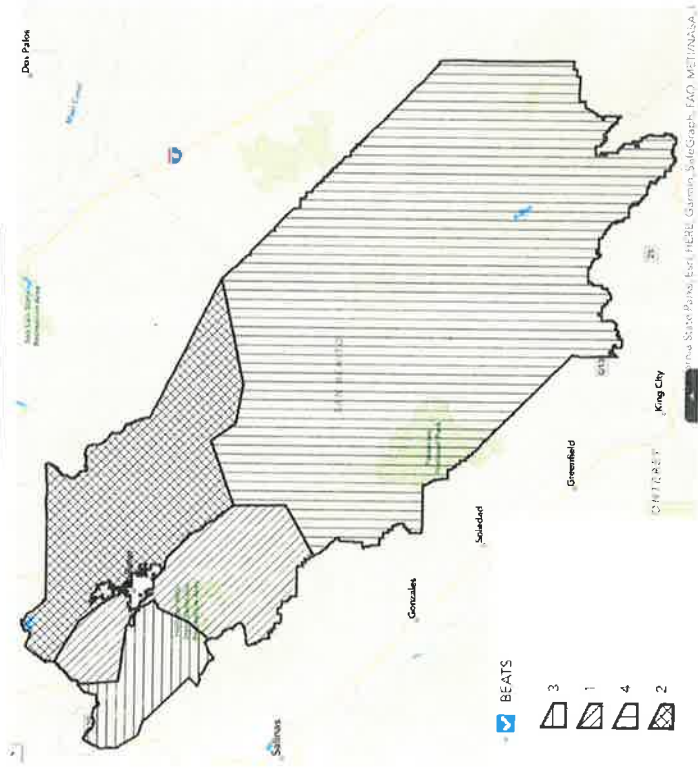
High-Level Overview of Public Safety

Public Safety Overview

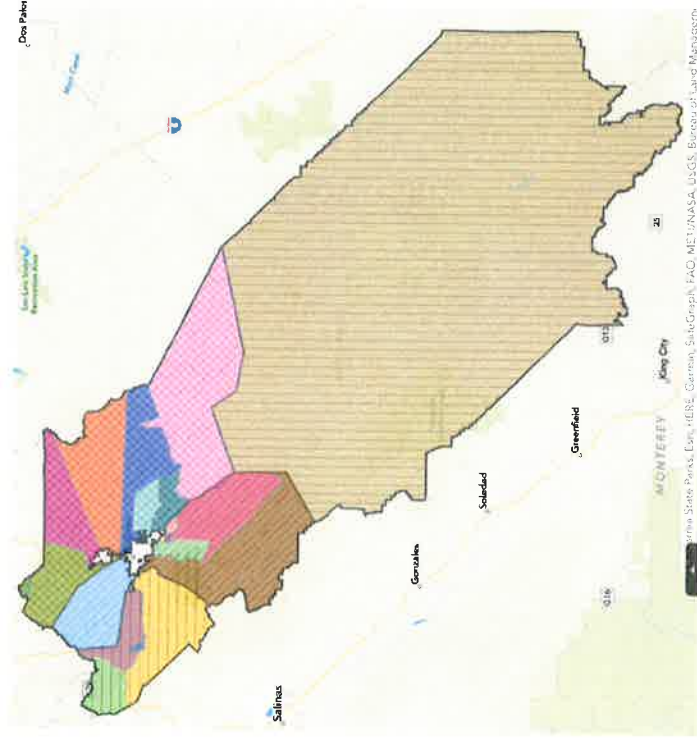
- Overall budget dedicated to public safety: \$587,207 or 20%
- Public Safety Services
 - San Benito County Sheriff (SBSO) contract – 1 Deputy Sheriff
 - County 9-1-1
 - Private security contract – 68 hours per week
 - Animal control
 - Hollister Fire Department
 - Code enforcement

Public Safety Overview – Beats & Areas

4 Patrol Beats



19 Responsibility Areas



Public Safety Overview – San Juan Bautista Patrol

San Juan Bautista “Deputy”

Wednesday to Saturday (1400–2400)

Year	Reports	Part 1 - Violent	Part 1 - Property
2020	250	31	75
2021	323	34	79
2022	227	28	57
2023	73	12	14



Private Security Patrols (4 patrol officers)

Sunday to Wednesday 1000–0600

Thursday to Saturday 1800–2400

Observe and Report



Public Safety Overview – Observations

- Public safety not centrally managed
- Dedicated sworn coverage only 40 hours per week
- SBSO patrol staffing covers 9-1-1 after hours (from the few on patrol Countywide)
- Communication issues with SBSO
- Private security not a sustainable model
- No animal services resources
- Workload reporting not sufficient

Public Safety Overview – Recommendations

- Add a single coordinator for public safety
- Add second SBSO Deputy position funding
- Partner with the County on Animal Services
- Require the Sheriff's Office to provide monthly workload reports
- Consider eliminating private security and adding Public Safety Officers to City staff, short term, to handle non-emergency issues

All That Said

Combined (Staff, Stakeholders, and Community) (See Handout)

- **Community (81)**
 - General Plan and development discussions
 - Water services and costs
 - City leadership
 - **Economic development (revitalization, new business, activities)**
 - Vacant properties
 - Downtown shopping, restaurants, and parking
 - **Parks and recreation activities**
 - Infrastructure (streets, sidewalks and landscape, water services and quality)
 - Billing system
- **Staff (12)**
 - Communication within agency and public (transparency, collaboration, professionalism, team building, the fear effect, management styles, fairness, expectations, meetings (remote/input/effective), trust in/external, training for skills, efficiencies) (9)
 - Infrastructure (streets, water, sewer) (3)
 - Environment (space, technology, equipment, hours of operation) (3)
 - **Budget (spending, revenue opps., low salaries) (3)**
 - Security and policing (2)
- **Stakeholder Interviews (22)**
 - Communication (agency/community, technology, internet, marketing, customer service, professionalism, training for education, skills, service, management, personality styles) (26)
 - **Thoughtful economic development (workforce housing, GP and mixed-use new businesses, revitalization, retention, parking, need a chamber of commerce) (13)**
 - Disaster preparedness plan (fires, flooding, water safety, state mandates) (10)
 - Efficient practices (permitting) (7)
 - **Youth activities and recreation (5)**
 - County partnership challenged (4)
 - **Fiscal stability (including fee study) (2)**
 - Code enforcement and public safety

Word Cloud



2023 vs. 2022 Strategic Planning Priorities (See Handout)

- April 2023
 - Economic Development / Downtown (GP)
 - Water Services
 - City Leadership
 - Communications
 - Infrastructure
 - Disaster Prep
 - Parks, Recreation, and Activities
- March 2022
 - Community Partnerships
 - Economic Vitality
 - Infrastructure
 - Promote Amenities
 - Quality of Life (build, nurture, enforce)

EDCAC Business Development & Retention Sub-Committee Report & Recommendations

1. Update City Website – (communications)
2. List of Strategic Alliances – (partnerships)
3. Strategic Plan for New Business District
4. Healthy Tourism – (marketing/communication)
5. Economic Development/Downtown Revitalization (GP/ED)
6. Social Presence and Marketing Strategies (marketing/communication)
7. On-Boarding Experience (ED)
8. Tourism – Events w/a Buzz (ED)
9. Funding – (grant writer)
10. Unified Marketing Strategy – (marketing/communication)

High-level Financial Overview

Fiscal Positives

- The General Fund is fiscally healthy – FY22 General Fund unassigned reserves = \$3.01 million (12.2 months of FY22 expenditures)
 - FY22 tax-related revenues grew 49% when compared to FY19
- Water rate increase in August 2022 and ongoing increases through 2026 to help stabilize operations and decrease operating losses
 - FY22 Water Fund unrestricted reserves 8.8 months of FY22 expenditures

Fiscal Positives (cont.)

- Hiring of the ACM and creation of the EDCAC to improve focus on economic development within the City
- Sewer rate increase in December 2021 and acquisition of grants and loans to help stabilized operations and improve service provision through the construction of the Hollister Force Main Project
- Implementation of a new financial system to enhance fiscal recording and monitoring capabilities

Fiscal Issues

- Sewer Fund is in a weak financial position
 - FY22 unrestricted reserves a negative \$135,493
 - FY22 unrestricted cash – \$241,198
 - FY22 operational results – \$19,451 surplus
- General fees have not been reviewed for several years, indicating that the City may not be recouping cost of providing general services associated with fees
- Lingering impacts of COVID-19
- Aging infrastructure; no formal long-term CIP

Citywide Historical Activity Summary

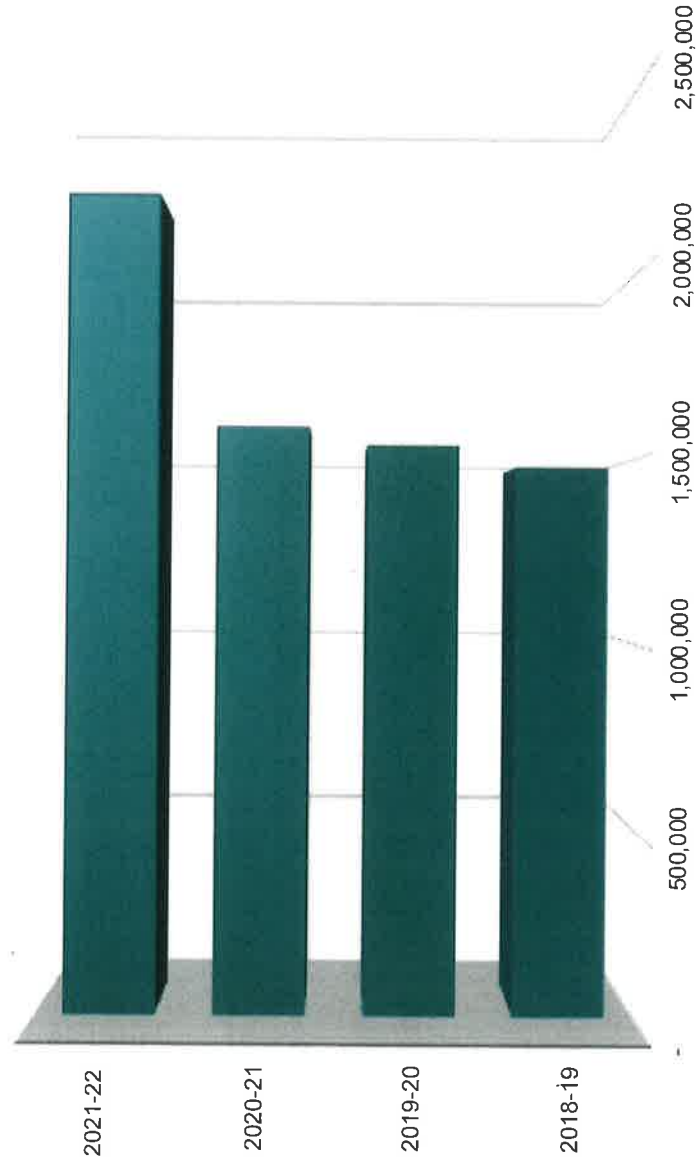
Component	FY 19/20 Actual	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Budget
Revenues	5,656,660	6,586,113	6,258,998	5,693,773
Expenditures	5,574,296	7,399,273	5,956,759	4,532,127
Net Operating Income / (Loss)	82,364	(813,160)	302,239	1,161,646
Beginning Total Fund Balance / Net Position	10,990,378	11,072,742	10,259,582	10,561,821
Ending Total Fund Balance / Net Position	11,072,742	10,259,582	10,561,821	11,723,467
Beginning Unassigned Fund Balance / Net Position	3,962,851	3,821,397	3,164,909	3,772,613
Ending Unassigned Fund Balance / Net Position	3,821,397	3,164,909	3,772,613	4,934,259
Cash Balance (Unrestricted)	7,115,926	5,249,888	6,179,844	7,341,490

General Fund Historical Activity Summary

Component	FY 19/20 Actual	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Budget
Revenues	2,715,655	3,552,448	3,464,856	2,737,935
Expenditures	2,702,251	3,645,393	2,964,010	2,425,349
Net Operating Income / (Loss)	13,404	(92,945)	500,846	312,586
Beginning Total Fund Balance	4,693,027	4,706,431	4,613,486	5,114,332
Ending Total Fund Balance	4,706,431	4,613,486	5,114,332	5,426,918
Beginning Unassigned Fund Balance	2,674,751	2,658,489	2,527,380	3,011,084
Ending Unassigned Fund Balance	2,658,489	2,527,380	3,011,084	3,323,670
Cash Balance (Unrestricted)	3,504,097	2,427,129	3,541,328	3,853,914

General Fund Tax-Related Revenues

General Fund Tax-Related Revenues



Water Funds Historical Activity Summary

Component	FY 19/20 Actual	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Budget
Revenues	1,022,680	1,407,833	1,123,541	1,213,800
Expenditures	1,157,456	1,636,851	1,218,268	805,232
Net Operating Income / (Loss)	(134,776)	(229,018)	(94,727)	408,568
Beginning Total Net Position	2,856,035	2,721,259	2,492,241	2,397,514
Ending Total Net Position	2,721,259	2,492,241	2,397,514	2,806,082
Beginning Unrestricted Net Position	686,973	471,968	365,758	897,022
Ending Unrestricted Net Position	471,968	365,758	897,022	1,305,590
Cash Balance (Unrestricted)	795,730	663,383	1,123,068	1,531,636

Sewer Funds Historical Activity Summary

Component	FY 19/20 Actual	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Budget
Revenues	1,154,798	1,114,390	1,235,197	1,185,000
Expenditures	1,149,132	1,458,001	1,215,746	923,911
Net Operating Income / (Loss)	5,666	(343,611)	19,451	261,089
Beginning Total Net Position	2,049,401	2,055,067	1,711,456	1,730,907
Ending Total Net Position	2,055,067	1,711,456	1,730,907	1,991,996
Beginning Unrestricted Net Position	607,038	695,165	273,445	(135,493)
Ending Unrestricted Net Position	695,165	273,445	(135,493)	125,596
Cash Balance (Unrestricted)	1,255,850	753,526	241,198	502,287

Preliminary General Fiscal Observations

- City is not utilizing a formal process for long-term financial forecasting and CIP development, such as the models provided by Citygate during the previous project.
- City does not incorporate department or functional performance measures to help ensure achievement and monitoring of City operational strategic planning goals.

Preliminary General Fiscal Observations (cont.)

- If City expands city hall hours opened to the public, as is being discussed, additional personnel would need to be hired to ensure adequate security is available for cash handling and deposit creation out of public sight and provide public counter coverage.
- Current written fiscal policies have not been revised in several years and do not cover some of the other major fiscal areas that are best practices as recommended by the GFOA, such as cash handling, accounts payable, accounts receivable/collections, cost recovery, and credit card usage.

Preliminary General Fiscal Observations (cont.)

- Bank reconciliations are two months behind. Since internal control checks in the City rely on current bank reconciliations, emphasis must be placed on ensuring current bank reconciliations. Citygate was informed that the implementation of the new financial system has caused the bank reconciliation delay and the issue should be rectified in April 2023.
- Payroll processing internal control could be strengthened by separating duties between the individual inputting payroll and approving release of payroll direct deposit and checks.

Preliminary General Fiscal Observations (cont.)

- Potential ongoing revenue vs. ongoing expenditure deficit in General Fund and other funds.
- Designation of fund balance to strategic goals, such as capital projects or fiscal stabilization goals in the General Fund, could be improved.

Core Values | Vision | Mission | Priorities | Strategic Goals & Timelines

Why

- **Mission, Vision, Priorities, Core Values**
 - Foundational Communication Tools
 - Infrastructure, Defines You (who, what, why)
 - Shared Purpose, Direction, Focus, Coherence
 - Creates and Sustains Value
 - Define Intent
 - Motivate
 - Inspire the Future

Core Values (Activity)

- Values are individual basic, fundamental BELIEFS that guide or motivate people to *act or behave* in a particular way. They are the things that you believe are important in the way you live and work. They can mean one's moral ideals. Values are the words or qualities which describe the type of life you want to live or that help guide an organization. Values are the STANDARDS or ideals with which we *evaluate* actions, people, things, or situations.

Lunch

Vision Statement (Activity)

- A vision statement details where the organization aspires to GO, your DESTINATION. Why does the City exist? What do you hope to ACCOMPLISH? Focuses on tomorrow. Promotes growth internally and externally. This invites innovation, sense of purpose, your WHY!

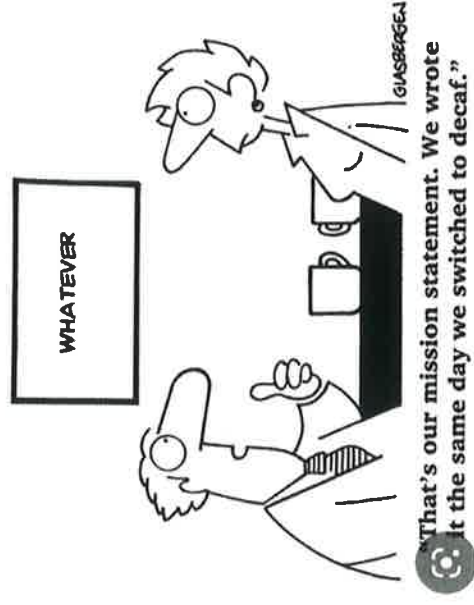
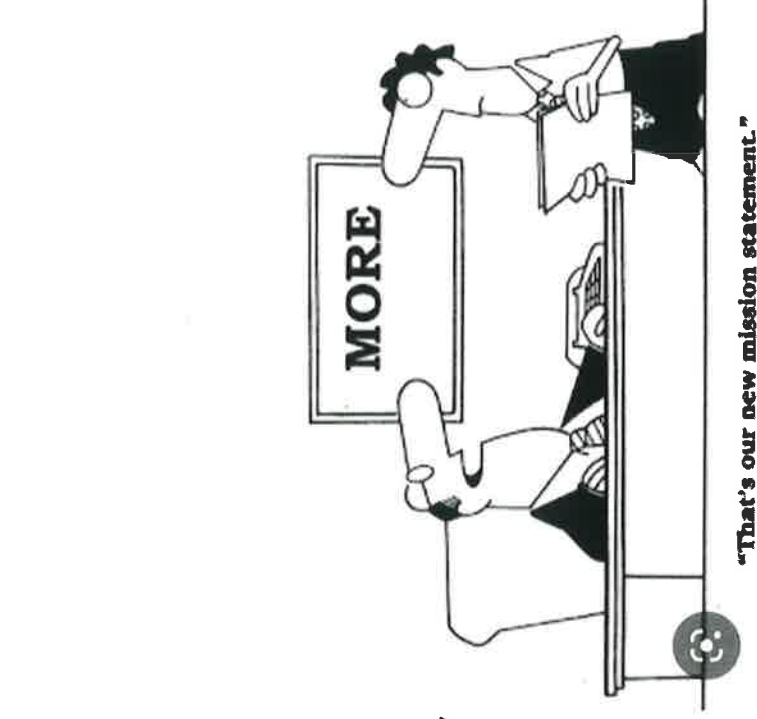
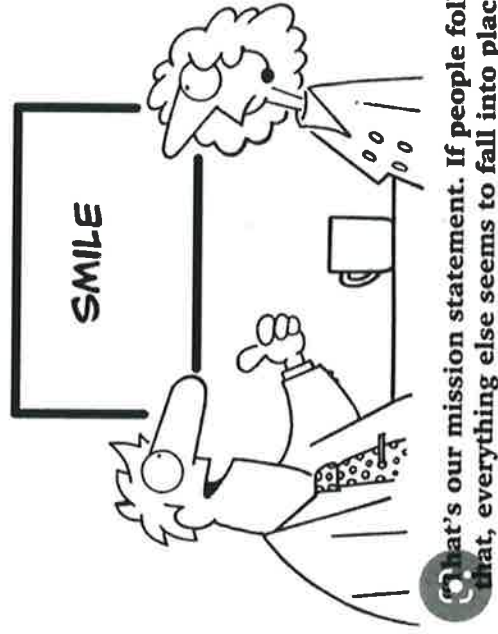
Current GP Vision Statement

- “San Juan Bautista is a vibrant, thriving community cherishing its history, cultural heritage, the arts and one another, honoring the needs of its residents and businesses and offering the world a destination amidst boundless recreational opportunities and agricultural resources.”

Mission Statement (Activity)

- A mission statement is what drives the organization. It is what you DO. The CORE of the business. It SHAPES the company culture. It can MOTIVATE your employees and provides CLARITY. From this, your OBJECTIVES are created. A mission statement focuses on TODAY and what the organization does to achieve it.

Messaging | Communication Vital Role for This Process



General Plan Defined

- Blueprint | Roadmap | State Mandate
- Guiding document for meeting the community's long-term vision for the future
- Goal, Objectives, Principals, Standards
- Guides: land use, circulation, housing, conservation, open space, noise, safety, environmental justice, air quality, and more.

What we have done!

- Housing Element Updates Round 4 and 5 – Round 6 this year
- Manage COVID 19 State of Emergency
 - Transform 3rd Street with Parklets
 - Retain Businesses during pandemic
 - Stabilize Sales Tax during crisis
 - Upgrade Council Chambers for hybrid meetings
- Currently managing 2 flood related States of Emergency
- Complete Overhaul of Community Development, Hiring Assistant City Manager
 - Permit Streamlining
 - Establish a Code Enforcement program
- Establish the Downtown Business Forum, then Economic Development Citizens Advisory Committee
- Partnering in regional Economic Development efforts
- Water and Wastewater EPA Compliance Projects being funded and implemented
 - \$18.7 million Decommission Wastewater Treatment Plant, send wastewater to regional treatment plant in Hollister
 - \$10 million Import surface water from Water District, blend hard ground water 65% with new imported water
 - Negotiated \$900,000 settlement with the State Water Board

What we have done!

- Initiate the Public Safety Initiative
 - Research cameras systems and fund them
 - Negotiate new Sheriff Contract (in the works now, improve communications)
 - Double Private Security services for the same price as previous provider (from 1 patrol to 2 daily)
 - Dedicated Officer- plus 1 additional request requested (2 total dedicated officers)
- Initiate Urban Growth Boundary/SOI Study
 - Ready to submit SOI Map to LAFCO this year
 - Draft "Community Plan" for the City south of Hwy 156 to be considered this year
- Third Street Master Plan-
 - \$350,000 grant for Multi Model Center
 - Active Transportation Plan completed
 - Establish working partnerships with Stakeholders- State Parks, Mission and School District
 - Upgraded City Engineering Services
 - Upgraded City Clerk Services
- Parks
 - Bathrooms at Verutti Park
 - Built Franklin Park
 - Completed Luck Park Master Plan
 - Implementing Recreation program now
 - Upgrading Community Hall Acoustics this year
- Streets
 - \$1.4 million Street Improvement project 90% complete- 11 streets resurfaced,
 - 1,000 linear feet of sidewalk
 - ADA Improvements

Council Primary Guiding Priorities (Activity)

- They provide DIRECTION on how to achieve the city's mission. The rules that govern what we DO. They are the guidelines for decision-making for staff. They are the tool that GUIDES policy and decision making.

Strategic Goals (5-Year | 3-Tier)

- Handout
- General Plan (s/s)
- Add, Edit, Delete
- Year (1-5)
- Tier (1,2,3)

General Plan Goals Review / Validation Exercise

Break 10 Minutes

Quantitative Studies – Fail Facts in Execution

1. Minimal investment/buy-in to aligning with the new plan
2. Lack of clear consistent communication from leadership
3. Add-Ons – Adding to staff's workload while nothing taken away (HBR, 2022)
4. Lack of accountability
5. Lack of patience
6. Staff's lack of clarity on the strategy
7. *Everything is a priority syndrome (my issues 1st and now)
8. No true allocation of resources
9. Lack of perceived fairness (recognition, rewards)
10. Lack of fostering innovation by leadership
11. Was the right approach utilized in the execution
12. Some failures are success
13. Lack of understanding the real problem (HBR)
14. Understanding organizational capabilities (HBR)
15. Lack of understanding cultural landscape (if they did it before will they do it again?)

Myths (HBR 2015)

1. Execution mean alignment. Limited goals, specific and measurable.
2. Execution means sticking to the Plan. Flexibility and opportunities.
3. Communication means understanding. Simple, clear, repeat back 2-way.
4. Performance culture drives execution. Broad recognition/rewards (for innovation, agility)
5. Execution should be driven from the top. Long-term gains by distributed leaders.

Be Flexible



"We've considered every potential risk except the risks of avoiding all risks."

Accountability | Monitoring | Implementation

- City Administrator
 - Annual detailed report to City Council (January)
 - Technology, smart sheets, or...
 - Fun Events
 - Workshops
 - Meetings
 - Executive Timely Memos
 - Task Force
 - Implementation Strategic Session Coming Soon...

Review

- Core Values
- Vision
- Mission
- Council Guiding Priorities
- Strategic Plan Goals
 - 1- to 5-year and tiers 1 to 3
 - Public input (comment cards)

Project Next Steps

- Complete and deliver Draft Strategic Plan document based on workshop outcomes in May
- Allow City two weeks to review draft and provide comments/potential revisions
- Implementation Strategic Session in May/June
- Incorporate ISS and applicable revisions and finalize Strategic Plan document for delivery to City in June/July (depending on complexity of requested revisions)
- Present Final Report to City Council late July

Questions



CITYGATE
ASSOCIATES

THANK YOU



Agenda Review

- 9:00am–10:00am—Welcome | Intros | Overview
 - Welcome, Intros | City Manager & Andy
 - Overview, Agenda | Stacey
 - Define Strategic Planning | Stacey
- 10:00am–11:00am—Review of S.W.O.T.
 - Community & Staff | Stacey
 - Key Takeaways | Stacey
 - High-Level Fiscal Overview | Andy
 - Public Safety Overview | Gary

Agenda Review (cont.)

- 11:00am–12:00pm
 - Core Values | Vision & Mission Statements
 - What's the difference | Stacey
 - Who are we? Where do we want to be? Our brand/message
- 12:00pm–12:30pm | Lunch
- 12:30pm–5:00pm | Developing the Road Map
 - Strategic Goals Worksheet; Guiding Priorities; Fail Facts & Myth; Accountability, Updates, Implementation | Stacey
- 5:00pm–5:30pm | Wrap-Up & Questions *End by 5:00pm*



CITYGATE ASSOCIATES, LLC

600 Coolidge Drive, Suite 150 ■ Folsom, CA 95630 ■ PH 916-458-5100 ■ FAX 916-983-2090

CITY OF SAN JUAN BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION

COMMUNITY, STAKEHOLDER AND STAFF SURVEYED TOP PRIORITIES

COMMUNITY (81)

- ◆ General Plan and development discussions
- ◆ Water services and costs
- ◆ Economic development (revitalization, new business, activities)
- ◆ Vacant properties
- ◆ City leadership
- ◆ Downtown shopping, restaurants, and parking
- ◆ Parks and recreation activities
- ◆ Infrastructure (streets, sidewalks and landscape, water services and quality)
- ◆ Billing system

STAFF (12)

- ◆ Communication within agency and public (transparency, collaboration, professionalism, team building, the fear effect, management styles, fairness, expectations, meetings (remote/input/effective), trust in/external, training for skills, efficiencies) (9)
- ◆ Infrastructure (streets, water, sewer) (3)
- ◆ Environment (space, technology, equipment, hours of operation) (3)
- ◆ Budget (spending, revenue opps., low salaries) (3)
- ◆ Security and policing (2)

STAKEHOLDER INTERVIEWS (22)

- ◆ Communication (agency/community, technology, internet, marketing, customer service, professionalism, training for education, skills, service, management, personality styles) (26)
- ◆ Thoughtful economic development (workforce housing, General Plan and mixed-use new businesses, revitalization, retention, parking, need a chamber of commerce) (13)
- ◆ Disaster preparedness plan (fires, flooding, water safety, state mandates) (10)
- ◆ Efficient practices (permitting) (7)
- ◆ Youth activities and recreation (5)
- ◆ County partnership challenged (4)
- ◆ Fiscal stability (including fee study) (2)
- ◆ Code enforcement and public safety





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COUNCIL GUIDING PRIORITIES

They provide direction on how to achieve the City's mission. The rules that govern what we do. They are the guidelines for the decision making for staff. They are the tool that guides policy and decision making.

Guidelines

Core Intent

3-5 Priorities

Pull from Vision, Mission, Survey, General Plan

Specific vs. Broad

1.

2.

3.

4.

5.





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VALUES WORKSHEET

Values are individual basic, fundamental beliefs that guide or motivate people to act or behave in a particular way. They are the things that you believe are important in the way you live and work. They can mean one's moral ideals. Values are the words or qualities which describe the type of life you want to live or that help guide an organization. Values are the standards or ideals with which we evaluate actions, people, things, or situations.

Guidelines

3–10 Core values (less is more)

The backbone of every-day decision making

Embed into culture, branding, communication

Set you apart and represent who you all are

Ground and guide the organization

Collective (You, Organization, Community)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

- 1.
- 2.
- 3.
- 4.
- 5.





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CITY OF SAN JUNA BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION

MISSION STATEMENT DEVELOPMENT WORKSHEET

MISSION STATEMENT DEVELOPMENT

A mission statement is what drives the organization. It is what you DO. The CORE of the business. It SHAPES the company culture. It can MOTIVATE your employees and provides CLARITY. From this, your OBJECTIVES are created. A mission statement focuses on TODAY and what the organization does to achieve it.

Guidelines

Between 1-3 sentences
Maximum of 100 words (fewer is better)
Include core values, inspire and be clear

Sample mission statement: Nike “Bring inspiration and innovation to every athlete in the world.”
“If you have a body, you are an athlete.”

Key Questions

What do we do?
Whom do we serve?
How do we serve them?
How do we want to serve them?
Key words



DRAFT MISSION STATEMENTS

1.

2.

San Benito County Mission Statement

“To serve the public by establishing a partnership with the community; to protect life and property, prevent crime, and solve problems.”



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CITY OF SAN JUAN BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION

VISION STATEMENT DEVELOPMENT WORKSHEET

A vision statement details where the organization aspires to GO, your DESTINATION. Why does the company exist? What do you hope to ACCOMPLISH? Focuses on tomorrow. Promotes growth internally and externally. This invites innovation, sense of purpose, your WHY!

Guidelines

Motivating and inspirational

Reflective of the City's culture and core values

Aimed at bringing benefits and improvements in the future (to City and community)

Short and to the point

Sample vision statement by Nike: "Driven by our passion for sport and our instinct for innovation, we aim to bring inspiration to every athlete in the world and to make sport a daily habit."

Key Questions

What are our hopes and dreams?

What problem(s) are we solving for the greater good?

Who and what are we aspiring to change?

Is this true to our why?

Key Words

DRAFT VISION STATEMENTS

1.

2.

San Juan Bautista General Plan | Vision Statement developed by the SPC

“San Juan Bautista is a vibrant, thriving community cherishing its history, cultural heritage, the arts and one another, honoring the needs of its residents and businesses and offering the world a destination amidst boundless recreational opportunities and agricultural resources.”