



# City of San Juan Bautista

*The "City of History"*

[www.san-juan-bautista.ca.us](http://www.san-juan-bautista.ca.us)

**PLANNING COMMISSION  
TUESDAY, MAY 9, 2023, 6:00 P.M.**

*(Continued from May 2, 2023)*

## **HYBRID MEETING**

**City Hall, Council Chambers**  
311 Second Street, San Juan Bautista, California

## **AGENDA**

### **ZOOM WEBINAR PARTICIPATION**

*The meeting can also be accessed by the public in the following methods: Through Zoom (<https://zoom.us/join>) per the instruction stated below, and on Facebook.*

### **JOIN ZOOM WEBINAR TO PARTICIPATE LIVE**

<https://us02web.zoom.us/j/86357637623>

To participate telephonically:

**call 1 (669) 900-6833**

**Webinar ID: 863 5763 7623**

### **1. CALL TO ORDER**

- A. Pledge of Allegiance
- B. Roll Call

### **2. GENERAL PUBLIC COMMENT**

*Public comments generally are limited to three minutes per speaker on items that are not on the agenda and are under the City's subject matter jurisdiction. The Chair may further limit the time for public comments depending on the agenda schedule.*

### **SUBMISSION OF PUBLIC COMMENTS PROCEDURES**

If you wish to make a general public comment and are attending in person, please fill out a speaker card. If you are attending via Zoom, join the Zoom Webinar, and use the "Raise Hand" or if joining by telephone, press \*9 on your telephone keypad icon.

Written comments may be submitted via mail to the Deputy City Clerk at City Hall (P.O. Box 1420, San Juan Bautista, CA 95045), or emailed to [deputycityclerk@san-juan-bautista.ca.us](mailto:deputycityclerk@san-juan-bautista.ca.us) no later than 4:00 p.m. on the day of the meeting. Written comments will be read into the record provided that the reading does not exceed three (3) minutes.

**3. INFORMAL PROJECT REVIEW**

*Any potential and/or future project applicant may present their project to the Commission during Informal Project Review for the purpose of gaining information as preliminary feedback only. No formal application is required, and no action will be taken by the Commission on any item at this time*

**4. CONSENT**

*All matters listed under the Consent Agenda may be enacted by one motion unless a member of the Planning Commission or the public requests discussion or a separate vote.*

A. Approve the Affidavit of Posting Agenda.

**5. INFORMATIONAL AND DISCUSSION ITEMS**

- A. City Attorney - the role and responsibilities of Planning Commission members in providing information and assistance to the public regarding planning matters and topics of concern.
- B. City Manager – presentation and discussion of Citygate program.
- C. Topics and Schedule for Planning Commission Workshops.

**6. COMMENTS**

- A. Planning Commissioners
- B. Community Development Director

**7. ADJOURNMENT****AGENDA MATERIAL / ADDENDUM**

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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 Wednesday, May 3, 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.

Meetings are streamed live at <https://www.facebook.com/cityofsanjuanbautista/> and televised live on local Channel 17 on the date of the regularly scheduled meeting.

## 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 Planning Commission Agenda. I Further Declare That I Posted Said Agenda on the 3rd day of May 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 3rd day of April 2023.



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Elizabeth Soto  
Deputy City Clerk / Administrative Services Manager



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

April 4, 2023

Don Reynolds, City Manager  
San Juan Bautista  
311 Second Street / PO Box 1420  
San Juan Bautista, CA 95045  
[citymanager@san-juan-bautista.ca.us](mailto:citymanager@san-juan-bautista.ca.us)

**SUBJECT: STRATEGIC PLANNING AND FACILITATION SESSION AND ASSISTANCE INCLUDING A HIGH-LEVEL ORGANIZATIONAL REVIEW FOR THE CITY OF SAN JUAN BAUTISTA – STATUS REPORT NO. 2**

Dear Mr. Reynolds:

The following letter presents Citygate Associates, LLC's written status report concerning our Strategic Planning and Facilitation Session and Assistance Including a High-Level Organizational Review for the City of San Juan Bautista. This Status Report is for the period of March 1, 2023, through March 31, 2023. Our letter is organized as follows:

- ◆ Work Performed in the Current Reporting Period
- ◆ Work Scheduled in the Next Reporting Period
- ◆ Project Schedule and Study Issues.

#### ***WORK PERFORMED IN THE CURRENT REPORTING PERIOD***

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The following is a bulleted list of the work performed during the month of March 2023:

- ◆ Completed on-site community stakeholders and public officials' interviews including 10 mini community discussions by Project Manager.
- ◆ Conducted interviews of Finance Department personnel and follow-up interview with the Assistant City Manager.
- ◆ Prepared draft survey instruments (community and staff) and intro letter and sent to City Manager for review.
- ◆ Finalized surveys including email/letter for launching surveys to City Manager.

- ◆ Reviewed General Plan and discussed Strategic Plan elements for Council to vote on.
- ◆ Drafted Strategic Plan handouts.
- ◆ Assessed interview data.
- ◆ Continued review of documents related to the project.
- ◆ Began drafting PowerPoint presentation for Strategic Planning Session for City Manager's review.
- ◆ New request for community survey to also be available online in Spanish and with 50 accompanying printouts, along with 150 in English. Proposed costs and received approval from City Manager.
- ◆ Spanish version of surveys was developed and distributed within one week.
- ◆ New request to add a Community Town Hall meeting on April 15<sup>th</sup>, the next day after the Strategic Planning Session. Additional costs for Town Hall being evaluated.

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#### **WORK SCHEDULED IN THE NEXT REPORTING PERIOD**

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- ◆ Continue document review.
- ◆ Continue video conference interviews with financial staff and public safety.
- ◆ Facilitate public Strategic Planning Session with City Council and staff and a Town Hall Meeting scheduled for April 14<sup>th</sup> and 15<sup>th</sup>.
- ◆ Complete interviews.
- ◆ Compile and assess survey data.
- ◆ Complete PowerPoint presentation for the Strategic Planning Session and share draft with City Manager.
- ◆ Conduct video meeting with City Manager to review survey and interview findings prior to Strategic Planning Session.

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#### **PROJECT SCHEDULE AND STUDY ISSUES**

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Based on the following additional requested scope of work items, the project will have some fiscal amendments related to:

- ◆ Community survey Spanish translation (\$1,000)

- ◆ 200 survey printouts (50 in Spanish) including envelopes, postage, administrative staff time to assemble, and shipping costs.
- ◆ Added Community Town Hall Meeting on April 15<sup>th</sup> and additional related travel expenses for one additional night on-site.
- ◆ Per email to City Manager dated March 20<sup>th</sup> regarding the originally approved contract amount of \$60,000, which was then stated as \$58,293 in the contract, an adjustment is needed of \$1,707 (to cover on-site stakeholders' interviews).

Some of these known costs related to the survey are reflected on the attached invoice. Others will be included on next month's invoice and the final amount of the budget amendment will be disclosed and requested with next month's status report.

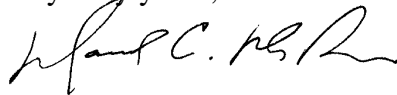
The project is on schedule with minor these budget amendments forthcoming.

\* \* \*

We appreciate the opportunity to serve the City of San Juan Bautista on this project. We will consider the tasks and actions described in this letter to fulfill those contract obligations unless you give us written notice of any deficiencies or shortcomings within 30 calendar days.

Please call me if you have any questions concerning this status report or the project. An invoice for the period covered by this status report is attached.

Very truly yours,



David C. DeRoos, MPA, CMC  
President

Attachment



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## **CITY COUNCIL STRATEGIC PLANNING SESSION**

**FRIDAY, APRIL 14, 2023  
9:00 A.M. – 5:30 P.M.**

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

## **AGENDA**

### **WELCOME AND CALL TO ORDER**

Facilitators:

### **PUBLIC COMMENT**

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### **COUNCIL WORKSHOP**

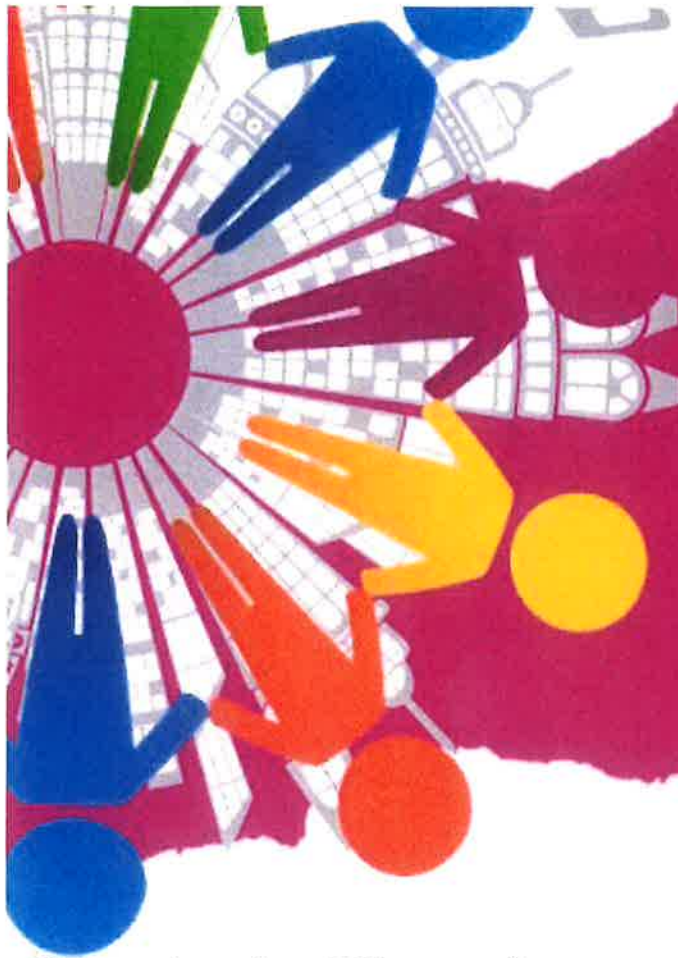
- a. GP Strategic Plan Update
- b. Financial Assessment
- c. Growth
- d. Organizational Assessment
  - i. Recreation
  - ii. Public Safety
  - iii. IT, Public Works, Etc.
- e. Future Needs

### **ADJOURNMENT**

### **AGENDA MATERIAL / ADDENDUM**

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# 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).







CITYGATE ASSOCIATES, LLC

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

**CITY OF SAN JUAN BAUTISTA  
FIVE-YEAR STRATEGIC PLANNING SESSION**

**AGENDA: APRIL 14, 2023—9:00 AM – 5:30 PM**

Meeting called by:	City Manager
Attendees:	Citygate Associates, City Staff, City Council, Public
Meals:	Lunch, snacks, beverages
Please bring:	PowerPoint tech, break out tables, pens

9:00 am – 10:00 am	<b>Welcome   Intros   Overview</b> Welcome and intros   <i>City Manager and Andy</i> Overview: Why are we here? Agenda   <i>Stacey</i> Define strategic planning   <i>Stacey</i>	Opening
10:00 am – 11:00 am	<b>Step 1 Review of S.W.O.T.</b> Community and staff   <i>Stacey</i> Key takeaways   <i>Stacey</i> High-level fiscal overview   <i>Andy</i> Public safety overview   <i>Gary</i>	Presentation
11:00 am – 1:30 pm	<b>Core Values   Vision and Mission Statements</b> What's the difference?   <i>Stacey</i> Who are we? Where do we want to be? Our brand/message. <b>LUNCH: Noon</b> Developing the RoadMap – <b>3 Activities</b>   <i>Stacey</i> <b>BREAK: 10 minutes</b>	Docs: Values, Mission, Vision, Questions, Values List
1:30 pm – 5:30 pm	<b>Strategic Goals Worksheet   Guiding Priorities (Transparency)   Facts</b> Goal setting <b>activity</b>   Guiding priorities <b>activity</b>   <i>Stacey</i> <b>BREAK: 10 minutes (3:30 pm)</b> Fail facts and myths   <i>Stacey</i> Accountability, updates, implementation   <i>Stacey</i> Report, snapshot review, and public feedback   <i>Stacey</i> Questions   <i>City Manager</i>	(General Plan / 5-Year / 3-Tier Categories Worksheet)



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## CITY OF SAN JUAN BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION

### COMMUNITY, STAKEHOLDER AND STAFF SURVEYED TOP PRIORITIES

#### **COMMUNITY (81)**

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- ◆ 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)**

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- ◆ 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)**

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- ◆ 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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## **CITY OF SAN JUAN BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION**

### **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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## **CITY OF SAN JUAN BAUTISTA 5-YEAR STRATEGIC PLANNING SESSION**

### **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***

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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



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## ***DRAFT MISSION STATEMENTS***

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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***

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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





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## ***DRAFT VISION STATEMENTS***

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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.”



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## CITY COUNCIL COMMUNITY TOWN HALL MEETING

**SATURDAY, APRIL 15, 2023**

**9:00 A.M. – 11:00 A.M.**

**San Juan Bautista Library**  
801 Second Street, San Juan Bautista, California

## **AGENDA**

### **WELCOME AND CALL TO ORDER**

### **COMMUNITY TOWN HALL MEETING**

- a. Stakeholder Input
- b. Financial Projections
- c. Council Goal-Setting Priorities
- d. Community Input

### **PUBLIC COMMENT**

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CITYGATE  
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

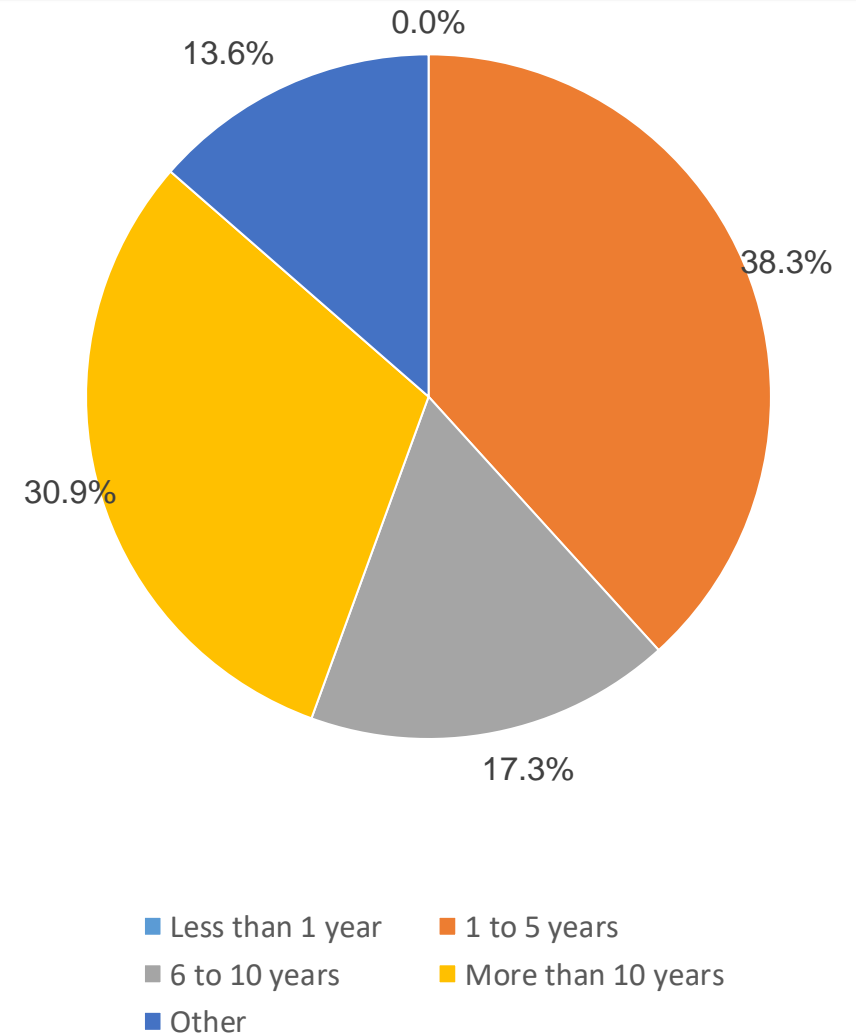
# Survey Data

- 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?

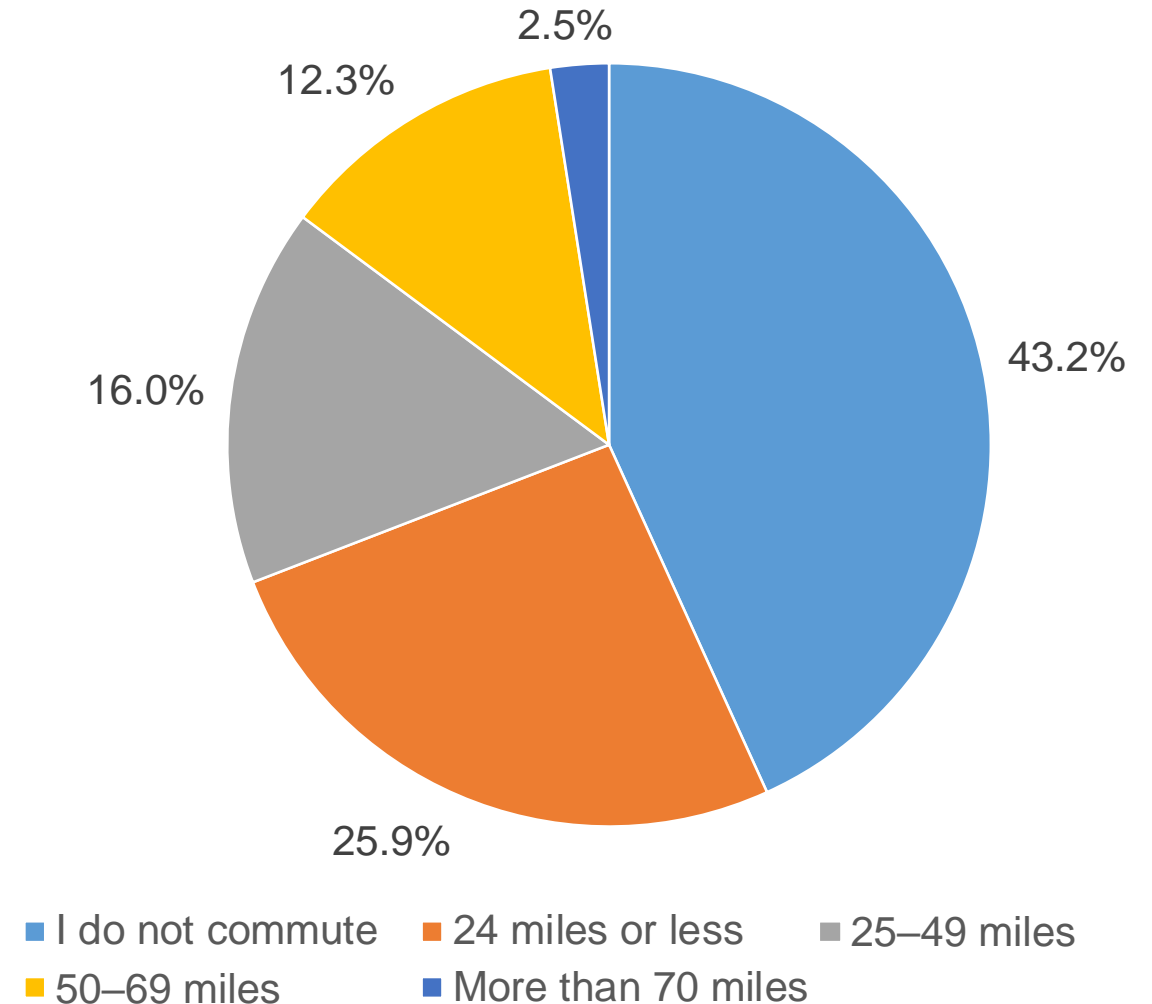


# Community Survey Results (cont.)

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.)

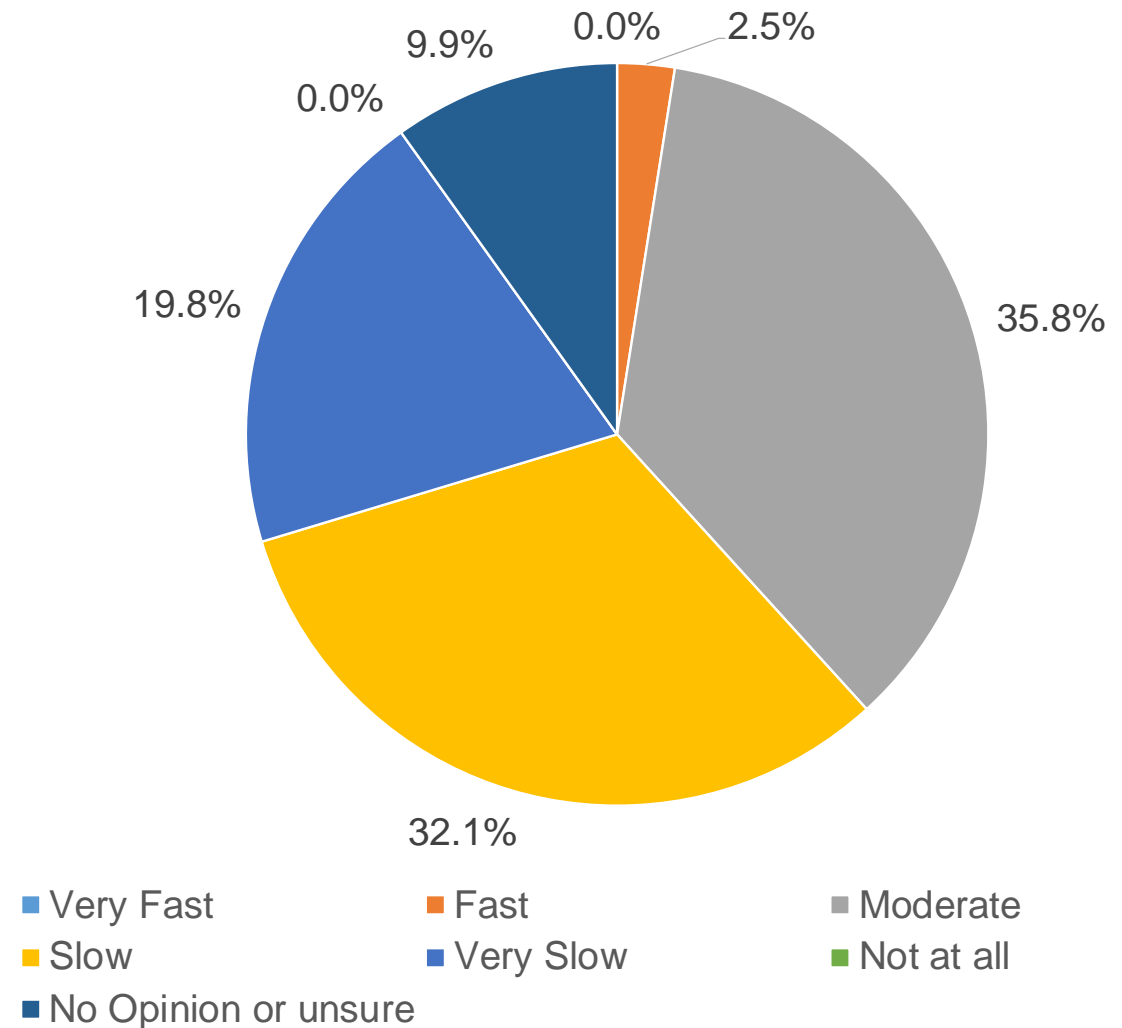
Top 7 Service Dissatisfaction	Mean	Std. Dev.	% Very Dissatisfied (-2)	% Dissatisfied (-1)	% Neither Satisfied nor Dissatisfied (0)	% Satisfied (1)	% Very Satisfied (2)	% Don't Know / N/A
Community housing programs	-0.7	0.9	16.0%	14.8%	35.8%	1.2%	0.0%	32.1%
Maintenance of sidewalks	-0.7	1.2	33.3%	27.2%	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 too 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)

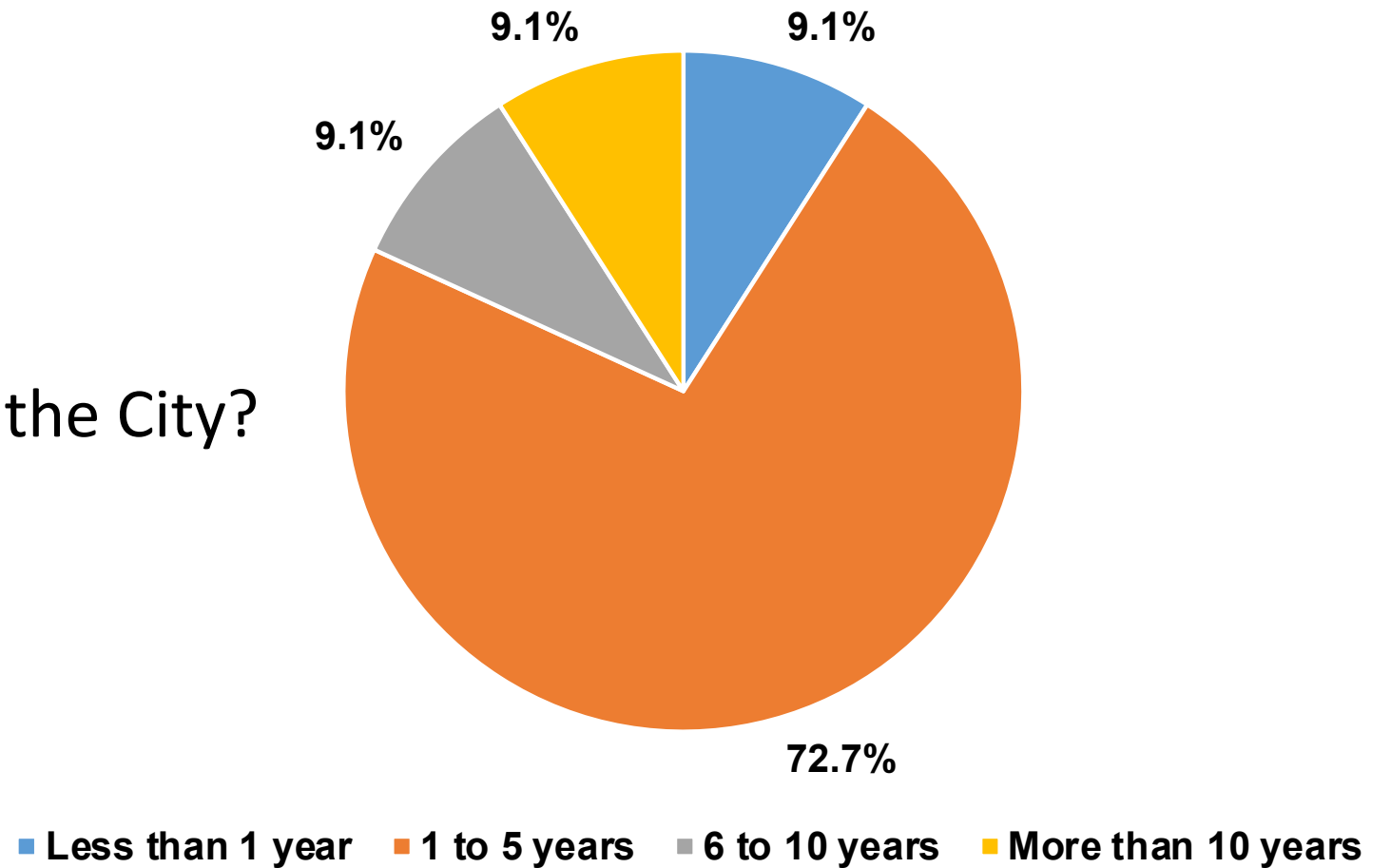
# Community Survey Results (cont.)

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

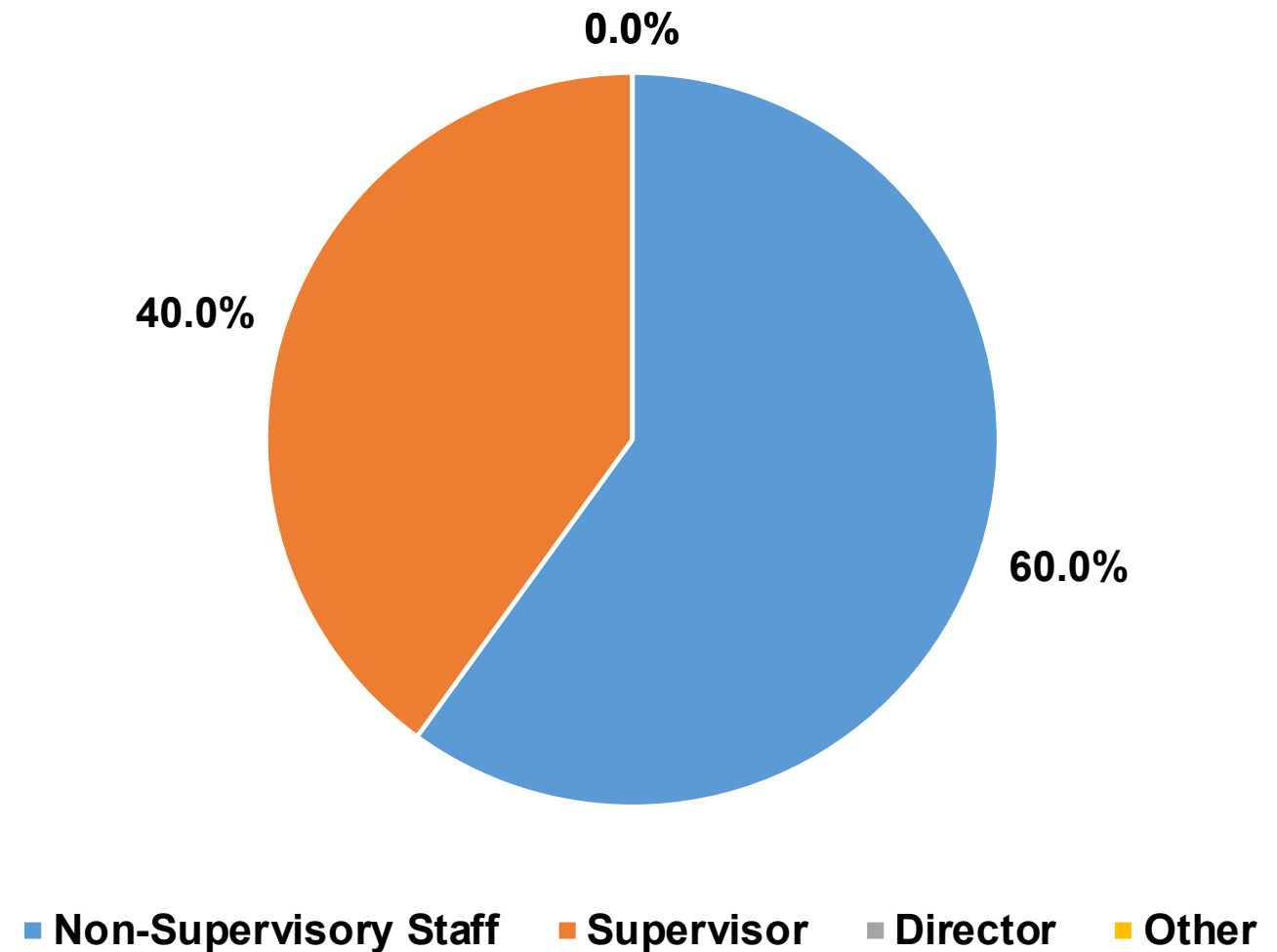
# Employee Survey Results

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

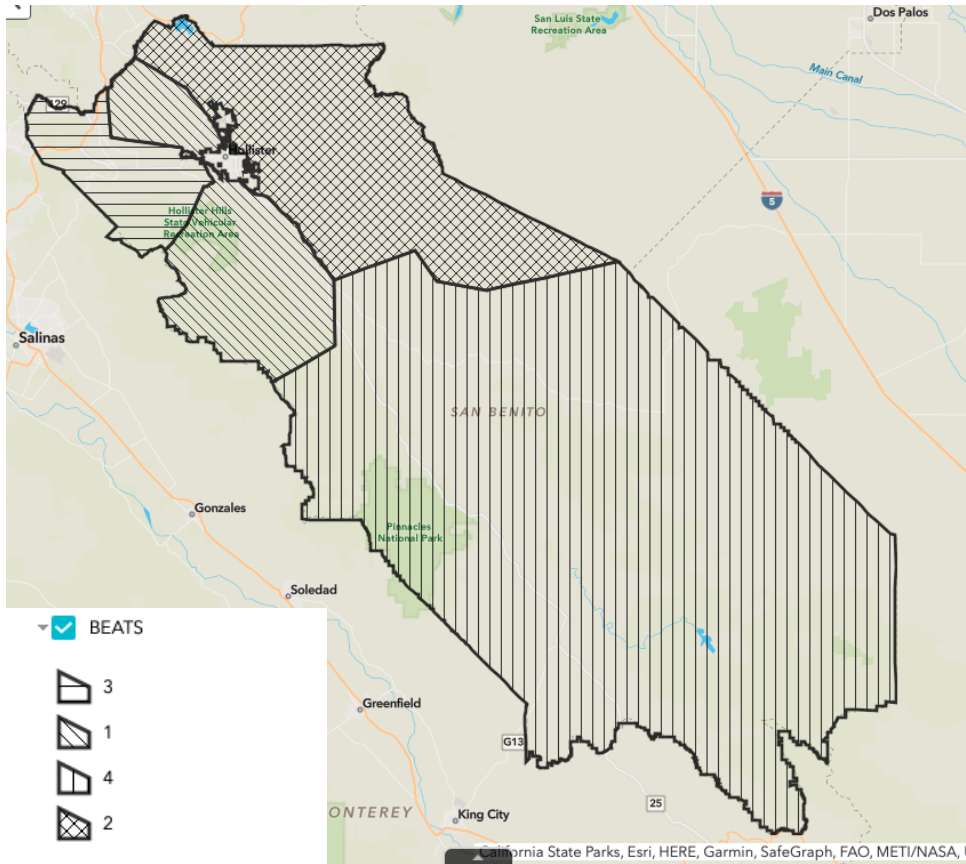


# Public Safety Overview

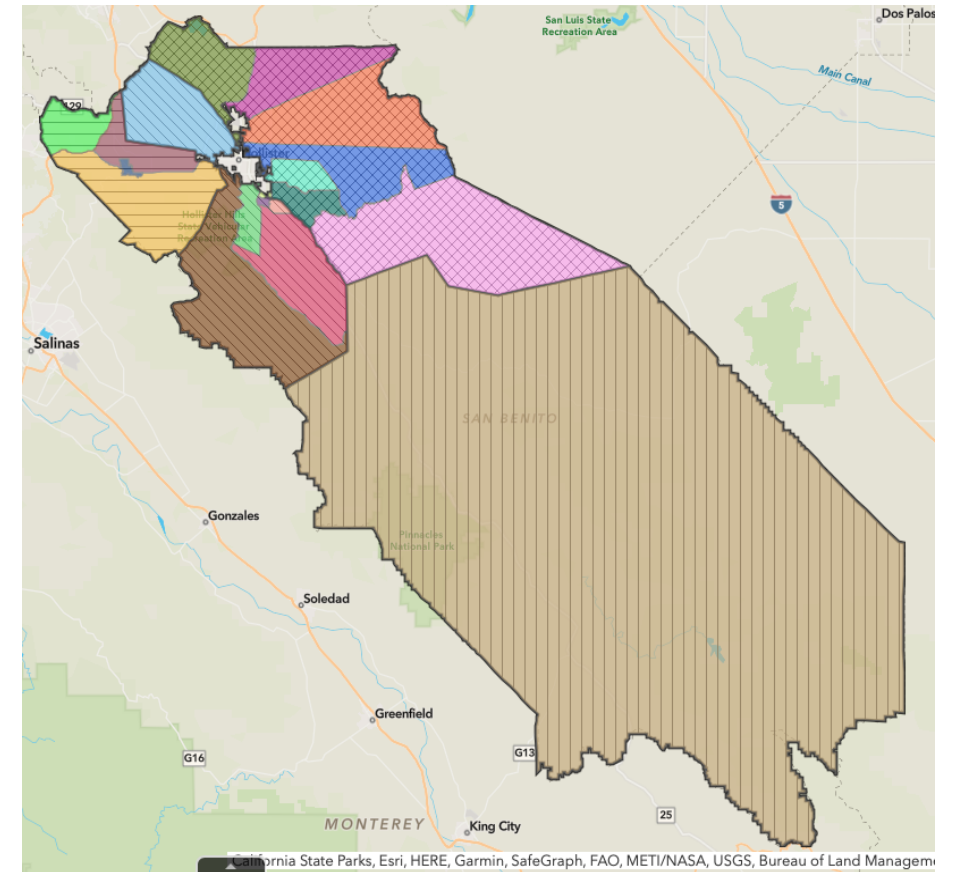
- Overall budget dedicated to public safety: \$587,207 or 20%
- Public Safety Services
  - San Benito County Sheriff (SBSO) contract – 1 Deputy Sheriff
  - County 9-1-1
  - Private security contract – 68 hours per week
  - Animal control
  - Hollister Fire Department
  - Code enforcement

# Public Safety Overview – Beats & Areas

## 4 Patrol Beats



## 19 Responsibility Areas

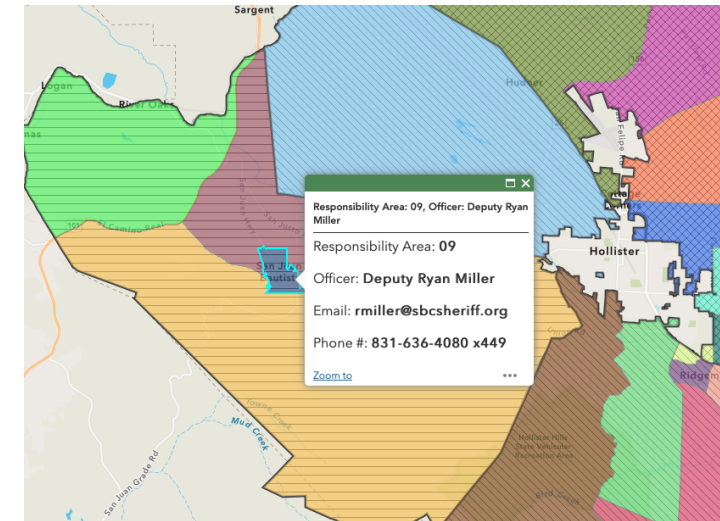


# Public Safety Overview – San Juan Bautista Patrol

## 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

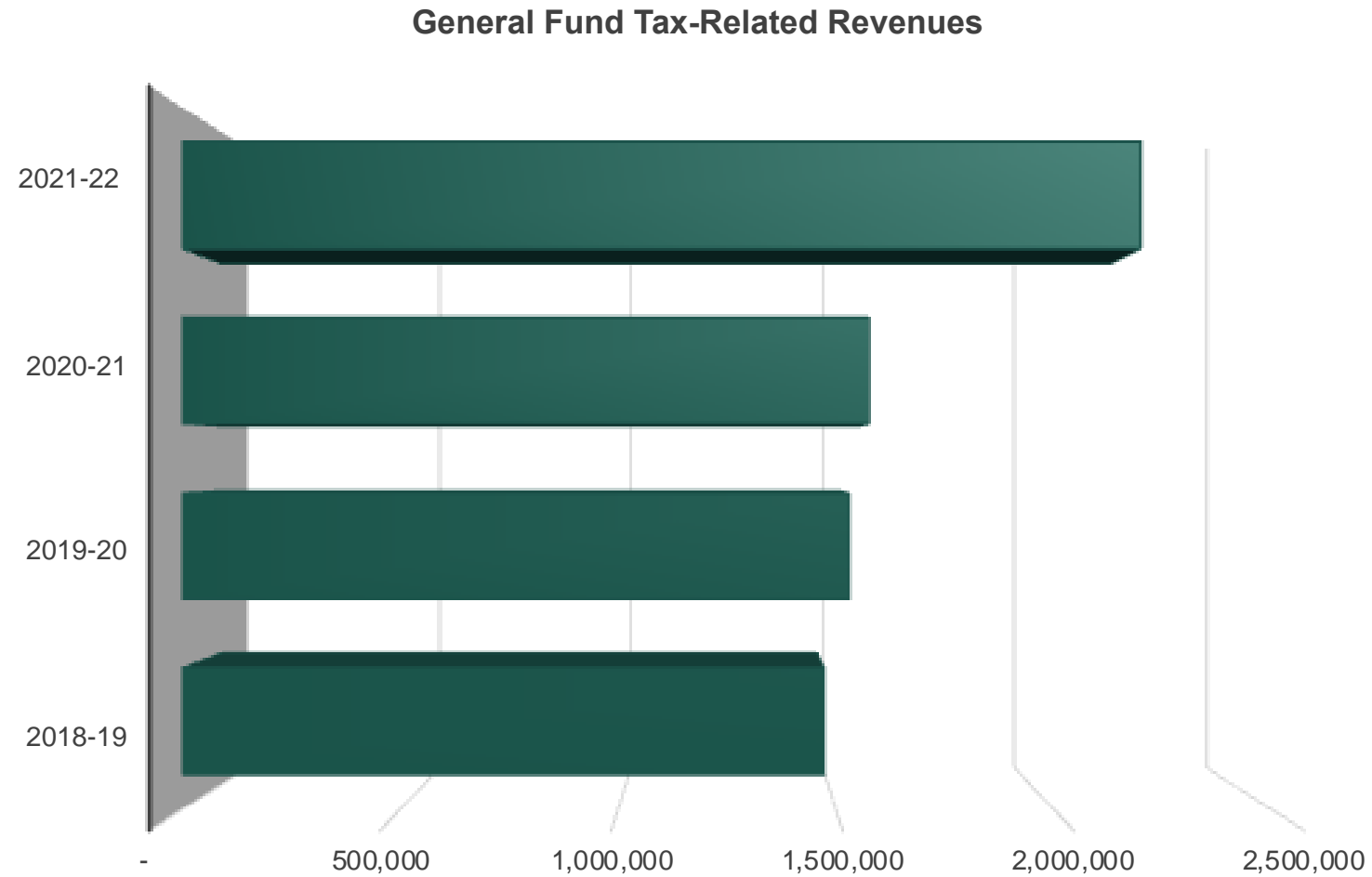
Component	FY 19/20 Actual	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Budget
Revenues	5,656,660	6,586,113	6,258,998	5,693,773
Expenditures	5,574,296	7,399,273	5,956,759	4,532,127
Net Operating Income / (Loss)	82,364	(813,160)	302,239	1,161,646
Beginning Total Fund Balance / Net Position	10,990,378	11,072,742	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



# 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 3<sup>rd</sup> 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, smartsheets, 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



# City of San Juan Bautista

*The "City of History"*

Office of the City Manager

## MEMORANDUM

**TO:** CITY COUNCIL  
**FROM:** DON REYNOLDS, CITY MANAGER  
**DATE:** APRIL 24, 2023  
**SUBJECT:** STRATEGIC PLANNING UPDATE

This note is to follow-up on the Strategic Planning work completed April 14 and 15, 2023. A second interaction is being planned a month from now, but June 1-5 don't seem possible.

A lot of hard work went into creating Core Values, Priorities, Mission, and Vision Statements. This is a summary of those efforts.

### Values | Priorities | Mission | Vision

**Core Values:** Collaboration | Honesty | Resourcefulness | Accountability | Integrity

**Council Priorities:** Fiscal stability | Infrastructure | Economic Development | Public Safety (disaster Prep/CodeEnf) | Communication | General Plan | Parks and Recreation

***Mission:*** *The city of SJB strives to provide exceptional service to the community by fostering a sustainable economy, while preserving its uniqueness through collaboration, honesty, and resourcefulness.*

***Vision:*** San Juan Bautista is a vibrant, thriving community who strives to tell its complete history & cultural heritage while honoring the needs of its residents & businesses. San Juan offers the world a unique destination amidst boundless natural beauty, open space & agricultural resources.

Work is still needed to complete the review of the 2016 General Plan priorities and Citygate and staff have developed a simplified plan for that. Also, the City had received 80 responses to the survey before April 14, 2023, and has now received more than 130 responses. This new data will be updated and shared.



# City of San Juan Bautista

*The “City of History”*

Office of the City Manager

A second session is being planned for the time between June 1-5, 2023. It will include another first day from 10-5 PM, and a follow-up the next day for 2-hours. The draft agenda includes the following topics:

Can you plan to be available 10-5 PM?? What dates work best for you (Friday again?)

1-2 hours reviewing the previous General Plan Strategic Plan

1 hour discussing “Innovation Training” in an Interactive Workshop

.5-hour Lunch

2-3 hours for Implementation discussion

Wrap Up –

Saturday Again? What date work best for you?

2-hour review and confirmations

Is does not look like the City Council available June 2 and June 3...

Are there items the Council wants to see added to the Agenda?

*Notes regarding the calendar, includes not meeting on Memorial Day Weekend, approving the budget June 13, 2023. The City Manager will be in New Orleans at the national gymnastic tournament June 14- June 21.*

Thank you for your dedication to the City and consideration of this Plan.

CC: Commissioners

City Staff

Citygate