



CITYGATE
ASSOCIATES

HIGH-LEVEL ORGANIZATIONAL, FINANCIAL, AND LAW ENFORCEMENT REVIEW

CITY OF SAN JUAN BAUTISTA, CA

AUGUST 10, 2023



CITYGATE
ASSOCIATES

WWW.CITYGATEASSOCIATES.COM

600 COOLIDGE DR., STE. 150 FOLSOM, CA 95630

PHONE: (916) 458-5100
FAX: (916) 983-2090



This page was intentionally left blank

TABLE OF CONTENTS

<u>Section</u>	<u>Page</u>
Final Report Executive Brief.....	1
Executive Summary	3
Citygate’s Assessment and 11 Overall Themes	3
The Challenge Facing a Small City	4
Some Good News	4
11 Overall Themes.....	4
High-Level Fiscal Review	5
High-Level Public Safety Review	6
The Priority Implementation Plan	7
Section 1—Introduction.....	13
1.1 Structure of Report.....	13
1.2 Project Work Plan	14
1.2.1 Core Tasks.....	14
1.2.2 Action and Implementation Plan Workshop Tasks.....	15
1.2.3 Fiscal Review/Update Tasks	16
1.2.4 Law Enforcement Review and Recommendation Tasks.....	16
1.2.5 Executive Leadership and Communication Tasks	16
1.3 Citygate’s Profile of Assessment Factors	16
Section 2—San Juan Bautista’s Unique Situation	19
2.1 The Story and the Good News	19
2.2 Important Contextual Themes	20
2.3 Overview of City Departments and Services.....	21
2.3.1 Current Organizational Structure	21
2.4 The Challenge Facing a Small City	22
Section 3—Employee Survey Results.....	23
3.1 Employee Survey Analysis.....	23
3.1.1 Organization of Analysis.....	23
3.1.2 Definition of Terms	24
3.2 Summary of Results.....	24
3.2.1 Five Highest Rated Statements	24
3.2.2 Responses for Each Statement	26
3.2.3 Open-Ended Questions.....	30
Section 4—Overview of Community Survey Results.....	33
4.1 Community Survey Analysis	33
4.1.1 Organization of Analysis.....	34
4.1.2 Definition of Terms	34
4.2 Summary of Results.....	34
4.2.1 Degree of Agreement, Satisfaction, or Assessment Statement Results	34
4.2.2 Open-Ended Questions – Response Summary	36
4.3 Community Stakeholders Interview Data.....	38

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Section 5—High-Level Financial Review	41
5.1 By the Numbers	41
5.2 Fiscal Positives	44
5.2.1 Specific Items	44
5.3 Fiscal Issues	46
5.3.1 Specific Items	47
5.3.2 Other Issues	49
5.4 Summary of Fiscal Findings and Recommendations	51
5.4.1 Findings.....	51
5.4.2 Recommendations	52
Section 6—High-Level Public Safety Overview	55
6.1 Law Enforcement Services	55
6.2 Private Security Patrols.....	56
6.3 Other Services.....	57
6.3.1 Code Enforcement.....	57
6.3.2 Animal Control Services	58
6.3.3 Fire Services.....	58
6.3.4 Emergency Services	58
6.4 Summary of Public Safety Findings and Recommendations.....	58
6.4.1 Findings.....	58
6.4.2 Recommendations	59
Section 7—Strategic Plan Development.....	61
7.1 Strategic Plan Development Process	61
7.1.1 Key Definitions	61
7.1.2 Guiding Questions.....	62
7.2 Statements, Values, and Priorities for San Juan Bautista	62
7.2.1 Approved Vision Statement	63
7.2.2 Approved Mission Statement.....	63
7.2.3 Approved Core Values	63
7.2.4 Approved Guiding Priorities	63
7.3 Other Strategic Observations	63
7.3.1 Important Steps	64
7.3.2 Financial Management Policies	64
7.2.3 Economic Development and Stabilization	65
Section 8—Progress: Moving Forward.....	67
8.1 Implementation Strategies	67
8.2 “Fail Facts” and Myths	67
8.2.1 Fail Facts	68
8.2.2 Myths.....	68
8.3 Priority Implementation Plan Worksheet	69
8.4 Executive Leadership and Communication Training	70
8.4.1 Recommendations	70
8.5 Small City Specifics.....	71
8.5.1 Best Practices	71
8.6 Ramping Up.....	72

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Section 9—Citygate’s Core Findings and Recommendations.....	75
9.1 Findings	75
9.1.1 Fiscal Findings	75
9.1.2 Public Safety Findings	75
9.2 Recommendations.....	76
9.2.1 Fiscal Recommendations.....	76
9.2.2 Public Safety Recommendations.....	77
9.2.3 Executive Leadership Recommendations	77

Appendices

Appendix A—Priority Implementation Plan Worksheet

Appendix B—Employee Survey Summary

Appendix C—Community Survey Summary

Table of Tables

Table 1—Priority Implementation Plan – Strategic Recommendations	9
Table 2—Employee Survey Summary.....	23
Table 3—Employee Survey –Most Agreed to Statements Regarding Working for the City	25
Table 4—Employee Survey – Least Agreed to Statements Regarding Working for the City	26
Table 5—Employee Survey – Responses for Each Statement.....	26
Table 6—Community Survey Summary.....	33
Table 7—Community Survey Summary.....	37
Table 8—Common Myths and Helpful Realities.....	69

Table of Figures

Figure 1—Citygate’s Profile of Assessment Factors.....	17
Figure 2—City of San Juan Bautista Organizational Chart (FY 21/22)	21
Figure 3—Multi-Year Actual – General Fund.....	42
Figure 4—General Fund Tax-Related Revenues	42
Figure 5—Multi-Year – Water Funds.....	43
Figure 6—Multi-Year – Sewer Funds.....	43

This page was intentionally left blank

FINAL REPORT EXECUTIVE BRIEF

This single-page Executive Brief provides a synopsis of the organizational review's context, the work performed by Citygate, the City's Priority Implementation Plan, and key takeaways and recommendations.

Request – Perform strategic planning, facilitation and implementation sessions including a high-level organizational, public safety, and budget analysis.

Core Deliverables – High-Level Organizational, Financial, and Law Enforcement Review Report and Priority Implementation Plan Worksheet including recommendations and implementation strategies based on organizational assessment, survey data, planning sessions, town hall meetings, and document review | Mission, Vision, Core Priorities, and Values statements | Executive Training Session

Mission – The City 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 that strives to tell its complete history and cultural heritage while honoring the needs of its residents and businesses. The City offers the world a unique destination with its boundless natural beauty, open spaces, and agricultural resources.

Values – Collaboration | Honesty | Resourcefulness | Accountability | Integrity

Core Council Priorities – Fiscal stability | Infrastructure | Economic Development | Public Safety | Communication | General Plan | Parks and Recreation

Community Priorities – See sections 3 and 4 and appendices B and C for Employee and Community Survey results | Water quality and costs | Infrastructure (roads, streets, sidewalks) | Economic development (downtown improvements and business friendliness) | Schools | Recreation | Growth and development

Five-Year Priority Implementation Plan – See: Table 1 and **Appendix A**.

Primary Recommendations – See Section 2.2 for 11 Overall Themes in addition to Citygate's 16 Core Recommendations:

- ◆ New Public Safety Coordinator | Reorganization | Disaster Preparedness and Recovery
- ◆ Fiscal policies in line with Government Finance Officers Association (GFOA) | Staff support for extended hours for City Hall | Fund balance designation and forecasting for long-term strategic goals and capital projects | Fee assessment | Staffing
- ◆ Parks and Recreation Coordinator position | General Plan review/update | Economic development programs | Recreational activities | Communication strategy | Improvements to water quality | Infrastructure improvements

Executive Communications and Leadership Training – See Section 8.4 | Innovation in Government | Belief Systems and Stories | Communication and Success Signals | Leadership Defined | Roles and Responsibilities | Service Philosophy Development

This page was intentionally left blank

EXECUTIVE SUMMARY

Citygate Associates, LLC (Citygate) is pleased to present this high-level organizational review including financial and law enforcement reviews for the City of San Juan Bautista (City). It was evident to Citygate’s Project Team members who have had the pleasure of working on this project that the City’s elected officials, staff, and residents all have a passion for their community and its future.

Founded in 1797 and incorporated in 1869, the City of San Juan Bautista is located in San Benito County, CA. The City is largely an agricultural community, though it also has a strong tourist industry due to its historic and cultural sites, which include the Mission San Juan Bautista (founded in 1812) and seven National Historic Landmarks—including two historic districts listed in the National Register of Historic Places (San Juan Bautista Plaza Historic District and Third Street Historic District). As of the 2020 Census, the City had a population of approximately 2,089.

Through conversations with residents and City staff, Citygate found a sense of pride and deep care from all stakeholders, who take an active role in honoring the City’s heritage and community. Citygate also recognized and heard that there are several desires and concerns related to bringing smart economic growth, infrastructure improvements, more recreational activities, and appropriate protections and attention to the City’s water supply. These were but some of the many ideas offered during Citygate’s interviews, but currently, no framework exists for bringing them into focus.

Civic leaders invested time and resources into having this study conducted to clarify where the City currently stands both operationally and financially. The study is intended to serve as the foundation for the strategic planning and goal-setting necessary to focus this small City’s energy on the highest and best potential use of local talent and resources.

This review includes strategic recommendations which accompany the Five-Year Priority Implementation Plan and a realistic framework of recommended actions, current financial analysis, and operational realities that City leaders, staff, and residents can use to begin making critical strategic decisions for the City’s future.

CITYGATE’S ASSESSMENT AND 11 OVERALL THEMES

The City functions as a non-full-service city—in partnership with the County Sheriff’s Department for public safety services, contracted services for security in the “observe and report” capacity, and contracted services with the City of Hollister for fire protection efforts. The City provides limited services related to planning and building, engineering, public works, parks, water and wastewater utilities, and a library.

The Challenge Facing a Small City

Small cities are susceptible to disruptions in service delivery and project delays when experiencing high turnover or staffing reductions. Larger cities have more redundancy and capacity built into individual staff roles because they have a greater number of personnel who can help pick up and continue projects or absorb additional work during recruitment efforts. San Juan Bautista has no redundancy built into its staffing, with only a single occupant in most job titles. Vacancies in any position mean that the work previously performed by that position either goes unaddressed when it is vacant or displaces the duties of another staff member.

The amount of work conducted by the small staff of the City is remarkable, and the work, overall, is performed in a professional manner. City staff is generally keeping up with a number of regulatory requirements, and the City has adopted long-term planning documents, such as the General Plan, a new Five-Year Priority Implementation Plan (included with this report), and other required documents. Citygate found these to be of good quality. The challenge facing the City is to provide City staff with the resources necessary to implement these plans and to ensure that all items receive proper attention—such as regular rate and fee studies and annual reviews of rates for water and sewer services—with the intent to provide the rate revenues necessary to construct and repair City street, water, and sewer infrastructure and ensure that City infrastructure provides for development to take place within the corridors and sites the City intends to be developed.

Some Good News

City personnel are highly commended for their own use of time and limited resources in juggling a wide variety of activities and time pressures. City employees face both the changes taking place within the City organization as well as the changes and challenges within the public perception of them, all of which affect their day-to-day ability to do their jobs.

The good news is that the City possesses a rich resource in the gifted and dedicated people who are both committed to its future and willing to engage in the work necessary to move forward as a more friendly, effective, fiscally stable, and robust community. The City had the courage to commission this study and carefully examine where it is currently and where it needs to be—an undertaking that not all cities are willing to carry out.

The hopeful outcome of this organizational, financial, and law enforcement review is informed public policy making at its best, along with implementation of Citygate's recommendations in a way that engages City Council, City staff, City commissioners, the broader community, volunteers, and businesses in the realization of the common good.

11 Overall Themes

This report consists of 9 sections and includes **Citygate's 12 core findings and 16 core recommendations**, which are discussed throughout the various sections of this report and

summarized in full, sequential order in Section 9. Further, the report identifies **11 overall themes** resulting from Citygate’s review.

The following themes informed Citygate’s recommendations:

- Theme 1:** Improvement and protection of water quality.
- Theme 2:** Investment in infrastructure improvements including sewer, roads, streets, sidewalks, and curbs.
- Theme 3:** Establishment of appropriate staffing levels.
- Theme 4:** Implementation of thoughtful, smart economic development—specifically in the Downtown area—through General Plan amendments, discussions, and policies related to growth, zoning, and conditions of approval.
- Theme 5:** Enhancement of business partnerships, incentives, communications, and process improvements.
- Theme 6:** Enhancement of recreation activities for all with a focus on the youth and seniors.
- Theme 7:** Revitalization of the Downtown area including addressing cleanliness, vacant lots, parking, esthetics, lighting, landscaping, and signage.
- Theme 8:** General enhancement of communication with City staff and volunteers, including messaging, updates, website, and other marketing opportunities.
- Theme 9:** Public safety review including Sheriff’s Department partnership, code enforcement, and current security services.
- Theme 10:** Disaster preparedness related to flooding, fires, state mandates, etc.
- Theme 11:** Fragmentation of the San Juan Bautista Community Business Association into two competing groups.

HIGH-LEVEL FISCAL REVIEW

Small cities are called upon to meet all laws and regulations and produce all of the audits, annual reports, and master plans required of larger communities—in addition to providing around-the-clock city services related to public safety, water, sewers, and streets. Small cities must perform to these measures with far less staff capacity compared to larger cities. It is therefore critical for small cities to do business in the most efficient manner possible.

All cities and counties in California have some sort of commitment to economic development. Typically, they have a designated individual or groups of individuals who are assigned to promote

a city's local economy. Larger agencies will have programs specifically designed to retain existing businesses, expand existing businesses, and attract new businesses. Typically, this involves keeping an inventory of vacant properties, assisting with permit processing, providing fee waivers, circulating marketing brochures and videos, and working with real estate agents, a chamber of commerce, and a visitors' bureau.

The good news is that all of these economic fundamentals are in place in the City in one form or another. The City has several potential partners and volunteer groups, such as the San Juan Bautista Community Business Association—both the new and the original association—and a recently hired Assistant City Manager to help provide a focus on economic development.

During its review, Citygate identified several **fiscal positives** implemented by the City that have helped to improve its overall fiscal health. These include a fiscally healthy General Fund, the sewer and water rate increases of 2021 and 2022 respectively, the hiring of an Assistant City Manager to focus on economic development, and implementation of a new financial system.

Citygate also identified potential **fiscal-related operational issues** during its review. Some of the more obvious areas included a lack of review or adjustment related to current fees and charges, a lack of formalized policies and procedures, the potential noncompliance with California Government Code due to the use of the same auditor service, and the lack of succession planning, cross-training, and long-range financial planning.

Citygate's fiscal review also discusses the development of performance measures, extended hours coverage at City Hall, and adequate separation of duties among City staff.

Stabilizing the City's finances requires a unified effort on the part of the City's elected officials, City staff, and community leaders. A sustained, multi-year, multifaceted rebuilding effort will ensure the City enjoys the benefits of a vibrant, cost-effective, full-service municipal organization well into the future.

HIGH-LEVEL PUBLIC SAFETY REVIEW

Public safety in the City is provided through a combination of private and public contracts as well as some organic City services. Police and Fire services are provided through contracts with the San Benito County Sheriff's Department and the Hollister Fire Department respectively. The City also contracts with a private security firm to provide additional patrols throughout the week. The City employs a part-time Code Enforcement Officer but has no effective Animal Control Services. All of these services are directly managed and supervised by the City Manager.

Given the size of the City, the total volume of public-generated calls for law enforcement service are relatively low, thus making the formation of a municipal police department fiscally impractical. However, the City's percentage of budget expenditures for public safety and policing in particular merit consideration of more investment. Citygate assesses that a management-level public safety

position—reporting directly to the City Manager, and responsible for oversight of all public safety-related issues discussed in this report—would be a beneficial addition.

The City earmarked funding in the current budget to add an additional Deputy Sheriff to the law enforcement service contract, which would, in effect, double the amount of dedicated patrol the City currently maintains. Thus far, the Sheriff’s Office has had difficulty in staffing that position and it has not yet been added. Citygate supports adding this position and expanding dedicated patrol coverage. In time, the goal should be to increase dedicated patrol coverage to 24 hours a day, 7 days a week.

Additionally, while the current Fire services contract is sufficient, the Sheriff’s contract should be expanded via the funds already earmarked for law enforcement to expand the patrol coverage of the Sheriff. Citygate further assesses that private patrols should be eliminated and replaced by Community Service Officer positions working directly within the City’s infrastructure.

THE PRIORITY IMPLEMENTATION PLAN

In addition to Citygate’s core findings and recommendations contained throughout this report, community members, volunteers, and City staff worked diligently and thoughtfully during several meetings and public processes to discuss, debate, and determine goals and priorities for the City. Once community stakeholders established clear mission and vision statements, goals, and priorities; desired outcomes, accountability measures, and timelines were determined. These strategic planning processes undertaken by the community make effective and efficient organizational change possible. The result of these efforts—a Priority Implementation Plan Worksheet developed by the community for this study—is provided as **Appendix A** and discussed, in detail, in Section 7 of this report.

From the full Worksheet representing the City’s efforts, a refined list of ten strategic recommendations and a blueprint for their implementation is presented in the following table, including:

- ◆ The parties responsible to implement each recommendation.
- ◆ The priority and timeframe for implementation of each recommendation.
- ◆ The anticipated benefits of each recommendation.

The table defines the priority of each recommendation indicated by the letters “A” through “C.” It is important to note that priorities have been established independent of the suggested implementation timeframes.

It is also important to note that an “A” priority, which indicates that the recommendation is deemed “mandatory or critical,” should not be interpreted to mean that the recommendation is mandated

by a statute or regulation—it is simply an urgent recommendation of the highest priority according to Citygate.

The Priority Implementation Plan – Strategic Recommendations table contains ten strategic recommendations—including fiscal and other operational recommendations resulting from this review. Citygate has taken care to recognize the limited staff resources available for the City to carry out the action items in this report. Nevertheless, throughout the report, Citygate makes some core recommendations for the City regarding how it should choose to deliver services in the future.

Table 1—Priority Implementation Plan – Strategic Recommendations

Priority Legend: A – Mandatory or critical | B – Highly recommended | C – Recommended

Recommendation	Responsible Parties	Priority	Benefits
<p><u>Strategic Recommendation #1:</u> Prioritize Economic Development</p> <ul style="list-style-type: none">• Increase and broaden the City’s economic development programs and related policies, procedures, ordinances, and zoning regulations.• Hold General Plan discussions and/or workshops in related areas affecting economic development.• Consider full-time, part-time, or limited-term staffing for implementation of economic development-related items listed within the Five-Year Priority Implementation Plan Worksheet.• Prioritize downtown cleanliness.• Develop and implement a vacant property registration program and/or ordinance.• Develop a wayfinding signage program.• Develop business improvement and incentive programs including facades (including forgivable loans and timeline grants).• Fund downtown esthetics with landscaping, lighting, and art.• Evaluate funding opportunities including a Citywide fee assessment, adoption program, benefit districts, facilities and/or art districts, to support downtown fiscal stability.	<p>City Manager, City Council, Assistant City Manager, Planning Commission, San Juan Bautista Business Association(s).</p> <p>Support from new staff, should any be hired and assigned to this area of need.</p>	<p style="text-align: center;">A</p> <p>Begin immediately—workshops and discussions related to the General Plan and adjustments related to growth and economic development.</p> <p>Engage business owners and appropriate volunteer groups to support elements of the Five-Year Strategic / Implementation Plan related to economic development and downtown revitalization efforts, including consideration of a vacant property registration program and/or ordinance.</p>	<p>Reviewing and adopting various new ordinances, zoning guidelines, and policies and procedures will provide clarity, consistency, and more efficient and effective processes for economic development.</p>

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Recommendation	Responsible Parties	Priority	Benefits
<p>Strategic Recommendation #2: Review Public Safety and Pursue Reorganization</p> <ul style="list-style-type: none"> Explore how the City could implement and hire an interdepartmental Executive Public Safety Coordinator position to provide much-needed coordination and facilitation of all public safety-related items including disaster preparedness and response, all public safety contracts (sheriff, fire, animal control, etc.), security services, grants, etc. Recruit and fill the vacant Sheriff's position including written reporting requirements on workload indicators (i.e., calls for service). Consider removing security services and replacing them with City staff Community Services Officer positions that report to the new Public Safety Coordinator. Evaluate recruitment and retention packages (salaries, benefits, other perks) 	<p>City Council, City Manager, City staff, Fire Chief, Sheriffs, and members of both the San Benito County Sheriff's Department and Hollister Fire Departments.</p>	A	<p>A well-organized public safety unit or division has significant influence on its staff (sworn and non-sworn) and the community at large. When public safety is well organized, fewer issues occur, and more efficient and effective outcomes are achieved. These recommendations allow for a more cohesive, cost-effective and (long-term) stable approach to public safety.</p>
<p>Strategic Recommendation #3: Prioritize General Plan Updates and Workshops</p> <ul style="list-style-type: none"> On an ongoing basis, evaluate and update elements of the General Plan as listed within the Five-Year Priority Implementation Plan Worksheet, with emphasis on those within the priority areas and based on appropriate listed timelines and various state mandates. Conduct City Council meetings/workshops related to economic growth and development in a thoughtful manner that brings the community benefits with a cost-recovery approach. 	<p>City Council gives direction. City Manager, with support from Assistant City Manager and appropriate staff, provides a process and recommendation.</p>	A	<p>Allows the community to create a vision together. Provides opportunity for creative, thoughtful approaches to policies, processes, and implementation efforts. Offers better decision-making processes for efficient and effective approaches. Helps to create consensus-building and collaborative mindset. Provides clarity, certainty, and understanding. Helps to better protect valued resources. Provides a comprehensive roadmap that supports a healthy and thriving community in both the short- and long-term.</p>

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Recommendation	Responsible Parties	Priority	Benefits
<p><u>Strategic Recommendation #4:</u> Strengthen Fiscal Stability and Operations Including Adopting Strong, Clear Financial Policies</p> <ul style="list-style-type: none"> Hire part-time staffing support related to extended hours of operation. Adopt a five-year revenue enhancement program. Conduct fee assessments/updates every three years and include an escalation clause. 	<p>City Council, City Manager, and Finance Director.</p> <p>City Finance Director, with assistance of City Manager, proposes financial policies for Council adoption.</p>	<p>B</p> <p>Prepare policies for Council consideration as part of the FY 23/24 budget cycle.</p> <p>Adopt the five-year program by December 2023 for incorporation into the FY 23/24 CIP and budget cycle.</p>	<p>By adopting strong, clear financial policies, the City will have a guidepost for making sound financial decisions.</p> <p>A Five-Year Plan will focus project funding and resources, providing pathways toward critical infrastructure improvements.</p>
<p><u>Strategic Recommendation #5:</u> Increase Parks and Recreation Activities Including a New Lead Position</p> <ul style="list-style-type: none"> Consider a full-time Parks and Recreation position (optional two-year limited term) to support grant applications and monitoring and all related items. Facilitate a volunteer-based Parks and Recreation committee to support new Parks and Recreation position. Involve Parks and Recreation staff in supporting economic development roles and responsibilities, including those determined in the Five-Year Priority Implementation Plan Worksheet 	<p>City Council, City Manager, City staff, potentially volunteer group(s), special districts.</p>	<p>A</p>	<p>Supports better and higher quality of life. Supports and promotes wellness and a healthy community. Provides a connection space and encourages conservation of valuable open green and wildlife spaces. Supports the improvement of property values. Encourages activity in youth and adults. Contributes to community identity. Combats (and can reduce) air pollution.</p>
<p><u>Strategic Recommendation #6:</u> Enhance Communication with Community, Visitors, and City</p> <ul style="list-style-type: none"> Provide quarterly City updates; enhance the City website as per Priority Implementation Plan Worksheet; and continue to increase engagement from the City Manager in community events, meetings, and neighborhood gatherings. 	<p>City Council, City Manager, volunteer groups, and City Clerk.</p>	<p>A</p>	<p>Stronger communication can bring better understanding, structure, knowledge, connection, and certainty to the community. Supports a positive environment and empowers people to find common ground for action. Builds a sense of identity and higher participation to help implement key decisions.</p>

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Recommendation	Responsible Parties	Priority	Benefits
<u>Strategic Recommendation #7:</u> Improve and Protect Water Quality <ul style="list-style-type: none"> Continue to seek out federal, state, and local funding to support clean water, infrastructure improvements, educational opportunities, and outreach. Utilize volunteers, commissions, and other local and regional partners to support outreach and education efforts, grant activities including research and writing, and possibly monitoring. As necessary, review and revise any policies and zoning regulations related to improving and protecting water quality. 	City Council, City Manager, Public Works City Engineer.	B	Supports potential development as guided by the General Plan / Strategic [Priority Implementation] Plan, quality of life, and healthy living for current and new residents and visitors. Protects agricultural economy.
<u>Strategic Recommendation #8:</u> Prioritize Financial Resources for Key Projects <ul style="list-style-type: none"> Allocate at least 10 percent of the City's annual unassigned General Fund revenues toward infrastructure projects, disaster preparedness, and advancement of the City's economic development goals. 	City Council, City Manager, and Finance Director.	A	Allocating funds will build financial resources for infrastructure projects that advance the City's economic goals.
<u>Strategic Recommendation #9:</u> Improve Infrastructure <ul style="list-style-type: none"> Support infrastructure improvements including development of a Capital Improvement Plan (CIP) for streets, sidewalks, curbs, gutters, and sewers. 	City Council, City Manager, Assistant City Manager, Public Works, City Engineer.	B Complete a CIP in FY 23/24. Seek funding opportunities to support improvements. See: Priority Implementation Plan.	Supports economic development and downtown revitalization efforts, General Plan requirements, quality of life in the City, tourism, and the esthetic appeal of the community while potentially decreasing liabilities.
<u>Strategic Recommendation #10:</u> Strengthen Community Business Association Relationships <ul style="list-style-type: none"> Facilitate mediation/discussions and better communications with the two San Juan Bautista Community Business Associations. 	City Manager or Assistant City Manager, leadership representatives of both business associations, and possibly outside mediation (done in June 2023)	A	Aligns and brings a more cohesive, efficient, and effective volunteer base to the City.

SECTION 1—INTRODUCTION

Citygate Associates, LLC (Citygate) is pleased to present this high-level organizational review for the City of San Juan Bautista (City). Citygate’s report consists of 9 sections. This introductory section will discuss the structure of Citygate’s report and the project work plan, including the approach and assessment factors.

1.1 **STRUCTURE OF REPORT**

This report consists of the following sections.

Executive Brief	Provides a single-page synopsis of the organizational review’s context, the work performed by Citygate, the City’s five-year strategic planning priorities, and key takeaways and recommendations from the full report.
Executive Summary	Provides a broad outline of major content contained throughout the report—including the 11 overall themes which shaped Citygate’s analysis and recommendations, challenges and opportunities facing the City, highlights from the financial and public safety reviews conducted by Citygate, and a refined list of ten strategic recommendations with a blueprint for implementation presented as a Priority Implementation Plan.
Section 1	Introduction – Introduces the review and explains its scope and objectives, how the work was conducted, and the approach and assessment factors utilized by Citygate.
Section 2	San Juan Bautista’s Unique Situation – Describes the themes heard from the community through interviews and document review. Further describes the organization of City departments, personnel, and services. Challenges and opportunities facing the City are discussed.
Section 3	Overview of City Departments and Employee Survey – Provides a summary and analysis of the results of the Employee Survey conducted by Citygate.
Section 4	Overview of Community Survey Results – Provides a summary and analysis of the results of the Community Survey administered by Citygate.
Section 5	High-Level Financial Review – Provides analysis of the City’s financial situation, including all major funds, fiscal positives, and fiscal issues facing the City.

- Section 6** **High-Level Public Safety Review** – Provides a summary of the City’s public safety services and contracts.
- Section 7** **Strategic Plan Development** – Discusses the strategic planning and development process utilized for this project in addition to other strategic observations and important steps to be taken.
- Section 8** **Progress: Moving Forward** – Provides discussion on implementation strategies, roadblocks and debilitating myths, the executive leadership and communication training held by the City, and best practices for small cities.
- Section 9** **Citygate’s Findings and Recommendations** – Provides a full and sequential list of all findings and recommendations contained throughout this report, curated by section.

This “big picture” overview should be used to inform and guide stakeholders through the process of reading the full report.

1.2 PROJECT WORK PLAN

The scope of the study encompassed the following tasks, which were completed by Citygate.

1.2.1 Core Tasks

- ◆ Held conference call with City Manager to initiate the assessment, coordinate the strategic planning session, and discuss the on-site interview schedule and overall project scope and schedule.
- ◆ Accessed documents relevant to this project on City website and/or as provided by the City Manager. Utilized individual City staff as informational sources throughout the project.
- ◆ Conducted videoconference interviews, beginning with the City Manager and Council members, followed by those the City Manager designated to include key staff, specified community stakeholders, and key business leaders.
- ◆ Completed community and employee surveys to assist in identifying general and operational issues/priorities and the associated development of Council priorities.
- ◆ Performed high-level organizational assessment, including:
 - Assessment of three to five current issues before City and suggested priorities.
 - Recommendations for workload management.

- Suggested topics for further in-depth study as needed.
- ◆ Facilitated a six-hour strategic planning session with City Council, coordinated with the City Manager, covering:
 - Presentation and discussion of community and staff input and feedback from surveys.
 - Assistance in establishing vision and mission statements, values, and an equity statement.
 - Assistance in identifying City strategic goals, up to five core priorities, and objectives.
 - Assistance in developing a process to monitor task completion and identify necessary revisions.
 - Assistance in developing a periodic Strategic Plan updating process.
 - Assistance with developing a Five-Year Strategic Plan document.
- ◆ Prepared a Draft Report for the City Manager to review summarizing the strategic planning process and outcomes and Citygate's high-level findings and recommendations.
- ◆ Based on the results of the Draft Report review process, Citygate completed this Final Report and discussed it with the City Manager via videoconference.

1.2.2 Action and Implementation Plan Workshop Tasks

- ◆ Citygate facilitated a separate on-site implementation planning workshop including an additional Town Hall meeting to accomplish the following:
 - Assist in determining what action tasks are needed to meet the intended goal or objective.
 - Assist with identifying what resource allocations (human, financial, technical) are required for each task.
 - Assist with determining roles and responsibilities for each goal.
 - Assist with accountability tools for objectives.
 - Assist with specific timelines for each task.
 - Assist with development of a communication roll-out plan.
 - Assist with development of an assessment and improvement plan.

- ◆ Citygate prepared an implementation plan tool for the City to use and complete.

1.2.3 Fiscal Review/Update Tasks

- ◆ Conducted kick-off call with City Manager and identified documents for review.
- ◆ Reviewed documents and policies and procedures to compare to prior Citygate report.
- ◆ Conducted interviews with applicable staff to determine issues and validate the information provided.
- ◆ Reviewed the City's use of documents, policies, and procedures and conducted interviews to determine status of prior Citygate report recommendations.
- ◆ Reviewed fiscal information, updated financial spreadsheets, and developed a high-level fiscal review as a part of the strategic planning session.
- ◆ Conducted a fiscal mid-project update videoconference review with City Manager.

1.2.4 Law Enforcement Review and Recommendation Tasks

- ◆ Conducted discovery by researching the City's contract with the Sheriff's Office, the parties involved, and local issues.
- ◆ Participated in one contract meeting with the Sheriff and the City Manager to gather further context and discuss emerging findings and recommendations.

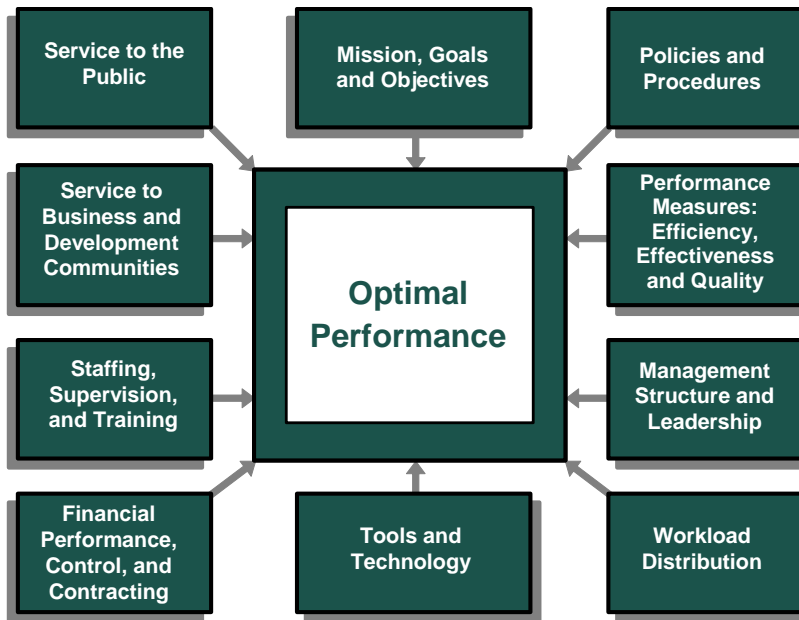
1.2.5 Executive Leadership and Communication Tasks

- ◆ Conducted executive leadership and communication training:
 - Town hall meeting
 - Executive training presentation and facilitation.

1.3 CITYGATE'S PROFILE OF ASSESSMENT FACTORS

In conducting this study, Citygate used the following assessment factors to form the backdrop to the questions and the review of materials and to inform the findings and recommendations.

Figure 1—Citygate’s Profile of Assessment Factors



This page was intentionally left blank

SECTION 2—SAN JUAN BAUTISTA’S UNIQUE SITUATION

2.1 THE STORY AND THE GOOD NEWS

San Juan Bautista is largely an agricultural community, though it also has a strong tourist industry due to its historic and cultural sites. Located within the region known as the largest producer of organic salads in the U.S., San Juan Bautista (Spanish for “Saint John the Baptist”) is located in San Benito County, California. With a current population of approximately 2,089, San Juan Bautista was founded in 1797 by the Spanish under Fermin de Lasuen, with the Mission San Juan Bautista being established in 1812—the 15th of 21 California Missions and also the largest. The community was eventually incorporated in 1869. The City is home to seven National Historic Landmarks including two historic districts listed in the National Register of Historic Places: San Juan Bautista Plaza Historic District and Third Street Historic District. The San Juan Bautista Historical Society was then established in 1965 and is currently located at the Luck Museum.

Just one block from the plaza is Third Street, the City’s main street. Lined with a collection of historic structures, including adobes dating back to the 1800s, the street has many great restaurants and interesting shops. The historic core of town is pedestrian friendly and quiet. You may see chickens wandering the streets or cats sleeping beneath the pews in the mission church. Despite its smaller size, the City has a busy calendar of annual community events, celebrations, and festivals supported by its many caring volunteers and locals.

Today, the City remains rich in agriculture and tourism, with many visitors touring and utilizing the beautiful San Juan Bautista Mission. The City’s population of over 2,000 includes new families as well as many that have lived in the community for over 50 years or are generational residents.

The community has a deep passion and care for their community and its future. While acknowledging that the City has seen some tough times including recent flooding, Citygate found the City representatives interviewed—officials, businesses owners, City staff, residents, volunteers, and commissioners—to be dedicated to securing a sound and prosperous future for the City, its residents, and guests. Many of the City’s people “wear more than one hat” in this endeavor, serving on multiple boards, holding various jobs, and volunteering their time and energy to the City’s greater good.

City personnel are highly commended for their own use of time and limited resources in juggling a wide variety of activities and time pressures. City employees face both the changes taking place within the City organization as well as the changes and challenges within the public perception of them, all of which affect their day-to-day ability to do their jobs.

The good news is that the City possesses a rich resource in the gifted and dedicated people who are both committed to its future and willing to engage in the work necessary to move forward as a more friendly, effective, fiscally stable, and robust community. The City had the courage to

commission this study and carefully examine where it is currently and where it needs to be—an undertaking that not all cities are willing to carry out.

The hopeful outcome of this organizational, financial, and law enforcement review is informed public policy making at its best, along with implementation of Citygate’s recommendations in a way that engages City Council, City staff, City commissioners, the broader community, volunteers, and businesses in the realization of the common good.

2.2 *IMPORTANT CONTEXTUAL THEMES*

To best understand the City’s current challenges and opportunities, it is important to understand the contextual themes identified during the course of this study. These 11 themes are specific to the City, underlying all aspects life and work for City stakeholders:

- Theme 1:** Improvement and protection of water quality.
- Theme 2:** Investment in infrastructure improvements including sewer, roads, streets, sidewalks, and curbs.
- Theme 3:** Establishment of appropriate staffing levels.
- Theme 4:** Implementation of thoughtful, smart economic development—specifically in the Downtown area—through General Plan amendments, discussions and policies related to growth, zoning, and conditions of approval.
- Theme 5:** Enhancement of business partnerships, incentives, communications, and process improvements.
- Theme 6:** Enhancement of recreation activities for all with a focus on the youth and seniors.
- Theme 7:** Revitalization of the Downtown area including addressing cleanliness, vacant lots, parking, esthetics, lighting, landscaping, and signage.
- Theme 8:** General enhancement of communications with City, volunteers, messaging, updates, website, and other marketing opportunities.
- Theme 9:** Public safety review including Sheriff’s Department partnership, code enforcement, and current security services.
- Theme 10:** Disaster preparedness related to flooding, fires, state mandates, etc.
- Theme 11:** Fragmentation of the San Juan Bautista Community Business Association into two competing groups.

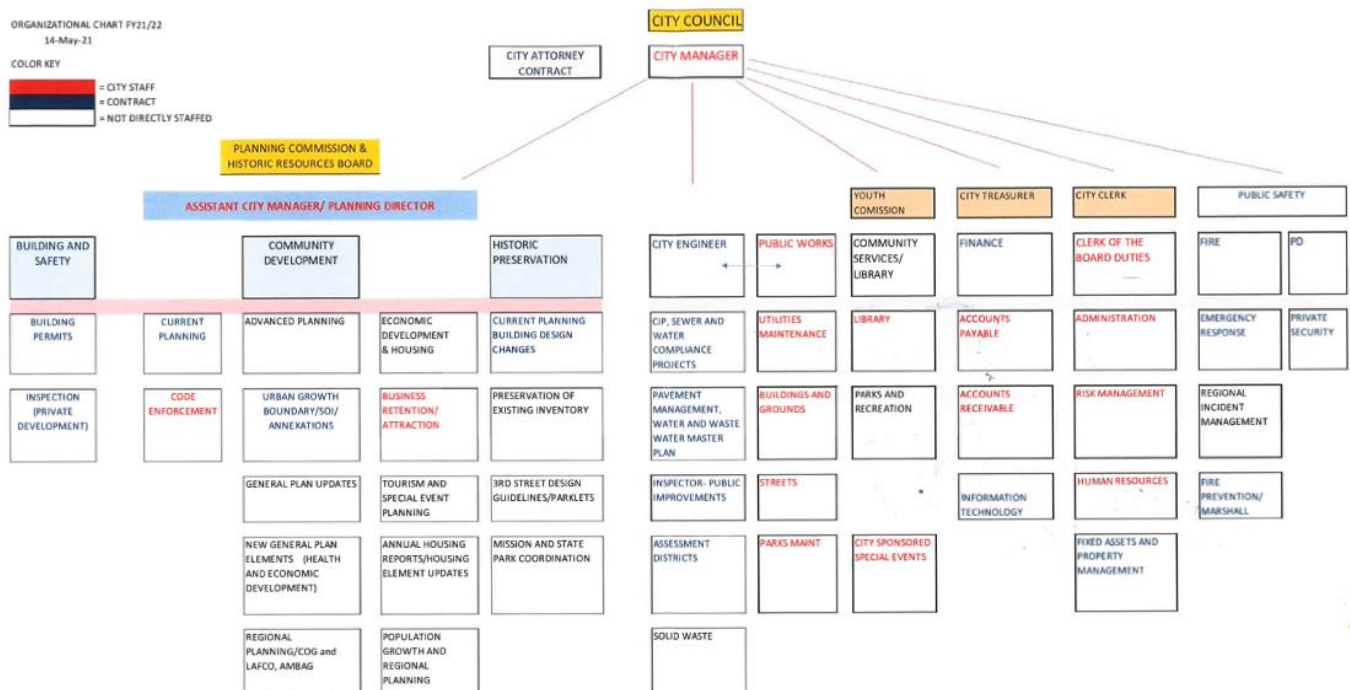
2.3 OVERVIEW OF CITY DEPARTMENTS AND SERVICES

The City functions as a non-full-service city—in partnership with the County Sheriff’s Department for public safety services, contracted services for security in the “observe and report” capacity, and contracted services with the City of Hollister for fire protection efforts. The City provides limited services related to planning and building, engineering, public works, parks, water and wastewater utilities, and a library.

2.3.1 Current Organizational Structure

The following figure reflects the City’s organizational structure as of FY 21/22.

Figure 2—City of San Juan Bautista Organizational Chart (FY 21/22)



As the figure shows, City staff is small, with a significant amount of work being completed via contract, and many other City services not being directly staffed.

As of the time of this review, Citygate is assisting the City in the creation of an updated chart to reflect the organizational composition of the City as of summer 2023.

2.4 THE CHALLENGE FACING A SMALL CITY

Small cities are susceptible to disruptions in service delivery and project delays when experiencing high turnover or staffing reductions. Larger cities have more redundancy and capacity built into individual staff roles because they have a greater number of personnel who can help pick up and continue projects or absorb additional work during recruitment efforts. San Juan Bautista has no redundancy built into its staffing, with only a single occupant in most job titles. Vacancies in any position mean that the work previously performed by that position either goes unaddressed when it is vacant or displaces the duties of another staff member.

The amount of work conducted by the small staff of the City is remarkable, and the work, overall, is performed in a professional manner. City staff is generally keeping up with a number of regulatory requirements, and the City has adopted long-term planning documents, such as the General Plan, a new Five-Year Priority Implementation Plan (included with this report), and other required documents. Citygate found these to be of good quality. The challenge facing the City is to provide City staff with the resources necessary to implement these plans and to ensure that all items receive proper attention—such as regular rate and fee studies and annual reviews of rates for water and sewer services—with the intent to provide the rate revenues necessary to construct and repair City street, water, and sewer infrastructure and ensure that City infrastructure provides for development to take place within the corridors and sites the City intends to be developed.

SECTION 3—EMPLOYEE SURVEY RESULTS

3.1 EMPLOYEE SURVEY ANALYSIS

Citygate conducted an internet-based employee survey between March 28, 2023 and April 5, 2023. Based on information provided by the City, all employees were invited to participate in this survey. The availability of the survey was announced via direct email invitations to staff. In total, there were 12 completed surveys, with an employee response rate of 75 percent. Complete Employee Survey results are included as **Appendix B** to this report.

Details of the deployment are shown in the following table.

Table 2—Employee Survey Summary

Launch Date	March 28, 2023
Close Date	April 5, 2023
Survey Recipients	16
Total Responses	12

Apart from two basic employee classification questions, the survey consisted mostly of closed-ended statements with which employees could rate their level of agreement, and eight open-ended questions for employees to provide a written response. For closed-ended statements, respondents rated their level of agreement from “Strongly Agree” to “Strongly Disagree” or “N/A or Don’t Know.”

3.1.1 Organization of Analysis

The survey results are organized in the following order.

Summary of Results

- ◆ The five statements receiving the overall highest and lowest mean score.

Response for Each Statement

- ◆ All the survey statements are presented with the calculation of the mean and standard deviation, along with the percentage of each type of response.

Open-Ended Responses

- ◆ Responses to the open-ended questions have been summarized to protect the identity of employees participating in the survey.

3.1.2 Definition of Terms

The following terms are encountered in assessment of the survey results.

Mean

An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.

Mode

The response value that occurs most frequently.

Standard Deviation

Standard deviation shows how spread out the responses are from the arithmetic mean. Technically, 68 percent of responses can be found within plus or minus one standard deviation of the mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists among employees regarding the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists among employees regarding the statement.

3.2 SUMMARY OF RESULTS

3.2.1 Five Highest Rated Statements

The following table shows the five highest-rated (most agreed to) employee survey statements presented in descending order with the calculation of the mean and standard deviation of responses, along with the percentage of each type of response, including “Don’t Know or N/A.” The lowest degree of agreement is -2 (Strongly Disagree). The highest degree of agreement is 2 (Strongly Agree). Neutrality is represented by 0.

Table 3—Employee Survey –Most Agreed to Statements Regarding Working for the City

Statement	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%
I am treated fairly.	1.2	0.8	0.0%	0.0%	25.0%	33.3%	41.7%	0.0%

The following table shows the five lowest-rated (least agreed to) employee survey statements presented in ascending order with the calculation of the mean and standard deviation of responses, along with the percentage of each type of response.

Table 4—Employee Survey – Least Agreed to Statements Regarding Working for the City

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 performance evaluations I have received have been completed in a timely manner and according to schedule.	-0.2	1.2	8.30%	25.00%	25.00%	8.30%	8.30%	25.00%
I have sufficient opportunities for advancement and promotional upward mobility.	0	1.3	16.70%	0.00%	58.30%	0.00%	16.70%	8.30%
Compared to similar organizations, I am satisfied with the salary and benefit package I receive.	0	1.4	25.00%	0.00%	41.70%	16.70%	16.70%	0.00%
Clear, written policies and procedures are in place to assist me in the performance of my job responsibilities.	0	1	8.30%	16.70%	50.00%	16.70%	8.30%	0.00%
There is good coordination of projects and functions between my department and other departments in the city.	0.2	1.2	16.70%	0.00%	41.70%	33.30%	8.30%	0.00%
The current compensation and promotion process rewards me for higher-than-average levels of performance.	0.2	1.4	16.70%	8.30%	25.00%	25.00%	16.70%	8.30%

3.3.2 Responses for Each Statement

The following table shows all the employee survey statements with the calculation of the mean and standard deviation of responses, along with the percentage of each type of response.

Table 5—Employee Survey – Responses for Each Statement

Statement	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%

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
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%
I am treated fairly.	1.2	0.8	0.0%	0.0%	25.0%	33.3%	41.7%	0.0%
The management of my department contributes to the productivity of the department.	1.1	0.8	0.0%	0.0%	25.0%	41.7%	33.3%	0.0%
Service to the public is strongly emphasized in my department.	1.1	0.9	0.0%	8.3%	8.3%	50.0%	33.3%	0.0%
I am given opportunity to improve my skills.	1.1	0.5	0.0%	0.0%	8.3%	75.0%	16.7%	0.0%
I am adequately recognized for my good work.	1.1	0.8	0.0%	0.0%	25.0%	33.3%	33.3%	8.3%
Overall, I believe the decision-making within my department is consistent with City Council priorities.	1.0	0.7	0.0%	0.0%	25.0%	50.0%	25.0%	0.0%
Leadership realizes that "perfection" is unachievable and has realistic expectations for measuring employee performance.	1.0	0.7	0.0%	0.0%	16.7%	50.0%	16.7%	16.7%
We resolve conflict honestly, effectively, and quickly.	0.9	1.4	8.3%	8.3%	8.3%	25.0%	41.7%	8.3%
The management of my department listens to employees.	0.9	1.0	0.0%	8.3%	25.0%	33.3%	33.3%	0.0%
Overall, I feel the City organization is successful.	0.9	0.7	0.0%	0.0%	25.0%	50.0%	16.7%	8.3%
Overall, I believe my department's performance is above average.	0.9	0.8	0.0%	0.0%	33.3%	41.7%	25.0%	0.0%
My manager/supervisor keeps commitments they make to me.	0.9	0.7	0.0%	0.0%	25.0%	50.0%	16.7%	8.3%
My manager/supervisor encourages my professional development.	0.9	0.9	0.0%	8.3%	16.7%	41.7%	25.0%	8.3%
We have a set of values and beliefs that guides our decisions about work.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
Resources and equipment needed for the performance of my job tasks are properly maintained.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
My manager/supervisor encourages teamwork in my department.	0.8	1.1	8.3%	0.0%	25.0%	41.7%	25.0%	0.0%

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
My department is an inspiring place to work.	0.8	1.5	16.7%	0.0%	8.3%	33.3%	41.7%	0.0%
I believe the workload within my department is equally divided among my co-workers.	0.8	1.1	0.0%	16.7%	16.7%	41.7%	25.0%	0.0%
I believe opportunities for employee involvement in goal setting, decision-making, and other aspects of my work are adequate.	0.8	0.9	0.0%	8.3%	25.0%	41.7%	25.0%	0.0%
I believe my department is an efficient, well-run organization.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
I believe my department has a solution-oriented philosophy.	0.8	1.1	0.0%	16.7%	16.7%	33.3%	33.3%	0.0%
I believe my department functions proactively and does not simply react to crises.	0.8	1.1	0.0%	16.7%	16.7%	41.7%	25.0%	0.0%
I am actively encouraged to try creative approaches to my work, even to the point of taking the initiative.	0.8	0.9	0.0%	8.3%	25.0%	41.7%	25.0%	0.0%
I agree with the mission, vision, and values statement that guides all City staff members.	0.8	1.1	8.3%	0.0%	25.0%	41.7%	25.0%	0.0%
The internal practices of the City support my ability to deliver a high standard of quality to our customers.	0.7	0.9	0.0%	8.3%	33.3%	41.7%	16.7%	0.0%
The goals and objectives of my department are reasonable.	0.7	0.8	0.0%	8.3%	25.0%	58.3%	8.3%	0.0%
Our staff meetings are filled with open and honest participation.	0.7	1.1	0.0%	16.7%	25.0%	33.3%	25.0%	0.0%
I receive clear and specific direction from my supervisor(s) regarding my work assignments.	0.7	1.2	8.3%	0.0%	33.3%	33.3%	25.0%	0.0%
Given the level of staffing within my department, the goals and objectives of the department are achievable.	0.7	0.9	0.0%	8.3%	33.3%	41.7%	16.7%	0.0%
The City has an effective process for listening to community or customer concerns.	0.6	1.0	0.0%	16.7%	25.0%	41.7%	16.7%	0.0%
Leaders handle human errors on the part of staff in a constructive and respectful manner.	0.6	1.4	16.7%	0.0%	16.7%	41.7%	25.0%	0.0%
I understand my manager's/supervisor's expectations of the job I perform.	0.6	1.2	8.3%	0.0%	41.7%	25.0%	25.0%	0.0%

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
Generally, I have adequate decision-making authority	0.6	1.2	8.3%	8.3%	16.7%	50.0%	16.7%	0.0%
Written policies and procedures are available and consistently followed in day-to-day operations.	0.5	0.8	0.0%	8.3%	41.7%	41.7%	8.3%	0.0%
The established goals and objectives of my department have been clearly communicated to me.	0.5	1.0	0.0%	16.7%	33.3%	33.3%	16.7%	0.0%
Regulations and/or policies I am responsible for administering are reasonable and enforceable.	0.5	1.2	16.7%	0.0%	8.3%	66.7%	8.3%	0.0%
My manager/supervisor values my time as much as their own.	0.5	1.2	0.0%	25.0%	25.0%	25.0%	25.0%	0.0%
I believe that my department's approach to employee discipline is fair and evenly administered.	0.5	1.3	16.7%	0.0%	16.7%	50.0%	16.7%	0.0%
There is an effective flow of information between managers/supervisors and staff within my department.	0.4	1.3	8.3%	16.7%	25.0%	25.0%	25.0%	0.0%
The City does a good job communicating about changes or decisions that affect employees?	0.4	1.1	8.3%	0.0%	50.0%	25.0%	16.7%	0.0%
I have sufficient resources to complete my work, such as office space, computers, etc.	0.4	1.3	8.3%	16.7%	25.0%	25.0%	25.0%	0.0%
I feel that I have sufficient authority to uphold recommendations and policies when challenged.	0.4	1.2	8.3%	8.3%	33.3%	33.3%	16.7%	0.0%
I believe that customers perceive that my department is consistently doing a good job.	0.4	0.8	0.0%	8.3%	50.0%	33.3%	8.3%	0.0%
The equipment and technology used in my department are up to date.	0.3	1.1	8.3%	8.3%	33.3%	41.7%	8.3%	0.0%
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%

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
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%

3.2.3 Open-Ended Questions

The following tables show summaries of responses to the open-ended employee survey questions. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response. The following eight questions will show what the top two responses were for each (in the case of ties, more responses will be shown). Please see the full survey results in **Attachment B** for details.

Open-Ended Question #1: Where could the City strengthen partnership with the community?

3	The City should improve the way it listens to residents or listen to residents more frequently.
2	The City should ensure that Council Members adhere to the same regulations that the public is required to adhere to or take accountability for its actions.

Open-Ended Question #2: What does a good quality of life mean to you?

5	Job and financial stability contribute to a good quality of life.
5	A safe, peaceful, and/or supportive environment, both at work and in the community, contribute to a good quality of life.

Open-Ended Question #3: What existing activities and processes are functioning well and should be continued that currently support your department and the City's goals?

2	Staff parties and events.
1	Communication with City Hall via emails and phone calls.

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Open-Ended Question #4: What processes or activities should be discontinued or are no longer providing value?

2	None.
2	Don't know.

Open-Ended Question #5: If there was one thing you could change and or would like to see changed, what would it be?

1	Current engineering lacks the skills to complete Public Works projects.
1	None
1	Staff meetings are currently just a review of the City Council meetings. It would be more useful to discuss tasks and work.
1	Having a full-time manager.
1	Being able to attend meetings remotely.
1	Displaying a sign at the front counter that encourages customers to treat employees with respect, and that cussing and threatening staff will not be tolerated.
1	Enforcing all rules equally regardless of political position or friendships.
1	There would be better communication and more clear job responsibilities.
1	Records should be preserved better, which cannot happen because the building has been outgrown.
1	Having better equipment and vehicles.
1	Having input into decisions.

Open-Ended Question #6: What is the biggest strength of the organization?

4	Our employees and our willingness to help one another (Teamwork).
2	Our residents.

Open-Ended Question #7: What do you think are the biggest challenges in the community right now?

2	The poor condition of the streets.
1	Completing important infrastructure.
1	Flooding and global cooling.
1	Politicians acting overly entitled, and/or yell or complain.
1	Security.
1	Unreasonable expectations.
1	Increasing revenue from new projects because the community does not want change.
1	Traffic enforcement has been too lax.
1	Communicating to residents in a way that helps them to understand.
1	The community and the Councilmembers not trusting City staff.
1	Low budgets.
1	Water and sewer rate increases.

Open-Ended Question #8: Please add any specific comments or suggestions you may have for improving services in your department.

All feedback related to management styles, communications, office hours, team-building, and staffing levels.

1	Upper management should not micromanage.
1	Upper management should take responsibility for decisions.
1	Pavement
1	Office hours
1	We need a full-time supervisor or manager. 20 hours per week is insufficient.
1	In light of our current staffing, business hours should be from 9:00am to 1:00pm, Monday through Friday.
1	We should improve communication with all service providers.
1	The City is a small jurisdiction which sometimes makes it difficult for Council to act without affecting someone they know. Sometimes they rescind their actions for fear of "stepping on toes."
1	Team-building activities
1	Inventory control

SECTION 4—OVERVIEW OF COMMUNITY SURVEY RESULTS

Community surveys are a means to confidentially measure how residents of a city feel, and what their perceptions are regarding various city services, priorities, and ultimately, a city’s direction or trajectory. As such, community surveys often play a pivotal and critical role in any data-gathering efforts during a period of assessment or analysis, helping to determine a community’s needs and attitudes toward city staff, functions, and progress. Surveys can represent a cost-effective mechanism for gathering data to assist in setting goals and establishing objectives, as they bring awareness to city officials regarding how they are measuring up in the eyes of their communities, and can also serve as a form of check-and-balance to support accountability, collaboration, and progress. While the desire is to hear from all constituents, surveys offer but one process for gathering data.

Following are the results from San Juan Bautista’s confidential Community Survey, which yielded a high percentage of responses for a small city.

4.1 COMMUNITY SURVEY ANALYSIS

Citygate conducted an internet-based community survey between March 27, 2023 and April 27, 2023, for the San Juan Bautista community. The availability of the survey was announced via direct email invitations and hard copies were available at both City Hall and the San Juan Bautista Library. The survey was available in English and Spanish. In total, there were 158 completed surveys, with a community response rate of approximately seven percent. Complete Community Survey results are included as **Appendix C** to this report.

Details of the deployment are shown in the following table.

Table 6—Community Survey Summary

Launch Date	March 27, 2023
Close Date	April 27, 2023
Total Responses	158

Apart from four basic community member informational questions, the survey consisted of closed-ended statements for which community members could (1) rate their level of agreement from “Strongly Agree” to “Strongly Disagree” or “N/A or Don’t Know,” (2) rate their level of satisfaction from “Very Satisfied” to “Very Dissatisfied” or “N/A or Don’t Know,” and (3) rate their overall assessment of general, Citywide operations from “Very Good” to “Very Bad” or “N/A or Don’t Know.” The survey concluded with open-ended questions for which community members were to provide written responses.

4.1.1 Organization of Analysis

The results for the survey are organized in the following order.

Basic Information Results

- ◆ The raw data for all community informational questions included in the survey.

Degree of Agreement / Level of Satisfaction / General Assessment Results

- ◆ Scores for each closed-ended statement, organized from highest to lowest mean score.

Open-Ended Questions – Response Summary

- ◆ The questions for which community members provided an open-ended response, with answer themes arranged by frequency.

4.1.2 Definition of Terms

The following terms are encountered in assessment of the survey results.

Mean

An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.

Standard Deviation

Standard deviation tells how spread out the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists regarding the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists regarding the statement.

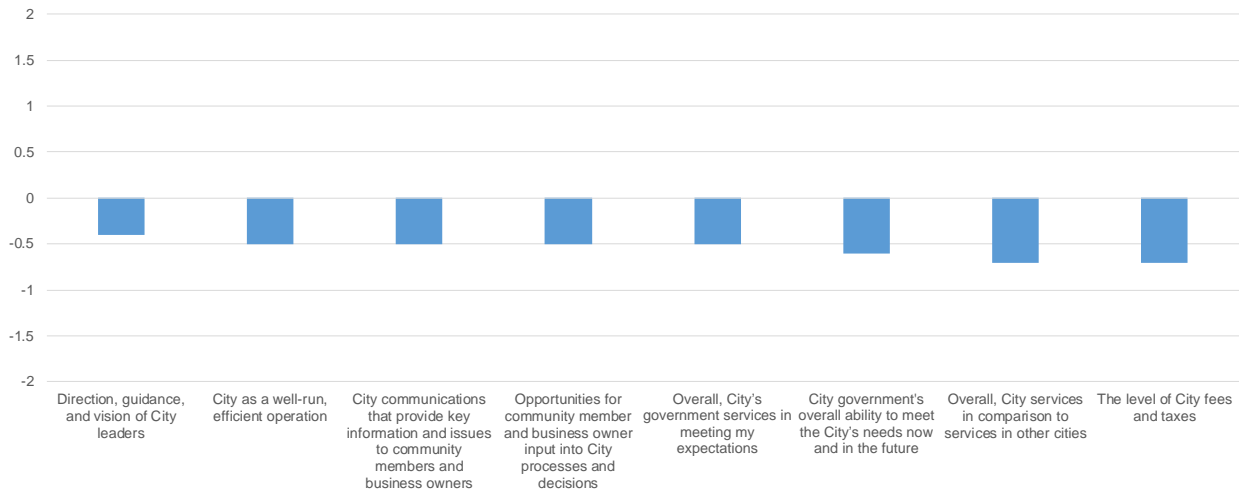
4.2 SUMMARY OF RESULTS

4.2.1 Degree of Agreement, Satisfaction, or Assessment Statement Results

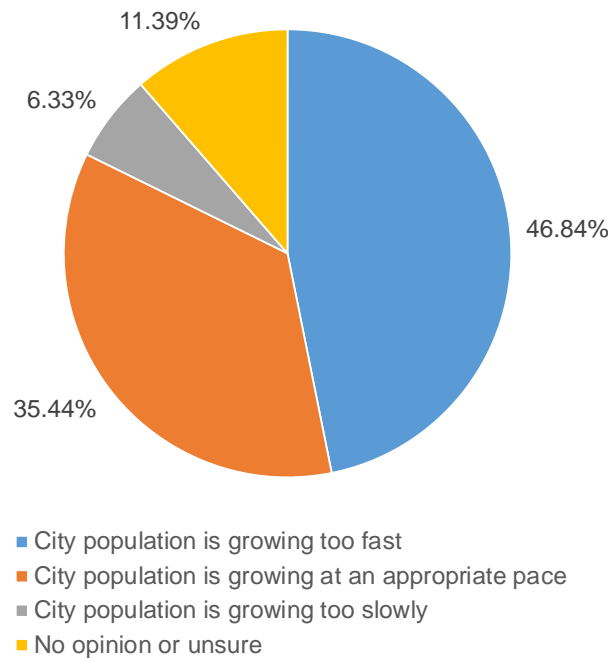
Results for each statement are organized from highest to lowest by mean score. The highest possible agreement is 2 (Strongly Agree). The lowest possible agreement is -2 (Strongly Disagree). A score of 0 represents neutrality.

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

Please rate the following areas that address general, Citywide operations from "Very Good" to "Very Bad" or "N/A."



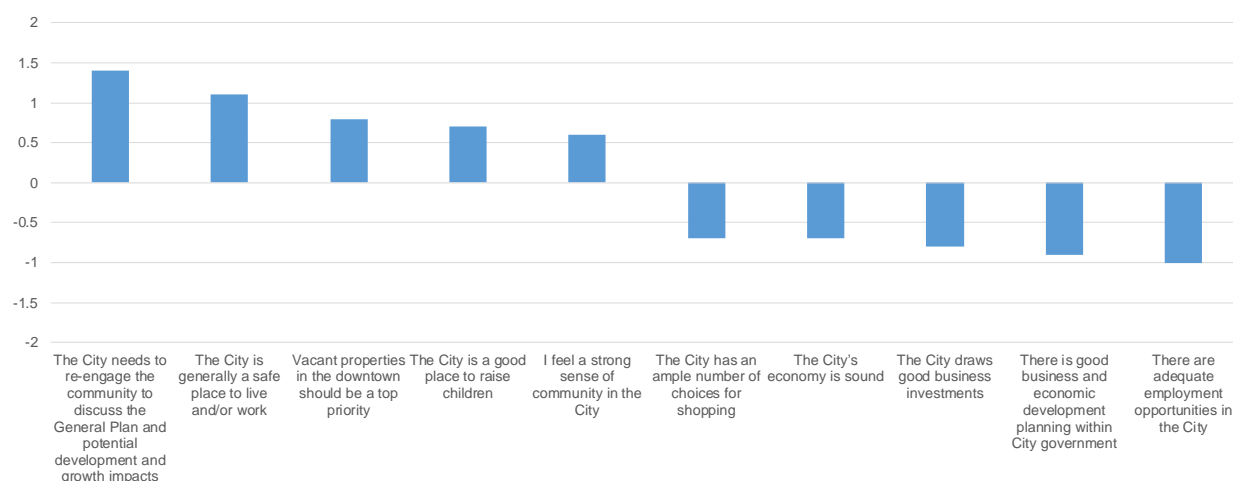
Please evaluate the pace of the City's population growth.



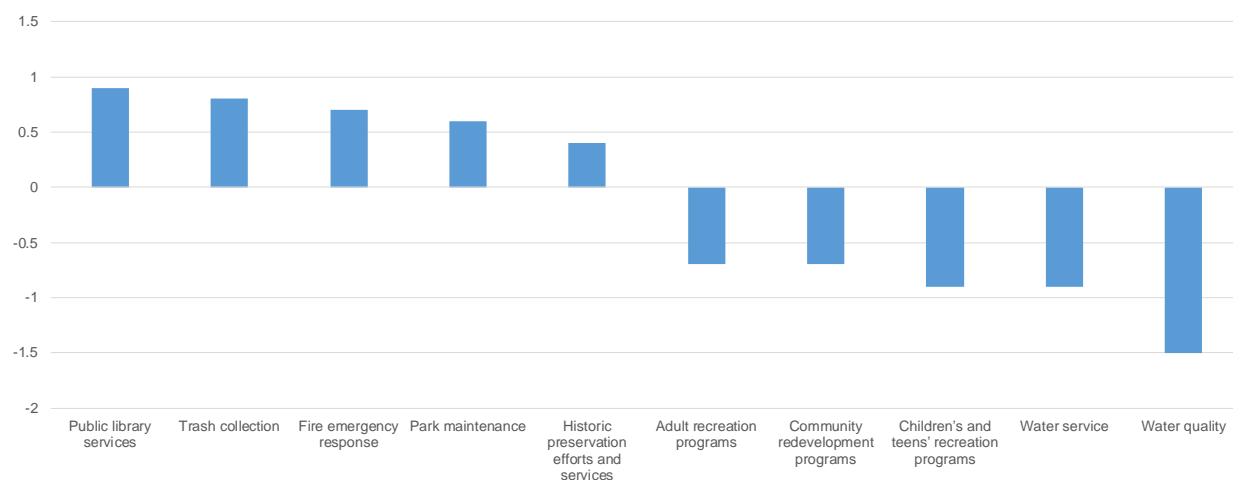
The mean score of community responses to the following statements are represented graphically in the two following images. The top 5 most agreed-to statements are listed first, followed by the 5 least agreed-to statements.

City of San Juan Bautista, CA
High-Level Organizational, Financial, and Law Enforcement Review

*Please rate your **LEVEL OF AGREEMENT** with the following statements from "Strongly Agree" to "Strongly Disagree" or "N/A."*



*Please rate your **LEVEL OF SATISFACTION** with the following City services from "Very Satisfied" to "Very Dissatisfied" or "N/A."*



4.2.2 Open-Ended Questions – Response Summary

The following tables show a summary of responses to the open-ended community survey questions. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response.

Open-Ended Question #1 (Top 5 Responses): In your opinion, what are the top five priorities that should be focused on by the City in order of importance?

Respondents were asked to prioritize their responses, with responses being weighted based on priority. The first item mentioned is given a 5-point weight; the second item mentioned is given a

4-point weight; etc., until the fifth item mentioned by respondents is not weighted. *Thus, the weighted count factors in the importance of items early in respondents' priority order. Of 58 items, the top 21 are charted below.*

Table 7—Community Survey Summary

Count	Weighted Count	Item
50	210	Water quality
44	143	Roads and streets
25	86	Economic development
19	76	Water cost
23	63	Downtown improvement
17	60	Business friendliness
16	57	Slow development/growth
18	55	City cleanliness, empty lots, blight, trash, etc.
19	53	Sidewalks and curbs
14	52	Sewer service quality
17	50	Schools
13	43	Responsiveness/Communication with citizens or businesses
14	41	Preserving and maintaining historic buildings and esthetic
11	39	City staff capability
14	37	Youth recreation opportunities
12	35	Traffic and traffic enforcement
11	35	Crime and safety
11	35	Police
7	34	Water (unspecified)
9	28	Tourism
10	26	Expanded shopping and dining options

Open-Ended Question #2 (Top 5 Responses): What do you like best about the City of San Juan Bautista?

Count	Item
43	Small town feel
28	Sense of community
18	Historic allure
17	Quiet
14	Safety

Open-Ended Question #3 (Top 5 Responses): What is your current biggest concern about the City of San Juan Bautista?

Count	Item
21	Water quality
18	Staff or leadership capability
16	Growing too fast
9	Water cost
7	Infrastructure

Preferred Method of Contact for Community Members

Count	Comment
68	Email newsletter
53	Printed newsletter
51	City website
47	City Manager's Mission Village Voice article
35	Facebook

4.3 COMMUNITY STAKEHOLDERS INTERVIEW DATA

Over the course of three days in March 2023, Citygate's project manager interviewed 22 individuals including City Council, City commissioners, volunteers, business owners, and residents on-site and in person. Following (in order of priority) are the top concerns and themes that arose from those conversations. An in-depth comparison of the community and employee surveys and stakeholder interview data was presented during the public City Council strategic session on April 14, 2023, and the community town hall held the following day.

Core concerns included communications, economic development, disaster preparedness, efficiencies, and recreation.

- ◆ 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 updates and mixed-use new businesses, revitalization, retention, parking, need for a chamber of commerce) [13]
- ◆ Disaster preparedness plan (fires, flooding, water safety, state mandates) [10]
- ◆ Efficient practices (permitting and over all City processes) [7]
- ◆ Youth and senior activities and recreation [5]
- ◆ County partnership is challenged [4]
- ◆ Fiscal stability (including needing a fee study) [2]
- ◆ Code enforcement and public safety [2]

This page was intentionally left blank

SECTION 5—HIGH-LEVEL FINANCIAL REVIEW

As is the case for numerous cities, the effects of the COVID-19 pandemic are beginning to dissipate; however, they have not been eliminated. According to information provided by City staff, sales tax revenue collections in FY 22 (excluding Measure G sales tax activity) have increased almost 17 percent when compared to pre-COVID-19 FY 19 levels. This seems to indicate that the City is recovering from the economic impacts of the pandemic. Per City staff, however, some City businesses are still experiencing lingering impacts. Citygate is uncertain as to how much, if any, of the sales tax growth previously mentioned is related to collection adjustments, delinquencies, or other anomalies.

Some agencies hire sales and property tax consultants to provide a detailed analysis of sales and property tax activity to determine anomalies versus actual growth and help fine-tune growth estimates. To date, the City has chosen not to contract for this resource.

5.1 BY THE NUMBERS

The following figures (5, 7, and 8) reflect a comparison of fiscal activity for the major funds—General (excluding Measure G activity), Water, and Sewer—between FY 19/20 and the current budget for FY 22/23. Also shown (Figure 6) is a comparison of General Fund tax-related revenues actually collected from FY 18/19 through FY 21/22.

The actual amounts shown in the figures for the General Fund, which were reflected in the City’s audited financial statements, were revised to remove fiscal activity related to Measure G—the sales tax measure approved by voters in 2018, which auditors had combined into the General Fund. It should be noted that, per the City’s accounting system, fiscal activity related to Measure G is recorded in a separate fund to meet the requirements of the legislation.

Given that Measure G proceeds are restricted to certain functions, the auditors’ decision to combine Measure G activity with the General Fund in the audit serves to artificially inflate General Fund unassigned reserves. Citygate recommends that auditors be directed to segregate Measure G fiscal activity in the audited financial statements while maintaining Generally Accepted Accounting Principles (GAAP).

Figure 3—Multi-Year Actual – General Fund

City of San Juan Bautista
Multi-year Actual - General Fund

Actual per audited financial statement documents

	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	2,150,415	2,272,678
Ending Unassigned Fund Balance	2,658,489	2,150,415	2,272,678	2,585,264 Est
Cash Balance (unrestricted)	3,504,097	2,050,164	2,802,922	3,115,508 Est

As the figure shows, the City has begun to recover from the most pronounced effects of COVID-19, and has attained a fiscally healthy unassigned fund balance in the General Fund of approximately \$2.3 million as of FY 21/22—which is estimated to grow to approximately \$2.6 million in FY 22/23 if budget estimates are realized. The FY 22 Annual Comprehensive Financial Report (ACFR) reflected a General Fund unassigned fund balance of approximately \$3 million; however, the audit amount reflects a fund balance of approximately \$738,000 from Measure G funds, which have spending restrictions. The amounts reflected in Figure 5 adjust for Measure G funds. Additionally, these unassigned reserves are supported by cash.

Figure 4—General Fund Tax-Related Revenues

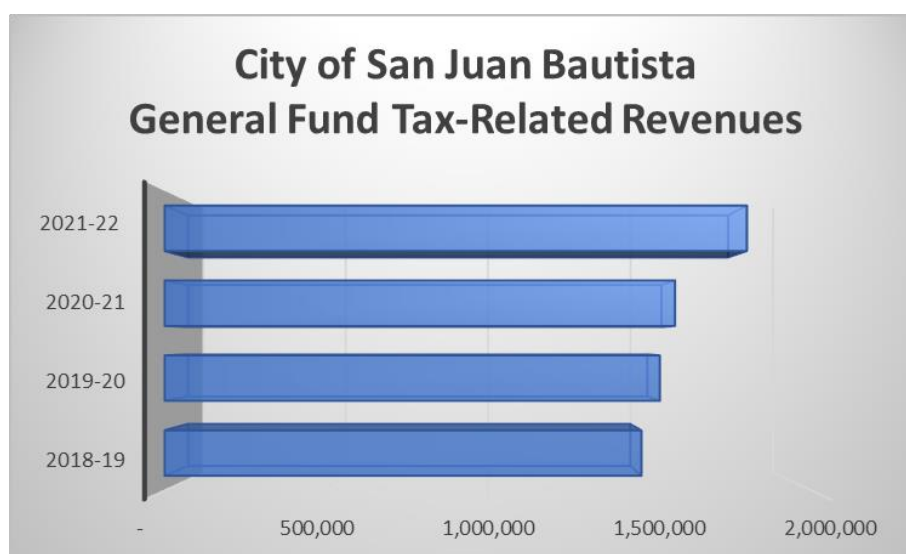


Figure 5—Multi-Year – Water Funds

City of San Juan Bautista
Multi-year - Water Funds

Actual per audited financial statement documents

	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	Est
Cash Balance (unrestricted)	795,730	663,383	1,123,068	1,531,636	Est

Figure 6—Multi-Year – Sewer Funds

City of San Juan Bautista
Multi-year - Sewer Funds

Actual per audited financial statement documents

	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	Est
Cash Balance (unrestricted)	1,255,850	753,526	241,198	502,287	Est

As can be seen in figures 7 and 8, the City's water and sewer functions have been in a weak financial position in the past; however, due to recent rate increases and the acquisition of various grants and loans, the fiscal conditions of both the water and sewer functions are expected to improve in FY 23/24.

5.2 FISCAL POSITIVES

During its review, Citygate identified several fiscal positives implemented by the City that have helped to improve its overall fiscal health. The following is a discussion of some of these items.

5.2.1 Specific Items

Fiscally Healthy General Fund

According to the FY 22 audit report, the City's General Fund unassigned fund balance totaled approximately \$3.01 million. However, in discussions with City staff, and subsequent to the initial strategic planning workshop, it was determined that approximately \$738,405 (rather than approximately \$400,000) of this amount was the result of net proceeds from Measure G. On a related note, the City has received notice that Measure G allocations to the City will be deferred until FY 28. This is due to the fact that Measure G Tier II allocations have been front-loaded through FY 24. From FY 25 through FY 28, Tier I Measure G will be allocated with all Measure G funds collected to make up for the Tier II front-loading.

After netting out the applicable Measure G proceeds, the remaining FY 22 unassigned fund balance in the General Fund was approximately \$2.3 million. This balance represents approximately 9.2 months of operating cushion. The City has a very well-written reserve policy which establishes the unassigned fund balance at a minimum level of 20 percent (2.4 months). Based on FY 22 operations, this would equate to approximately \$585,000. The City's reserve policy also reflects how any unassigned fund balance in excess of the 20 percent minimum should be allocated. Per City policy, the components of distribution of excess unassigned fund balance include:

- ◆ Offsetting projected future deficits
- ◆ Addressing anticipated intergovernmental fiscal impacts
- ◆ Addressing one-time funding, non-recurring needs
- ◆ Addressing capital improvement projects
- ◆ Paydown of long-term debt.

The Government Finance Officers Association (GFOA) best practice recommends an operating cushion of at least 2 months.¹ As of FY 22, General Fund reserves exceed both the City reserve policy and GFOA best practice recommendations.

Overall FY 22 General Fund revenues, net of Measure G activity, increased by approximately 38.5 percent compared to pre-COVID-19 levels—an amount driven primarily by tax-related General

¹ GFOA fund balance guidelines: <https://www.gfoa.org/fund-balance-guidelines-general-fund>

Fund revenues, which grew by approximately 22.1 percent. In contrast, FY 22 General Fund expenditures only grew by approximately 23 percent compared to pre-COVID-19 levels.

Water Rate Increase – August 2022

Although rate increases are usually unpopular, appropriate increases in rates are crucial in ensuring a fiscally strong and reliable water operation. Based on a rate study commissioned by the City, water rates were increased effective November 2022, with automatic increases through FY 26 to improve the fiscal health of the water operations function. As a result of this and other fiscally prudent measures, as of FY 22, the Water Fund had unrestricted reserves of approximately \$900,000, or 8.8 months of expenditures (based on FY 22 operations).

The City's reserve policy calls for three separate reserves:

1. **Emergency Operating Reserve** – equivalent to 90 days of operations (\$304,500 per FY 22 operations).
2. **Emergency Capital Reserve** – budgeted at \$57,000 per year until \$171,000 is attained.
3. **Rate Stabilization Fund Reserve** – equivalent to five percent of the prior year's water operating revenues, which would equate to approximately \$70,300 for FY 22.

GFOA best practice recommends a 1.5-month minimum working capital reserve or operational reserve for enterprise funds.² Consequently, the City's water operation seems relatively strong, meeting both the City's current policy and GFOA best practice. Of course, this does not take into account large capital improvements that may be desired as a result of the strategic planning process.

Sewer Rate Increase – December 2021

As was the case with the previously discussed water rate increase, the City implemented a much-needed sewer rate increase to help stabilize operations and improve service provision to customers. Other measures initiated by the City include acquisition of various loans and grants to complete the Force Main to Hollister Project,³ which will allow transportation of City sewage to the Hollister sewage treatment plant for more economic processing, thus helping to minimize future cost increases related to sewage treatment. These loans/grants consist of approximately \$8 million in grants and \$10 million in a USDA low-interest loan in FY 23/24. The rate increase is intended to cover the expected debt service on the loan at 2.5 percent over a 40-year period. Although FY 22

² <https://www.gfoa.org/materials/working-capital-targets-for-enterprise-funds>

³ https://www.san-juan-bautista.ca.us/departments/planning/sanitary_sewer_force_main_to_hollister_project.php

financial activity reflected a negative unrestricted reserve, this is primarily caused by the advancement of funds totaling approximately \$1 million to design and initiate the Force Main to Hollister Project—funds which will be reimbursed from the various grants and loans acquired for the project, anticipated to be received in early FY 24. This infusion will result in a substantial improvement in the fiscal health of the Sewer Fund.

Hiring of Assistant City Manager to Focus on Economic Development

In FY 21, the City hired an Assistant City Manager to manage Community Development work including long-range planning and historic preservation, as well as to provide an increased focus on economic development. This action has produced the reactivation of the Economic Development Citizens Advisory Council to assist with the generation of a comprehensive Economic Development Plan for the City. The Plan consists of writing an Economic Development Strategy for the City including identification of economic development opportunities, streamlining City processes related to economic development, review and analysis of the General Plan and other specific plans, and fees and changes to increase overall efficiency and effectiveness related to economic development within the City to benefit its residents.

Implementation of a New Financial System

A critical factor of successful operations for any agency is an effective and efficient financial system. The public and City leaders rely on accurate and timely fiscal information to make good operational decisions to benefit the City as a whole. In January 2023, the City implemented the MIP financial system for the current QuickBooks financial system. Regardless of the size of an agency, the effective implementation of any new financial system is not an easy task. It requires the review of operational procedures, practices, and policies to identify operational inefficiencies, errors, and ways to take advantage of new capabilities included in the new system, such as increased internal control features to help minimize potential fraud risks. The City has revised its chart of accounts, which form the base of any financial system. This was a time-consuming process which caused some delays in some of the fiscal activities of the City. According to City staff, these issues will be addressed by the end of the fiscal year and the City will benefit from a more robust and comprehensive financial system that will increase operational efficiency and monitoring, transparency, and internal control.

5.3 FISCAL ISSUES

Citygate also identified potential fiscal-related operational issues during its review. The project scope consisted of a high-level fiscal review, so the following items (as is the case with the fiscal positives discussed above) are not intended to be an all-inclusive list. Rather, they reflect some of the more obvious areas identified.

5.3.1 Specific Items

Current Fees and Charges

According to City staff, the City's fees and charges have not been reviewed or adjusted for several years. Consequently, it is uncertain whether the current fees and charges adequately cover the cost of providing services related to the same fees and charges.

Policies and Procedures

A GFOA best practice is the development of financial policies. The City's financial policies previously reviewed by Citygate included reserves, investments, travel, purchasing, and personnel. Citygate found these policies to be comprehensive and well written. However, there remain some important financial policies that the City lacks. Some of the more important policies that the City should adopt include those related to cash-handling, debt, internal control, and budget.

Another important financial area that could be improved is documented financial operating procedures. These procedures address how various financial operating processes are completed. Examples include:

- ◆ Accounts payable
- ◆ Payroll
- ◆ Journal voucher and other general ledger posting
- ◆ Accounts receivable
- ◆ Utility billing
- ◆ Business licensing
- ◆ Permitting.

The GFOA website has many examples of best practices, including policies and procedures, which can be utilized by the City.^{4,5}

Citygate understands that the development of formal written policies and procedures is time consuming and difficult to implement—especially for a city of San Juan Bautista's size—but whatever effort the City can put into addressing this best practice will help to improve fiscal operational consistency and minimize potential fraud risk. A lack of formal financial policies and procedures can lead to confusion and inconsistency and weaken internal control.

⁴ GFOA best practices can be found at <https://www.gfoa.org/best-practices>.

⁵ GFOA financial policy examples can be found at <https://www.gfoa.org/financialpolicies>.

Auditor

The City has used the same auditors since (at least) FY 14. Per the California Government Code section 12410.6(b): “Commencing with the 2013-14 fiscal year, a local agency shall not employ a public accounting firm to provide audit services to a local agency if the lead audit partner or coordinating audit partner having primary responsibility for the audit, or the audit partner responsible for reviewing the audit, has performed audit services for that local agency for six consecutive fiscal years.” Consequently, the City may be required to change audit firms unless the current firm is large enough to assign a different partner lead or the City gets a waiver from the State Controller based on no other eligible public accounting firm being available to perform the audit.

Succession Planning / Cross-Training

It is always difficult to address the need for succession planning and cross-training in small jurisdictions like San Juan Bautista. However, smaller jurisdictions are impacted more severely than larger jurisdictions by the sudden loss of staff because individual staff members tend to be responsible for numerous operational tasks that are taken on out of necessity and with little training. Consequently, the loss of any single staff member has the potential to cause a major disruption in operations until a new staff member is hired and trained. Larger jurisdictions with larger staffs can usually absorb the sudden loss of a staff member.

Citygate recommends that the City identify its critical operational areas (such as finance, water, sewer, etc.) for continuity weaknesses and develop a succession plan, including structured cross-training to help address unanticipated operational disruptions due to loss of staff.

Long-Range Financial Planning

An essential component of the operations of any organization is the development of formal long-range planning for financial operations and capital improvements. Per discussions with City staff, due to factors such as the implementation of a new financial system and the creation of a new chart of accounts, the City has not been able to develop long-range planning models based on what was provided by Citygate during its previous engagement.

Additionally, as a part of the long-range financial planning and forecast, a delineation should be made between ongoing revenues and expenditures versus one-time revenues and expenditures to ensure accurate reflection and monitoring of the City’s fiscal condition.

Citygate recommends that the City implement the long-range planning models as soon as possible.

Bank Reconciliations

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 bank reconciliation delay caused by implementation of the new financial system is now rectified.

5.3.2 Other Issues

Performance Measures

The GFOA has developed approximately 200 best practice recommendations related to municipal financial operations.⁶ Finance Department staff should review this list and use it as a guide when developing written policies for the City.

One specific area identified by Citygate during its review is the overall lack of Citywide goals or performance measures to reflect how departments are meeting those goals. One recommendation of this review is the enhanced development and usage of performance measures as a tool to gauge operational effectiveness. Performance measurement is an essential element of budget development and monitoring regardless of the size of an agency. The GFOA recommends that all organizations identify, track, and communicate performance measures to monitor financial and budgetary status, service delivery, program outcomes, and community conditions as a best practice.

The GFOA further recommends that, when identifying performance measurements, governments should focus on making sure that measures meet the following conditions.⁷

- ◆ **Useful** – Measures should provide information that is helpful to decision making, understanding, or accountability efforts.
- ◆ **Relevant** – Measures can be clearly linked to the service delivery/program outcomes that they are intended to measure, appropriate for the outcome being measured, and are readily understandable.
- ◆ **Reliable** – Collection methods and measure definitions need to be understood so stakeholders can rely on the information.
- ◆ **Adequate** – Ensure enough and an appropriate variety of measures are used to measure performance and that measures do not incentivize behavior that adversely impacts the measures, such as a quantity versus quality scenario. There is often not a single measure that can provide sufficient context and understanding.
- ◆ **Collectible** – Measures are readily available and do not involve excessive time/effort to collect.

⁶ <https://www.gfoa.org/best-practices>

⁷ <https://gfoa.org/performance-measures>

- ◆ **Consistent** – Measures can be regularly collected to track outcomes over time and avoid the need to continuously identify new measures.
- ◆ **Environment** – Measures include variables related to externalities that impact service delivery and program performance.
- ◆ **Responsibility** – Clearly identify responsibilities for collection, storage, and dissemination of the data.
- ◆ **Systems** – Existing data collection capacities are leveraged appropriately, or new systems are identified to ease the burden of data collection.

While Citygate does not recommend that the City establish extensive and complicated performance measures, it is recommended that the City identify a few performance measures applicable to each department, which should be developed to reflect that City resources are being used in support of City goals and objectives.

Extended Hours Coverage

Per City staff, there has been a discussion about extending the hours that City Hall is open to the public. Currently, the closure of City Hall at 1:00 pm allows staff to complete tasks such as preparation of the daily deposits that should be completed away from the public. It is a best practice and a good risk avoidance measure to ensure that the deposit preparation is in a location that is separate from the public. Additionally, individuals preparing a deposit should have uninterrupted time to help minimize errors. Citygate's understanding is that the Finance & Admin Clerk, in addition to other duties, is the primary person responsible for counter traffic while also having the primary responsibility for daily cash handling, preparation of the daily deposit, and transportation of the deposit to the bank. The City's current process of closing City Hall (counter) addresses the best practice and risk avoidance issue.

Citygate was informed that the Deputy City Clerk position is currently used to help backfill for the counter, which seems to work under the current schedule. However, one concern is that the Deputy City Clerk is also responsible for the Human Resources (HR) and risk management functions of the City. These duties can require confidential and time-sensitive discussions that have been addressed with the current schedule. However, under a schedule with extended hours, there would be less flexibility for the Deputy City Clerk to address counter backfill requirements if an HR or risk management conflict arose. Filing and (in some cases) answering phones can be less time sensitive than dealing with confidential personnel or risk management issues. Although it probably would not occur that frequently, if a critical personnel or risk management matter occurred that was being handled by the Deputy City Clerk while the Finance & Admin Clerk is preparing and delivering the deposit, coverage of the counter would not be readily available.

If the City decides to expand the hours in which City Hall is open to the public, Citygate would recommend consideration of additional personnel—such as a part-time position—to provide adequate and consistent counter coverage and allow for secure and confidential handling of cash and human resources/risk management issues.

Separation of Duties

Adequate separation of duties is a best practice and risk avoidance measure necessary for all agencies. While it is often difficult to manage for a smaller city, striving to ensure separation of duties should nonetheless be a goal. Based on Citygate’s review, the City does make a conscious effort to ensure the separation of duties. Payroll processing internal control could be strengthened by separating duties between the individual inputting payroll and the individual approving release of payroll direct deposits and checks.

5.4 SUMMARY OF FISCAL FINDINGS AND RECOMMENDATIONS

5.4.1 Findings

- Finding #1:** The General Fund is fiscally healthy and meets reserves recommended by GFOA best practice and the City’s reserve policy requirement.
- Finding #2:** Water and sewer rate increases, in addition to application and receipt of various loans and grants, will help improve the fiscal strength of both water and sewer operations.
- Finding #3:** The implementation of the new MIP financial system began in January 2023 and will provide additional capabilities and controls to help improve overall fiscal operational efficiency, monitoring, and transparency.
- Finding #4:** General fees and charges have not been reviewed in several years, indicating that the City may not be recouping the cost of providing the services associated with the applicable fees and charges.
- Finding #5:** The City does not have a formal, comprehensive long-term Capital Improvement Plan to identify and address aging infrastructure.

Finding #6: The City does not have a formal financial forecasting process to develop a long-term delineation between ongoing revenues and expenditures versus one-time revenues and expenditures to ensure accurate reflection and monitoring of the City's fiscal condition.

Finding #7: The City's current fiscal policies are incomplete when compared to best practice. A lack of formal financial policies and procedures can lead to confusion and inconsistency and weaken internal control.

5.4.2 Recommendations

Recommendation #1: Auditors should be directed to segregate Measure G fiscal activity in the audited financial statements while maintaining Generally Accepted Accounting Principles (GAAP) to improve clarity and transparency and reduce confusion.

Recommendation #2: Designate fund reserves as outlined in the City's reserve policy.

Recommendation #3: Expedite the completion of the new financial system's implementation to the extent possible to allow the City to take advantage of increased efficiency, monitoring, internal control, and transparency capabilities.

Recommendation #4: The City should develop a succession plan, particularly in the Finance Department, to ensure continuity of fiscal operations.

Recommendation #5: To ensure a long-term focus on identification of issues and provide time to develop plans of action to address the issues, the City should utilize the templates provided by Citygate during its previous review as a guide to develop formal, long-term financial forecasts and capital improvement plans.

- Recommendation #6:** Finance Department staff should review the GFOA list of approximately 200 best practice recommendations related to municipal financial operations and use it as a guide when developing written policies for the City.
- Recommendation #7:** The budget development process should include identification of performance measures to ensure departments are monitoring and achieving individual department objectives to meet overall City goals and objectives.
- Recommendation #8:** If City Hall hours of operation are extended, consider hiring new personnel to help provide adequate coverage and address risk avoidance and confidentiality concerns.
- Recommendation #9:** To improve internal controls, revise the payroll process to more definitively separate the duties of the individual processing the payroll from the individual who ultimately approves release of the completed payroll.

This page was intentionally left blank

SECTION 6—HIGH-LEVEL PUBLIC SAFETY OVERVIEW

Public safety in the City is centrally managed within the City Manager’s Office and consists of the following service types:

- ◆ Law enforcement services
- ◆ Private Security patrols
- ◆ Code enforcement
- ◆ Fire services
- ◆ Animal control services
- ◆ Emergency services.

6.1 LAW ENFORCEMENT SERVICES

The City has no full-time police department, but rather, contracts with the San Benito County Sheriff’s Department for law enforcement services. The contract relationship with the Sheriff’s Department has been in place since at least the early 2000s, as the City’s response to the document request provided copies of a draft contract for the period July 2001 to June 2003.

The City also provided an executed contract dated 2009 that stipulated the contract shall automatically renew annually unless terminated by either the City or the County (Sheriff). The scope of the contract provides that the County (Sheriff) shall provide law enforcement services within the City. The outlined level of service within the scope includes one full-time Deputy Sheriff who works 80 hours during a two-week pay period. Other components of the contract’s scope of service include the following.

- ◆ Overtime assigned at the Sheriff’s discretion not to exceed 10 percent of total hours of the agreement unless approved by the City (with emergency public safety exceptions).
- ◆ Patrol plan, hours of coverage, and similar details to be coordinated by mutual agreement with the Sheriff and City Manager.
- ◆ Sheriff or representative to meet with Public Safety Committee not less than once per year.
- ◆ Additional services available by request at cost.
- ◆ Deputy or other designated Sheriff representative to provide monthly reports to the City Council on activity during the previous month (report may be verbal or in writing).

- ◆ County provides law enforcement services by on-duty patrol deputies when contract deputy is not on duty.
- ◆ Sheriff as County Emergency Services Director will provide designated City staffing emergency services training and assistance with continuity of operations planning.

Given the size of the City, the total volume of public-generated calls for law enforcement service are relatively low, thus making the formation of a municipal police department fiscally impractical. However, the City's percentage of budget expenditures for public safety and policing in particular merit consideration of more investment. Citygate assesses that a management-level public safety position—reporting directly to the City Manager, and responsible for oversight of all public safety-related issues discussed in this report—would be a beneficial addition.

The City earmarked funding in the current budget to add an additional Deputy Sheriff to the law enforcement service contract, which would, in effect, double the amount of dedicated patrol the City currently maintains. Thus far, the Sheriff's Office has had difficulty in staffing that position and it has not yet been added. Citygate supports adding this position and expanding dedicated patrol coverage. In time, the goal should be to increase dedicated patrol coverage to 24 hours a day, 7 days a week.

In discussions with City staff, it appears that there is limited visibility of the Sheriff's patrol activity as it relates to calls for service within the City. This can be remedied by ensuring that reporting requirements are clearly articulated in the annual service contract. Currently, there is language in the contract that provides for the Sheriff's Office to deliver monthly reports. In discussing the issue with Sheriff's representatives, they concur that this should be done.

The City should also consider developing a custom reporting tool with the Santa Cruz Regional 911 communications center, which provides dispatch services in the City. The custom reporting tool can be developed to provide monthly reporting on all public calls for service and patrol deputy-initiated activity.

6.2 PRIVATE SECURITY PATROLS

The City contracts with Kysmet Security & Patrol Inc. to provide private patrols within the City. Kysmet is a private company licensed by the State of California as a Private Patrol Operator. The contract calls for Kysmet to provide four uniformed private patrol officers in marked security vehicles for up to 68 hours per week.

The private patrol duties and authorities include the following:

- ◆ Patrol and monitor properties assigned by the City within City limits.

- ◆ Approach and question suspicious persons and notify the Sheriff's Department if crime is suspected.
- ◆ Initiate citizen's arrest if necessary.
- ◆ Provide high-visibility patrols throughout the City.
- ◆ Assist City Manager during emergencies.
- ◆ Provide detailed activity reports.
- ◆ Assist City in preparing emergency action plans.
- ◆ Assist Sheriff's Office as necessary within the City.

Although not listed in the contract, Kysmet has been delegated the task of parking enforcement within the City, which has received a favorable response from the City Manager's Office and other members of the community.

Citygate assesses that private security patrols are not consistent with best practices for providing direct public safety services, but rather, should be used for special circumstances such as special events or providing static security of specific facilities.

Many municipalities that contract for police services with their Sheriff's Office also build public safety capacity by directly employing non-sworn community service officers to assist with minor quality-of-life issues such as parking enforcement, high-visibility security patrols, abandoned vehicle abatement, animal control, etc. These community service officers can work in conjunction with code enforcement officers and perform all the duties currently being provided by the private security company in addition to acting as disaster service workers for emergency management purposes.

6.3 OTHER SERVICES

6.3.1 Code Enforcement

The City employs one part-time Code Enforcement Officer. The Code Enforcement Officer is a retired San Benito County Sheriff's Deputy who spent over 16 years as the City's contract Deputy. His knowledge of the community, in addition to his understanding of the Sheriff's Office, has put him in a position of trust with the City Manager. He is the de facto the public safety coordinator, having been described as the City Manager's "eyes and ears" on the street. The contracted private security company Kysmet coordinates their communications with the City through the Code Enforcement Officer.

6.3.2 Animal Control Services

There is no formal Animal Control Service contract in place, and the number of calls related to animal services likely does not merit a standalone contract. However, in the current model, the Code Enforcement Officer and the City Manager have responded to vicious and/or stray animal calls. This is not an efficient use of City resources. If community service officers are employed by the City, they can be trained to handle the relatively few animal calls that the City receives.

6.3.3 Fire Services

The City currently contracts with the City of Hollister for Fire Services. Citygate has assessed the current contract fire services provided by Hollister are adequate and does not recommend any changes to this service delivery method.

6.3.4 Emergency Services

As with other public safety services in the City, Emergency Services are provided by the City Manager, who serves as the Director of Emergency Services. The City's private security contract has language which states that private patrol officers will respond as necessary during emergency circumstances. While this arrangement is better than having no arrangement at all, Citygate questions the efficacy of utilizing contract employees as disaster service workers in the case of emergencies.

6.4 SUMMARY OF PUBLIC SAFETY FINDINGS AND RECOMMENDATIONS

6.4.1 Findings

Finding #8: Public safety services have no central point of contact other than the City Manager.

Finding #9: The City currently contracts for 40 hours of dedicated patrol per week from the Sheriff's Office, which, in Citygate's assessment, is inadequate.

Finding #10: The City contracts with a private security company to provide private patrol for 68 hours per week. Citygate assesses that private patrols are not a viable public safety alternative to fully sworn patrol services provided by the Sheriff's Office.

Finding #11: The City is not receiving adequate status reporting from the Sheriff's Office related to services rendered.

Finding #12: The Fire Services contract with the City of Hollister is serving the City well.

6.4.2 Recommendations

Recommendation #10: Add a management-level public safety position that reports directly to the City Manager and is responsible for all public safety-related issues discussed in this report.

Recommendation #11: Add a second patrol Deputy position to the law enforcement services contract with the San Benito County Sheriff's Office to expand dedicated patrol coverage to seven days a week and 80 hours. In time, the goal should be to increase dedicated patrol coverage to 24 hours a day, 7 days a week.

Recommendation #12: Ensure that a renewed service contract with the Sheriff's Office includes a requirement for workload reporting. Work with the regional dispatch center (Santa Cruz Regional 911) to develop a monthly custom reporting tool to assist in monitoring the Sheriff's dedicated patrol activity.

Recommendation #13: Consider converting the contracted private security contract to full-time or part-time Community Service Officer positions that work under the Public Safety Manager to enhance the Sheriff's patrols and can also serve as disaster service workers during emergencies.
[Note: During the course of Citygate's review, it was found that a full-time CSO position has already been approved in the City budget.]

This page was intentionally left blank

SECTION 7—STRATEGIC PLAN DEVELOPMENT

7.1 STRATEGIC PLAN DEVELOPMENT PROCESS

On April 14, 2023, Citygate facilitated a full-day strategic planning session. Four key deliverables included the development of foundational organizational pillars that entailed defining core values, determining top guiding priorities, and vision and mission statements. The process included defining each pillar, reviewing and discussing the guiding questions, and ultimately holding breakout sessions to create and vote on best ideas that ultimately support and reflect the goals of the community and City—based on surveys, interviews, historical data, and point-in-time voting to ensure the best future for San Juan Bautista.

During this strategic session, the Council, in collaboration with the community and City staff, also began work on selecting, categorizing, and prioritizing all items (“wish lists”) that were gleaned from both community and employee surveys, stakeholder interviews, historical data, the General Plan, previous strategic plans, and point-in-time items. This resulted in a comprehensive Priority Implementation Plan Worksheet (**Appendix A**) that included General Plan items. The Worksheet was categorized into five sections—each depicting one year’s time, with three tiers for prioritization within each. This Worksheet was later modified for the implementation planning session to be categorized into three sections, each encompassing 18 months, with three tiers in each section. After the implementation session held on June 3, 2023, the Worksheet was finalized. Ultimately, the Worksheet included 105 specific items for action and implementation.

7.1.1 Key Definitions

To establish mutual understanding and promote helpful exercises for community participation, the following definitions were presented in Citygate’s strategic planning session.

Vision Statement

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!

Values

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.

Mission Statement

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

Guiding Priorities

Guiding priorities provide DIRECTION on how to achieve the City's mission. The rules that govern what we DO. They are the tools that GUIDE policy and decision-making for staff.

7.1.2 Guiding Questions

The strategic planning session was further shaped and provided direction via the following guiding questions.

1. If success was a place, how do we know when we have arrived?
2. What does success, or winning, look like to our team or organization?
3. What measurable impact will this have?
4. What do we want the future to look like for our team, community, and bottom line?
5. Is this in alignment with mission/vision/ of the City Council and this community's values?
6. What is the likely outcome of making this a priority?
7. Will it help us grow?
8. Does this resonate with me and my values?
9. Is this something we want to be remembered for?
10. Do we have what we need to accomplish this? Is it attainable? (Resources, Budget)
11. Does this align with our General Plan? To what degree?
12. Is this the best outcome right now?

7.2 STATEMENTS, VALUES, AND PRIORITIES FOR SAN JUAN BAUTISTA

The following elements reflect the City-approved results of a collaborative effort between City Council, City staff, and community members.

7.2.1 Approved Vision Statement

San Juan Bautista is a vibrant, thriving community that strives to tell its complete history and cultural heritage while honoring the needs of its residents and businesses. The City offers the world a unique destination with its boundless natural beauty, open spaces, and agricultural resources.

7.2.2 Approved Mission Statement

The City of San Juan Bautista strives to provide exceptional service to the community by fostering a sustainable economy while preserving its uniqueness through collaboration, honesty, and resourcefulness.

7.2.3 Approved Core Values

- ◆ Collaboration
- ◆ Honesty
- ◆ Resourcefulness
- ◆ Accountability
- ◆ Integrity

7.2.4 Approved Guiding Priorities

- ◆ Infrastructure
- ◆ Economic development
- ◆ Public safety including code enforcement and disaster preparedness
- ◆ Recreation and activities
- ◆ Fiscal stability

7.3 OTHER STRATEGIC OBSERVATIONS

Small cities are called upon to meet all laws and regulations and produce all of the audits, annual reports, and master plans required of larger communities—in addition to providing around-the-clock city services related to public safety, water, sewers, and streets. Small cities must perform to these measures with far less staff capacity compared to larger cities. It is therefore critical for small cities to do business in the most efficient manner possible.

7.3.1 Important Steps

The City can recognize significant organizational improvements by taking the following steps to establish routine strategic planning and budget cycles and by establishing routine approval authorities and processes.

- ◆ Establish a Five-Year Strategic Plan and goals.
- ◆ Establish an annual City Council meeting calendar and adhere to it, including a cycle for annual review of the Five-Year Strategic Plan, annual work program adoption, and annual budget.
- ◆ Establish an achievable annual work program and goals for the City that are in line with Five-Year Strategic Plan goals.
- ◆ Ensure annual expenditures reflect Five-Year Strategic Plan goals and include resources necessary to achieve annual work programs.
- ◆ Institute performance measures.
- ◆ Evaluate annual achievements prior to adopting a work program for the new year.
- ◆ Expedite the completion of the new financial system's implementation to the extent possible to allow the City to take advantage of increased efficiency, monitoring, internal control, and transparency capabilities.

7.3.2 Financial Management Policies

Cities following best practices adopt and impose sound and wide-ranging financial management policies. Examples of these winning budgeting-related strategies include the following:

- ◆ The budget must be balanced.
- ◆ There will be no unfunded positions included in the budget or staffing resolution.
- ◆ No new positions will be considered unless there is new income for the position that covers not only the cost of the position, but any indirect and overhead-related costs as well.
- ◆ There must be a reasonable expectation that there will be an ongoing funding stream of at least three years or more for any new position.
- ◆ Only use reserve funds for one-time expenditures or for purposes for which the reserve is designated. Every effort will be made to preserve reserve funds.
- ◆ Economic development will remain a priority.
- ◆ Technology should be invested in continually.

- ◆ The budget format and terminology should be standardized so that pertinent and relevant performance and financial information is provided for presentation to the City Council and the public.
- ◆ Income streams should be identified for the continual improvement of the City's capital facilities.

7.2.3 Economic Development and Stabilization

All cities and counties in California have some sort of commitment to economic development. Typically, they have a designated individual or groups of individuals who are assigned to promote a city's local economy. Larger agencies will have programs specifically designed to retain existing businesses, expand existing businesses, and attract new businesses. Typically, this involves keeping an inventory of vacant properties, assisting with permit processing, providing fee waivers, circulating marketing brochures and videos, and working with real estate agents, a chamber of commerce, and a visitors' bureau.

The good news is that all of these economic fundamentals are in place in the City in one form or another. The City has several potential partners and volunteer groups, such as the San Juan Bautista Community Business Association—both the new and the original association—and a recently hired Assistant City Manager to help provide a focus on economic development.

Stabilizing the City's finances requires a unified effort on the part of the City's elected officials, City staff, and community leaders. A sustained, multi-year, multifaceted rebuilding effort will ensure the City enjoys the benefits of a vibrant, cost-effective, full-service municipal organization well into the future.

This page was intentionally left blank

SECTION 8—PROGRESS: MOVING FORWARD

8.1 IMPLEMENTATION STRATEGIES

While there are various styles and tools for implementation, taking a human-centered and long-term approach is a method which has been proven to be successful, leading to healthy and collaborative processes which yield significant benefits related to thriving organizations and communities.

The City Manager has various opportunities when it comes to accountability and implementation approaches. As these are tested and utilized, the City manager may choose varying paths to support the desires and needs of the Council and community related to the execution of this plan. These include:

- ◆ Annual detailed reports to City Council (recommended prior to budget session)
- ◆ The use of technology
- ◆ Smart sheets
- ◆ Fun, employee-engaging events as communication tools
- ◆ Empowering employees
- ◆ Ongoing support and training for staff
- ◆ Positive work environments
- ◆ Managing risks
- ◆ Building capacity
- ◆ Facilitating effective workshops
- ◆ Monthly or quarterly meetings/updates with City Council and/or the community
- ◆ Timely executive memos or briefings of progress to City Council and the community
- ◆ Support from volunteers on current or newly formed task force groups.

8.2 “FAIL FACTS” AND MYTHS

Why do plans not always work out the way we envision them? Often, once a plan has been carefully developed, things can (and do) go awry. This is a fact. Ongoing daily attention and care must be taken throughout the implementation process to achieve optimal results. It is important to

recognize that, even with the best of intentions, efficient efforts, and resource alignment, the end result may differ than the original vision.

8.2.1 Fail Facts

As the City develops a strategic plan, some important elements of that process often go overlooked in many organizations. The City must be aware of these potential challenges:

- ◆ Minimal investment/buy-in to aligning with the new plan.
- ◆ Lack of clear, consistent communication from leadership.
- ◆ Add-ons – Adding to staff’s workload while nothing is taken away.⁸
- ◆ Lack of accountability from the top down.
- ◆ Lack of patience. Some things take more time—be mindful of requests and the level of response needed.
- ◆ Lack of clarity regarding the strategy among staff members.
- ◆ Everything is a priority syndrome (i.e., my issues *first* and *now*).
- ◆ No true allocation of resources.
- ◆ Lack of perceived fairness, recognition, rewards, etc.
- ◆ Lack of fostering innovation by leadership.
- ◆ Was the right approach utilized in the execution?
- ◆ Some failures are success. Experimentation is important—there must be room for new ideas, trial and error, etc.
- ◆ Lack of understanding the real problem.⁸
- ◆ Understanding organizational capabilities.⁸
- ◆ Lack of understanding cultural landscape (if they did it before will they do it again?).

8.2.2 Myths

The assumption of validity where common myths are concerned can present a serious roadblock to beneficial evolution and progress within any organization. Granting such myths space will ultimately stagnate growth and prevent needed change from happening.

⁸ Harvard Business Review, 2022.

The following table reflects some common myths⁹ as well as helpful realities to reorient organizational perspectives.

Table 8—Common Myths and Helpful Realities

Myth	Reality
Myth #1: Execution means alignment.	Reality: Setting limited goals that are specific and measurable will foster alignment.
Myth #2: Execution means “sticking to the plan.”	Reality: Flexibility is crucial to execution. Look for opportunities.
Myth #3: Communication equals understanding.	Reality: Promote understanding with simple and clear communications, with those engaged in dialog utilizing two-way repetition to ensure retainment.
Myth #4: A performance culture drives execution.	Reality: Execution is driven by broad recognition and rewards (innovation, agility, etc.).
Myth #5: Execution should be driven from top to bottom.	Reality: Execution is driven from all levels by all members of an organization.

8.3 PRIORITY IMPLEMENTATION PLAN WORKSHEET

Implementation plans are a critical and effective tool for organizations to assist employees and leadership and ensure they can address the basic elements of any task or activity. An implementation plan brings clarity and efficiency to processes, taking ideas and developing them into actionable steps to that can be followed. Such a guiding document helps organize funding strategies and is an integral part of any budgetary process or decisions going forward.

On June 3, 2023, City Council met in a public forum and participated in a final strategic session to complete the Priority Implementation Plan which had begun during the April 2023 session with community stakeholders. After Citygate and City staff revised, discussed, and drafted an updated Worksheet, the Council spent two hours discussing, voting, and gathering final feedback from the community for a final Five-Year Priority Implementation Plan. All items were thoughtfully placed in a priority order that will serve as a road map for City staff, City council and the community over the next five years. This plan will also serve as an important document that will be incorporated

⁹ <https://www.outsourcedpharma.com/doc/myths-of-strategic-execution-that-you-may-hold-0001> and <https://www.outsourcedpharma.com/doc/myths-of-strategic-execution-that-you-may-hold-part-0001>.

into the next General Plan update. See **Appendix A—Priority Implementation Plan Worksheet** for itemized goals and priorities.

8.4 EXECUTIVE LEADERSHIP AND COMMUNICATION TRAINING

In response to the community and staff surveys and stakeholder interviews, on June 3, 2023, the City Manager and City Council approved and participated in an on-site executive leadership and communication training conducted by Citygate.

Executive communications training is central to the healthy functioning of any successful organization. Effective communicators bring countless benefits to individuals, teams, organizations, and communities. Some of these benefits include higher morale among employees; increased positive engagement, connection, and trust; higher productivity; stronger job satisfaction; more empowered employees and community members; better clarity; reduction of conflict and misunderstandings; and a sense of cohesiveness for efficient decision-making and problem solving.

The participatory training conducted on June 3 included the following modules.

- ◆ Innovation in Government
- ◆ Understanding Belief Systems and Stories
- ◆ Communication and Success Signals
- ◆ Leadership Practices and Statements
- ◆ Roles and Responsibilities
- ◆ Service Philosophy Development
- ◆ Support Structures
- ◆ Messaging and Branding
- ◆ Self-Accountability
- ◆ Best Practices Helpful Hints

8.4.1 Recommendations

Following are Citygate’s core recommendations related to the executive leadership and communication training sessions.

Recommendation #14: The City should utilize annual or semi-annual communication training courses throughout the organization.

Recommendation #15: New tools and philosophies can and should be utilized as part of a five-point accountability measure and general performance guide for employee evaluations.

Recommendation #16: The City should leverage periodic 360 survey assessments, which are a good tool to help measure a point-in-time success rate related to service standards, communications, and other organizational benefits—including higher morale among employees; increased positive engagement, connection, and trust; higher productivity; stronger job satisfaction; more empowered employees and community members; better clarity; reduction of conflict and misunderstandings; and a sense of cohesiveness for efficient decision-making and problem solving.

8.5 SMALL CITY SPECIFICS

Small cities, especially those in remote and/or rural locations, often share several common attributes including a committed and engaged citizenry; significant natural, scenic, and/or historic resources; financial constraints; challenges in attracting qualified staff and outside investment; and a remote location that makes it difficult to access training and networking opportunities.

8.5.1 Best Practices

The following best practices identify strategies that small cities can employ to enhance the community's quality of life and economic vitality.

Build a common vision and plan for the future.

Engage residents from all segments of the community, business owners, and other stakeholders to develop a vision for the community's future that reflects the community's desires, needs, and goals while generating public support that can maintain momentum through election cycles and over times of City staff turnover.

Identify and build upon existing assets.

Identify the community’s key assets that enhance quality of life and offer opportunities to attract businesses, investment, and visitors—such as natural beauty, outdoor recreation, historic architecture, or arts and cultural institutions—and develop strategies to support, protect, and enhance those assets.

Take advantage of outside funding and leverage financial opportunities for strategic priorities.

Identify and pursue available funding targeted to specific priority community projects and initiatives. Even a small amount of outside grants or other funding applied strategically to support a community’s vision and plans can help move priority projects forward. At the same time, chasing grants or other funding simply because they are available can distract focus and staff time from identified community priorities.

Identify and utilize a system of support.

Take advantage of opportunities for education, training, and networking with colleagues in other communities such as those workshops provided through municipal and professional organizations. A modest budget for staff and City Council training/education can pay big dividends by fostering new ideas, “big picture” thinking, and better visibility for the community.

Encourage civic engagement and volunteer participation.

Harness the expertise and talent that exists within the community to help implement specific initiatives and complete projects that address the community’s strategic priorities.

Encourage communication, coordination, and cooperation within the community and across the region.

Build relationships with other governmental agencies and community and regional organizations to encourage the development of shared priorities and to leverage the assets that each party can bring to the table to assure that necessary services are available for residents and visitors.

Support a clean and healthy environment.

Protect natural resources and develop long-term plans and funding for ongoing maintenance and rehabilitation of utility and transportation infrastructure systems to assure their productive operation and use. Avoid environmental contamination and help spur business and development investment.

8.6 RAMPING UP

It is important to be aware that, with any new plan, there is a ramp-up period to ensure buy-in and ultimate success in implementation. It takes time, care, and strategic planning approaches to

gradually increase workloads, skills, training, support, resources, and revenues / revenue generating programs, and assessments to achieve improved performance, productivity, and desired outcomes. Additionally, various monitoring and accountability measures will occur. Allowing for necessary adjustments along the way will be a key element of success.

It is recommended to schedule an initial launch date of the implementation element of the plan 90–180 days after final development of the plan. During this accelerated timeline, this approach gives leadership, staff, potential volunteers, and the community time to communicate, understand, and formulate the best approaches. Particular attention should be given to thoughtfully communicating goals and desired outcomes, fiscal needs, and the actions to be taken to support the stated goals while managing risk and caring for growing pains. This is a crucial step in the long-term success of any government agency in today’s dynamic, competitive, and challenging landscape.

This page was intentionally left blank

SECTION 9—CITYGATE’S CORE FINDINGS AND RECOMMENDATIONS

Citygate’s 12 core findings and 16 core recommendations are presented in full sequential order.

9.1 FINDINGS

9.1.1 Fiscal Findings

- Finding #1:** The General Fund is fiscally healthy and meets reserves recommended by GFOA best practice and the City’s reserve policy requirement.
- Finding #2:** Water and sewer rate increases, in addition to application and receipt of various loans and grants, will help improve the fiscal strength of both water and sewer operations.
- Finding #3:** The implementation of the new MIP financial system began in January 2023 and will provide additional capabilities and controls to help improve overall fiscal operational efficiency, monitoring, and transparency.
- Finding #4:** General fees and charges have not been reviewed in several years, indicating that the City may not be recouping the cost of providing the services associated with the applicable fees and charges.
- Finding #5:** The City does not have a formal, comprehensive long-term Capital Improvement Plan to identify and address aging infrastructure.
- Finding #6:** The City does not have a formal financial forecasting process to develop a long-term delineation between ongoing revenues and expenditures versus one-time revenues and expenditures to ensure accurate reflection and monitoring of the City’s fiscal condition.
- Finding #7:** The City’s current fiscal policies are incomplete when compared to best practice. A lack of formal financial policies and procedures can lead to confusion and inconsistency and weaken internal control.

9.1.2 Public Safety Findings

- Finding #8:** Public safety services have no central point of contact other than the City Manager.
- Finding #9:** The City currently contracts for 40 hours of dedicated patrol per week from the Sheriff’s Office, which, in Citygate’s assessment, is inadequate.

Finding #10: The City contracts with a private security company to provide private patrol for 68 hours per week. Citygate assesses that private patrols are not a viable public safety alternative to fully sworn patrol services provided by the Sheriff's Office.

Finding #11: The City is not receiving adequate status reporting from the Sheriff's Office related to services rendered.

Finding #12: The Fire Services contract with the City of Hollister is serving the City well.

9.2 RECOMMENDATIONS

9.2.1 Fiscal Recommendations

Recommendation #1: Auditors should be directed to segregate Measure G fiscal activity in the audited financial statements while maintaining Generally Accepted Accounting Principles (GAAP) to improve clarity and transparency and reduce confusion.

Recommendation #2: Designate fund reserves as outlined in the City's reserve policy.

Recommendation #3: Expedite the completion of the new financial system's implementation to the extent possible to allow the City to take advantage of increased efficiency, monitoring, internal control, and transparency capabilities.

Recommendation #4: The City should develop a succession plan, particularly in the Finance Department, to ensure continuity of fiscal operations.

Recommendation #5: To ensure a long-term focus on identification of issues and provide time to develop plans of action to address the issues, the City should utilize the templates provided by Citygate during its previous review as a guide to develop formal, long-term financial forecasts and capital improvement plans.

Recommendation #6: Finance Department staff should review the GFOA list of approximately 200 best practice recommendations related to municipal financial operations and use it as a guide when developing written policies for the City.

Recommendation #7: The budget development process should include identification of performance measures to ensure departments are monitoring and achieving individual department objectives to meet overall City goals and objectives.

Recommendation #8: If City Hall hours of operation are extended, consider hiring new personnel to help provide adequate coverage and address risk avoidance and confidentiality concerns.

Recommendation #9: To improve internal controls, revise the payroll process to more definitively separate the duties of the individual processing the payroll from the individual who ultimately approves release of the completed payroll.

9.2.2 Public Safety Recommendations

Recommendation #10: Add a management-level public safety position that reports directly to the City Manager and is responsible for all public safety-related issues discussed in this report.

Recommendation #11: Add a second patrol Deputy position to the law enforcement services contract with the San Benito County Sheriff's Office to expand dedicated patrol coverage to seven days a week and 80 hours. In time, the goal should be to increase dedicated patrol coverage to 24 hours a day, 7 days a week.

Recommendation #12: Ensure that a renewed service contract with the Sheriff's Office includes a requirement for workload reporting. Work with the regional dispatch center (Santa Cruz Regional 911) to develop a monthly custom reporting tool to assist in monitoring the Sheriff's dedicated patrol activity.

Recommendation #13: Consider converting the contracted private security contract to full-time or part-time Community Service Officer positions that work under the Public Safety Manager to enhance the Sheriff's patrols and can also serve as disaster service workers during emergencies. *[Note: During the course of Citygate's review, it was found that a full-time CSO position has already been approved in the City budget.]*

9.2.3 Executive Leadership Recommendations

Recommendation #14: The City should utilize annual or semi-annual communication training courses throughout the organization.

Recommendation #15: New tools and philosophies can and should be utilized as part of a five-point accountability measure and general performance guide for employee evaluations.

Recommendation #16: The City should leverage periodic 360 survey assessments, which are a good tool to help measure a point-in-time success rate related to service standards, communications, and other organizational benefits—including higher morale among employees; increased positive engagement, connection, and trust; higher productivity; stronger job satisfaction; more empowered employees and community members; better clarity; reduction of conflict and misunderstandings; and a sense of cohesiveness for efficient decision-making and problem solving.

APPENDIX A

PRIORITY IMPLEMENTATION PLAN WORKSHEET (INCLUDED SEPARATELY)

The Priority Implementation Plan Worksheet is included separately as an .xlsx file formatted for Microsoft Excel.

This page was intentionally left blank

APPENDIX B

EMPLOYEE SURVEY SUMMARY

This page was intentionally left blank

CITY OF SAN JUAN BAUTISTA EMPLOYEE SURVEY SUMMARY

OVERVIEW AND METHODOLOGY

Citygate Associates, LLC (Citygate) conducted an internet-based employee survey between March 28, 2023, and April 5, 2023, as part of our Citywide Organizational Review for the City of San Juan Bautista (City), California. All City personnel were invited by the City to participate in this survey. In total, there were 12 completed survey responses.

Survey Summary	
Launch Date	March 28, 2023
Close Date	April 5, 2023
Total Responses	12

Apart from two basic employee classification questions, the survey consisted mostly of closed-ended statements with which employees could rate their level of agreement, and eight open-ended questions for employees to provide written response. For closed-ended statements, respondents rated their level of agreement from “Strongly Agree” to “Strongly Disagree” or “N/A or Don’t Know.”

Employees were not required to answer every question. Additionally, they were permitted to respond “Don’t Know or N/A” to many statements, and these responses were excluded from the mean response calculations. Therefore, the response totals to a particular question may not always correspond with the total of 12 completed surveys.

ORGANIZATION OF ANALYSIS

The results for the survey are organized in the following order:

Classification Results

- ◆ The raw data for both employee classification questions included on the survey.

Degree of Agreement Statement Results

- ◆ Scores for each closed-ended statement.

Open-Ended Questions – Response Summary

- ◆ Each of the eight questions for which employees provided an open-ended response, with answer themes arranged by frequency.

DEFINITION OF TERMS

The terms defined below are encountered in the information that follows:

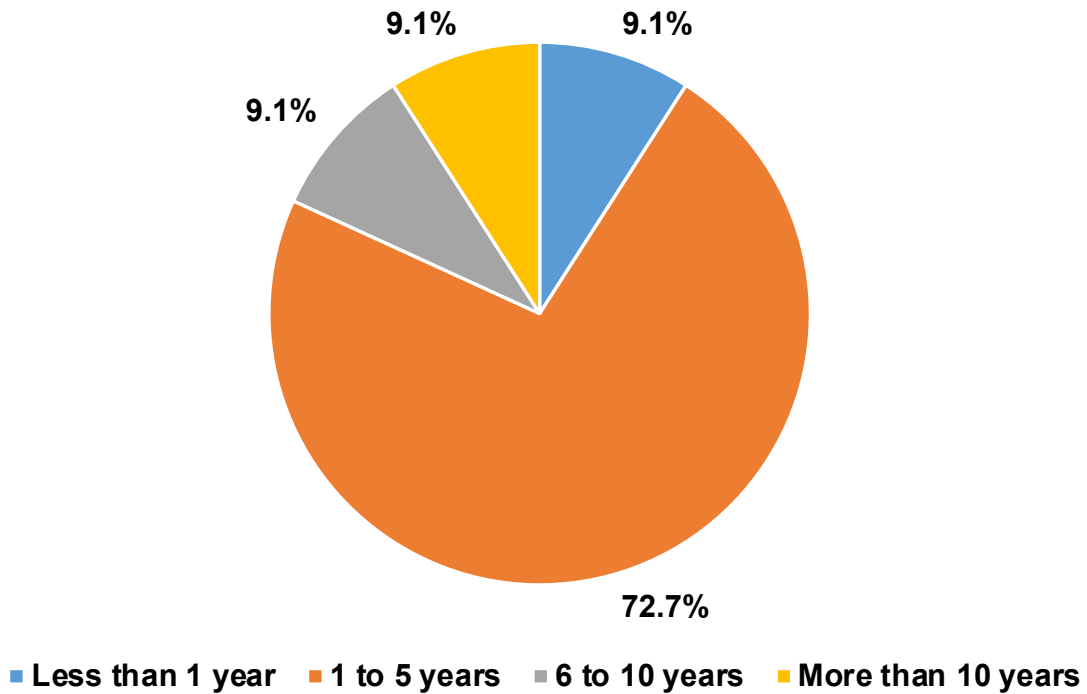
- ◆ Mean: An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.
- ◆ Standard Deviation: Standard deviation expresses how spread apart the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists regarding the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists regarding the statement.

CLASSIFICATION RESULTS

How long have you worked for the City?

Response	Number of Responses	Response Ratio
Less than 1 year	1	9.1%
1 to 5 years	8	72.7%
6 to 10 years	1	9.1%
More than 10 years	1	9.1%

This information is represented graphically in the following image:



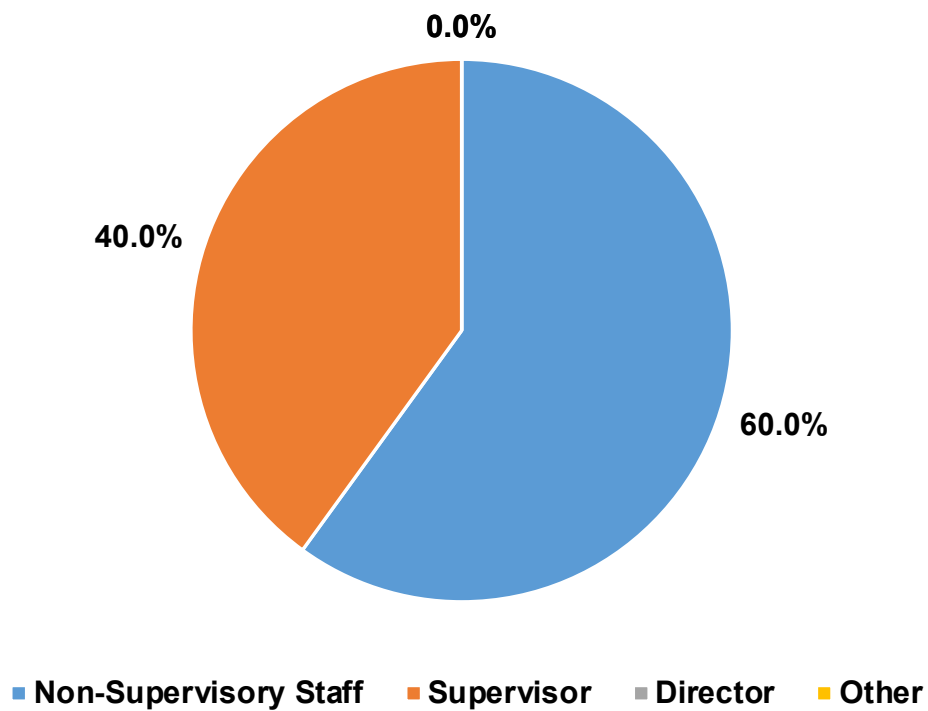
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What is your job function?

Response	Number of Responses	Response Ratio
Non-Supervisory Staff	6	60.0%
Supervisor	4	40.0%
Director	0	0.0%
Other	0	0.0%

This information is represented graphically in the following image:



City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

RESPONSES FOR EACH STATEMENT

The following table shows all the employee survey statements with the calculation of the mean and standard deviation of responses, along with the percentage of each type of response, including “Don’t Know or N/A.” The lowest degree of agreement is -2 (Strongly Disagree). The highest degree of agreement is 2 (Strongly Agree). Neutrality is represented by 0.

Statement	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%
I am treated fairly.	1.2	0.8	0.0%	0.0%	25.0%	33.3%	41.7%	0.0%
The management of my department contributes to the productivity of the department.	1.1	0.8	0.0%	0.0%	25.0%	41.7%	33.3%	0.0%
Service to the public is strongly emphasized in my department.	1.1	0.9	0.0%	8.3%	8.3%	50.0%	33.3%	0.0%
I am given opportunity to improve my skills.	1.1	0.5	0.0%	0.0%	8.3%	75.0%	16.7%	0.0%
I am adequately recognized for my good work.	1.1	0.8	0.0%	0.0%	25.0%	33.3%	33.3%	8.3%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
Overall, I believe the decision-making within my department is consistent with City Council priorities.	1.0	0.7	0.0%	0.0%	25.0%	50.0%	25.0%	0.0%
Leadership realizes that “perfection” is unachievable and has realistic expectations for measuring employee performance.	1.0	0.7	0.0%	0.0%	16.7%	50.0%	16.7%	16.7%
We resolve conflict honestly, effectively, and quickly.	0.9	1.4	8.3%	8.3%	8.3%	25.0%	41.7%	8.3%
The management of my department listens to employees.	0.9	1.0	0.0%	8.3%	25.0%	33.3%	33.3%	0.0%
Overall, I feel the City organization is successful.	0.9	0.7	0.0%	0.0%	25.0%	50.0%	16.7%	8.3%
Overall, I believe my department’s performance is above average.	0.9	0.8	0.0%	0.0%	33.3%	41.7%	25.0%	0.0%
My manager/supervisor keeps commitments they make to me.	0.9	0.7	0.0%	0.0%	25.0%	50.0%	16.7%	8.3%
My manager/supervisor encourages my professional development.	0.9	0.9	0.0%	8.3%	16.7%	41.7%	25.0%	8.3%
We have a set of values and beliefs that guides our decisions about work.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
Resources and equipment needed for the performance of my job tasks are properly maintained.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
My manager/supervisor encourages teamwork in my department.	0.8	1.1	8.3%	0.0%	25.0%	41.7%	25.0%	0.0%
My department is an inspiring place to work.	0.8	1.5	16.7%	0.0%	8.3%	33.3%	41.7%	0.0%
I believe the workload within my department is equally divided among my co-workers.	0.8	1.1	0.0%	16.7%	16.7%	41.7%	25.0%	0.0%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
I believe opportunities for employee involvement in goal setting, decision-making, and other aspects of my work are adequate.	0.8	0.9	0.0%	8.3%	25.0%	41.7%	25.0%	0.0%
I believe my department is an efficient, well-run organization.	0.8	0.9	0.0%	8.3%	25.0%	50.0%	16.7%	0.0%
I believe my department has a solution-oriented philosophy.	0.8	1.1	0.0%	16.7%	16.7%	33.3%	33.3%	0.0%
I believe my department functions proactively, and does not simply react to crises.	0.8	1.1	0.0%	16.7%	16.7%	41.7%	25.0%	0.0%
I am actively encouraged to try creative approaches to my work, even to the point of taking the initiative.	0.8	0.9	0.0%	8.3%	25.0%	41.7%	25.0%	0.0%
I agree with the mission, vision, and values statement that guides all City staff members.	0.8	1.1	8.3%	0.0%	25.0%	41.7%	25.0%	0.0%
The internal practices of the City support my ability to deliver a high standard of quality to our customers.	0.7	0.9	0.0%	8.3%	33.3%	41.7%	16.7%	0.0%
The goals and objectives of my department are reasonable.	0.7	0.8	0.0%	8.3%	25.0%	58.3%	8.3%	0.0%
Our staff meetings are filled with open and honest participation.	0.7	1.1	0.0%	16.7%	25.0%	33.3%	25.0%	0.0%
I receive clear and specific direction from my supervisor(s) regarding my work assignments.	0.7	1.2	8.3%	0.0%	33.3%	33.3%	25.0%	0.0%
Given the level of staffing within my department, the goals and objectives of the department are achievable.	0.7	0.9	0.0%	8.3%	33.3%	41.7%	16.7%	0.0%
The City has an effective process for listening to community or customer concerns.	0.6	1.0	0.0%	16.7%	25.0%	41.7%	16.7%	0.0%
Leaders handle human errors on the part of staff in a constructive and respectful manner.	0.6	1.4	16.7%	0.0%	16.7%	41.7%	25.0%	0.0%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

Statement	Mean	Std. Dev.	% Strongly Disagree (-2)	% Disagree (-1)	% Neutral (0)	% Agree (1)	% Strongly Agree (2)	% Don't Know / N/A
I understand my manager's/supervisor's expectations of the job I perform.	0.6	1.2	8.3%	0.0%	41.7%	25.0%	25.0%	0.0%
Generally, I have adequate decision-making authority	0.6	1.2	8.3%	8.3%	16.7%	50.0%	16.7%	0.0%
Written policies and procedures are available and consistently followed in day-to-day operations.	0.5	0.8	0.0%	8.3%	41.7%	41.7%	8.3%	0.0%
The established goals and objectives of my department have been clearly communicated to me.	0.5	1.0	0.0%	16.7%	33.3%	33.3%	16.7%	0.0%
Regulations and/or policies I am responsible for administering are reasonable and enforceable.	0.5	1.2	16.7%	0.0%	8.3%	66.7%	8.3%	0.0%
My manager/supervisor values my time as much as their own.	0.5	1.2	0.0%	25.0%	25.0%	25.0%	25.0%	0.0%
I believe that my department's approach to employee discipline is fair and evenly administered.	0.5	1.3	16.7%	0.0%	16.7%	50.0%	16.7%	0.0%
There is an effective flow of information between managers/supervisors and staff within my department.	0.4	1.3	8.3%	16.7%	25.0%	25.0%	25.0%	0.0%
The City does a good job communicating about changes or decisions that affect employees?	0.4	1.1	8.3%	0.0%	50.0%	25.0%	16.7%	0.0%
I have sufficient resources to complete my work, such as office space, computers, etc.	0.4	1.3	8.3%	16.7%	25.0%	25.0%	25.0%	0.0%
I feel that I have sufficient authority to uphold recommendations and policies when challenged.	0.4	1.2	8.3%	8.3%	33.3%	33.3%	16.7%	0.0%
I believe that customers perceive that my department is consistently doing a good job.	0.4	0.8	0.0%	8.3%	50.0%	33.3%	8.3%	0.0%
The equipment and technology used in my department are up to date.	0.3	1.1	8.3%	8.3%	33.3%	41.7%	8.3%	0.0%

City of San Juan Bautista, CA

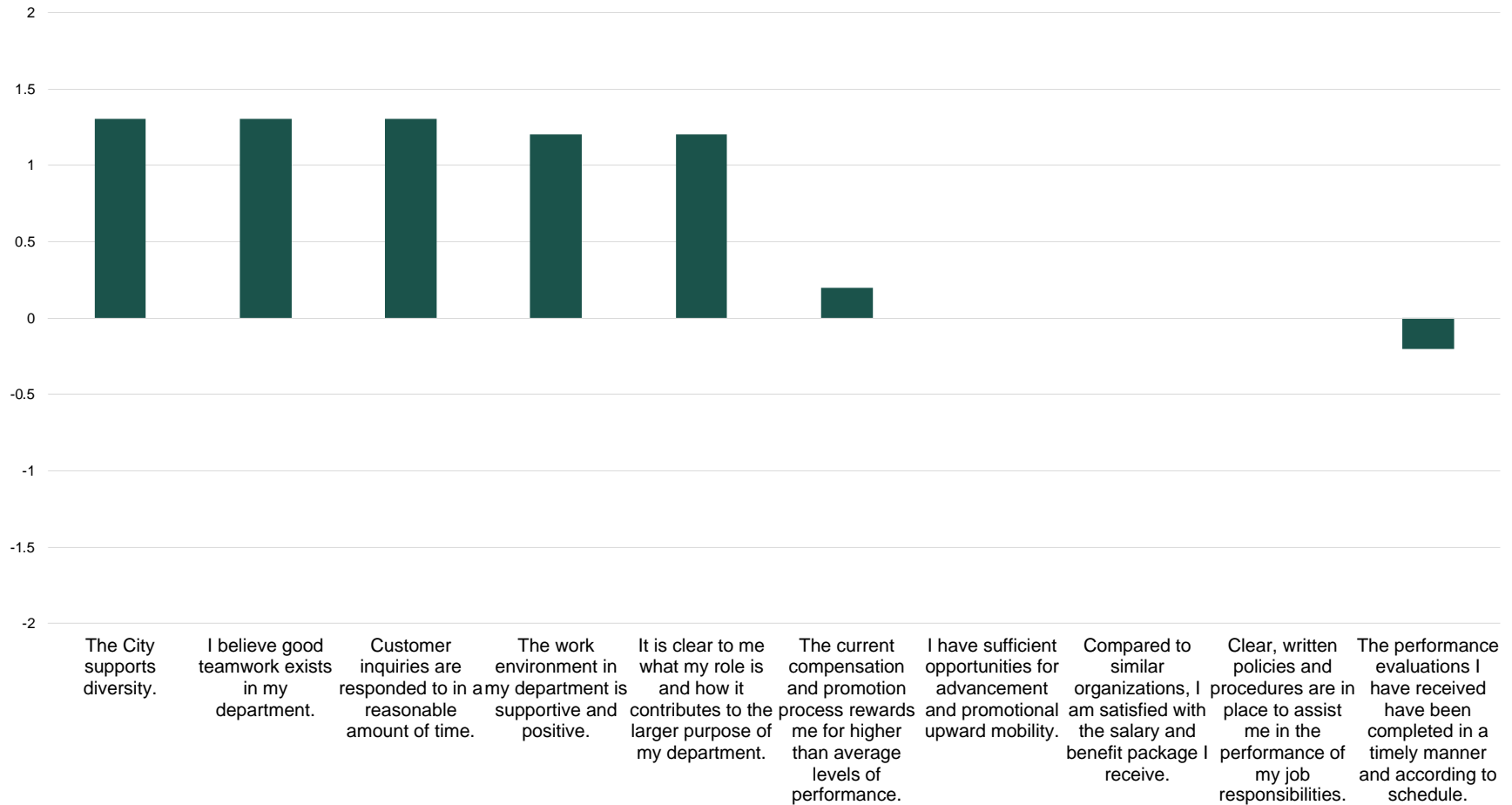
High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

Statement	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%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

The mean score of employee responses to the preceding statements are represented graphically in the following images. The top 5 most agreed-to statements are listed first, followed by the 5 least agreed-to statements.



OPEN-ENDED QUESTIONS – RESPONSE SUMMARY

The following tables show summaries of responses to the open-ended employee survey questions. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response.

Where could the City strengthen partnership with the community?

Count	Comment
3	The City should improve the way it listens to residents or listen to residents more frequently.
2	The City should ensure that Council Members adhere to the same regulations that the public is required to adhere to or take accountability for its actions.
1	The City could be more transparent.
1	The City could discontinue wasteful spending.
1	The City could use City-provided policing services.
1	The City should foster a more positive attitude from volunteers toward City staff and community engagement.
1	The City needs to be doing everything that it can.
1	The City needs to repave the streets.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What does a good quality of life mean to you?

Count	Comment
5	Job and financial stability contribute to a good quality of life.
5	A safe, peaceful, and/or supportive environment, both at work and in the community, contribute to a good quality of life.
4	Having sufficient time off and work-life balance are important for a good quality of life
3	Having a positive impact in the community contributes to a good quality of life.
1	A good quality of life means everything to me.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What existing activities and processes are functioning well and should be continued that currently support your department and the City goals?

Count	Comment
2	Staff parties and events.
1	Communication with City Hall via emails and phone calls.
1	While execution could be improved, the idea behind the budget process is positive.
1	Having an independently managed department rather than being managed by City Hall.
1	Access to electronics and software.
1	Working hard at customer service and working on a team.
1	The utilization of private security to augment law enforcement services.
1	The current staff help one another.
1	Training and education.
1	Incentives system.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What processes or activities should be discontinued or are no longer providing value?

Count	Comment
2	None.
2	Don't know.
1	Hiring consulting firms.
1	Politicians.
1	The inability to order paper for the department.
1	Allowing council members to attend meetings remotely.
1	The City Council no valuing City staff.
1	Paper.
1	The Independent Sewer Department.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

If there was one thing you could change and or would like to see changed, what would it be?

Count	Comment
1	Current engineering lacks the skills to complete Public Works projects.
1	None
1	Staff meetings are currently just a review of the City Council meetings. It would be more useful to discuss tasks and work.
1	Having a full-time manager.
1	Being able to attend meetings remotely.
1	Displaying a sign at the front counter that encourages customers to treat employees with respect, and that cussing and threatening staff will not be tolerated.
1	Enforcing all rules equally regardless of political position or friendships.
1	There would be better communication and more clear job responsibilities.
1	Records should be preserved better, which cannot happen because the building has been outgrown.
1	Having better equipment and vehicles.
1	Having input into decisions.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What is the biggest strength of the organization?

Count	Comment
4	Our employees and our willingness to help one another (Teamwork).
2	Our residents.
1	We are well rounded in all areas to provide solutions for day-to-day issues.
1	We have a good understanding of the needs of our community.
1	Our leadership and/or knowledgeable supervisors.
1	Projects that are started are completed on time.
1	Our City Manager.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

What do you think are the biggest challenges in the community right now?

Count	Comment
2	The poor condition of the streets.
1	Completing important infrastructure.
1	Flooding and global cooling.
1	Politicians acting overly entitled, and/or yell or complain.
1	Security.
1	Unreasonable expectations.
1	Increasing revenue from new projects because the community does not want change.
1	Traffic enforcement has been too lax.
1	Communicating to residents in a way that helps them to understand.
1	The community and the Councilmembers not trusting City staff.
1	Low budgets.
1	Water and sewer rate increases.

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Employee Survey Summary

Please add any specific comments or suggestions you may have for improving services in your department.

Count	Comment
1	Upper management should not micromanage.
1	Upper management should take responsibility for decisions.
1	Pavement
1	Office hours
1	We need a full-time supervisor or manager. 20 hours per week is insufficient.
1	In light of our current staffing, business hours should be from 9:00am to 1:00pm, Monday through Friday.
1	We should improve communication with all service providers.
1	The City is a small jurisdiction which sometimes makes it difficult for Council to act without affecting someone they know. Sometimes they rescind their actions for fear of "stepping on toes."
1	Team-building activities
1	Inventory control

APPENDIX C

COMMUNITY SURVEY SUMMARY

This page was intentionally left blank

CITY OF SAN JUAN BAUTISTA COMMUNITY SURVEY SUMMARY

OVERVIEW AND METHODOLOGY

Citygate Associates, LLC (Citygate) conducted an internet-based community survey between March 27, 2023, and April 26, 2023, as part of our Citywide Organizational Review for the City of San Juan Bautista (City), California. The community was invited by the City to participate in this survey. In total, there were 158 completed survey responses.

Survey Summary	
Launch Date	March 27, 2023
Close Date	April 27, 2023
Total Responses	158

Apart from four basic community member informational questions, the survey consisted of closed-ended statements for which community members could (1) rate their level of agreement from “Strongly Agree” to “Strongly Disagree” or “N/A or Don’t Know,” (2) rate their level of satisfaction from “Very Satisfied” to “Very Dissatisfied” or “N/A or Don’t Know,” and (3) rate their overall assessment of general, Citywide operations from “Very Good” to “Very Bad” or “N/A or Don’t Know.” The survey concluded with open-ended questions for which community members were to provide written response.

Community members were not required to answer every question. Additionally, “Don’t Know or N/A” responses were excluded from the mean response calculations. Therefore, the response totals to a particular question may not always correspond with the total of 158 completed surveys.

ORGANIZATION OF ANALYSIS

The results for the survey are organized in the following order:

Basic Information Results

- ◆ The raw data for all community informational questions included in the survey.

Degree of Agreement / Level of Satisfaction / General Assessment Results

- ◆ Scores for each closed-ended statement, organized from highest to lowest mean score.

Open-Ended Questions – Response Summary

- ◆ The questions for which community members provided an open-ended response, with answer themes arranged by frequency.

DEFINITION OF TERMS

The terms defined below are encountered in the information that follows:

- ◆ Mean: An arithmetic mean that is the sum of the responses for each statement divided by the number of responses for each statement.
- ◆ Standard Deviation: Standard deviation tells how spread out the responses are from the arithmetic mean. A standard deviation close to zero indicates that most responses are close to the mean response and that a greater degree of agreement exists regarding the statement. A greater standard deviation indicates that there was a wider spread of variation in the responses and that a greater degree of disagreement exists regarding the statement.

City of San Juan Bautista, CA

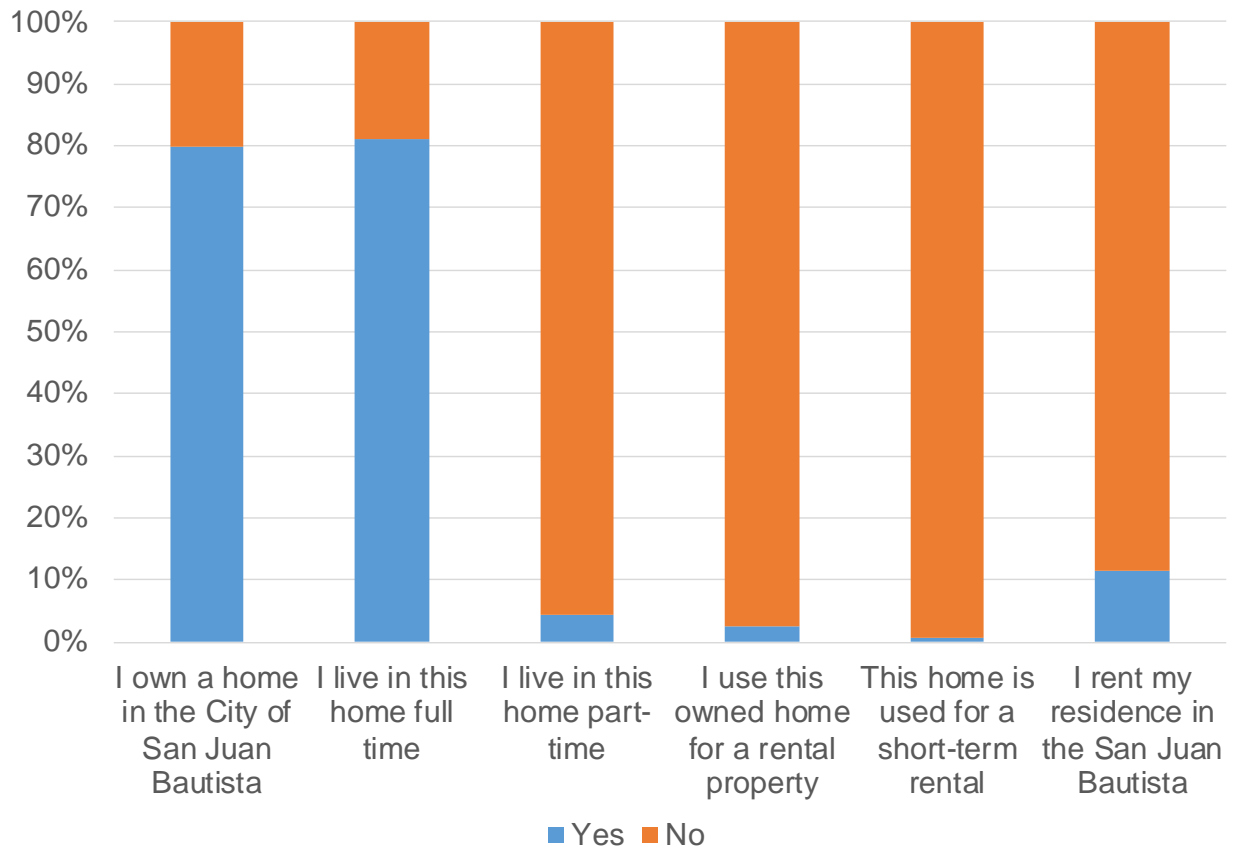
High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

BASIC INFORMATION RESULTS

Please tell us a little about yourself. This information will help us to better understand your responses and respond to your concerns.

Statement	Yes	Response Ratio	No	Response Ratio
I own a home in the City of San Juan Bautista	126	79.7%	32	20.3%
I live in this home full time	128	81.0%	30	19.0%
I live in this home part-time	7	4.4%	151	95.6%
I use this owned home for a rental property	4	2.5%	154	97.5%
This home is used for a short-term rental	1	0.6%	157	99.4%
I rent my residence in the San Juan Bautista	18	11.4%	140	88.6%

This information is represented graphically in the following image:



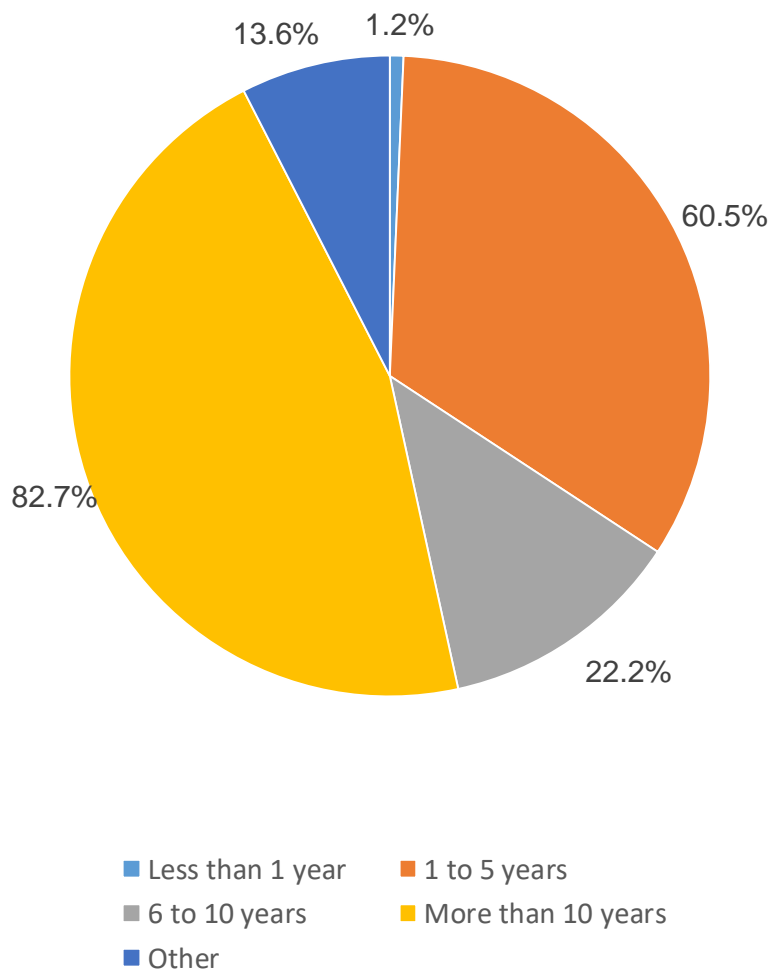
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

I have been living in the City for:

Residency	Count	Response Ratio
Less than 1 year	1	1.2%
1 to 5 years	49	60.5%
6 to 10 years	18	22.2%
More than 10 years	67	82.7%
Other	11	13.6%

This information is represented graphically in the following image:



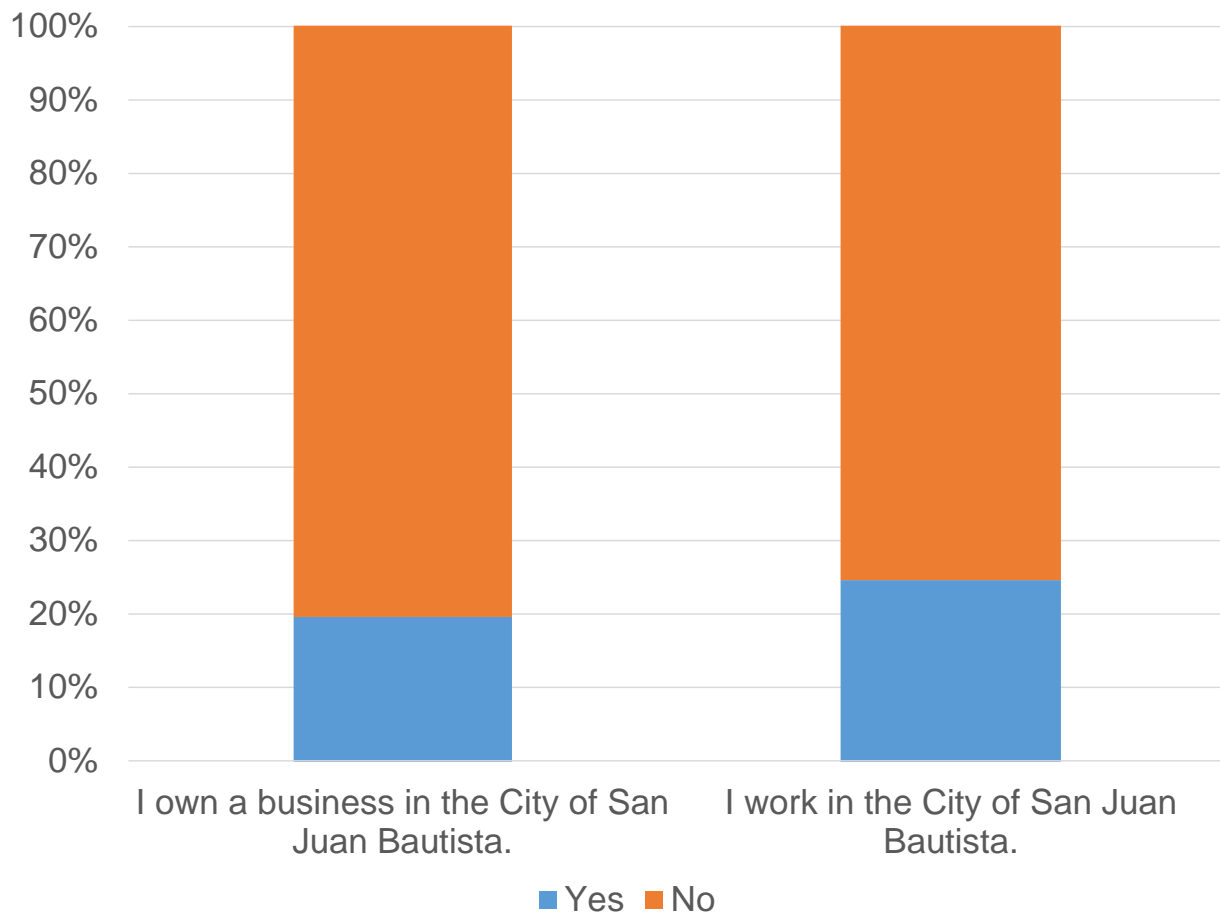
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Please answer “yes” or “no” to the following statements:

Statement	Yes	Response Ratio	No	Response Ratio
I own a business in the City of San Juan Bautista.	31	19.6%	127	80.4%
I work in the City of San Juan Bautista.	39	24.7%	119	75.3%

This information is represented graphically in the following image:



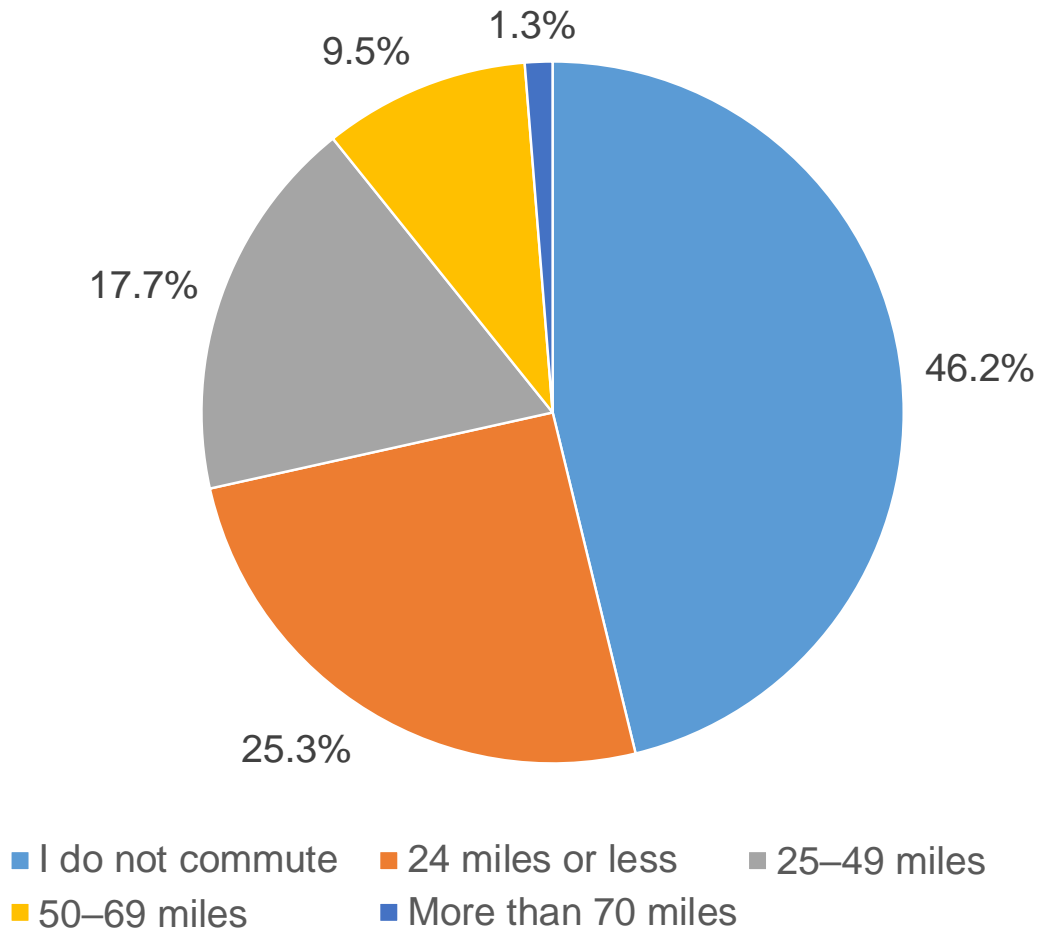
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

I commute to work:

Commute	Count	Response Ratio
I do not commute	73	46.2%
24 miles or less	40	25.3%
25–49 miles	28	17.7%
50–69 miles	15	9.5%
More than 70 miles	2	1.3%

This information is represented graphically in the following image:



City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

DEGREE OF AGREEMENT, SATISFACTION, OR ASSESSMENT STATEMENT RESULTS – SORTED BY MEAN SCORE

Results for each statement are organized from highest to lowest mean score. The highest possible agreement is 2 (Strongly Agree). The lowest possible agreement is -2 (Strongly Disagree). A score of 0 represents neutrality.

*Please rate your **LEVEL OF AGREEMENT** with the following statements from "Strongly Agree" to "Strongly Disagree" or "N/A."*

Statement	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	1.4	0.7	0.0%	1.3%	6.3%	41.8%	48.7%	1.9%
The City is generally a safe place to live and/or work	1.1	0.8	0.0%	3.8%	12.7%	54.4%	28.5%	0.6%
Vacant properties in the downtown should be a top priority	0.8	1.0	1.9%	8.9%	24.1%	36.7%	27.2%	1.3%
The City is a good place to raise children	0.7	0.9	2.5%	7.0%	24.7%	44.9%	17.7%	3.2%
I feel a strong sense of community in the City	0.6	1.1	5.1%	13.9%	15.8%	42.4%	22.8%	0.0%
The overall quality of life in the City is high	0.5	1.0	3.8%	13.9%	21.5%	46.2%	12.7%	1.9%
The City is environment-friendly	0.3	0.9	3.2%	12.7%	40.5%	31.6%	7.6%	4.4%
The residential areas in the City are attractive	0.2	1.0	7.6%	15.2%	38.0%	29.7%	8.9%	0.6%
The City has a vibrant downtown area	0.0	1.2	13.9%	20.9%	31.0%	23.4%	10.8%	0.0%
The commercial areas in the City are attractive	-0.1	1.1	9.5%	32.3%	24.7%	28.5%	4.4%	0.6%
The downtown has adequate parking	-0.1	1.1	12.0%	31.0%	17.1%	34.8%	4.4%	0.6%
There are adequate parks and recreation amenities in the City	-0.1	1.1	10.8%	31.0%	19.6%	33.5%	3.2%	1.9%
There is good access to arts and cultural opportunities in the City	-0.1	1.0	8.2%	26.6%	33.5%	23.4%	3.8%	4.4%
Retail shopping areas in the City are attractive	-0.2	1.1	13.9%	27.8%	26.6%	27.2%	2.5%	1.9%
The City has adequate internet options	-0.3	1.0	12.0%	30.4%	29.7%	16.5%	3.8%	7.6%

City of San Juan Bautista, CA

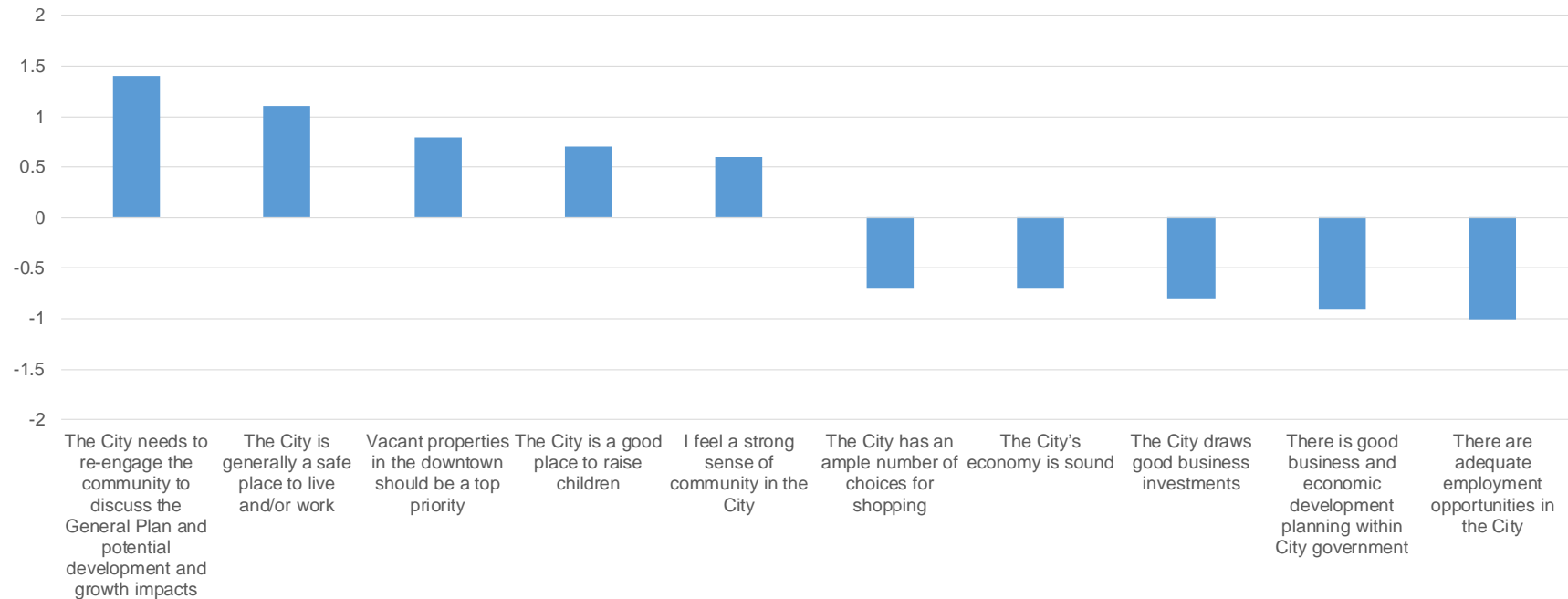
High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Statement	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	-0.3	1.2	18.4%	29.7%	22.2%	22.8%	5.7%	1.3%
The City provides plenty of opportunities to enjoy the nightlife	-0.6	1.1	25.3%	31.0%	20.9%	17.1%	3.2%	2.5%
The downtown has adequate parking for big events	-0.6	1.2	25.9%	34.8%	13.9%	22.2%	1.9%	1.3%
The City has an ample number of choices for shopping	-0.7	1.1	27.2%	36.7%	18.4%	13.9%	2.5%	1.3%
The City's economy is sound	-0.7	0.9	19.0%	36.1%	29.1%	4.4%	1.9%	9.5%
The City draws good business investments	-0.8	1.0	23.4%	33.5%	27.2%	6.3%	1.3%	8.2%
There is good business and economic development planning within City government	-0.9	0.9	28.5%	30.4%	25.9%	5.7%	0.6%	8.9%
There are adequate employment opportunities in the City	-1.0	0.9	32.3%	39.9%	14.6%	7.6%	0.0%	5.7%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

This information is represented graphically in the following image. The mean score of community responses to the preceding statements is shown, with the top 5 most agreed-to statements listed first, followed by the 5 least agreed-to statements.



City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

*Please rate your **LEVEL OF SATISFACTION** with the following City services from "Very Satisfied" to "Very Dissatisfied" or "N/A."*

Statement	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	0.8	0.6%	3.8%	22.8%	43.7%	22.8%	6.3%
Trash collection	0.8	0.9	1.9%	4.4%	24.1%	50.6%	19.0%	0.0%
Fire emergency response	0.7	0.9	2.5%	3.8%	27.2%	46.8%	13.3%	6.3%
Park maintenance	0.6	0.9	3.8%	7.0%	24.1%	53.8%	10.1%	1.3%
Historic preservation efforts and services	0.4	1.0	5.1%	13.3%	27.2%	39.2%	9.5%	5.7%
Special events sponsored by the City	0.3	1.1	8.2%	12.7%	29.7%	35.4%	8.9%	5.1%
Fire prevention	0.2	1.0	8.2%	10.1%	34.2%	36.7%	4.4%	6.3%
Organization and accessibility of City website	0.2	1.0	5.1%	16.5%	31.6%	32.9%	5.7%	8.2%
Friendliness and welcoming nature of City staff	0.1	1.2	15.2%	11.4%	30.4%	29.1%	9.5%	4.4%
City building facilities	0.0	0.9	7.0%	16.5%	48.1%	21.5%	2.5%	4.4%
Crime prevention	0.0	1.1	8.9%	21.5%	30.4%	29.7%	7.0%	2.5%
Timeliness of information on City website	0.0	1.0	7.0%	18.4%	39.2%	22.8%	3.2%	9.5%
Law enforcement emergency response	-0.1	1.1	9.5%	27.2%	24.7%	23.4%	7.0%	8.2%
Process of obtaining information I have requested	-0.1	1.1	10.8%	13.9%	35.4%	20.3%	4.4%	15.2%
Street sweeping services	-0.1	1.1	14.6%	17.7%	30.4%	29.7%	4.4%	3.2%
The City's preparedness to support the community during disasters	-0.1	1.1	15.2%	14.6%	31.6%	24.1%	5.1%	9.5%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Statement	Mean	Std. Dev.	% Very Dissatisfied (-2)	% Dissatisfied (-1)	% Neither Satisfied nor Dissatisfied (0)	% Satisfied (1)	% Very Satisfied (2)	% Don't Know / N/A
City staff's responsiveness to my concerns or comments	-0.2	1.2	19.0%	14.6%	33.5%	15.2%	7.6%	10.1%
Maintenance of street trees and landscaping	-0.2	1.2	19.0%	20.3%	24.7%	31.6%	3.2%	1.3%
Residential and commercial building inspection services	-0.2	0.9	9.5%	11.4%	42.4%	8.9%	2.5%	25.3%
Utility billing services	-0.2	1.1	13.9%	28.5%	24.1%	27.8%	4.4%	1.3%
Animal control services	-0.4	1.2	22.2%	16.5%	31.0%	17.7%	3.2%	9.5%
Code enforcement	-0.4	1.2	20.9%	22.2%	26.6%	15.8%	4.4%	10.1%
Senior Center	-0.4	0.9	8.9%	21.5%	30.4%	7.0%	1.3%	31.0%
Transit services	-0.4	0.9	11.4%	20.3%	32.9%	8.2%	1.3%	25.9%
Commercial vehicle enforcement	-0.5	1.0	17.7%	21.5%	32.9%	14.6%	1.3%	12.0%
Community housing programs	-0.5	0.9	13.3%	14.6%	38.0%	2.5%	1.3%	30.4%
Law enforcement public education programs	-0.5	1.0	14.6%	23.4%	33.5%	10.8%	1.9%	15.8%
Long-range planning and development	-0.5	1.1	19.0%	22.8%	31.0%	11.4%	2.5%	13.3%
Senior recreation programs	-0.5	0.8	7.6%	23.4%	30.4%	5.7%	0.6%	32.3%
Senior services	-0.5	0.8	7.0%	25.9%	30.4%	4.4%	0.6%	31.6%
Storm water drainage	-0.5	1.0	19.6%	25.9%	35.4%	15.8%	0.6%	2.5%
Street maintenance	-0.5	1.2	27.8%	29.1%	14.6%	23.4%	3.8%	1.3%
Traffic enforcement	-0.5	1.2	24.1%	21.5%	27.2%	20.9%	2.5%	3.8%
Building and development permit process (i.e., assistance, application, plan review)	-0.6	0.9	14.6%	21.5%	35.4%	5.7%	0.6%	22.2%

City of San Juan Bautista, CA

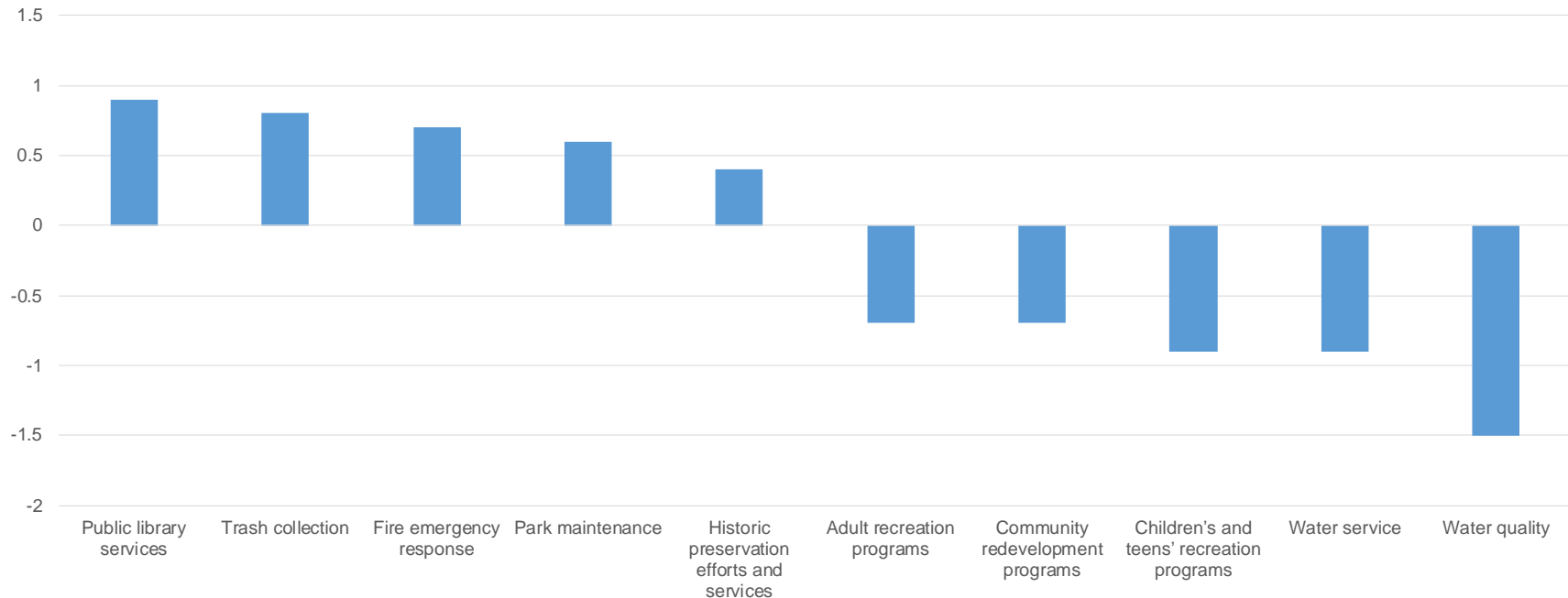
High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Statement	Mean	Std. Dev.	% Very Dissatisfied (-2)	% Dissatisfied (-1)	% Neither Satisfied nor Dissatisfied (0)	% Satisfied (1)	% Very Satisfied (2)	% Don't Know / N/A
Dependability of the City's sewer system	-0.6	1.1	27.2%	22.2%	29.7%	15.2%	3.2%	2.5%
Maintenance of sidewalks	-0.6	1.2	26.6%	31.0%	18.4%	21.5%	1.9%	0.6%
Adult recreation programs	-0.7	0.8	12.0%	32.9%	30.4%	2.5%	1.3%	20.9%
Community redevelopment programs	-0.7	0.9	15.8%	18.4%	31.6%	3.2%	0.6%	30.4%
Children's and teens' recreation programs	-0.9	0.9	25.3%	31.6%	18.4%	3.8%	1.3%	19.6%
Water service	-0.9	1.0	36.7%	29.1%	22.2%	10.1%	0.6%	1.3%
Water quality	-1.5	0.8	58.9%	25.3%	10.8%	1.9%	0.0%	3.2%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

This information is represented graphically in the following image. The mean score of community responses to the preceding statements is shown, with the top 5 most agreed-to statements listed first, followed by the 5 least agreed-to statements.



Please rate the following areas that address general, Citywide operations from "Very Good" to "Very Bad" or "N/A."

Statement	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	-0.4	1.1	17.7%	22.2%	31.0%	19.0%	0.6%	9.5%
City as a well-run, efficient operation	-0.5	1.1	22.8%	20.9%	32.3%	12.7%	3.8%	7.6%
City communications that provide key information and issues to community members and business owners	-0.5	1.1	19.0%	23.4%	29.1%	15.2%	2.5%	10.8%

City of San Juan Bautista, CA

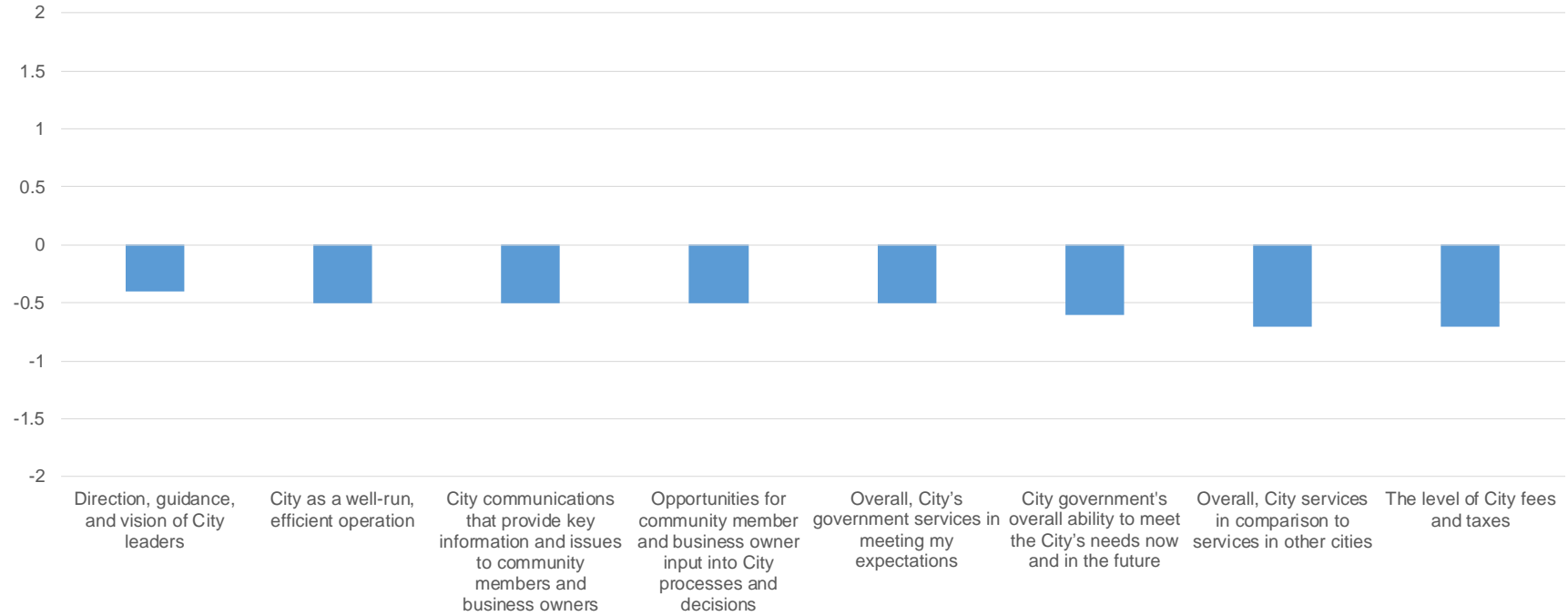
High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Statement	Mean	Std. Dev.	% Very Bad (-2)	% Bad (-1)	% Neutral (0)	% Good (1)	% Very Good (2)	% Don't Know / N/A
Opportunities for community member and business owner input into City processes and decisions	-0.5	1.2	23.4%	15.8%	31.0%	12.0%	4.4%	13.3%
Overall, City's government services in meeting my expectations	-0.5	1.1	22.8%	18.4%	38.0%	12.7%	2.5%	5.7%
City government's overall ability to meet the City's needs now and in the future	-0.6	1.1	24.1%	19.6%	32.9%	12.7%	1.3%	9.5%
Overall, City services in comparison to services in other cities	-0.7	1.1	27.2%	23.4%	25.3%	9.5%	1.9%	12.7%
The level of City fees and taxes	-0.7	1.1	25.3%	25.3%	26.6%	11.4%	1.3%	10.1%

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

This information is represented graphically in the following image:



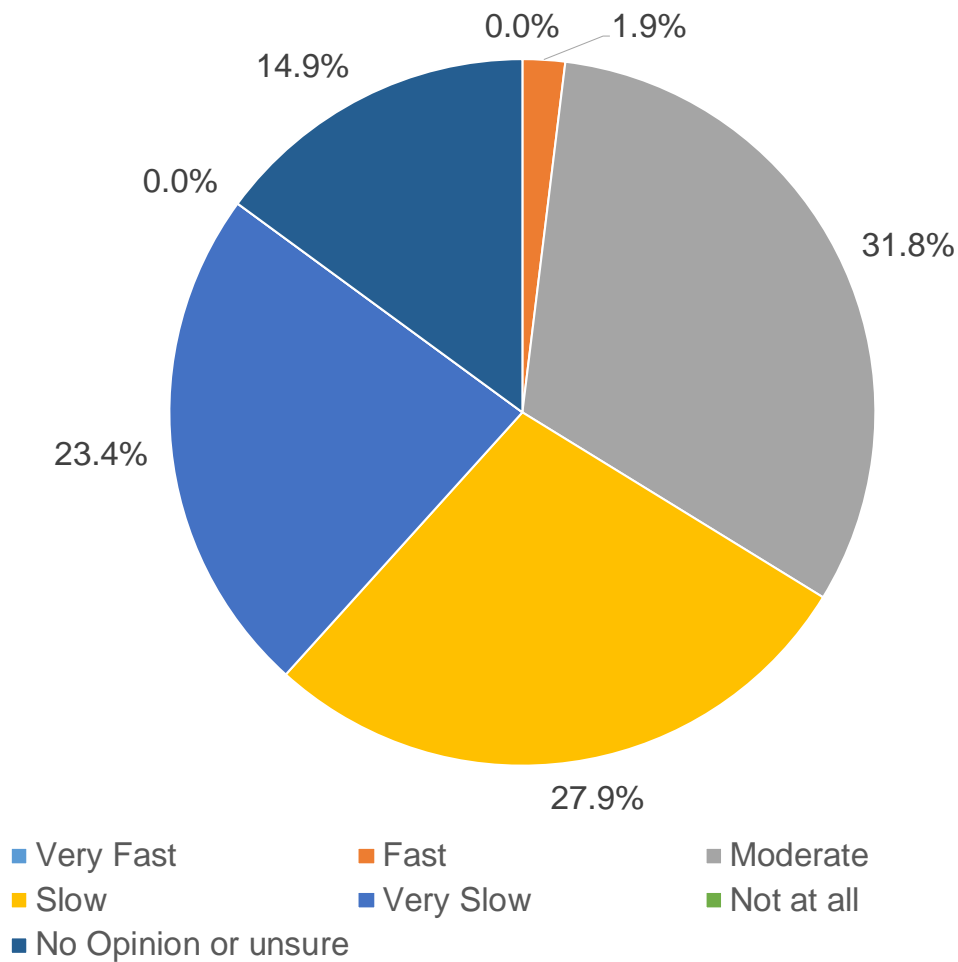
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

How fast should the City's population grow?

Statement	Count	Response Ratio
Very Fast	0	0.0%
Fast	3	1.9%
Moderate	49	31.8%
Slow	43	27.9%
Very Slow	36	23.4%
Not at all	0	0.0%
No Opinion or unsure	23	14.9%

This information is represented graphically in the following image:



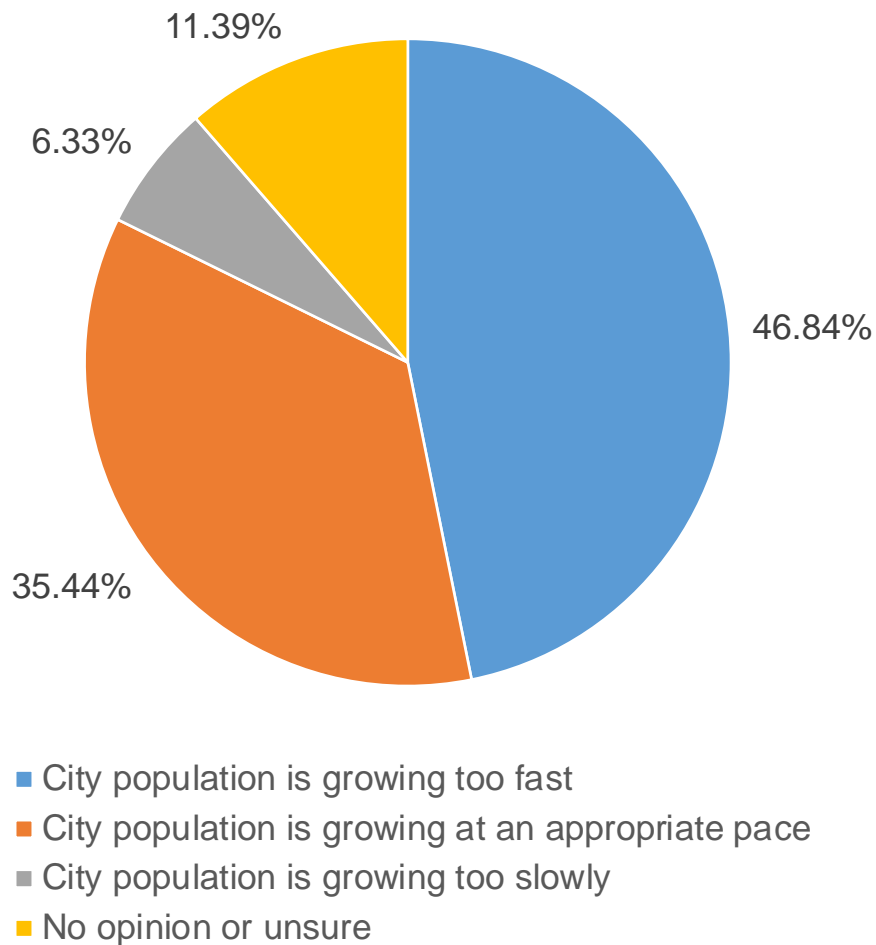
City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Please evaluate the pace of the City's population growth.

Statement	Count	Response Ratio
City population is growing too fast	74	46.8%
City population is growing at an appropriate pace	56	35.4%
City population is growing too slowly	10	6.3%
No opinion or unsure	18	11.4%

This information is represented graphically in the following image:



OPEN-ENDED QUESTIONS – RESPONSE SUMMARY

The following tables show a summary of responses to the open-ended community survey questions. The results are summarized by common themes identified in each response and are organized by count (frequency) of each response.

In your opinion, what are the top five priorities that should be focused on by the City in order of importance?

Since respondents were asked to prioritize their response, responses have been weighted based on priority. The first item mentioned is given a 5-point weight. The second item mentioned is given a 4-point weight, etc., until the fifth item mentioned by respondents was not weighted. Thus, the weighted count factors in the importance of items early in respondents' priority order.

Count	Weighted Count	Item
50	210	Water quality
44	143	Roads and streets
25	86	Economic development
19	76	Water cost
23	63	Downtown improvement
17	60	Business friendliness
16	57	Slow development/growth
18	55	City cleanliness, empty lots, blight, trash, etc.
19	53	Sidewalks and curbs
14	52	Sewer service quality
17	50	Schools
13	43	Responsiveness/Communication with citizens or businesses
14	41	Preserving and maintaining historic buildings and aesthetic
11	39	City staff capability
14	37	Youth recreation opportunities
12	35	Traffic and traffic enforcement
11	35	Crime and safety
11	35	Police
7	34	Water (unspecified)
9	28	Tourism
10	26	Expanded shopping and dining options

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Count	Weighted Count	Item
8	24	City maintenance
7	24	Dog park
7	21	Financial efficiency
7	20	Community events
6	19	Code Enforcement
6	18	Sewer Cost
7	17	Public parking
6	17	Entertainment/night life
7	16	Parks and recreation
5	16	Support for arts and culture
5	16	Community involvement
6	15	Senior services
5	15	Planning
4	14	Preserving open space
4	14	Preventing tract developments
5	13	Fire protection
4	12	Animal services
3	12	Government transparency
4	11	Home mail delivery
3	11	Sewer (Unspecified)
3	11	Community building/center
2	10	Growth boundary
4	9	Housing
3	9	Remove retail from sidewalks
3	9	Partnering with the state park and mission
2	9	Highway 156 pedestrian bridge
3	8	Permitting / design review process
3	8	Flooding and flood control
2	8	Multi-family housing
3	7	Public restrooms
2	7	More affordable goods
2	7	Smart growth

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Count	Weighted Count	Item
2	7	City plumbing
2	7	Cleanliness standards for business
2	6	Expanded childcare options
2	6	City facility maintenance
2	6	Attitude of elected officials
2	6	Limit medium and high-density housing
2	5	Improve quality of life
1	5	Attract professional jobs / young professionals
1	5	Revenue
1	5	Support volunteers
2	4	Technology infrastructure/internet connectivity
2	4	Lower Taxes
1	4	Tennis courts
1	4	Al fresco dining
2	3	Biking and hiking
1	3	Civility
1	3	4th of July parade
1	3	Government corruption
1	3	EDEAC efficiency
1	2	Capitalizing on local specialties
1	2	Horse rentals for the trail
1	2	City website updating
1	2	Media
1	2	Farm and Farmworker Assistance
1	1	Housing equity and accessibility
1	1	Environmental sustainability

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

What is the best thing you like about the City of San Juan Bautista?

Count	Item
43	Small town feel
28	Sense of community
18	Historic allure
17	Quiet
14	Safety
7	beauty
7	Rural
6	Charm
6	Location
6	The Mission
4	Downtown
4	Walkable
4	Weather
3	Open space
3	Quality of life
1	Affordability
1	Affordable
1	al fresca dining
1	Business opportunities
1	Hospitality businesses working together
1	Library
1	Walkable/bikeable

City of San Juan Bautista, CA*High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary****What is your current biggest concern about the City of San Juan Bautista?***

Count	Item
21	Water quality
18	Staff or leadership capability
16	Growing too fast
9	Water cost
7	Infrastructure
6	Water (unspecified)
5	Roads and streets
5	Sewer services cost
3	Lack of services
3	Not business friendly
3	Schools
2	Communication with citizens and businesses
2	Crime
2	Economic development
2	Government corruption
2	Growing too big
2	Growing too slow
2	Lack of vision
2	Limited dining and shopping options
2	Low-quality developments
2	No police force
2	Not business friendly
2	Sewer
2	Sewer services quality
2	Small farmers and farm workers
2	Trash/crime
1	Growing at all
1	Homelessness
1	Limited / No childcare options
1	Mentality of Volunteers
1	Not friendly to community
1	Revenue

City of San Juan Bautista, CA

High-Level Organizational, Financial, and Law Enforcement Review – Community Survey Summary

Count	Item
1	Too many antique/thrift stores
1	Tourism
1	Walking across the highway
1	Youth engagement

PREFERRED METHOD OF CONTACT FOR COMMUNITY MEMBERS

Count	Comment
68	Email newsletter
53	Printed newsletter
51	City website
47	City Manager's Mission Village Voice article
35	Facebook
24	Attending City Council meetings
14	Nextdoor
5	Twitter
2	All of the above
1	All media platforms
1	City Council Meetings Remotely
1	Informal meetings
1	MVV
0	Instagram