

Capitola City Council

Agenda Report

Meeting: September 14, 2023

From: City Manager Department

Subject: Long-Term Strategic Planning



Recommended Action: Provide feedback regarding the development process for a longer-term City of Capitola Strategic Plan.

Background: On March 1, 2023, the City Council discussed the FY 2023-24 Budget Goals and directed staff to develop five, ten, and 15-year strategic goals for the City of Capitola. Staff recommended using a professional consultant to complete this project. The City Council adopted the FY 2023-24 Budget on June 22, 2023, which included an allocation of \$50,000 for developing long-term strategic goals.

Discussion: Long-term strategic plans can be set using a variety of tools and processes. Plans from the County of Santa Cruz and other cities similar in size to Capitola were studied to provide examples.

In 2018, the County of Santa Cruz adopted a Strategic Plan for 2018-2024 (included as Attachment 1), which identified focus areas of attainable housing, comprehensive health and safety, reliable transportation, a sustainable environment, dynamic economy, and county operational excellence. Specific goals were set within each identified focus area. The year-long development process began with the establishment of a Strategic Plan Steering Committee, led by the Assistant County Administrative Officer. Over several months, staff and consultants sought input at a department head off-site retreat, Board of Supervisors workshops, employee mixer, community surveys, and focus groups. The Board of Supervisors adopted the final plan in June 2018. This process was spearheaded by the County Assistant Administrative Officer along with several members of County staff who dedicated about half of their bandwidth to the project. Outside consultants were also brought on to conduct community outreach meetings and facilitate visioning meetings with the Board. This is an example of a year-long process with less effort by outside consultants and significant involvement from the County-established Steering Committee and County staff.

Staff also reviewed strategic plan examples from other cities closer in size to Capitola. These plans were like that of Santa Cruz County, but often smaller in scale. They served more like an internal work plan rather than a graphic and data-intensive published document. As an example, the King City 20-year Strategic Plan is included as Attachment 3. That plan was developed by City staff using a community survey, a community workshop, and by referencing previously adopted planning documents and processes; all of these resources were combined into a more cohesive and comprehensive work plan to guide City priorities and initiatives.

In all instances, once the focus areas and goals of a long-term Strategic Plan are identified, the City identifies current and future projects, goals, and city initiatives that fit within those focus areas. These items would be included within the Strategic Plan, and in some jurisdictions are also detailed and tracked more thoroughly within a one (or two) year Operational Plan. This ensures that both the day-to-day and long-term functions and initiatives of the City are responsive to and in alignment with the Strategic Plan's focus areas. These documents could take the place of annual budget priority/goal workshops, effectively streamlining the budget adoption process, or serve as a tool to help develop a modified version of the City's goal setting process.

Based on staff's review of strategic plans in other cities, staff recommends the City Council consider a middle-ground approach to the Strategic Plan. Essentially, to develop a strategic plan that includes appropriate levels of public and community participation but does not exceed current budgetary resources devoted to the project or become the sole focus for key City staff members over the next 12 months.

Specifically, staff recommends the following 9-month process:

Steps	Description	Responsibility
Fact Finding	Citywide needs assessment using SWOT (strengths, weaknesses, opportunities, and threats) or SOAR (Strengths, opportunities, aspirations, and results) analysis; projection of long-term needs	Consultant-led in coordination with staff
Community Outreach	Survey; public workshop(s)	Staff/Consultant
Synthesizing	Unify community feedback with SWOT/SOAR; draft and present proposed goals and strategies	Consultant
Visioning	Half-day Council workshop to review fact-finding information and determine focus categories	City Council
Drafting	Prepare draft strategic plan, using all previously identified information and feedback from public and Council	Staff/Consultant
Fine Tuning	Distribute Strategic Plan draft to Council for review; Opportunities for comments, questions, amendments.	City Council and staff

Regardless of the scale of the Plan, the finished product should be a living document that City employees, Council, Board Members and Commissioners, and City residents can identify, understand, and feel connected to. An important aspect of this process is ensuring Strategic Plan information is utilized in future staff and Council decision-making and is updated over time.

Depending on Council feedback and direction, staff can identify consultants to assist with community outreach meetings and facilitate the process outlined above.

Alternatively, staff could instead start with an update to the City’s Mission, Vision, and Value statements (Attachment 4) which could then be used as guiding principles for the development of a Strategic Plan later in 2024 and into 2025. This could be a first step towards a bigger-picture outlook when envisioning Capitola’s future direction.

Fiscal Impact: The Fiscal Year 2023-24 adopted budget includes \$50,000 allocated towards developing long-term strategic goals.

Attachments:

1. Santa Cruz County Final Strategic Plan 2018-2024
2. King City 20-year Plan
3. City of Capitola Mission, Vision, and Value statements

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