



Staff Report

TO: Honorable Mayor and Members of the Town Council
FROM: Sean Rabé, Town Manager
DATE: April 9, 2021
RE: 2021-2026 Strategic Planning Workshop

Recommendation

Work with Staff during the Strategic Planning Workshop to craft a five-year Strategic Plan to guide the Town's priorities through 2026.

Issue Statement and Discussion

Strategic Planning is a critical process for local governments to provide a framework that ensures priorities set by the Town Council are clear to all Staff, goals are laid out that respond to priorities, objectives are achieved that meet the goals, and that Town government is accountable to meeting community needs.

The goals are broad statements of what we are striving for in delivering services to our community and should be both quantitative and qualitative in nature. The plan should identify strategies and initiatives to support the core goals.

On May 16 & 17, 2019, the Town Council held a Council and staff retreat at the Blue Anchor Annex. The retreat was facilitated by Ted Gaebler, of Team Gaebler, an internationally recognized expert on approaching change in governments. Action steps for the implementation of those goals were developed, with Staff working to fulfill those goals since the retreat.

Attachment A provides a status of that goal-setting effort.

Now that the Town Council has its two new members seated and some time has passed since their seating, it is timely to revisit the goal-setting process and begin the process of creating an updated Strategic Plan. Staff proposes a five-year horizon for the new Strategic Plan.

Using input from the Council and Staff, I have created a framework for the new Strategic Plan (Attachment B). The timeframes for each strategy are my best guess in light of workload, resources and operational importance. I would like Council's concurrence on those timeframes.

I have added explanations and possible programs after the chart.

Note that the actual Plan will be drafted and presented to Council at an upcoming Council meeting for formal adoption.

Staff is prepared to respond to any questions you may have.

CEQA Requirements

There are no CEQA implications associated with the recommended action.

Financial and/or Policy Implications

Financial implications will be identified as the tasks are implemented and further refined.

Attachments

- A. 2019 Retreat Status Report
- B. 2021-2026 Strategic Plan Framework

MAY 16 & 17, 2019 COUNCIL & STAFF RETREAT FOLLOW UP

Town of Loomis Mission Statement

The Town of Loomis is committed to preserving a quality of life to which families can grow and enjoy the small town atmosphere; a town in which there are concerns for all segments of society, including businesses and residents; a town that encourages the participation of all of its citizens in civic and community activities; a council and town staff that responds courteously and respectfully to the concerns and needs of the town's residents; and a plan that calls for slow, quality growth while preserving the financial integrity of the town.

ISSUE	Activity – Process – Outcomes – Who	TIMING	STATUS (April 2021)
Planning / Public Works	Create quarterly report on on-going projects – Town Engineer	JULY 2019	Complete and ongoing
	Staffing analysis of Public Works/Engineer – Town Manager	Fall 2019	Complete
	Revise the CIP process with Council input – Town Engineer	Fall 2019	Delayed (will be started by new Engineer)
	Update traffic impact fees (process) – Town Engineer	Fall 2019	Complete
Heritage Park	Clean up land and hire a park feasibility consultant – Town Engineer	End of 2019	Delayed; will be analyzed as part of 2020 General Plan Update
General Plan Update	Have community-oriented 101 General Plan and Zoning workshops – Town Planner	End of 2019	Complete
	Council to see action on General Plan soon – Town Planner	End of 2019	General Plan Update underway
Legislative Action Plan	Develop a legislative action plan that will allow quick response to quick-moving legislation that is of concern or interest to Loomis – Town Manager	End of 2019	Delayed; will be brought forward in 2021
Code Enforcement Codes	Come back with Code Enforcement Ordinance Update, if needed – Town Manager	End of 2019	Existing codes being reviewed
Build Community, transparency	More transparency; social media and more informational workshops – Town Manager	ASAP	Completed and ongoing – Facebook page created; website updated; quarterly newsletter ongoing
	Loomis Town Facebook page - send out messages a few times a week	ASAP	Completed and ongoing
Rebranding Loomis	Find creative way to brand Loomis – a family atmosphere, billboard sign – Town Manager	ASAP	Ongoing

<p>General Government</p>	<p>Ensuring fiscal stability</p> <p>Long-range planning and master plans</p> <p>Business friendly</p> <p>Having a clear vision shared by the community</p> <p>Developing future leaders</p> <p>Providing for and encouraging public involvement</p> <p>Priority on public safety to protect property and people</p> <p>Focusing resources on priorities</p> <p>RESPONSIBLE PARTIES: ALL</p>	<p>ASAP</p>	<p>Ongoing</p> <p>General Plan Update underway</p> <p>Ongoing</p> <p>Ongoing; General Plan Update underway</p> <p>Loomis Leadership Program in second year</p> <p>Ongoing through GP Update; Town Manager Tuesdays; Town Talks (will restart soon)</p> <p>Ongoing</p> <p>Ongoing; Strategic Planning scheduled for 4/9/21</p>
<p>Financial Stability</p>	<p>Economic Development Master Plan – Town Manager</p> <p>Create stability for library - tax and take control of building – Town Manager, Council</p> <p>Continue building community unity through positive outreach – All</p> <p>Implement plans – provide housing for missing middle – Planning Director</p> <p>Costco – secure it – Town Manager, Council</p> <p>Agritourism - grow as economic sector – Planning Director, Town Manager</p> <p>Review development codes – Planning Director</p>	<p>January 1, 2020</p> <p>ASAP</p> <p>ASAP</p> <p>Ongoing</p> <p>ASAP</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Part of General Plan Update (underway)</p> <p>Library purchase completed (in escrow); revisit use tax in future</p> <p>Ongoing; new forums established (Mayor Mondays, Town Manager Tuesdays), Town Talks; newsletter; etc.</p> <p>Will be addressed through General Plan Update (underway)</p> <p>Completed</p> <p>General Plan Update underway</p> <p>Ongoing</p>

	Community education on town government and planning – Town Manager, Planning Director	ASAP	Ongoing. Town Talks; newsletter; Town Manager Tuesdays; Loomis Leadership
	Add more community events – Town Manager, Chamber	Ongoing	Ongoing collaboration with Chamber (COVID-19 restrictions)

2021-2026 Strategic Plan Framework

Town of Loomis Mission Statement

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ISSUE	GOAL	STRATEGIES	DEPARTMENT	TIMING
Use of Technology	Use technology to increase services to Town residents and provide more efficient operations	1. Create public portal for Planning and Public Works issues (using Social Pinpoint)	Planning	Short-term
		2. Use various Finance technologies to streamline and simplify financial processes	Finance	Short/Mid
		3. Update mapping for ROWs and Easements	PW/Engineering	Mid
		4. Upgrade facility security (cameras, lighting)	PW/Engineering	Long
Infrastructure	Maintain and enhance the Town's infrastructure	1. Revamp and update Capital Improvement Plan	PW/Engineering	Short/Mid
		2. Fund and implement Capital Improvement Plan (including grants)	PW/Engineering Finance Town Manager	Short/Mid/Long
		3. Long-term planning for circulation – roads, bike/trails/pedestrian	Planning/ Engineering	Mid/Long
Operations	Provide efficient governmental operations in as cost-efficient manner as possible	1. Use contractors for appropriate services	All	Short/Mid/Long
		2. Succession Planning	All	Long
		3. Spending Authority	Town Manager	Short
		4. Uniform Construction Cost Accounting Procedures	Engineering/Town Manager	Short/Mid
		5. Identify operational efficiencies	Town Manager	Short/Mid
		6. Legislative Platform	Town Manager / Council	Short/Mid

		7. Communication Policy	Town Manager / Clerk	Mid
Financial Resiliency	Provide revenue stabilization through Economic Development and other means	<ol style="list-style-type: none"> 1. Provide for economic development that is less impacted by economic downturn 2. Finalize Costco 3. Update Building Permit Fees 4. Branding of Loomis 5. Sales and Use Tax for library (parks?) 6. American Recovery Plan (use?) 7. Maintain and use strategic partnerships (GSEC, Chamber, etc.) 8. WW Moulding Development 9. Targeted Economic Development 10. Remove hinderances to Economic Development 	<p>Town Manager/ Planning</p> <p>Town Manager/ Atty</p> <p>Building / Engineering</p> <p>Town Manager/ Planning</p> <p>Town Manager</p> <p>Finance/Town Manager</p> <p>Town Manager / Council</p> <p>Town Manager/ Planning</p> <p>Town Manager</p> <p>Town Manager</p>	<p>Short/Mid/Long</p> <p>Short</p> <p>Short</p> <p>Mid/Long</p> <p>Short/Mid</p> <p>Short</p> <p>Short/Mid/Long</p> <p>Short</p> <p>Short/Mid/Long</p> <p>Short/Mid</p>
Community Development	Provide for the planning of the Town in line with community expectations and values	<ol style="list-style-type: none"> 1. Certify Housing Element 2. General Plan Update 3. Zoning Code Update 4. Development project processing 5. Tree ordinance revision 	<p>Planning</p> <p>Planning</p> <p>Planning</p> <p>Planning</p> <p>Planning/Council</p>	<p>Short</p> <p>Mid</p> <p>Mid</p> <p>Short/Mid/Long</p> <p>Mid</p>
Build Community, Transparency	Continue building Community in a positive way; increase transparency in operations	<ol style="list-style-type: none"> 1. Maintain communication channels (Facebook, newsletter, website) 2. Increase public events (when able) 	<p>ALL</p> <p>Chamber/Clerk/ Manager</p>	<p>Short/Mid/Long</p> <p>Mid</p>

		3. Create an overall vision for Loomis	Council/Planning	Short/Mid
		4. Increase trust in local government	All	Short/Mid/Long
		5. Continue creation of searchable digital archive of Town Records on website	Clerk	Mid
		6. Continue improving customer service at Town Hall to provide transparency and exceed expectations	Clerk/Town Manager	Short/Mid/Long

NOTE: Timing is Town Manager's best guess

2021-2026 Strategic Plan Framework

Supporting Programs:

(Highlights indicate key discussion areas for meeting)

Use of Technology:

Use technology to increase services to Town residents and provide more efficient operations

- Planning Department:
 - Short term:
 - Social Pinpoint: Build out a public-facing portal for the General Plan update that allows comments to be inserted into a map for tracking. That mapping program can be expanded for use by other departments, particularly Public Works.
- Finance Department: Implement various technologies to streamline operations and simplify financial data.
 - Short term:
 - Establish Bill.com for payment processing and digital document storage
 - ClearGov for budget reporting and transparency
 - Mid-term:
 - Increase use of technology to streamline and simplify the financial process
 - Investigate and possibly implement cloud based Enterprise Resource Management (ERP) system. This uses technologies and systems to manage and integrate all core business processes.
- Public Works:
 - Mid-term:
 - Begin the process of updating mapping to address maintenance in areas where right of way is unclear or unknown
 - Long Term:
 - Update facility security by upgrading camera systems and lighting

Infrastructure:

Maintain and enhance the Town's infrastructure

- Public Works / Engineering Departments:
 - Short and Mid Terms:
 - **Revamp and update the Town's Capital Improvement Program**
 - This would include additional facilities added to the CIP (parks, facilities, roads, capital equipment, etc.)
 - Focus on deferred maintenance
 - Update existing facilities as resources allow
 - Fund CIP programs:
 - Continue looking for grants and additional funding sources
 - Mid and Long Terms:
 - Long Term Planning for infrastructure
 - General Plan Update
 - Future developments
 - Storm drain facilities
 - Update fee structures?

Operations:

Provide efficient governmental operations in as cost-efficient manner as possible

- Town Manager:
 - Short and Mid Terms:
 - Continue reviewing organization for operational efficiencies
 - Adjust Town Manager spending authority to allow for greater contracting efficiencies
 - Implement Uniform Cost Accounting procedure for streamlined contracting
 - Establish legislative platform to allow for faster response to pending legislation
 - Mid Term:
 - Create communication policy to guide how Council, commissions, committees and Staff should interact with media and public
- All Departments:
 - Short/Mid/Long Terms:
 - Review contracting capabilities to determine if contracting or staff is more efficient
 - Succession planning
 - Some long-term Staff may be at or nearing retirement. As Staff is so lean, need to begin succession planning.

Financial Resiliency:

Provide revenue stabilization through Economic Development and other means

- Town Manager:
 - Short and Mid Terms:
 - Review Town ordinances to determine possible hindrances to economic development and bring resolutions to Council for action
 - Begin process to renew sales and use tax for Loomis Library and Community Learning Center, and review potentially increasing tax to ½ cent and include park development and funding in tax
 - Short/Mid/Long Terms:
 - Continue targeted economic development that attracts businesses that are complimentary to Loomis
- Town Manager and Town Attorney:
 - Short Term:
 - Finish Costco litigation and get Costco built
- Town Manager and Planning Department:
 - Short Term:
 - Move forward with WW Moulding Redevelopment
 - Short/Mid/Long Term:
 - Provide for economic development that is less impacted by economic downturns. Examples include the transient occupancy tax created by hotels and partnering with the League of California Cities on tax sharing reform with the State
 - Mid and Long Term:
 - Continue branding efforts
- Town Manager, Council and Finance Department:
 - Short Term:
 - Decide on use of American Recovery Plan funds (approximately \$1.3 million; program requirements to be established by Federal government soon)
- Town Manager and Town Council:
 - Short/Mid/Long Term:
 - Maintain and better use the strategic partnerships the Town has in the region, including Greater Sacramento Economic Council, SACOG, PCTPA, etc.
- Building and Engineering Departments:

- Short Term:
 - Update building permit fees to provide for greater cost recovery (General Fund is subsidizing permitting costs)

Community Development:

Provide for the planning of the Town in line with community expectations and values

- Planning Department:
 - Short Term:
 - Complete Housing Element Update
 - Short/Mid/Long Terms:
 - Ongoing Development processing – the Town will be processing several large scale development proposals, all at the same time. Staff will continue to provide quality planning services, augmented by contract planning firms.
 - Mid Term:
 - Complete General Plan Update
 - Update Zoning Code to reflect new General Plan
 - Revisit Oak Tree ordinance (requested by Councilman Cartwright)

Build Community and Transparency

Continue building Community in a positive way; increase transparency in operations

- Town Manager / Town Clerk:
 - Short/Mid/Long Term:
 - Continue ongoing process of improving customer service at Town Hall to provide transparency and exceed customer service expectations. Continue ongoing culture of helping, not hurting
- Chamber / Clerk / Town Manager:
 - Mid Term:
 - Increase community events to provide community togetherness
- Town Clerk:
 - Mid Term:
 - Continue ongoing effort to create searchable database of public documents on Town Website and Town intranet
- All Departments:
 - Short/Mid/Long Term:
 - Maintain communication channels to provide transparency and to create an educated residency
 - Facebook, newsletter, Town Manager Tuesday, newsletter, website
 - Increase trust in local government:
 - Foster culture of respect and helpfulness at Town Hall so that our residents feel heard, valued and respected
- Council / Planning Department:
 - Short/Mid Term:
 - Create an overall vision for Loomis (requested by Councilmember Clark-Crets):
 - Take time to survey, poll, workshop with Town residents and businesses to create a consensus vision for Loomis that will feed into the General Plan update