



STAFF REPORT

TOWN COUNCIL MEETING OF APRIL 14, 2015

To: Town Council

From: Town Manager

Subject: 2015 Town Council Strategic Planning Retreat

Date: April 1, 2015

RECOMMENDATION:

Receive and File

ISSUE/DISCUSSION:

On February 28, 2015, the Town Council held a Town Council Strategic Planning Retreat. The retreat was facilitated by Michael Ward of HighBar Global Consulting and lasted from 9:00 am to 4:00 pm. All Council members attended and participated. Attached is the Town of Loomis Council Strategic Planning Summary Report.

As set forth in the attached document, staff is preparing an action plan to implement the "Focused Implementation" identified in the report. Work has already begun on the Town Website updating, reviewing the adopted General Plan and Zoning documents, the Highway Horseshoe Bar over cross artwork, and addressing signage on our Borders. Staff anticipates returning at the May 14, 2015 Town Council meeting to present the Action Plan for Implementation.

CEQA:

There are no CEQA issues involved.

FINANCIAL IMPLICATIONS:

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



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Town of Loomis Council Strategic Planning Summary Report

Council Retreat

Loomis Depot – 5775 Horseshoe Bar Road

February 28, 2015 – 9:00am to 4:00pm

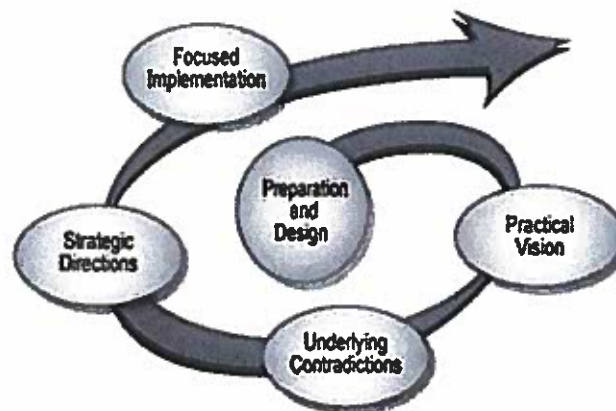
Participants: Brian Baker, Robert Black, Rhonda Morillas, Miguel Ucovich, Dave Wheeler, Jeff Mitchell, Rick Angelocci, and active public participation

Rational Aim: Develop a long range strategic plan to guide the council, staff, and community.

Experiential Aim: A collaborative approach resulting in a unified council speaking with one voice.

Retreat Agenda

- 9:00 Welcome - Agenda Review
- 9:10 Setting the Context for Planning - Survey and Interview Debrief
- 9:30 A Practical Long Range Vision for Loomis
- 10:30 Morning Break
- 10:45 Resolving Issues/Contradictions That Might Block Realization of Our Vision
- 12:00 Lunch
- 12:45 Setting Strategic Directions to Guide Progress Toward Our Vision
- 2:15 Afternoon Break
- 2:30 Preliminary Implementation - One Year Accomplishments
- 3:45 Handoff to the Town Manager and Staff for Action Planning
- 4:00 Adjourn



Preparation and Design

At the request of the Town Manager HighBar Global prepared a Scope of Work with the following planning framework and objectives.

The Town of Loomis would like a Strategic Planning process (including Council Retreat) that provides the Town Council a positive and constructive opportunity to achieve:

- *A clear vision for what the Town of Loomis might become over the next 15 to 20 years*
- *A strategy framework with incremental goals*
- *A simple mission statement*
- *A “core values” framework (3 to 5) to guide decision-making*
- *Help the council shift its attention from a current focus on projects to the longer term vision*
- *An educational process that clarifies the council strategic plan role as setting policy and funding that policy with the Town Manager and staff responsible for plan implementation*
- *Effective participation by all council members*
- *Resolution of contradictions that may impede strategic plan consensus and implementation (e.g. balancing “slow growth” vs. pressure to increase revenues)*
- *Consensus about how to maximize Town of Loomis favorable relations with “neighbors”*
- *Pre-retreat preparation and post-retreat council outreach to the community to communicate the Strategic Plan scope and dimensions*
- *A strong hand-off to the Town Manager and staff for plan implementation*

Preparation for the Council Retreat included an online survey followed by individual interviews with each of the Council members and the Town Manager. The summary report of that data gathering is appended to this retreat summary report (see page 9). The data gathering and dialogue process helped the consultant to design a facilitation plan, agenda, and process for the retreat which would maximize the opportunity for each Council member to express clearly their current and future hopes and expectations for the Town of Loomis with clarity and resolve.

The retreat format followed the graphical outline illustrated on page 1 and produced:

- ☞ *A Practical Vision (20 Year Time Horizon - Page 3)*
- ☞ *Underlying Contradictions/ Issues to Resolve (Page 4)*
- ☞ *Strategic Directions to Guide the Council, Manager, Town (2 Year Time Horizon - Page 5)*
- ☞ *Focused Implementation Plan with Key Actions (1 Year Time Horizon – Page 7)*
- ☞ *Core Values (Extracted From the Complete Planning Exercise – Page 8)*

The Retreat concluded with a clear “handoff” to the Town Manager and staff to implement the *Focused Implementation Plan* while also determining additional actions that will effectively implement the Strategic Directions over a longer time horizon.

Practical Vision (20 Years)
“What do we want to see in place in 20 years?”

Council members were asked to respond to this question individually. All responses were posted and clustered by similar themes. Council members developed “names/headlines” for each category based upon the central idea driving each cluster. The four *Practical Vision* “headlines” are placed across the top of the following table with individual responses listed below. The table is organized to reflect highest-to-lowest in volume of total ideas contributed.

Family Lifestyle	Viable Connected Downtown	Traffic Flow	Revenue For Financial Solvency
Safe And Friendly Town To Live In	Town Theme	Maintained Roads And Sidewalks	Turtle Island Developed Like The Fountains
Friendly People	Taylor Road Full Of Retail	Improved Streets & Traffic Flow	Development At I80 And Horseshoe Bar
Housing For Families	Viable Downtown-- Alive Like It Is	Up-To-Date Infrastructure	Vibrant Financially Sound Town
Memorial To Rhonda ☺	Downtown Intact	No Traffic Congestion	Jobs For Our Youth And Adults
Del Oro Still Going Strong	Walking Based Downtown Core Area	New Access To Interstate 80	
Affordable Housing For All Groups	Small Town Celebrations		
Small Town Feel In New Developments (No High Rise)	Viable Business In Downtown		
Pride In Our Town	History Of Our Town Preserved		
Del Oro Focus Of Town	Rural Small Town Feel		
Loomis Town Limits Twice As Big (I.E. Boundaries We Control 2x As Large)			
Rural Lifestyle			

Underlying Contradictions (Current)

“What is blocking us from moving toward our vision?”

Council members were then asked to discuss the existing underlying issues or “contradictions” which might block the council, the town, and the community from realizing the *Practical Vision*. Contradictions represent constraints based upon beliefs, assumptions, or real conditions which – if not resolved – may actually interfere with progress toward achieving the vision. Six contradictions were identified by the Council (bold, left hand column) with the specific underlying issues listed to the right.

Contradictions:

Border Development Will Drive Our Planning And Strategies	Outside Influences On Development			
We Might Fail To Act Or Implement Our Plans	Lack Of Ownership To Get Things Done	Fail To Act On Our Competitive Advantage	Not Following The General Plan	No Parks For Downtown
Existing Conditions Might Limit Our Choices	Limited Commercial Property – Old Buildings – No Parking	Current Zoning Allows Multi-Family On Commercial Property	Existing Conditions (No Blank Slate)	
Lack Of Communication May Limit Community Engagement	Lack Of Bringing The Community Into The Process	Lack Of Effective Communication		
We Will Need To Adapt To Changing Conditions And Lifestyles	Rural Lifestyle Can Limit Revenue Options	Need To Define “What Is Lifestyle?”	Adapting To Changing Conditions	Traditions
We Will Need To Attract And Retain The Next Generation Of Civic/Community Leaders	Lack Of Affordable Housing For Next Generation Of Civic Leaders	Developing Housing (-\$) Vs. Increasing Revenue (+\$)	Lack Of Next Generation Leadership	

Strategic Directions (2 Years)

**“What innovative practical actions will deal with the contradictions
AND move us toward our vision?”**

Council members were asked to identify specific actions over a two year period which would address the underlying contradictions and move the community toward the *Practical Vision*. Council contributions were clustered and discussed to determine the central theme driving each strategy. Three clear strategic directions were revealed and are recorded in the headers of the table below. Council input to each strategic direction is detailed in each column.

1. Plan Realistically For Our Future	2. Build An Involved Community	3. Brand Loomis As A Historical Destination & Small Town Experience
Stay Current As We Plan And Look Forward	Develop Our Council Replacements	Town And Chamber Promote Downtown Business
Reduce “Knee Jerk” Reactions	Set Up Leadership Workshops With Chamber Or School	Develop A Niche For Loomis – 2 nd Hand Stores
Set Timetables For Implementation	Review New Development Proposals To Reflect/ Account For Attraction Of Next Generation	Encourage Shoppers From Border To Visit Loomis Business
Set Goals With Realistic Time Frames	Encourage Younger Generation To Get Involved	Expand Sphere Of Influence
Make Hard Choices	Involve The Younger Generation In More Projects	Adaptive Changes To Border Development
Update General Plan To Take Residential Out Of Commercial	Actively Solicit New Leaders	Advocate Loomis Business On Borders
Set Deadlines For Plans To Be Done	Use More Social Media	Stress Benefits Of Our Small Town
Use Our Assets – Focus On Our Strong Points In Town – Improve Our Weak Spots	Have A Quarterly Newsletter Sent By Email To Residents	Look At Our Projects To Be Different Than Rocklin
Constant Re-Assessment To Change Goals	Reach Out To The Community	Create A Better Marketing Plan
Stay Focused On What Needs To Get Done	Update The Web Site	

1. Plan Realistically For Our Future	2. Build An Involved Community	3. Brand Loomis As A Historical Destination & Small Town Experience
Re-Review Existing Plans Implement Them	Be Open And Listen To What Is Being Said (Hear!)	
Look At Long Term Effects	Determine What Programs, Etc. People Want – Draft Plans	
Be Innovative In Our Planning Of Future Projects	Town/ Chamber Sponsor More Workshops With Public Input	
Redevelop Existing Conditions (From Negative To Positive)	Joint Community Leader Meeting	
Enhanced IFD (Infrastructure Finance District)		

Focused Implementation (1 Year)
“What will we do during the next 12 months?”

Council members were then asked to work in pairs and develop key actions that would implement the new *Strategic Directions* during the next 12 months (2015-16). Council was also asked to identify which quarter in the next 12 months they would like to see the key action completed. The very concise summary is outlined in the table below and provides Council direction to the Town Manager and staff for where to focus efforts in the coming year.

Strategic Direction	Quarter 1	Quarter 2	Quarter 3	Quarter 4
1. Plan Realistically For Our Future	Review General Plan And Zoning	Focus And Plan So That Success Of Future Projects Work For Future Generations		Finalize And Begin To Implement A Downtown Master Plan That Is Workable
2. Build An Involved Community	Open Lines Of Communication To Increase Interaction With Schools, Service Groups, Community Groups, Churches, Chamber	New Website -Link Social Media -Link With Chamber -Better Town Calendar -Pictures Of Events		
3. Brand Loomis As A Historical Destination & Small Town Experience	Signage On Borders To Direct Business/ People To Town; Involve Historic Society And Chamber With Town To Brand	Freeway Bridge Sign -Create A New Logo		Town To Partner With Downtown Business To: Paint, Awnings, Signage; Historical Signage

As noted in the overview on page two the Town Manager and staff will want to look at the *Strategic Directions* and consider additional key actions in years 2, 3, 4 and beyond that will help to realize and sustain momentum toward the long term *Practical Vision*.

Core Values

The closing discussion provided an opportunity for Council to reflect on the entire workshop and extract the *Core Values* driving their thinking, input, and decision-making while formulating this Strategic Plan. The Council identified and easily agreed on the following values as critical drivers for the Town of Loomis today and over the long term. The values are simply listed as suggested and not intended to reflect a priority order.

- ††† Family Centric
- ††† Quality Services
- ††† Civility
- ††† Quality Lifestyle
- ††† Open Communication
- ††† Community Involvement
- ††† Safe Environment
- ††† Fiscal Stability

Mission Statement

The Council also reviewed and validated the existing Mission statement as current and consistent with the *Practical Vision, Underlying Contradictions, Strategic Directions, and Focused Implementation Plan* and is presented below to document that agreement.

The Town of Loomis is committed to preserving: a quality of life in 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.