



# Staff Report

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**TO:** Honorable Mayor and Members of the Town Council  
**FROM:** Sean Rabé, Town Manager  
**DATE:** March 25, 2022  
**RE:** 2021-2026 Strategic Plan Status Update

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## **Recommendation**

Review status of the attached five-year Strategic Plan (approved in June 2021) and provide direction to Staff on any modifications. The approved plan is intended 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 June 8, 2021, the Town Council approved the attached five-year Strategic Plan, after holding a workshop on April 9, 2021.

The attached 2021-2026 Strategic Plan includes status updates (shown in red) to each of the programs approved by Council. The intent of this meeting is to review the status of the programs and provide direction to Staff on any potential modifications.

Explanations and programs aimed at implementation of the plan are found after the chart. The timeframes for each strategy are my best guess considering workload, resources and operational importance.

One issue I need direction from Council on is how to move forward with 3800 Taylor Road – should the Town continue to pursue selling the property? Lease it? Hold it and make a decision later?

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. 2021-2026 Strategic Plan (with annotated status updates)

## 2021-2026 Strategic Plan Framework

### *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	GOAL	STRATEGIES	DEPARTMENT	TIMING
<b>Use of Technology</b>	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	Short
		5. Develop an app for resident engagement	All	Mid/Long
<b>Infrastructure</b>	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
		4. Pavement Condition Index on Website	Engineering	Short
<b>Operations</b>	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

		<ul style="list-style-type: none"> <li>5. Identify operational efficiencies</li> <li>6. Legislative Platform</li> <li>7. Communication Policy</li> </ul>	<ul style="list-style-type: none"> <li>Town Manager</li> <li>Town Manager / Council</li> <li>Town Manager / Clerk</li> </ul>	<ul style="list-style-type: none"> <li>Short/Mid</li> <li>Short/Mid</li> <li>Mid</li> </ul>
<b>Financial Resiliency</b>	Provide revenue stabilization through Economic Development and other means	<ul style="list-style-type: none"> <li>1. Provide for economic development that is less impacted by economic downturn</li> <li>2. Finalize Costco</li> <li>3. Update Building Permit Fees</li> <li>4. Branding of Loomis</li> <li>5. Sales and Use Tax for library</li> <li>6. American Recovery Plan (use?)</li> <li>7. Maintain and use strategic partnerships (GSEC, Chamber, etc.)</li> <li>8. WW Moulding Development</li> <li>9. Targeted Economic Development</li> <li>10. Remove hinderances to Economic Development</li> </ul>	<ul style="list-style-type: none"> <li>Town Manager/ Planning</li> <li>Town Manager/ Atty</li> <li>Building / Engineering</li> <li>Town Manager/ Planning</li> <li>Town Manager</li> <li>Finance/Town Manager</li> <li>Town Manager / Council</li> <li>Town Manager/ Planning</li> <li>Town Manager</li> <li>Town Manager</li> </ul>	<ul style="list-style-type: none"> <li>Short/Mid/Long</li> <li>Short</li> <li>Short</li> <li>Mid/Long</li> <li>Short/Mid</li> <li>Short</li> <li>Short/Mid/Long</li> <li>Short</li> <li>Short/Mid/Long</li> <li>Short/Mid</li> </ul>
<b>Community Development</b>	Provide for the planning of the Town in line with community expectations and values	<ul style="list-style-type: none"> <li>1. Certify Housing Element</li> <li>2. General Plan Update</li> <li>3. Zoning Code Update</li> <li>4. Development project processing</li> </ul>	<ul style="list-style-type: none"> <li>Planning</li> <li>Planning</li> <li>Planning</li> <li>Planning</li> </ul>	<ul style="list-style-type: none"> <li>Short</li> <li>Mid</li> <li>Mid</li> <li>Short/Mid/Long</li> </ul>

		5. Tree ordinance review/application	Planning/Council	Short/Mid
<b>Build Community, Transparency</b>	Continue building Community in a positive way; increase transparency in operations	<ol style="list-style-type: none"> <li>1. Maintain communication channels (Facebook, newsletter, website)</li> <li>2. Increase public events (when able)</li> <li>3. Create an overall vision for Loomis</li> <li>4. Increase trust in local government</li> <li>5. Continue creation of searchable digital archive of Town Records on website</li> <li>6. Continue improving customer service at Town Hall to provide transparency and exceed expectations</li> <li>7. Provide additional technologies and budget appropriately for better transparency and resident access</li> </ol>	<p>ALL</p> <p>Chamber/Clerk/Manager</p> <p>Council/Planning</p> <p>All</p> <p>Clerk</p> <p>Clerk/Town Manager</p> <p>All</p>	<p>Short/Mid/Long</p> <p>Mid</p> <p>Short/Mid</p> <p>Short/Mid/Long</p> <p>Mid</p> <p>Short/Mid/Long</p> <p>Short/Mid</p>

# 2021-2026 Strategic Plan Framework

## Supporting Programs:

### 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.
      - **STATUS MARCH 2022: Ongoing effort as part of the General Plan Update**
- Finance Department: Implement various technologies to streamline operations and simplify financial data.
  - Short term:
    - Establish Bill.com for payment processing and digital document storage
      - **STATUS MARCH 2022: Complete, though Staff is reviewing whether or not to continue using the software based on organizational efficiencies and costs.**
    - ClearGov for budget reporting and transparency
      - **STATUS MARCH 2022: Ongoing**
  - Mid-term:
    - Increase use of technology to streamline and simplify the financial process
      - **STATUS MARCH 2022: Not yet started (Fiscal Year 2022/23, pending budget)**
    - Investigate and possibly implement cloud based Enterprise Resource Management (ERP) system. This uses technologies and systems to manage and integrate all core business processes.
      - **STATUS MARCH 2022: Not yet started (Fiscal Year 2022/23, pending budget)**
- Public Works:
  - Mid-term:
    - Begin the process of updating mapping to address maintenance in areas where right of way is unclear or unknown
      - **STATUS MARCH 2022: In Progress; initial map of public vs. private streets completed.**
  - Short Term:
    - Update facility security by upgrading camera systems and lighting
      - **STATUS MARCH 2022: Partially completed; further work to be done in FY 2022/23 (pending budget)**
- All Departments:
  - Mid / Long Term:
    - Contract with a company to build out a smartphone application to provide for better resident engagement (calendar, report an issue, etc.)
      - **STATUS MARCH 2022: Not yet started (Fiscal Year 2023/24, pending budget)**

### Infrastructure:

### *Maintain and enhance the Town's infrastructure*

- Public Works / Engineering Departments:
  - Short Term:
    - Present the recently-completed Pavement Condition Index to Council and put the document on the Town website
      - **STATUS MARCH 2022: Complete**
  - 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
        - **STATUS MARCH 2022: Ongoing. New CIP process to be implemented in Spring 2022**
    - Fund CIP programs:
      - Continue looking for grants and additional funding sources
        - **STATUS MARCH 2022: Ongoing. Grant-funded project to replace in-ground crosswalk lights with flashing beacons completed.**
  - Mid and Long Terms:
    - Long Term Planning for infrastructure
      - General Plan Update
      - Future developments
      - Storm drain facilities
        - **STATUS MARCH 2022: Ongoing.**

### Operations:

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

- Town Manager:
  - Short and Mid Terms:
    - Continue reviewing organization for operational efficiencies
      - **STATUS MARCH 2022: Ongoing process. Fulltime Town Engineer hired in 2021**
    - Adjust Town Manager spending authority to allow for greater contracting efficiencies
      - **STATUS MARCH 2022: Complete**
    - Implement Uniform Cost Accounting procedure for streamlined contracting
      - **STATUS MARCH 2022: Complete**
    - Establish legislative platform to allow for faster response to pending legislation
      - **STATUS MARCH 2022: In process; to be presented in FY 2022/23**
  - Mid Term:
    - Create communication policy to guide how Council, commissions, committees and Staff should interact with media and public
      - **STATUS MARCH 2022: In process; to be presented in FY 2022/23**
- All Departments:
  - Short/Mid/Long Terms:
    - Review contracting capabilities to determine if contracting or staff is more efficient
      - **STATUS MARCH 2022: Ongoing process**
    - Succession planning
      - Some long-term Staff may be at or nearing retirement. As Staff is so lean, need to begin succession planning.

- **STATUS MARCH 2022: Town Clerk staff position transitioned to existing employee; new front-counter staff hired. Ongoing process.**

## 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
      - **STATUS MARCH 2022: Ongoing process**
    - Begin process to renew sales and use tax for Loomis Library and Community Learning Center
      - **STATUS MARCH 2022: Exploratory committee established (not a Town function). Town Manager will bring actions to Council when Committee is ready.**
  - Short/Mid/Long Terms:
    - Continue targeted economic development that attracts businesses that are complimentary to Loomis
      - **STATUS MARCH 2022: Ongoing process. ACE Hardware Annex approved; Loomis Garage tenant improvements**
- Town Manager and Town Attorney:
  - Short Term:
    - Finish Costco litigation and get Costco built
      - **STATUS MARCH 2022: Judge ruled in favor of Town on traffic issues; ruled against Town on zoning issue. Council and Planning Commission taking necessary steps to resolve zoning issue.**
- Town Manager and Planning Department:
  - Short Term:
    - Move forward with WW Moulding Redevelopment
      - **STATUS MARCH 2022: RFP released in Summer 2021; development rights awarded in Fall 2021. Negotiations fell through.**
        - **Need Council direction on how to proceed.**
  - 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
      - **STATUS MARCH 2022: Ongoing process. General Plan Land Use Committee work nearly done that will help identify if any changes are made to possible hotel sites.**
  - Mid and Long Term:
    - Continue branding efforts
      - **STATUS MARCH 2022: Ongoing process.**
- Town Manager, Council and Finance Department:
  - Short Term:
    - Decide on use of American Recovery Plan funds (\$1.6 million).
      - **STATUS MARCH 2022: Complete.**
- 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.
      - **STATUS MARCH 2022: Ongoing process.**
- Building and Engineering Departments:
  - Short Term:
    - Update building permit fees to provide for greater cost recovery (General Fund is subsidizing permitting costs)
      - **STATUS MARCH 2022: In process. Staff determining scope of fee study; completed fee study to be done in FY 2022/23.**

## Community Development:

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

- Planning Department:
  - Short Term:
    - Complete Housing Element Update
      - **STATUS MARCH 2022: Complete and certified.**
  - 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.
      - **STATUS MARCH 2022: Ongoing process. Some of the anticipated developments have not moved forward.**
  - Mid Term:
    - Complete General Plan Update
      - **STATUS MARCH 2022: Ongoing process.**
    - Update Zoning Code to reflect new General Plan
      - **STATUS MARCH 2022: In progress.**
    - Revisit Oak Tree ordinance for more flexibility in application and use of fees
      - **STATUS MARCH 2022: Staff determined no need to modify ordinance. Maintenance of existing trees is an allowed use. Pruning contract approved by Council in February 2022; work being done now.**

## 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
      - **STATUS MARCH 2022: Ongoing process. New staff hired; has been working out really well.**
- Chamber / Clerk / Town Manager:
  - Mid Term:
    - Increase community events to provide community togetherness
      - **STATUS MARCH 2022: Ongoing process. Eggplant Festival held in Fall; concerts coming back this Summer.**
- Town Clerk:
  - Mid Term:



- Continue ongoing effort to create searchable database of public documents on Town Website and Town intranet
  - **STATUS MARCH 2022: Ongoing process.**
- 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
        - **STATUS MARCH 2022: Ongoing process. Town Manager Tuesday held as often as possible (holidays and COVID permitting); website continually updated. Newsletter will come back in FY 2022/23 as digital version (direct mail expensive).**
    - Increase trust in local government:
      - Foster culture of respect and helpfulness at Town Hall so that our residents feel heard, valued and respected
        - **STATUS MARCH 2022: Ongoing process.**
    - Provide additional technologies and budget appropriately for increased transparency and resident access to Town meetings
      - **STATUS MARCH 2022: Contract with Ken Benedict provides for live streaming of most Town meetings to YouTube. All meetings are now hybrid with Zoom. Staff can stream meetings without Ken if necessary.**
  - 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
        - **STATUS MARCH 2022: Surveys sent out through Social Pinpoint and direct mail.**
- Council / Planning Department