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DATE: April 15, 2024

TO: Honorable Mayor and Members of the City Council through City Manager

FROM: Brian Cochran, Assistant City Manager  
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SUBJECT: Receive an Updated Goals and Priorities Workplan for Fiscal Years 2024/25 and 2025/26 and Provide Direction to Staff

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### **RECOMMENDATION**

It is recommended that the City Council receive the updated workplan for the City's goals and priorities for fiscal years 2024/25 and 2025/26 and provide direction to staff as needed.

### **BACKGROUND**

The Petaluma City Council has had a regular tradition of establishing annual goals and priorities each year as a guidepost for what it would like to get accomplished in the upcoming year and to help set a workplan for City staff. Staff recently brought an updated outlook on goals and priorities at the February 26, 2024 City Council meeting, which proposed a division of 32 goals into 4 different categories. One of those four categories was “Capital Improvement Program” (“CIP”), which staff proposed sectioning off from the goals discussion due to the separate CIP budgeting and planning process already underway. For a more thorough discussion of the background on Petaluma’s goal-setting process, as well as the information that was prepared for the February 26<sup>th</sup> meeting, please see that staff report here:

<https://cityofpetaluma.primegov.com/Portal/viewer?id=0&type=7&uid=56835603-c218-457c-b6dd-4730604894a5>

At the February 26<sup>th</sup> meeting, staff presented the proposed goals organized into the four categories, as well as background information about the complexity and timing considerations that go into planning each deliverable. The Council and community asked questions about many of the goals and proposed some potential new ones to add to the list. Staff proposed to return in April with a more finalized list of goals, and milestones for each goal, as well as estimated timelines for completion.

## **DISCUSSION**

The updated document presented to Council with this agenda item represents staff's best estimate of the milestones and timelines for each goal. As a reminder, the goals being proposed are as follows (as mentioned above, CIP projects will be prioritized as part of the City's annual budget process):

### **Legislative Initiatives**

- Retail Cannabis Program Expansion
- Adoption of Tree Preservation Ordinance and Updated Policies and Procedures
- Zoning Code Update
- Parking Ordinance Update
- Housing Element Implementation
- Parking Management
- Charter Amendments
- Urban Growth Boundary Extension

### **Policies, Programs and Plans**

- Adoption of a new General Plan 2050;
- Active Transportation Plan;
- Transitioning the Fairgrounds and Completion of a Master Plan;
- Implementation of the Blueprint for Carbon Neutrality;
- Integrated Pest Management Plan (IPMP);
- Open Space Acquisitions and Management;
- Downtown Investments and Beautification;
- Strategic Plan to End Homelessness;
- Sea Level Rise (SLR) and Floodplain Modeling/Mapping, FEMA FIRM map update;
- Petaluma North Specific Plan;
- Utilization of the West Wing of City Hall.
- Reimagining of Senior Services (Added at February 26<sup>th</sup> meeting by staff)

### **Internal / Organizational Goals:**

- Hybrid Police Oversight Model;
- Citywide Diversity, Equity, Inclusion, and Belonging Efforts;
- Enterprise Resource Planning (ERP) software;
- Completion of an Organizational Strategic Plan (i.e. 'OnePetaluma');
- Update of Purchasing Regulations and Policies;
- Improve Capacity of City Services Provided at City Hall.

Since the February 26<sup>th</sup> Council discussion, staff have worked to build out each goal in several ways. First, multiple milestone items have been identified for each goal, in most cases somewhere between 2 – 7 milestones per goal. These milestones each represent a significant step forward for the goal and typically involve many staff hours and collaboration of multiple departments. Second, timeline estimates have been added for each milestone, designated by

“Year 1”, “Year 2”, “Year 3”, etc. These are rough approximations of which fiscal year the item is estimated to be completed (which will be driven by multiple factors, discussed more below). Third, a list of collaborative departments has been added for each workplan item; as with most projects, it often requires the input and expertise of three, four, or more departments to bring a milestone to fruition. Naming the departments in this way is one way to track the relative workload for heavily impacted departments.

All of the above information has been input into a new tracking tool that allows additional data visualization and reporting. Attachment 1 to this staff report is organized in a basic list view, with each goal separated out and individual milestone items below. To the right, you will see the departments and timelines associated with each milestone. Attachments 2 and 3 split out the year 1 and year 2 workplans by department, showing the total number of milestone items that each department will be supporting.

To fully understand the overall workplan, it’s important to concede that it is developed at a point in time with currently known information. As with any plan, it is likely that circumstances will change during the year, necessitating flexibility and adaptation at times. Below are some important caveats and observations as we move forward on this plan:

- Staff would deem the current workplan “aggressive”, especially in the first year. In the attachments, note the number of milestones in year 1 versus years 2 – 5. Any number of issues could push milestones out a year, which then has ripple effects for other milestones. Examples of this could include: loss of staff; new legislative mandates; new unanticipated priorities mid-stream from Council or community; unexpected regulatory hurdles such as outside agency permit processing; or requests for more outreach on particular topics than planned.
- Available “discretionary” time to work on goals and milestones is minimal for staff. All of the above goals are “above and beyond” the day-to-day work that staff are charged with, and it is only a small sub-set of staff who can work on these types of major initiatives. Furthermore, we estimate that only about 10% of any given staff member’s time can be devoted to special projects (about 200 hours per year per employee).
- Projects exist on a continuum from “absolutely mandatory” to “completely optional”. Mandatory items include goals such as The General Plan and Implementation of the Housing Element. To the extent that Mandatory items are either taking longer or requiring more staff resources than originally expected, it may cause us to push out some optional items into later years. This will ensure we can meet statutory deadlines, grant funding deadlines, etc.
- As you’ll see in the year-by-year breakdowns and the departmental tallies of the number of milestones per department, certain departments are heavily impacted and involved in dozens of initiatives each year. Specifically, the City Attorney’s Office, City Manager’s Office, Community Development Department and Economic Development and Open Government Department are involved in many, or most, of the milestones in our plan. Staffing resource shortages in those departments may mandate a slower pace of projects (for example, 2 out of the 6 positions in the City Manager’s Office are currently vacant).

- Finally, given all of the above considerations, if Council chooses to add items to the list during the year, especially in Year 1, we will need to figure out what projects can get moved to Years 2 or 3 to accommodate.

Staff are eager to present this refreshed and comprehensive workplan to the City Council and community. As we move into the Fiscal Year 2024/25 budget conversations, we will be presenting additional information about available staff resources and a robust prioritization within our Capital Improvement Program. Additionally, enhanced dashboards and reporting tools, some of which may be able to be linked from our website, will allow us to provide dynamic updates and more regularly keep the community abreast of the progress of milestones as they are achieved.

### **PUBLIC OUTREACH**

This agenda item was previously discussed at the February 26, 2024 Council meeting and appeared on the City’s tentative agenda document on April 8, 2024 which was a publicly-noticed meeting.

### **COUNCIL GOAL ALIGNMENT**

This agenda item will set the goals for the next 2-year period.

### **FINANCIAL IMPACTS**

There are no financial impacts from reviewing the goals and priorities.

### **ATTACHMENTS**

1. Dashboard of City Goals and Milestones 2024 – 2026
2. Departmental Report of Year 1 Milestones
3. Departmental Report of Year 2 Milestones