City of Folsom
Strategic Planning
City Council Workshop

February 16, 2023
9:00 a.m. to 3:30 p.m.
Library Meeting Room

Jan Perkins | Facilitator
Rick Haydon | Facilitator
Welcome and Call to Order

Mayor Rosario Rodriguez
Comments from City Manager Elaine Andersen

• Focusing and setting priorities is essential to achieving results
• The Executive Team is committed to the community’s success
Public Comments
Objectives for Today

- Create consensus about norms for governing
- Obtain Council’s priorities for the first two years of the Strategic Plan
- Obtain Council’s input and direction on the overall Strategic Plan
1. Discussion about Governance
2. Highlights of Input for Strategic Plan
3. Review Vision, Mission and Values
4. Discuss Overall Strategic Plan
5. Establish Council Priorities
6. Review How Progress Will Be Reported
7. Discuss How to Communicate the Strategic Plan to the Community
8. Wrap Up
Ground Rules for a Successful Session

- Listen to understand each other’s points of view
- Engage fully
- Assume good intent
- Stay focused
Bike Rack

Time Management Tool

Items to discuss at another time
Icebreaker
Serving the Community

Most Productive When There is Alignment

The What

The How

Goals

Teamwork
Governance

- Review best governing practices
- Review and clarify roles
- Reach consensus on norms for governing
"The Folsom City Council is committed to good governance. Together, the City Council works as a cohesive unit to make decisions in the city's best interest. While individual Councilmembers each bring their unique background and expertise to their role as an elected official, it is only by working together rather than as individuals that the City Council can achieve the greatest good for the greatest number of people."

Page 1 – Governance Manual
What Makes a Council Work Well?

Effective Councils
- Unity of Purpose
- Clear Roles and Responsibilities
- Positive Governance Culture
- Norms, Protocols and Policies

Institute for Local Government
1. Have a sense of team; a partnership with the city manager to govern and manage the city
2. Have clear roles and responsibilities that are understood and adhered to
3. Honor the relationship with staff and each other
4. Routinely conduct effective meetings
5. Hold themselves and the city accountable
6. Have members who practice continuous improvement

What resonates from this article?
Effective Governing is a Team Sport: Council and Staff Together

Getting the most accomplished is through teamwork as no one person can do it alone.

Requires clear roles, cooperation, persuasion, compromise and commitment to relationships.
Distinct but Complementary Roles

Council’s Role

• Serves as legislative body
• Makes financial decisions based on long term interests of the city
• Establishes policies based on the overall interests of the community

City Manager’s Role

• Oversees day-to-day municipal operations, crafts the budget, and implements and enforces the Council’s policies and direction
“Generally, governance is about setting policy by defining what the organization will do, and administration focuses on how to do it.”

“If the City Council discussion focuses on long-term outcomes, it tends to be policy setting; if it focuses on short-term objectives or incremental steps, it tends to be administrative.”

Page 3, City of Folsom Governance Manual
Key Responsibilities of City Manager

Council/Manager form of government is the dominant form in California

By design, the City Manager has significant responsibilities and authority

Examples

- Appointing and removing all employees
- Directing departments and staff (*Council may not direct staff, either formally or informally*)
- Preparing the budget for consideration by the City Council
- Keeping the Council fully informed about the City and future needs and making recommendations
- Providing for enforcement of laws, ordinances, etc.
- Attending and participating in Council meetings
- Preparing the Council agenda

*Pages 4-5, City of Folsom Governance Manual*
### Effective Council - City Manager Teamwork
*Makes for Good Policy and Solid Organizations*

<table>
<thead>
<tr>
<th>City Council</th>
<th>City Manager</th>
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<tbody>
<tr>
<td>• Respect the professionalism of staff and assume good intent</td>
<td>• Carry out the role as chief executive; provide leadership to City staff and ensure accountability</td>
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<tr>
<td>• Be sensitive to the need to pace the organization</td>
<td>• Be direct with Council</td>
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<td>• Allow City Manager to translate policy interests and priorities to achieve action</td>
<td>• Practice the “no surprise” rule</td>
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<td>• Refrain from directing staff, even informally</td>
<td>• Communicate equally with all members of Council</td>
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<td>• Fix the problem not the blame to help create a “no blame” culture</td>
<td>• Provide clear analysis and recommendations to Council</td>
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<td>• Do not criticize staff; if Councilmembers have concerns, bring them to City Manager privately</td>
<td>• Work to help Council see the “big picture” including impacts of policy positions</td>
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**Best Practices from Institute for Local Government, League of California Cities, and International City/County Management Association**
What Clarification About Roles Would Be Helpful?
Why Is Effective Governance and Teamwork Important?

Strategic Direction and Results

Regional Influence

Economic Development

Community Image

Staffing
Council Discussion About Norms

- City Council’s Governance Manual provides clear principles and practices for effective governance.

- Many City Councils have a set of adopted norms that augment the Council Governance Manual; for instance any practices that are not specifically stated in the manual.
### Some Typical Council Norms

*That Augment a Council Governance Manual*

1. Maintain a **citywide perspective**, while being mindful of our districts.
2. Move **from I to we**, and from campaigning to governing.
3. Work together as a body, **modeling teamwork and civility** for our community.
4. Assume **good intent**.
5. Disagree **agreeably and professionally**.
6. Demonstrate **respect, consideration and courtesy** to all.
7. Share information and **avoid surprises**.
8. Keep **confidential** things confidential.
9. Respect the **council/manager form of government** and the roles of each party.
10. Communicate concerns about staff to the City Manager; **do not criticize staff** in public.
11. Utilize **long range planning** to provide big picture context that is realistic and achievable.

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Would these be useful to have as Council norms?
Consensus on Norms

Do you **concur** with these typical norms?

What would you **change**?
By-District Elections

What is the same in governing?

What is different?

What do we need to be mindful of?
Summary

We can get things done when everyone respects each other and our roles

• Follow the City Council’s adopted Governance Manual
• Carry out our respective roles (each in our own lanes)
• Follow agreed upon norms
• Contribute to the “care and feeding” of the partnership
• Respect the chain of command and use established processes
• Commit to regular training and professional development
Stretch Break
Discussing Our Plans for the Future
A Strategic Plan is a policy document that:

- Establishes **vision** and **direction**
- Includes **major work efforts**
- Requires allocation of **resources**

A Strategic Plan **is not** a task list but is a policy document that moves the City forward in an intentional way.
Elements of the Strategic Plan

- Vision, Mission and Values
- Key Council Priorities
- Multi-Year Goals
- Strategies
- Implementation Action Plan
Information Gathered

Gap Analysis Questionnaire
(Executive Team)

Council Interviews
(Baker Tilly)

Environmental Scan
(City Staff)

Community Survey
(Godbe Research)

Business Survey
(Baker Tilly and Staff)
Council Interviews Offered...

- Key Accomplishments
- Major Challenges
- Priorities for the Future
Business Survey

• Outreach through
  ▪ E-blast to business license holders
  ▪ Choose Folsom/Chamber Commerce
  ▪ Direct outreach to major employers in Folsom

• 125 responses

Priorities
• Parks and trails
• Public safety
• City facilities

Strengths
• Access to parks, trails, open space and nature
• Safe community
• “Family-friendly” feel

Challenges
• Growth management
• Increased traffic
• Unhoused population
Community Polling Provides Good Information

Godbe Research and Folsom Listens Survey*

- **88.6%** of respondents are satisfied with the *quality of life* in Folsom
- **85.5%** of respondents are satisfied with the City’s *provision of services*
- **63.7%** of respondents are satisfied with the City’s *management of funds*

**Strengths**
- Small town feel
- Access to parks, trails, open space and nature

**Challenges**
- Growth management
- Public safety and homelessness
- Affordable housing

4,858 completed surveys received
12,750 individual comments received

*The response from Folsom residents was extraordinary—up to ten times higher than similar efforts have achieved recently in other California cities.*

- Clifford Moss consultant
Environmental Scan: Key Factors Affecting Folsom’s Future Considered in Developing the Draft Strategic Plan

- Fiscal outlook
- Revenue impacts on City services
- Recruitment and retention
- Public safety
- Various state mandates
- Facilities and equipment
- Infrastructure, environmental and water resources
- Various state mandates
- Various state mandates
Employee Recruitment and Retention Is Impacting All Departments

• **Retirements** and the loss of institutional knowledge and history

• **Recruitment and retention**
  • City does not look as attractive as it once did (salaries, benefits, retirement)
  • Competitive, if not greater, salaries of nearby agencies
  • Employee generational transition and respective values
Big swings in development activity throughout the City over the last five-year period creates economic uncertainty. The Community Development Department is challenged to adapt to fluctuations in planning, permitting, and inspections for housing and commercial projects.
Infrastructure and Public Works

External Factors and Funding Issues

- **Regional growth will increase traffic volumes** on City streets and impact maintenance and operations and could trigger need for additional transportation projects.

- **Unfunded state mandates** such as SB 1383 and fleet electrification impact staffing needs, vehicle purchases, and supporting infrastructure.

- **Regional air quality attainment goals** constrain our ability to qualify for or obtain funding for major transportation projects such as the Connector.

- **Proliferation of electric vehicles** and ridesharing has a direct impact on City gas tax revenues. State has failed to identify a means of taxing electric vehicles.

- As City approaches buildout south of 50, **developer impact fees diminish**.

- County half-cent transportation sales tax has been a reliable revenue source but is **insufficient to meet our needs**.
Environmental & Water Resources Challenges

- **Climate change** impacts to water supplies.
- Implementing **water use efficiency requirements** adopted by the state.

Increase in temperature by year 2070 of up to:

- Warm-Wet
- Central Tendency
- Hot-Dry

Future temperature is forecasted to rise faster in the upper watershed.
Five-Year Forecast Shows a Growing General Fund Shortfall

Revenue capacity impacts ability to maintain and upgrade facilities, purchase equipment, provide adequate staffing in all departments.

Gap grows to $4.6 million annual shortfall.
Updated Vision, Mission, Values

VISION

MISSION

VALUES
Vision Statement

Vision Statement: About the Future

Current Vision Statement
The City of Folsom strives to be a role model and regional leader that blends its rich historical roots and diverse recreational and business resources into a great community.

Proposed Vision Statement Options
A. The City of Folsom blends its diverse natural and recreational offerings, and a high level of public service into a great community.

OR

B. We champion the City’s historic, natural, cultural, and business resources in service to the most desirable community in the region.

Select one of the vision statements
## Mission Statement

### Mission Statement: About the Purpose

<table>
<thead>
<tr>
<th>Current Mission Statement</th>
<th>Proposed Mission Statement</th>
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<tbody>
<tr>
<td>The City of Folsom will provide a safe, healthy, and vibrant community through innovative, responsive, and effective delivery of public services to maintain and enhance the quality of life of our residents.</td>
<td>The City of Folsom delivers quality programs, services, and amenities to maintain and enhance a safe and vibrant community.</td>
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</table>
A set of values **drives the behaviors** of all members of the organization.

Ideally have **three to four** so they can be easily remembered.

**Current Values**
- Innovation
- Integrity
- Professionalism
- Teamwork
- Trust and respect
- Workplace of choice
Proposed Revised Values

❖ **Integrity:** Demonstrating honesty and strong ethical principles in all actions and decisions.

❖ **Professionalism:** Delivering high-quality services based on the skills and competence of trained employees and best industry practices.

❖ **Financial stability:** Planning for the long term and making decisions in the short term to ensure the necessary resources are available to deliver City services and achieve goals established by the Council.
Break for Lunch
❖ **Goal.** A brief statement of the desired outcome
❖ **Strategies.** Significant initiatives designed to move the City toward achieving the goal
### Councilmembers Noted the Following Priorities

1. Address the City’s finances (anticipated deficit, examine cost recovery, potential cost savings, etc.)
2. Adequately staff our Police and Fire Departments
3. Economic development (specific goals and added staffing)
4. Complete the River District Master Plan, including relocating the City corporation yard
5. More tourism focused on Lake Natoma (including art along the Johnny Cash trail)
6. Attract a technology park on the south side of Interstate 50
7. Ensure budgeted staffing reflects our increased service needs and population increases
8. Utilize technology and innovation to improve services (e.g., to reduce speeding)
9. Create a walking or bicycle trail along the historic sites with QR codes for self-guided tours
10. Create succession planning opportunities
11. Reduce likelihood of catastrophic fires
12. Establish a long-term vision for the Wye property and the Placerville and Sacramento Valley Railroad
13. Create a vision and long-term plan for revitalization of central business district and redevelopment of Folsom Blvd
14. Establish a policy that roundabouts are preferred traffic management over stop signs/lights

*Numbers do not signify priority order. The first four (shown in italics) were identified by two or more Councilmembers.*
Four Proposed Multi-Year Goals

Goal A
Financial Stability and Sustainability

Goal B
Public Safety and Infrastructure

Goal C
Economic and Community Development

Goal D
Organization Effectiveness

Each of these has a set of strategies to achieve the goals
<table>
<thead>
<tr>
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<tr>
<td>1. Evaluate current policies for cost recovery and actual revenue received and modify as needed to implement increased cost recovery.*</td>
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<tr>
<td>2. Quantify the cost of service needed to meet current and increased population.*</td>
</tr>
<tr>
<td>3. Assess the procurement process for professional services contracts.</td>
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<tr>
<td>4. Implement an updated General Fund balance policy that incorporates a minimum emergency reserve and policy for use of any surplus funds at year end.</td>
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<tr>
<td>5. Create a long-term funding plan that includes a fund-balance policy for deferred and ongoing infrastructure needs including asset replacement (e.g., drainage, parks, vehicle replacement, city facilities, technology, and other).</td>
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<tr>
<td>6. Develop new funding sources to build new facilities or expand existing facilities to meet the demands of a growing population.</td>
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<tr>
<td>7. Develop an additional revenue source for consideration to provide sufficient revenues to deliver services to the community.</td>
</tr>
<tr>
<td>8. Quantify the costs needed and resources assigned to carry out major special events to ascertain any potential changes needed.</td>
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* Indicates **two or more** Councilmembers suggested the item.
## Draft Strategies

### Fire and Police

1. Implement a new, second fire station in the Folsom Plan Area, including an initial staffing plan of nine additional employees for a single engine company.*

2. Develop a plan to meet future Fire Department needs including reviewing the need for additional stations, apparatus, and administrative and training facilities.*

3. Identify a funding plan to expand Police Department facilities to meet department needs.*

4. Identify funding to increase Police Department staffing.*

### Technology

5. Initiate technology solutions to streamline organization and improve efficiency.*

6. Establish a funded replacement schedule for updating and replacing outdated hardware and software.

7. Conduct an IT needs assessment that could lead to an IT strategic roadmap.

8. Assess what would be involved in becoming a “Smart City” and establish a plan that matches resources as feasible.

9. Implement a robust Human Resources Information System (HRIS) that allows HR staff to track important employee information such as recruiting and talent acquisition, compensation, and organizational and absence management.

10. Create a City intranet for all forms, processes, templates, contracts, approved City documents, and internal files to increase efficiency and security of file and document use.

11. Create new ways for the public to access information and records for increased transparency and to meet Public Records Act requirements.

* Indicates two or more Councilmembers suggested the item
### Draft Strategies

**Public Works**

12. Establish a method of assessing and comparing the relative costs and benefits of roundabouts in lieu of traffic signal controls and create criteria to apply in determining which alternative to employ.*

13. Create a plan for relocating the corporation yard, including funding and timing.*

14. Establish an asset management plan and program for fleet management and parts procurement.

15. Establish a plan and identify a funding source for completing a transition to a full electric fleet by 2035.

16. Study, design, and construct capital improvements to enhance traffic flow and improve safety citywide.

**Parks and Recreation**

17. Prepare an update to the Zoo Sanctuary Master Plan to provide focus for future operations, funding, and development.

18. Prepare an update to the Parks and Recreation Master Plan.

* Indicates **two or more** Councilmembers suggested the item
## Goal C: Economic and Community Development

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<td><strong>Preparation of plans</strong></td>
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<tr>
<td>1. Complete preparation of the River District Master Plan to enhance the City’s waterfront and waterfront-adjacent recreation and development opportunities.*</td>
</tr>
<tr>
<td>2. Complete preparation of a master plan of the City’s central business district with the goal to revitalize land use and infrastructure and set the foundation for future investments.*</td>
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<tr>
<td><strong>Outreach and business development</strong></td>
</tr>
<tr>
<td>3. Evaluate market opportunities in Folsom to create approaches to leverage existing high tech, healthcare, and other significant local industries.*</td>
</tr>
<tr>
<td>4. Establish a long-term vision for the Wye property and the Placerville and Sacramento Valley Railroad.*</td>
</tr>
<tr>
<td>5. Develop funding/sponsorship plan for the Johnny Cash Trail (JCT) art trail to increase tourism focused on Lake Natoma.*</td>
</tr>
<tr>
<td>6. Develop a narrative plan (e.g., QR codes) along walking and bicycle trails and historic sites for self-guided tours.*</td>
</tr>
<tr>
<td>7. Partner with the Greater Folsom Partnership to market Folsom as a premier recreation and competitive events destination in northern California (e.g., Folsom Lake, Lake Natoma, the Historic District, scenic trails, bike trails, and other natural amenities).</td>
</tr>
<tr>
<td>8. Identify funding and other factors to determine feasibility of large scale, highly visible facilities and events that could provide recreational and tourism benefits to the community.</td>
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<tr>
<td>9. Collaborate with private developers to implement the vision concept for a town center in the Folsom Plan Area (preliminary plans submitted and under review).</td>
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## Draft Strategies

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<tbody>
<tr>
<td>1.</td>
<td>Implement multi-year staffing and succession plans for each department in consideration of projected retirements and turnover.*</td>
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<tr>
<td>2.</td>
<td>Establish an enhanced employee training program that includes the latest tools in technology, local government best practices, and new customer service approaches (e.g., Folsom University 2.0, lunch and learns, “how to” videos).</td>
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<tr>
<td>3.</td>
<td>Assess opportunities to make greater use of volunteers in City programs and services to strengthen the relationship with our community.</td>
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<tr>
<td>4.</td>
<td>Establish customer service standards and corresponding resource funding.</td>
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<td>5.</td>
<td>Establish a diversity, equity, inclusion (DEI) program.</td>
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Updated goals and strategies will go into a revised Draft Strategic Plan for consideration by City Council in March 2023.
Establishing Council Priorities for First Two Years

Place your dots on strategies you think require particular focus and attention for achievement in FY 2023-24 and FY 2024-25
How Progress Will Be Reported

- Twice a year reports
- Website
- Provided to Council, staff, commissions, committees and boards
- Highlights used in public communications throughout the year

Other ideas?
Next Steps

✓ Baker Tilly prepares revised draft of the Strategic Plan (incorporating today’s input from Council)
✓ City staff will present updated Strategic Plan to Council for adoption
Wrap Up

- Closing comments
- Evaluation form
Thank you!

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Jan Perkins  |  jan.perkins@bakertilly.com