

C I T Y O F S I E R R A M A D R E  
STRATEGIC PLANNING RETREAT

May 6, 2015 \* Recreation Center

Marilyn Snider, Facilitator – Snider and Associates (510) 531-2904  
Michelle Snider Luna, Graphic Recorder – Snider Education & Communication (510) 610-8242

MISSION STATEMENT

*The City of Sierra Madre provides quality, cost-effective public services that preserve the small town character and enhance the health, safety and welfare of the community.*

VISION STATEMENT

*The All-America City of Sierra Madre will be recognized as a thriving, civically engaged community that honors its past, lives in the present and plans for the future.*

CORE VALUES

not in priority order

The City of Sierra Madre values . . .

*Efficiency and effectiveness*

*Honesty and integrity*

*Financial accountability*

*Teamwork*

*Community participation*

*Small town character*

THREE-YEAR GOALS

2015 - 2018 \* not in priority order

*Achieve water supply stability and independence*

*Achieve financial stability and sustainability*

*Finalize and implement the General Plan update*

*Provide high quality, cost-effective and achievable public services*

## S.W.O.T. ANALYSIS

Strengths – Weaknesses - Opportunities - Threats

### WHAT ARE THE STRENGTHS AND ACCOMPLISHMENTS OF THE CITY OF SIERRA MADRE IN THE PAST THREE YEARS, PARTICULARLY SINCE THE NOVEMBER 2014 STRATEGIC PLANNING RETREAT?

Brainstormed List of Perceptions

- Maintaining a safe community with fewer resources
- Got the Raymond Basin Water Master to enforce the adjudication of the East Raymond Basin
- Moratorium on the installation of new water meters
- Adopted new R-1 standards
- Completed a successful Proposition 218 process for new water rates
- City Council scheduled many community input meetings as well as a Town Hall meeting in June
- Implemented a Turf Rebate Program and all of the grant money has been distributed
- Filled our Captain position in the Police Department
- Installed a Well #6 bypass
- Smooth transition with new staff—maintained our workload
- Created three full-time Fire Captain positions
- Updated Sewer Management Plan
- Clean audits for all three years
- Adopted a demolition moratorium
- Updating the Senior Master Plan
- We are designing a new website to be unveiled July 1<sup>st</sup>
- Installed dog waste stations at all of the parks
- Had a RFP for a library condition facility assessment and received great responses, including information from the original architects' grandson
- Doing a fundraiser for City Center Landscaping Project
- Completed Sewer Project
- Presented the draft Biennial Budget
- Hired a new Finance Director
- Planning Commission and City Council approved a draft General Plan update
- Held a Library Open House to increase awareness of library services
- Revised our code to require gray water stub-outs on new construction
- Approved by the County Health Department for a second paramedic unit
- Rebuilt Well #3
- Authorized the purchase of a new ambulance
- Implemented library programs for young families and teens
- Updated the Police Department radio system to a county-wide interoperable system
- Adopted balanced budget for all three years
- Implemented City Volunteer Patrols
- Maintained most of the City's community service programs despite a decline in staff
- New water main on Sierra Madre Boulevard
- Implemented multiple water conservation measures
- Adopted a new demolition ordinance
- Completed multi-street repair programs
- Redeveloped the blighted hospital site in downtown
- Twice reorganized staff for better efficiency
- Switched to a new source of water
- Enhanced our Neighborhood Watch Program

- Instituted a Community Service Officer program in the Police Department
- We designed a Drought Resistant Landscaping Plan for the Civic Center
- Hired a new Planning and Community Preservation Director
- Adopted a Parks and Facility Master Plan
- Adopted a Sidewalk Master Plan
- Formed a Library Master Plan Committee
- Adopted a Community Forest Master Plan
- Created a Public Safety Committee
- Increased library circulation by 4%
- Implemented volunteer tracking software
- Contracted the City's Aquatics Program so the pool is now open year-round
- Contracted out our Fire Battalion services
- Replaced Mountain Trail Water Main
- Got the fire horn working
- Implemented terms and conditions of employment for management and for part-time staff
- Implemented financial caps on medical benefits
- Instituted parking enforcement patrols
- Reopened City Hall in the mornings

## WHAT ARE THE CITY'S CURRENT INTERNAL WEAKNESSES/CHALLENGES?

Brainstormed List of Perceptions

- Staff wears too many hats
- Insufficient resources to meet expectations
- Financial instability
- Personnel instability—high turnover
- Decrease in revenue
- Lack of community support for the staff
- Public perception that our employees are not as productive as possible
- Ongoing additional workload impacts staff morale
- Staffing reductions starting to affect services
- Budget shortfall
- Limited financial resources
- Lack of infrastructure maintenance
- Answering machine in City Hall is on during business hours
- Perception of unfairness of water baseline
- Resistance to change
- Inadequate compensation to effectively recruit and retain staff
- Aging buildings that haven't been sufficiently maintained
- Budget situation installing fear into staff
- One Carter and Stonehouse being built without sufficient natural resources
- Loss of institutional knowledge with staff turnover
- Public perception of possible overdevelopment
- Public perception of adequate financial resources
- Lack of youth involvement outside of sports programs

## EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON THE CITY OF SIERRA MADRE IN THE NEXT THREE YEARS

Brainstormed List of Perceptions

- Increasing property values/taxes
- Decreasing technology costs

- Potential for the drought to be over
- Decrease of yellow water
- Positive press regarding the City's response to water situation
- Elementary school has a very high API
- Good press
- Potential State water grants
- Overall improvement in the economy, increasing special revenue sources
- Completion of middle school construction
- Gold Line extension
- Outstanding K-8 public schools
- Aging of population with the potential for volunteers
- Community partner in Kensington
- Good community volunteer base
- Possible partnership with Army Corps of Engineers for water projects
- Access to Measure R funds Call for Projects
- Demographics are becoming more affluent
- Lower fuel costs

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON THE CITY OF SIERRA MADRE IN THE NEXT THREE YEARS**

Brainstormed List of Perceptions

- Lack of water
- Drought
- Gas tax decline because of cheaper gas, better mileage on cars and electric cars
- Public's perception of being overtaxed
- Data security breaches
- Storm water regulations
- Federal unfunded mandates
- Losing historical homes
- Increased pension rates
- Increased workers' comp
- Aging population
- Current and possible litigation
- High community expectations vs. available resources
- Energy grid vulnerability
- Composition of imported water
- Limitations on new revenue sources—ballot measure process
- Continuing State water conservation regulations
- UUT revenues staying flat or decreasing
- Proposition 47 and AB109
- Terrorism
- Natural disasters
- Part-time sick leave and mandated medical benefits
- State mandates that are unfunded and cost the City money
- Unfunded pension liabilities
- Public negative perception of law enforcement
- Increasing insurance rates
- Housing supply and demand imbalance
- Changing demographic from a blue collar community to an affluent one
- Lack of financial resources from the State
- Lack of management of the East Raymond Basin

- Sierra Madre has a very unique water resource vulnerability
- Resistance by neighboring communities to work together to combine resources

### **BRAINSTORMED LIST OF THREE YEAR GOALS**

- Keep all City resources: continue to be a full-service city
- Pursue new revenue sources
- Attract and retain staff
- Achieve water supply stability
- Maintain current level of public safety
- Update zoning ordinance to preserve small town character
- Enhance water conservation efforts
- Resolve the One Carter situation
- Improve public perception of staff
- Begin structural improvements to library facility
- Update our Youth Master Plan
- Achieve financial stability
- Achieve a balanced budget that meets the needs of the city
- Improve infrastructure maintenance
- Finalize and implement the General Plan update
- Obtain new water resource
- Complete Library Master Plan
- Resume independence in our water resources
- Achieve personnel stability in the Fire Department

## NEXT STEPS/FOLLOW-UP PROCESS

WHEN	WHO	WHAT
May 7, 2015	City Manager	Distribute the updated Strategic Planning retreat record to retreat invitees.
Within 48 hours	All recipients	Read the retreat record.
May 11, 2015	City Manager and Management Team	Review the “Current Internal Weaknesses” list for possible action items.
By May 15, 2015	City Manager & Department Heads	Share and discuss the updated Strategic Plan with staff.
At the May 26, 2015 City Council meeting	City Council	Present the updated Strategic Plan to the community.
By June 1, 2015	City Manager	Place the Strategic Plan on the City website.
Monthly	City Council and City Manager	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	City Manager	Prepare and distribute the written, updated Strategic Plan monitoring matrix to the City Council, Management Team, staff, and on the Website.
October 20, 2015 8:00/8:30 am – 2:30 pm	City Council, City Manager & Management Team	Strategic Planning Retreat to: <ul style="list-style-type: none"> <li>- more thoroughly assess progress on the Goals and Strategic Objectives.</li> <li>- develop Strategic Objectives for the next six months of the Strategic Plan.</li> </ul>

# STRATEGIC PLAN ELEMENTS

Marilyn Snider, Strategic Planning Facilitator  
Snider and Associates (510) 531-2904

## “SWOT” ANALYSIS

Assess the organization’s:

- Internal Strengths      - Internal Weaknesses
- External Opportunities      - External Threats

## MISSION/PURPOSE STATEMENT

States WHY the organization exists and WHOM it serves

## VISION STATEMENT

A vivid, descriptive image of the future—what the organization will BECOME

## CORE VALUES

What the organization values, recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

## THREE YEAR GOALS

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) – usually limited to 4 or 5 key areas

## KEY PERFORMANCE MEASURES

What success will look like upon achievement of the goal

## SIX MONTH STRATEGIC OBJECTIVES

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

## FOLLOW-UP PROCESS

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months