



Office of the City Manager

WORK SESSION

January 31, 2017

To: Honorable Mayor and Members of the City Council

From: *DWR* Dee Williams-Ridley, City Manager

Submitted by: Timothy Burroughs, Assistant to the City Manager

Subject: Update on the Berkeley Strategic Planning Process

INTRODUCTION

The purpose of this report is to provide City Council with an update on progress and next steps for the Berkeley Strategic Plan.

CURRENT SITUATION AND ITS EFFECTS

The City is developing a strategic plan to articulate the long-term goals that the City government will achieve on behalf of the community and the short-term projects designed to advance those goals. The strategic plan will help City Council and staff throughout the organization to prioritize limited time and resources. It will be updated every two years along with the City budget.

Staff kicked-off phase 1 of the strategic planning process – the “discovery phase” – on January 26, 2016 with a City Council Work Session. The purpose of the six-month “discovery phase” was to build the foundation of the Berkeley Strategic Plan by gathering input from staff and City Council on the strengths of the City government, i.e., what the City does well, as well as challenges that the City and community face. During the “discovery phase” a multi-departmental committee of City staff facilitated 24 listening sessions with staff in all parts and at all levels of the organization. The strategic planning committee also gathered input from the leadership of the employee labor unions and met directly with City Council Members.

The “discovery phase” resulted in organization-wide awareness of the purpose of the strategic planning process, multiple opportunities for staff to get involved, and an initial set of input from which to develop draft Strategic Plan goals.

Staff pivoted to phase 2 of the strategic planning process – the “discussion phase” – at the June 23, 2016 staff appreciation event, at which the strategic planning committee presented 11 draft Strategic Plan goals for employee review and input. The initial draft goals are the following:

- **City Government Services and Technology:** Provide excellent service and information to the community.

- **Infrastructure:** Provide modern, well-maintained infrastructure and facilities.
- **Efficient City Government:** Provide an efficient and financially-healthy City government.
- **Equity:** Promote and demonstrate racial and social equity.
- **Inclusive Government:** Create diverse and inclusive opportunities to participate in local decision-making.
- **Safety and Preparedness:** Create a safe, healthy and prepared City.
- **Collaboration:** Build partnerships that help to improve the community.
- **Civic Amenities:** Offer a high quality of life and extraordinary civic amenities.
- **Economy:** Foster a dynamic and sustainable local economy.
- **Environment:** Be a global leader in addressing climate change and protecting the environment.
- **City Government Workforce:** Attract and retain a talented and diverse workforce.

Staff input gathered on these 11 draft goals serves as the starting point for gathering community input on the Berkeley Strategic Plan. Beginning in February 2017, staff will invite input from City Commissions and the community, including through an online survey and in-person events. Staff will work closely with City Council to engage the Berkeley community in the strategic planning process.

Based on staff and community input and guidance from City Council in the “discussion phase,” the process will transition into its third and final phase – the “decision phase” – in which staff will develop a draft Strategic Plan for staff review and for City Council consideration and input.

Below is a summary of the 3-phase strategic planning process:

Discovery Phase (January – June 2016) -

- City Council provides initial input on staff’s framework for developing the strategic plan at the January 26 work session.
- A staff committee reviews existing City planning documents, such as the Capital Improvement Plan, budget, General Plan, City-wide work plan, Climate Action Plan, and others, that articulate some existing City goals and priorities that can inform development of the strategic plan.
- Staff throughout the organization are invited to provide input that informs development of a shared set of goals and priorities.
- Staff committee meets with leadership of employee labor unions to gather input.
- Staff committee meets with City Council Members to gather input and guidance.

Discussion Phase (June 2016 – March 2017) -

- Over 660 staff provide input on draft strategic plan goals at June 23 staff appreciation event.

- The City invites input on draft strategic plan goals from City Commissions and the community, including through an online survey.
- Staff provides City Council with an update on the strategic plan process and gathers input at September 27, 2016 and January 31, 2017 City Council Work Sessions.
- Staff committee meets directly with City Council Members to gather input and guidance.

Decision Phase (April – June 2017) -

- Based on community, staff and City Council input, the staff committee develops a draft strategic plan, including long-term goals and short-term priorities designed to advance those goals.
- City Manager submits a draft strategic plan for City Council consideration and adoption.

Council input throughout the planning process is critical. In particular, staff requests guidance on how best to engage community members in the process, including achieving wide distribution of the online survey.

BACKGROUND

Many cities develop a strategic plan in order to assist City Council and staff to prioritize resources to meet the needs of the community. A strategic plan identifies a shared mission and set of goals against which future potential projects, programs, and policies can be evaluated and prioritized.

Local government strategic plans tend to follow a similar format/outline:

1. **Mission** – A high-level statement that describes the aspirations of an organization, who it serves, and how it does its work.
2. **Values** – Shared values that underpin the organization's work and approach to the work, e.g., responsiveness, continuous improvement, accountability, innovation, equity, sustainability, etc.
3. **Goals** – Statements that frame the organization's aspirations across a range of issue areas.
4. **Priorities** – A set of priorities are associated with each goal. Priorities are the projects/programs that the City will achieve in a given two-year budget cycle. Priorities have a clear scope of work and timeline. Example priority: Update the City of Berkeley Arts & Culture Plan.
5. **Performance metrics** – Metrics foster transparency and accountability by illustrating progress on each goal.

Once the Berkeley Strategic Plan is finalized, staff will develop an implementation dashboard in order to regularly and transparently report progress. The Berkeley

Strategic Plan will inform development of the City budget and department level work plans.

ENVIRONMENTAL SUSTAINABILITY

Environmental sustainability and implementation of existing adopted plans, such as the Climate Action Plan, will inform identification of the goals and priorities included in the Berkeley Strategic Plan.

POSSIBLE FUTURE ACTION

With guidance and input from City Council, staff, and the community, staff will develop a draft Strategic Plan for City Council consideration in spring 2017.

FISCAL IMPACTS OF POSSIBLE FUTURE ACTION

The strategic plan will help City Council and staff throughout the organization to prioritize limited time and resources.

CONTACT PERSON

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