



County of Santa Cruz

County Administrative Office

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Carlos J. Palacios, County Administrative Officer

Meeting Date: October 17, 2017
Date: October 11, 2017
To: The Board of Supervisors
From: Carlos J. Palacios, County Administrative Officer
Subject: Strategic Planning Framework and Timeline

On September 19, 2017, the County Administrative Office (CAO) provided an overview of the strategic planning process, called "Vision Santa Cruz County," and staff was directed to return on today's agenda with the final framework and timeline.

Background

The purpose of strategic planning is to establish a long-term vision for the County and set a course of action through (1) overarching focus areas and (2) specific goals and objectives. This will require assessing the current landscape and trends, engaging internal and external stakeholders, and drafting and adopting a multi-year strategic plan and a shorter-term operational plan, which would inform County budget development.

Staff began preparing for this process by comparing existing models and formats in other counties and cities, reviewing department and subject-area plans, and receiving input on strategic plan development. This work led to the identification of five key strategic plan elements:

- **Vision** - reflects the collective understanding of the ideal situation
- **Mission** - identifies the County's role in pursuing the community's vision
- **Values** - provide the foundation on which the strategic plan is constructed
- **Focus areas** - represent strategic initiatives, which organize the goals of an organization into a limited number of categories or themes
- **Goals** - provide generalized statements of what the community wants to achieve consistent with its vision

Since the end of August, the Strategic Plan Steering Committee (SPSC) has been meeting weekly to organize the strategic planning process that will lead to the development of these elements. Staff intend to provide robust internal and external engagement of the County’s numerous stakeholders through a variety of in-person, electronic and other methods.

Last month, engagement efforts kicked off with employees, starting with department heads and participants of the Learn, Engage, Apply and Perform (LEAP) Program, the County’s new leadership academy. Departments are also being asked to introduce the strategic planning process at staff meetings this month and next. The SPSC will reach out to departments to provide support and facilitation as needed.

To date, there has been strong public interest in participating in the strategic planning process. More than 350 members of the public have already signed up to receive updates about strategic planning, including how to participate. A limited paid Facebook campaign also outperformed its top expected return on investment for engagement by more than 50 percent.

Employee Mixers

To engage more employees at all levels, the SPSC is arranging a series of three “Strategic Planning Employee Mixers”, as shown in the following table.

Schedule of Employee Mixers

Date	Time	Location
Monday, October 30	10 AM	Board Chambers, 701 Ocean Street, Santa Cruz
Monday, October 30	2 PM	Large Meeting Room, 18 West Beach Street, Watsonville
Wednesday, November 8	9 AM	Large Auditorium, 1080 Emeline Avenue, Santa Cruz

Emails and flyers with more information on the mixers will be distributed to employees and volunteers in the coming days. Our strategic planning facilitator, Angela Antenore, will be leading these one-hour sessions, which will provide an overview of the strategic planning process and an orientation on strategic planning vocabulary as well as obtain input on the County’s vision, mission and values. Participants also will be asked for their interest in participating in a focus group or forum on goal setting at a later date.

Following the mixers, the SPSC will engage employees who work in the field. This will include employees in the departments of the Agriculture Commissioner, General Services, Parks and Public Works. The SPSC will help facilitate these half-hour

meetings, the content of which will be similar to the mixers.

Community Meetings

The CAO is coordinating with the Board to arrange a series of five “Strategic Planning Community Meetings”. The following table presents the tentative schedule for these meetings.

Schedule of Community Meetings

Date	Time	Location
Thursday, November 9	6 PM	Highlands Park Senior Center, 8500 CA-9, Ben Lomond
Wednesday, November 15	6 PM	Civic Plaza Community Room, 275 Main Street, Watsonville
Saturday, November 18	10 AM	Monschke Hall at Twin Lakes Church, 2701 Cabrillo College Drive, Aptos
Tuesday, November 28	6 PM	Community Room at Simpkins Family Swim Center, 979 17 th Avenue, Santa Cruz
To Be Determined	6 PM	Pacific Elementary School, 50 Ocean Street, Davenport

With the goal of transparency and inclusivity, the community meetings will be open to all constituent groups, including residents, boards, commissions, special districts, service providers, businesses and community-based organizations, and staff intend to notify these groups through email, flyers, handouts, newsletters, social media and websites. The meetings are anticipated to last no more than two hours and will be led by local facilitators based on direction from the CAO and Ms. Antenore.

Similar to the employee mixers, the community meetings will provide an overview of the strategic planning process and an orientation on strategic planning vocabulary as well as obtain input on the County’s vision and mission. An environmental scan activity also will be conducted to solicit community input on critical strategic issues and challenges facing the County. Before leaving, participants will be asked for their interest in participating in a focus group or forum on goal setting at a later date.

Local Events

In addition, the CAO is coordinating with the Santa Cruz County Office of Education and Workforce Development Board to work with students on pop-up engagement at various local events, including those below.

Schedule of Local Events

Date	Event	Location
Thursday, October 19	Access2Employment Job Fair	Coconut Grove at the Santa Cruz Beach Boardwalk
Friday, November 3	First Friday Art Tour	Various Locations
Saturday, November 11	Veteran's Day	Various Locations
Sunday, November 12	Antique Street Faire	Downtown Santa Cruz
Saturday, November 25	Small Business Saturday	Various Locations
Friday, December 1	First Friday Art Tour	Various Locations
Saturday, December 2	Holiday Art and Craft Faire	Community Room at Simpkins Family Swim Center
Various Dates	Farmers Markets	Aptos, Felton, Live Oak, Santa Cruz, Scotts Valley, Watsonville
Various Dates	Flea Market	Former Skyview Drive-in Theater

Additional events will be added to the schedule for pop-up engagement as needed. The public is invited to sign up for updates at www.santacruzcounty.us/sp or contact us at vision@santacruzcounty.us.

Lastly, the SPSC is working on plans for targeted engagement with certain demographic groups, such as youth and seniors. Engagement activities may include a youth-to-youth strategy using students and/or technology and visits to large meal sites for seniors.

Surveys

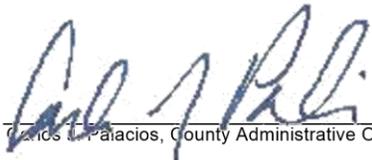
The CAO will be developing surveys to be administered with internal and external stakeholders during the month of November. The goal of the surveys is to increase public participation in the strategic planning process and to obtain further input on the County's vision, mission, values and environmental scan. The surveys will be more detailed than the employee mixers and community meetings and will be distributed widely through email, flyers, handouts, newsletters, social media and websites. The surveys will be another opportunity to ask participants if they are interested in participating in a focus group or forum on goal setting.

Next Steps

Following the planned engagement efforts, staff will return with an update in December. It is our goal to present the draft vision, mission, values and focus areas in January. This will be followed by a series of goal setting events, including focus groups and/or forums with employees and community members in February, as well as a study session with the Board in March. Staff will then finalize the goals within each focus area and draft the County Strategic Plan. Staff intend to present the draft document in May and return with the final document in June before the start of the new fiscal year. Attached is a timeline of the strategic planning process.

It is, therefore, RECOMMENDED, that the Board accept and file this report and direct staff to return on or before December 12, 2017 with an update on the strategic planning process.

Submitted by:



Carlos L. Palacios, County Administrative Officer 10/12/2017

Attachments:

- a Strategic Planning Timeline