



## **City of Lodi Council Retreat Final Report**

**April 21, 2023**

### **Introduction**

The City Council of the City of Lodi held a Council Retreat on April 11-12, 2023, to develop the City's Strategic Vision for the future. All of the Council Members and the Mayor were in attendance. The City Manager, the Assistant City Manager, and the Department Directors for the City were also in attendance. The retreat was facilitated by Strategic Government Resources (SGR.) The facilitator for SGR was Dr. Mike Mowery, SGR's President of Leadership Development and Strategic Foresight.

SGR's approach is built around the tenet that in the Council/Manager form of government, it is the responsibility of the Council to create a strategic vision, which is about direction and priorities, and that it is the responsibility of the staff to create a strategic workplan that is in alignment with and supportive of the Council's strategic vision. Because of that, SGR facilitates a process that enables the Council to set strategic priorities and milestones and relies upon the staff to create initiatives that will be executed to move the organization forward in alignment with the Council's vision.

This process includes having discussions about strategic questions to help the Council clarify what is important to them and develop a cohesive and coherent unified vision for the future. Below is a summary of these discussions as well as the strategic priorities and milestones developed during the retreat.

## **Reputational Drivers**

Participants discussed the question, “What do we want to be known for in the future?” After discussing this question in small groups, each group shared their ideas with the larger group. The ideas that were shared fall roughly into two main categories.

### **1. Lodi will have a reputation for being a great place to live and do business.**

- Safe city that is a great place to live.
- Inclusive and welcoming of people and new ideas.
- High quality of life with great amenities and educational programs.
- Engaged citizens and high levels of civic pride.
- Good for business.
- Strategic development and growth.

### **2. Lodi will have a reputation for being a well-run city.**

- Fiscally responsible, providing excellent municipal services.
- High level of customer service.
- Trusted and Trustworthy.
- Visionary.
- Transparent.
- Data driven government.
- Excelling in communication and outreach to citizens.
- Well-trained staff and Council.
- Innovative with private/public partnerships.

## **Pressing Needs**

The participants were asked to discuss what they perceived to be the pressing needs of residents both now and as the city moves into the future. They discussed this question in small groups. Below are the things that they identified.

- Homelessness.
- Affordable places to live.
- Comprehensive plan for downtown revitalization.
- Plan for economic development.
- Easier for businesses to renovate their properties.
- Infrastructure maintenance and development capacity.
- High quality of life.
- Not having to leave the city for amenities.
- Traffic enforcement.
- Literacy needs.
- Advance life support needs, especially for the elderly, children, and the homeless.
- Generational housing.
- Dealing successfully with technological advancements, such as the digitalization of city services.
- Fentanyl crisis.

## **SWOT Analysis**

Participants were asked to conduct a modified version of a SWOT Analysis. They did not address the Strengths and Weaknesses of the organization, but instead, focused their attention on the future by discussing great opportunities on the horizon, as well as some of the threats to those opportunities as they perceive them. Below is a summary of the lists that the groups developed.

### **Opportunities**

- Hydrolyzer.
- Tourism.
- City Size.
- Housing and Business Development.
- Water Supply.
- Green Power.
- Workforce development.
- Wine/Ag.
- Quality of life.
- Assets such as Lodi Lake.
- Drawing people to Lodi with quality amenities.
- Generate revenue through some city services.
- Strengthening the City's relationship with the County.
- Expanding and developing assets.

### **Threats**

- Limited funding for the Hydrolyzer.
- Limited services for tourism.
- Limited infrastructure to accommodate development needs.
- State Legislature response to the drought could affect water supply.
- Generational brain-drain.
- Revenue constraints.
- Limited amount of staff time to invest in projects.
- Skeleton crew staffing.
- Community pushback on fees.

## **Strategic Priorities**

The Council was asked to identify their top priorities as a governing board. This was done through having a series of discussions between the Council members so that the list of priorities was a unified, collective list of priorities that the whole council agreed upon. The Council identified 8 Strategic Priorities. They are listed in alphabetical order below.

- 1. Downtown**
- 2. Economic Development**

3. **Fiscal Health**
4. **Housing**
5. **Infrastructure**
6. **Parks**
7. **Public Safety**
8. **Public Well-being**

## **Strategic Priorities and Milestones**

Participants were asked to identify Milestones for each of the Strategic Priorities. Milestones help answer the question, “What do you mean by that?” They help clarify the Council’s intention and help the Staff to know that they are moving in the right direction to fulfill the Council’s priorities in a timely fashion. Neither Priorities, nor Milestones, are typically items that can be completed in the short-term. These are long-term priorities and “objectives” that can take years and decades to accomplish.

Below is the list of Milestones for each of the Strategic Priorities that the Council developed. Also, included below is one Stretch Goal developed for each Strategic Priority. A Stretch Goal is one which the Council would consider the ideal long-term result of their efforts.

### **1. Downtown**

**Stretch Goal: Realize a lively mixed use, walkable commercial downtown district.**

- A. Expand opportunities for downtown living.
- B. Preserve downtown historic character.
- C. Ensure accessibility for multi-modal transportation and public safety.
- D. Protect and promote the use of public facilities including the library, public safety building, and the city administration building.
- E. Expand the perimeter of downtown mixed-use zoning.
- F. Adopt policies that incentivize the revitalization of buildings and infrastructure.

### **2. Economic Development**

**Stretch Goal: Raise the median income of Lodi residents to the top 25% of the State of California.**

- A. Develop a long-term economic development strategy.
- B. Expand and diversify economic opportunities.
- C. Implement Hydrogen training facilities.
- D. White Slough Public Safety Training Facility.
- E. City growth through East Side annexation.
- F. Repurposing existing assets.
- G. Attracting tech and non-ag jobs.

### **3. Fiscal Health**

**Stretch Goal: Create a fiscal structure to accomplish City Council Strategic Priorities.**

- A. Promote city's fiscal transparency and citizen's fiscal fluency.
- B. Position Lodi to maintain a diversified revenue mix that reflects the economic prosperity of the community.
- C. Ensure elected leaders and staff retain focus on fiscal priorities.
- D. Anticipate and advocate against unfunded mandates, while ensuring the city has funding amounts equal to annual depreciation levels to maintain assets.
- E. Improve pension as against average cities by 25%.

**4. Housing**

**Stretch Goal: Ensure every socio-economic demographic and family structure can secure quality housing within the community.**

- A. Develop new housing opportunities with market values aligned with current AMI and standard housing/income ratios.
- B. Create more residential opportunities downtown.
- C. Ensure continued progress towards RHNA Goals.
- D. Require a percentage of housing in new developments to be workforce housing.
- E. Adopt standards and policies to promote housing for all economic levels.
- F. Develop policies that will promote affordable housing by design; generational housing by design; and diverse housing by design.
- G. Consider ways to support the existence of an adequate number of rental properties.

**5. Infrastructure**

**Stretch Goal: Develop and maintain a robust infrastructure to support a world-class city.**

- A. Invest in innovative infrastructure with a high ROI.
- B. Adaptive reuse of existing properties.
- C. Address deferred maintenance.
- D. Ensure capacity for future growth.
- E. Proactive infrastructure development for SOI and growth areas.
- F. Ensure that funding for maintenance of future development projects is sustainable and self-supporting.

**6. Parks**

**Stretch Goal: Develop a world-class revenue generating Parks System.**

- A. Fully staffed to annual benchmarks.
- B. Acquire Mokelumne River Nature Area to expand Lodi Lake.
- C. Build an indoor sports facility.
- D. Expand HSS Facilities.
- E. Create a dedicated fund to improve event-based facilities.

## **7. Public Safety**

**Stretch Goal: Create the best trained police and fire departments in the State of California.**

- A. Reach and maintain full staffing.
- B. Create an outdoor training facility.
- C. Institute the ALS Program.
- D. Combine fire base workforces in North County.
- E. Create Revenue generating services in public safety.
- F. Meeting ISO Measurements in response time.
- G. High levels of community involvement by public safety employees.

## **8. Public Well-being**

**Stretch Goal: Be a recognized leader in generating a happy, healthy, high quality of life for all.**

- A. Increase opportunities for physical, recreational, and cultural activities.
- B. Partner with other public/private entities to provide outreach, education, and activities to engage diverse cultures and communities.
- C. Provide opportunities for access to mental health and substance abuse treatment.
- D. Focus on youth education and mentorship to foster positive life-choices.

## **SGR Recommendations**

1. SGR recommends that the City Council formally adopt these Strategic Priorities and Milestones as their Strategic Vision at an upcoming regular City Council Meeting, and that the staff develop a workplan or strategic plan that is in alignment with the Council's Strategic Vision.
2. SGR recommends that the City hold an annual Council Retreat with the Department Directors to review the progress that is being made on the Strategic Vision and to address any adjustments that need to be made to the Strategic Vision and Milestones.