

**CITY OF COSTA MESA**  
**STRATEGIC PLANNING RETREAT**

**27 September 2021 • Costa Mesa Senior Center**

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**MISSION STATEMENT**

**The City of Costa Mesa serves our residents, businesses and visitors  
while promoting a safe, inclusive and vibrant community.**

**CORE VALUES**

Not in priority order

The City of Costa Mesa values . . .

- ◆ **Integrity**
- ◆ **Sustainability**
- ◆ **Compassion**
- ◆ **Innovation**
- ◆ **Inclusion**
- ◆ **Collaboration**

**THREE-YEAR GOALS**

2021-2024 • Not in priority order

- ▶ **Recruit and retain high quality staff**
- ▶ **Achieve long-term fiscal sustainability**
- ▶ **Strengthen the public's safety and improve the quality of life**
- ▶ **Diversify, stabilize and increase housing to reflect community needs**
- ▶ **Advance environmental sustainability and climate resiliency**

## NEXT STEPS/FOLLOW-UP PROCESS

<b>WHEN</b>	<b>WHO</b>	<b>WHAT</b>
Tuesday, Sept. 28	Asst. to the City Manager	Distribute the retreat record to all invitees.
Within 48 hours of receipt	All recipients	Read the retreat record.
At the Oct. 6, 2021 Management Team meeting	Management Team (City Manager – lead)	Review the “Current Internal Weaknesses/Challenges” list for possible action items.
By Oct. 11, 2021	Management Team	Share and discuss the Strategic Plan with staff face-to-face.
At the Oct. 19, 2021 City Council meeting	City Manager	Present the Strategic Plan to the public.
Monthly	Management Team (City Manager – lead)	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
By the 22 <sup>nd</sup> of the month	Objectives’ leads	Provide an update on the progress of the Objective
Monthly	Asst. to the City Manager	Prepare and distribute the updated Strategic Plan Monitoring Matrix.
March 25, 2021 (Friday) 8:30 am to 4:00 pm	Management Team Mayor and City Council	Strategic Planning Retreat to: - more thoroughly assess progress on the Goals and Strategic Objectives. - develop objectives for the next six months.

## S.W.O.T. ANALYSIS

Strengths – Weaknesses - Opportunities - Threats

### **STRENGTHS AND ACCOMPLISHMENTS OF THE CITY OF COSTA MESA SINCE THE 1-25-19 STRATEGIC PLANNING RETREAT**

#### **Brainstormed List of Perceptions provided by Participants:**

- Managed the COVID Pandemic / Public Safety & Fiscally
- Appointed a new Mayor
- Opened the bridge shelter to assist with homeless outreach
- Open the Community Center / Lions Park
- Fought through the pandemic to successfully reopen City Hall and community programs
- Balanced the budget at a time when other cities are struggling to do so
- Opened the NHCC and Lion's Park
- Completed street projects and critical infrastructure repairs
- Prompt response to assist local businesses; including providing/fronting small business grants, outdoor dining expansions, unique shopping experiences (pavilions, BAC, etc.)
- Very strong management team
- Implementation of Succession Planning in some departments
- Expedited some technology enhancements: Waitwhile, laptops for those to continue to provide services from home
- Opened permanent Bridge Shelter
- Passed Cannabis Measure Q Ordinance
- Completed Merrimac active transportation improvements
- Hired new Police Chief
- Ended furloughs and re-opened City Hall with new customer service technology
- Held successful Concert in the Park
- Completion of Major Capital projects – Airway Bridge Shelter, Merrimac Way Active Transportation Program (ATP) improvements, Norma Hertzog Community Center (NHCC), Fairview Traffic Signal Synchronization Project, Bike Racks installation
- Completed Lions Park Playground project
- Street Rehabilitation – Hamilton Street, Santa Ana Avenue, West 18th Street, Westside area streets, several streets in Districts 2 and 3 (Citywide Parkway and Street Rehabilitation Projects), start of the Randolph Ave. and St. Clair Street improvement project.
- Initiated Studies – Local Road Safety Plan (LRSP), Pedestrian Master Plan, Citywide Parking Study
- Implemented pop-up cycle tracks along Placentia Avenue for Concerts in the Park event
- Council approval for Underground Utility District along Adams Avenue
- Design of Adams Avenue/Pinecreek Drive Improvements and Adams Avenue Bicycle Lanes project initiated
- Sustainability Efforts: Conversion of over 6,000 Streetlights to LEDs, acquired grant-funded electric shuttle bus, Received LEED Gold certification for NHCC, Prepared Annual Sustainability Report, Organized and assisted in Arbor Day, Earth Day and Love Costa Mesa Day events, Procured new Zero emission vehicles for City fleet
- Awards: ASCE awards for Lions Park Projects, City Hall EV Charging Stations, the Airway Bridge Shelter, USGBC Municipal Green Building Award for LEED for Cities - Gold
- Successful implementation of Measure Q
- Closing a significant number of illegal cannabis dispensaries
- Recovered financially from the budget losses caused by COVID-19
- Completion of Lion's Park Playground and Opening of Norma Hertzog Community Center
- Closure of multiple illegal group homes and success in litigation against them
- Hiring of several management positions to supplement the management team
- Authorization of additional staffing
- Return of staff to in-person work

- Implementation of automated systems (Waitwhile, agenda management, etc.)
- The hundreds of projects and work completed during the pandemic, internally and externally, i.e. road projects, new hires, agenda management program, creating thinking- outdoor dining, rental assistance
- The extraordinary response to assist public due to Covid, i.e. food/rent/vaccinations/testing/childcare, outdoor dining
- Fiscal stability maintained during Covid- adopted balanced budget
- The response measures taken by City Council and City Leadership team in reaction to Covid, i.e. emergency meetings and proclamations, urgency ordinances, EOC activation, safety measures for employees
- Employees
- Teamwork
- Addressing Technical Challenges
- Addressing Homelessness
- Adoption of the retail cannabis ordinance (Measure Q)
- Adoption of Accessory Dwelling Unit (ADU) ordinance
- Hiring of new Police Chief
- Opening of homeless shelter
- Cohesive city leadership team
- Communications activity/diversity (multiple platforms)/quality (graphics, videos)
- Hard-working, committed team members
- Engaged, dedicated community members and organizations
- Too many to list, but...
- The continued leadership and engagement responding to COVID at all levels of Costa Mesa; City Council, the IMPRESSIVE City Team, and the Costa Mesa Community!
- ACTIVE ENGAGEMENT – at the local level, regional level, state level and national level!
- Investing in the incredible people who make up the entire Costa Mesa City Team!
- We are moving forward! And in big ways, during one of the most challenging times in our history!
- Lions Park/Norma Hertzog
- Good team vibes
- Balancing a tough budget
- High quality leadership team who work well together
- Specific goals and action items from the last retreat focused and prioritized staff efforts and made accomplishing goals more possible
- Progress in filling vacancies, though high turnover remains a challenge
- In addition to core services (which includes over 15,000 customer services contacts per year, 3,000 building permits issued, 28,000 building safety inspections and 150 development applications presented to Planning Commission and Council per year), staff also completed the following additional Council goals.
- Council Goal - Fiscal: Presented Measure Q cannabis staffing, fees and ordinances and successfully launched the City's new retail cannabis program; 60 applications received and counting.
- Council Goal - Fiscal: Successfully completed the scope of work for the City's first Economic Development Strategic Plan
- Council Goal - Housing: Successfully completed and released the Public Review Draft Housing Element
- Council Goal - Housing: Successfully executed an Exclusive Negotiating Agreement with Jamboree Housing for an affordable housing project at the Senior Center site.
- Council Goal - Housing: Substantial progress in resources planning for long term housing programs like ADUs, Short Term Rentals, and management of Home Funds
- Recruiting for a new Housing Grant Administrator position to manage the City's housing grants portfolio
- Successfully adopted new ADU Ordinances and on boarded contract staff to assist
- Onboarding STR expert consultant and initiated preparation of a Short Term Rentals program
- Council Goal - Housing: Completed short-term staffing needs evaluation, with longer-term staffing evaluation in progress.
- Successfully filled vacancies high-level vacancies for Assistant Director, Building Official, and Inspections Chief.
- Successfully recruited two new Assistant Planners and two new Community Improvement officers

- Onboarded seven temporary part-time contract staff members to assist with the implementation of Measure Q, ADU processing and permitting and inspection services.
- See Hadassah's Prezi Presentation
- Leadership Team's technical skill sets
- City Council/ Mayor- Best ever!
- Engaged community- feedback integrated in policy developments
- Balanced Budget
- Air Plane Park
- Youth Sports Programs
- Food Drives
- Entered into an MOU with SOY (local non-profit serving our youth)
- Myriad of partnerships with community organizations to address key issues (Homelessness, food security, etc.)
- Enhanced emergency and critical alert system (IPAWS, Alert OC, Nixle)
- Activation of the EOC during the pandemic- at Level 2 for 15 months
- Multiple CIPs that were ON TIME and ON BUDGET!!!
- Focus on Active Transportation (Merrimac, Bike Racks, first ever Pop-Up Bike lanes)
- Forming new staff development strategies
- Looking at innovative way to increase open space in park-poor areas (Perez Park)
- Ramped up community outreach and engagement efforts via various social channels.
- First ever pod-cast
- Increased bilingual outreach efforts
- Set up the Section 115 Fund of \$1.8 million
- Accepted ARP funds of \$27 million
- A number of significant legal victories – federal cases, engagement of the Council
- Successfully managed over 20 First Amendment protests
- Went out to 27 wildfires in California, providing statewide mutual aid
- Almost \$3 million in grants funding
- Helped lead and manage the Pandemic POD vaccination sites

## **THE CITY OF COSTA MESA'S CURRENT INTERNAL WEAKNESSES/CHALLENGES**

### **Brainstormed List of Perceptions provided by Participants:**

- IT / Infrastructure updates / Staffing levels to be responsive
- Communication between City Departments
- Staffing levels sworn and professional to manage new mandates- BWC / Court Discoveries/ Property/ Measure Q and increased population
- Technology Update/ PD Building Updates for growth- e.g. Property and evidence full/ PD Training Room/ Communication Building
- Need to update financial software for budget and payroll
- Need to hone in the committees and commissions that pull resources in too many different directions
- Continued staffing challenges including the turnover/retirement of long-term employees
- Unnecessarily long Council meetings
- Vacancies are hard to fill
- Second Tier of Classic CalPERS Formula
- Outdated technology, and as such, takes a long time to expedite new systems
- Outdated Cost Recovery Fees
- Staff workload is nearing burnout
- Too many vacancies in the City
- Too many people living in low-income circumstances
- Lack of affordable housing
- Persistent homelessness
- IT systems are antiquated (in process of upgrade)

- Measure Y's impact on our ability to create more housing units
- Aging infrastructure – Need additional funding for ongoing maintenance and replacement of equipment and facilities
- Staffing – Numerous projects requiring reliance on outside consultant support and reduced staffing levels result in stressful conditions, lack of succession planning, and impacts to response time to resident complaints/requests
- Training – Opportunities to develop, retain and promote staff
- High expectations that do not reflect staffing and work load
- Lack of adequate resources to meet both short-term and long-term tasks, opportunities and challenges.
- Filling vacancies
- IT infrastructure
- Council expectation
- Outdated policies
- Shortage of staff/turnover (losing employees as fast as we are bringing in employees)
- Compensation package is not competitive to attract high quality talent
- Balancing COVID safety vs. desire to return to normal (ex. in person events/meetings vs. virtual events/meetings)
- Communication/time management skills need improvement
- Lack of citywide class and compensation study
- Staff turnover, lack of stability
- Length of time and extensive processes for new hires and promotions
- City Hall lack of workspace
- Lack of employees
- Budget
- Loss of senior staff and institutional memory
- Lack of staff to deal with volume of work
- Measure Y
- No dedicated economic development leader
- Missing overall vision driving infrastructure / planning activities (citywide and districts/corridors)
- Roads designed for cars/speed/throughput makes moving around the city unsafe, uncomfortable, and expensive
- Limited in public spaces for people to gather & connect
- Ability to track impacts
- Rules / policies / red tape limits innovation, community-driven activities
- Our City Council is amazing! That said, making sure the City Council understands and embraces the reality that we (the City Team) cannot maintain the level of accomplishments and expectations from the City Council that has taken place over the past couple of years. Respectful Recommendation: City Council Members identify one (1) item, goal or pet project that will be a must have to work toward and then prioritizing subsequent goals with a realistic perspective on what can be accomplished. We will break our backs for the City Council, for each other, and for the community, but the expectations must be realistic for all involved.
- Active Succession Planning and... Depth in each position!
- Empowerment within each Department – empowerment of the number 2's, 3's, 4's and more! Provide the responsibility AND the authority for making proactive decisions! AND supporting those individuals without pause or hesitation!
- We need a 360-degree evaluation process, implemented in a timely manner, assessing our City Council, Our City Executive Leadership Team to start. Once completed, move on to Division Managers and so on. We need to lead by example and pull this trigger sooner, rather than later. Our team is strong, but we only get stronger (and become the best), by identifying, engaging AND addressing our gaps, blind spots and areas for improvement.
- Recruit, hire, and RETAIN the best of the best. We need to continue to work towards being THE leader in recruiting AND retaining the best of the best!
- Understaffed / staff being overworked
- Some priorities slipping through the cracks
- Not enough communication with council regarding community events
- Inadequate staffing levels/resources needed to perform core services PLUS Council priority projects
- Challenge to maintain organizational focus on completing projects and creating successes, with constant new "asks" and shifting priorities

- Too many vacancies; staff recruitment and retention challenges due to non-competitive compensation package, lack of promotional opportunities and work/life balance issues
- Outdated technology and unmaintained records systems make hard work harder and compound existing inefficiencies and staffing issues (Land Management, phone/voicemail, web capabilities, budgeting, ERP, Laserfiche/records scanning, etc.)
- Measure Y
- Capacity limits - Vacancies/ Time
- Losing institutional knowledge- training of new staff on “processes and precedence”
- Time needed to implement technology infrastructure
- Open staff positions
- Constituent Services Team should have City of Costa Mesa cell phones
- Council Meetings have too many agenda items
- Council compensation package should match Mesa Water
- Public is not aware of the scope of public activity

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

### **Brainstormed List of Perceptions provided by Participants:**

- Supportive Council.
- Measure Q revenue.
- Good tax revenues/ balanced budget.
- Community is supportive of City direction and Public Safety PD/FIRE.
- Continued recovery from the pandemic that should stimulate the local economy
- Balance of tech, retail, and commercial businesses
- Infusion of cannabis tax revenue into the City budget
- Prime location in Orange County
- If cases are curbed, the global pandemic
- Potential additional emergency funding to offset economic effects of the pandemic
- Support from friendly County and State representatives, Katrina Foley, Cottie Petrie-Norris and Dave Min.
- Ability to use Project Homekey to convert motels or other properties to permanent, affordable housing
- Investment in the City by businesses such as Anduril, Segerstrom, Invesco, cannabis industry
- Improvement in COVID trends
- Fulfilling staffing needs to accomplish more projects and serve our constituents
- Potential grants for sustainability-related activities such as EV charging stations, Zero Emission fleet
- Using technology for permit processing, work at home opportunities, data management, virtual training opportunities
- Positive movement in Covid-19 vaccinations/infections/death (in CA)
- Likely infrastructure bill at federal level
- Strong local economy
- Strong supportive council
- Reopening of the community (businesses, programs, etc.)
- Strong and diversified economic base, i.e. hotels, tourism, SC Plaza, restaurants
- Cannabis, tax revenue
- Grants and Federal funding - sustainability, street, federal Covid assistance
- Improvements in commercial opportunities, i.e. Sale of Trinity Broadcasting site
- Recovering Economy
- Strong Budget
- Addressing Homelessness
- Technology Upgrades
- Continued desirable location within Orange County
- Jobs rich community
- Hipness/Cool factor

- State legislation re: housing
- People want to live and work in Costa Mesa
- Technology – tech/tools to engage with and communicate with public/stakeholders
- Technology supporting local/small business initiatives
- State/federal money to support equity and park access
- We are in a very positive and supportive political environment, and we are grateful! This is not the long game. Prepare for the changing political environment... that will change, in some way, shape, or form.
- COVID...
- Becoming more innovative of City Cost recovery Options.
- Engaged community
- A collaborative council
- A young population with a lot of potential
- Maintaining current political cohesiveness and consistent policy direction
- Economic recovery/fiscal recovery post-COVID.
- Redistricting - Election 2022
- Community integrated partnerships/collaborations
- More food drives
- Updated I.T. systems for the I.T. Dept.
- Compensation Package should match Mesa Water
- Addition of a Pre-Apprentice Program
- Additional state and federal funding or infrastructure and broadband
- Increased state funding for sustainability efforts
- Our county supervisor, a former mayor of Costa Mesa, aids us in our good relationship with the county
- Support and collaboration with county and state elected officials

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

### **Brainstormed List of Perceptions provided by Participants:**

- COVID – Unknown impacts / mandated vaccines may cause early retirements.
- Legislation continues to decriminalize laws / sex-registrant tiering system.
- Unknown impacts from legal marijuana dispensaries.
- Expensive housing costs preventing home ownership / increase in rentals
- Continued political stress that separates the community at the local level
- ‘Me first’ politicians looking for credit and attention
- Overcrowding due to the state’s demands for housing, and a continued increase of traffic, congestion, pollution, and density
- Trying to keep up with other cities and trends that garner publicity when those projects take away from pre-established goals and objectives
- If not properly managed, the global pandemic
- State legislation proposing municipal revenue realignments
- City is currently experiencing the impacts of a lack of interest of graduating students to enter into a professional government career
- Social inequalities – racial, gender, age, etc. –
- Continued spread of Covid-19 and variants, and low vaccination level compared to neighboring cities
- Supply chain issues, particularly regarding the automotive industry
- Economic factors such as inflation
- Pending litigation matters involving sober living homes
- Return of COVID variants bringing unexpected consequences
- Material costs and availability. Delays in getting supplies and equipment.
- Potential high turnover in staffing causing instability
- Unexpected lack of funding for programmed projects



- Higher project costs
- Unfunded state mandates – increased cost to local jurisdictions and public
- Potential economic downturn
- Measure Y
- SB 8, 9 and 10 (housing bills taking effect 1-1-22)
- Continued political division
- Politicization of COVID-19
- Still dealing with COVID pandemic
- Balancing political/council/community priorities
- Measure AA
- State interference and legislation- SB9 and SB10
- Covid continuing, long-term impacts- financial and health
- Caustic political division on all levels of government, lack of civility from both political leaders and citizens
- Traffic congestion
- Not addressing employee shortage
- Economy not recovering fast enough
- Budget
- Politics
- Increasingly high cost and limited supply of housing
- November 2022 election
- Lingering impacts of pandemic
- Continued reliance on retail sales tax revenue
- Housing affordability/scarcity; cost of living
- Climate/heat/drought
- Community health / social determinants of health
- Ecommerce impacts on city revenue
- Prepare for the future: politically, financially, and strategically!
- COVID...
- Political divisiveness... from both sides of the aisle
- Bending to political pushes... from both sides of the aisle. We need to ensure that we remain A-political.
- Behavioral and Mental Health for all City employees, starting with all of our public safety employees.
- More loss of local control... (SB 9, mandatory vaccinations, and efforts by the federal and state legislative and political powers at be to marginalize and compromise local control... PERIOD!) Wherever you stand on issues, it should ultimately be by the relevancy and impacts at the local level. One size does NOT fit all!
- COVID cases
- Outdated equipment
- Divisive National political environment
- Economic uncertainty and ongoing budget challenges
- State government policies and regulations that undermine City goals and processes
- Continued public health impacts due to COVID and variants.
- Redistricting/Election 2022
- Legislative mandates - lack of funding sources
- Remote Controlled Aircraft Field in the Park
- Unhoused people in The City of Costa Mesa
- Promoting the under employed through existing employment programs
- Affordable Housing Crisis
- Second Tier of Classic CalPERS Formula
- A lot more wildfires
- Drought
- Other cities' programs that may not be beneficial to Costa Mesa
- Social media misinformation



## IDENTIFY CORE VALUES

Brainstormed list of values from which the City of Costa Mesa's Core Values were developed

- Trust
- Ethical
- Integrity
- Accessible
- Sustainable
- Transparency
- Civility
- Compassion
- Innovation
- Drive
- Courageous
- Empathy
- Synergy
- Efficiency
- Solution-based
- Safety
- Health
- Decisiveness
- Tolerance
- Robust
- Kindness
- Thirst for knowledge
- Embracing technology
- Teamwork
- Resiliency
- Inclusivity
- Creative
- Collaborative
- Fiscally responsible
- Equity
- Unity
- Stable
- Thoughtful
- Fun
- Responsive
- Enthusiasm
- Engaged
- Healthy
- Dedicated
- Welcoming
- Costa Mesa Pride
- Nice
- Forward thinking
- Prosperous
- Honesty
- Vibrant
- Open to change
- Warm

# STRATEGIC PLAN ELEMENTS

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## **“SWOT” ANALYSIS**

Assess the organization's:

- Internal **S**trengths      - Internal **W**eaknesses
- External **O**pportunities      - External **T**hreats

## **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