

Cameron Park CSD Strategic Plan

Board Planning Workshop

January 13, 2021



Introduction

- INTRODUCTION(s)
 - Brent Ives, BHI Management Consulting
 - Organizational consultant to Special Districts (20 years)
 - Strategic Planning - Supervisor training - Board/manager interactions - workshops, etc.
 - 25 years engineering manager at LLNL
 - USF - Organizational Development
 - 23 years on Tracy City Council prior to last 8 years as elected Mayor, various local and regional Boards/Commissions

Parking Lot

- **Anything you want to be sure we'll discuss today or throughout this process?**
- *What will we really look like in five years?*
- *What does it mean to be a CSD at this time?*
- *A GM that makes the public feel comfortable...*
- *Think about our strategic partners and relations with them*
- *Effectiveness and efficiency of our committee*
- *Discussion on environmental policy*
- *Firming up financial position*
- *Our Community is well connected with the CSD*



Background

Board decision on a new 5-year Strategic Plan

- Includes inputs from Board members, survey and staff leadership
- This workshop allows you to discuss and set *foundation and direction for strategy*
- *Review, update and document 5 years of direction*



The Process Today

- **We'll discuss strategy in general**
- **Consider District status – *financial/otherwise***
- **We'll look at the inputs (*Yours – stakeholders, anyone watching*)**
- **Ask you to consider the current foundational statements for strategy, those being: MISSION – VALUES - VISION**
- **Discuss and develop strategic focus areas that may have emerged**
- **These will update the current organization**
- **Discuss path forward for next workshop, with staff**





Flowdown of SP

- **MISSION STATEMENT**
- **VALUES**
- **VISION STATEMENT(S)**
- **SUPPORTIVE 5 YR. STRATEGIC FOCUS AREAS**
- **STAFF DERIVED INITIATIVE/PLANS/ACTION IN SUPPORT OF EACH FOCUS AREA**
- **GOALS AND MILESTONES FOR EACH INITIATIVE**

Linkages in Strategic Planning

MISSION STATEMENT →

VISION →

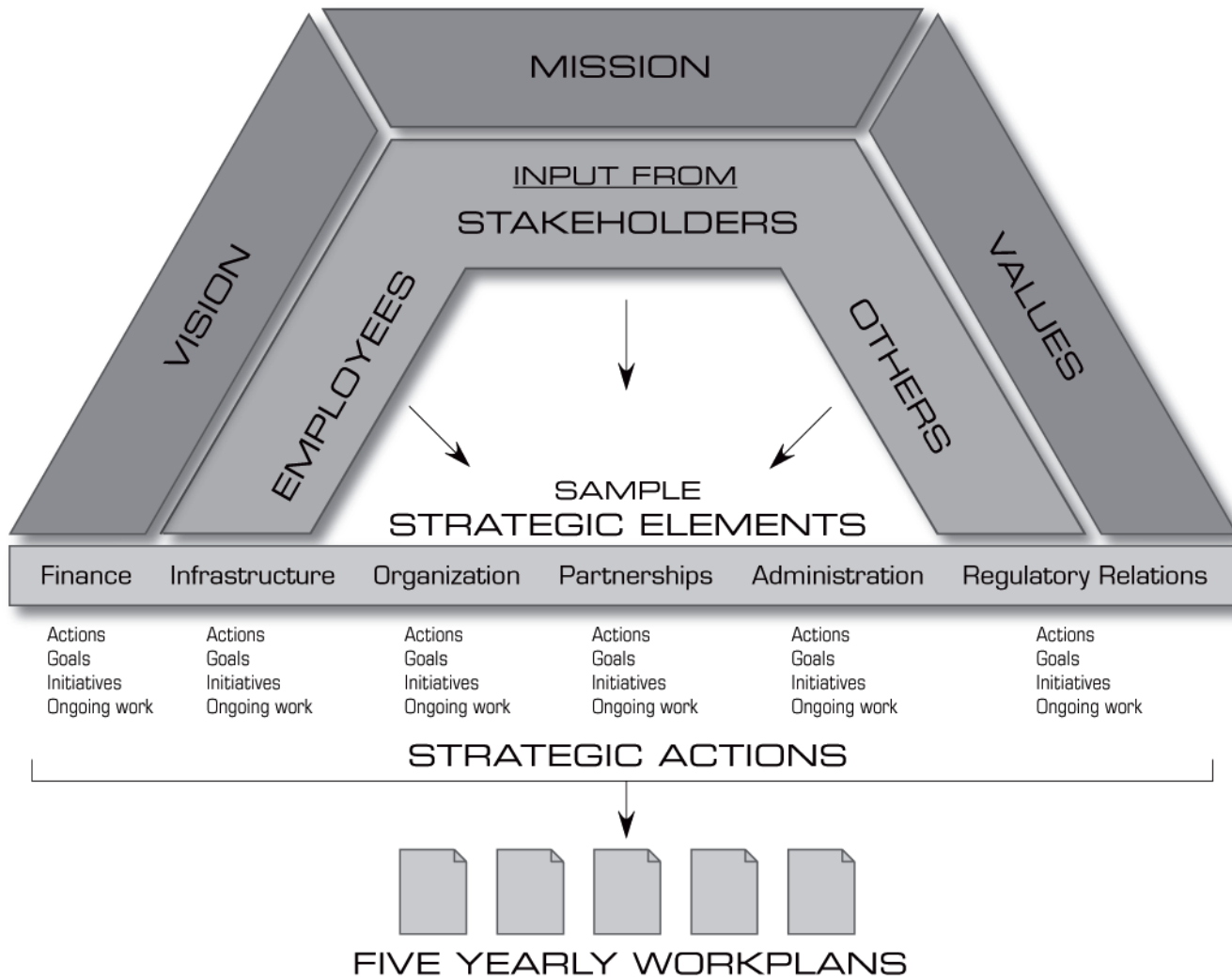
BOARD (WHAT) CORE VALUES →

Strategic Elements →

Strategic Implementation →

STAFF (HOW)

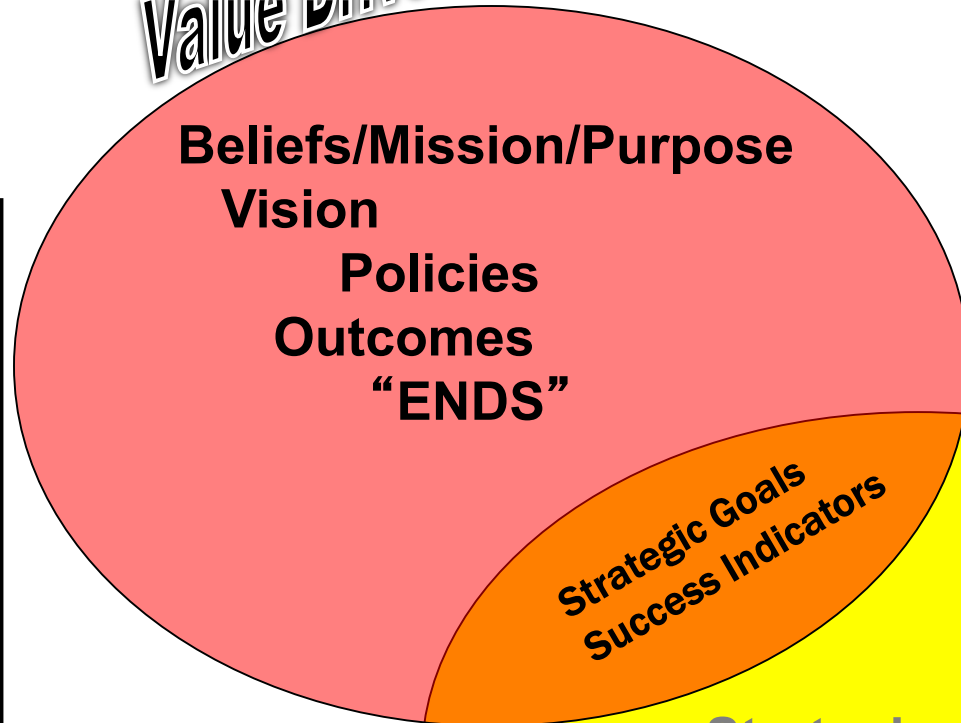
5-year Workplan



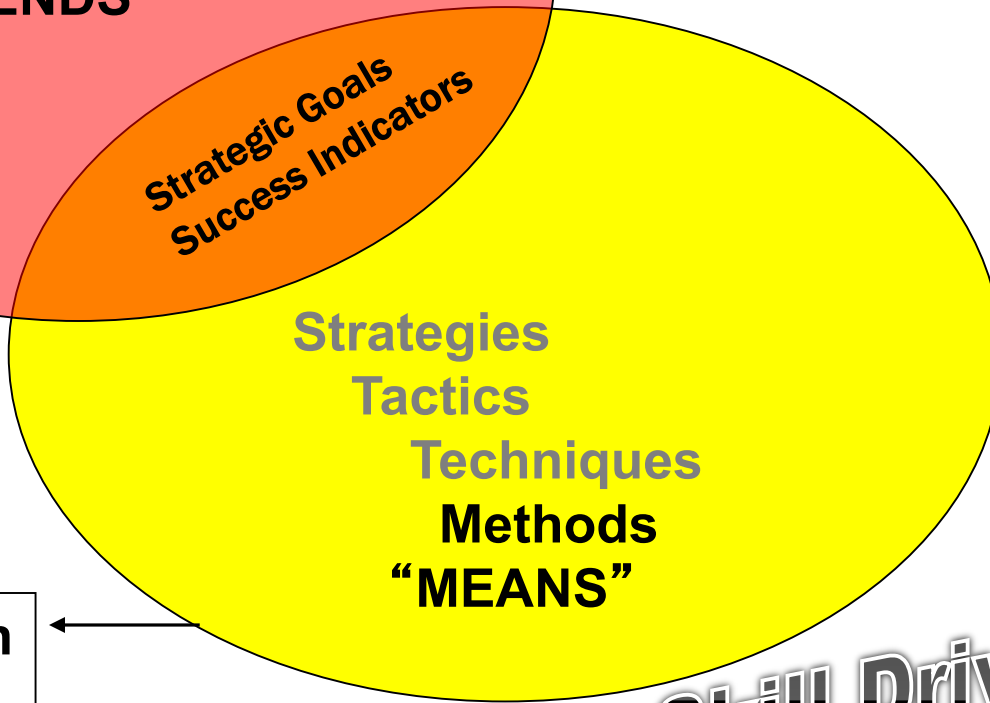


Understanding Roles

Value Driven



Governance Team



HOW

What

Administration and Staff

Skill Driven

Strategic Planning

Helps bring you all together at the right LEVEL (25,000 ft.) for looking out into the future.

- Allows you to practice your rightful leadership role.**
- Asserts and confirms your Mission.**
- Assures clarity for staff in the development of your Vision.**
- Keeps Vision properly separate from implementation.**
- Allows your staff to practice their professions by implementing your Vision**
- Requires Strategic Thinking...finishes the question “WHY?”**

Content and Linkage

- Mission
- Vision
- Strategic Elements or Strategic Focus Areas
 - Objective and Strategic statements
- Strategic Actions/Initiatives
- Strategic Implementation Plan

Inputs

Board perspective shared with you today allows you to hear from a variety of sources as you planning.

1. Your individual inputs (collected)
2. Staff Leadership
3. Stakeholders/Survey
4. Financial Status
5. Overall Position of the District in light of planning

Staff Inputs

- **NUMBERS INDICATE THAT MORE THAN ONE IDENTIFIED HAD LISTED THE ISSUE**
Emerge from pandemic as a viable, fiscally sound organization balancing all District services (4)
- Maintain culture that values professionalism, mutual respect and collaboration (4)
- Make capital investments to improve and expand services to residents (3)
- Education and outreach regarding District services, limited resources (3)
- Improve public perception as viable agency(2)
- Succession planning for leadership positions (2)
- Strengthen partnerships with local agencies and community groups to improve District's standing in the County and ability to serve to residents (1)

5-Yr. Budget Projection (Assumptions)

- Starting point is FY 2019-20 Final Budget, as adjusted January 2020
- 3% escalator property taxes (2% existing homeowners + 1% growth)
- Franchise Fee escalator 2%
- User Fee escalator match expenditure escalator; Fire Marshall fees based on current actuals FY19-20 with 3% escalator
- Retiree health care at highest point now (decreases will begin through attrition)
- Other employee benefits 1% cost growth projected annually
- Services and supplies increase 2% annually
- CALFIRE based on historical actuals and projected contract costs (current contract ends June 2023)
- Allocation to Capital Asset Reserves from property taxes projected 2%
- Wages escalator 3% annually (State mandated minimum wage increases end January 2022; current labor MOU ends June 2021)

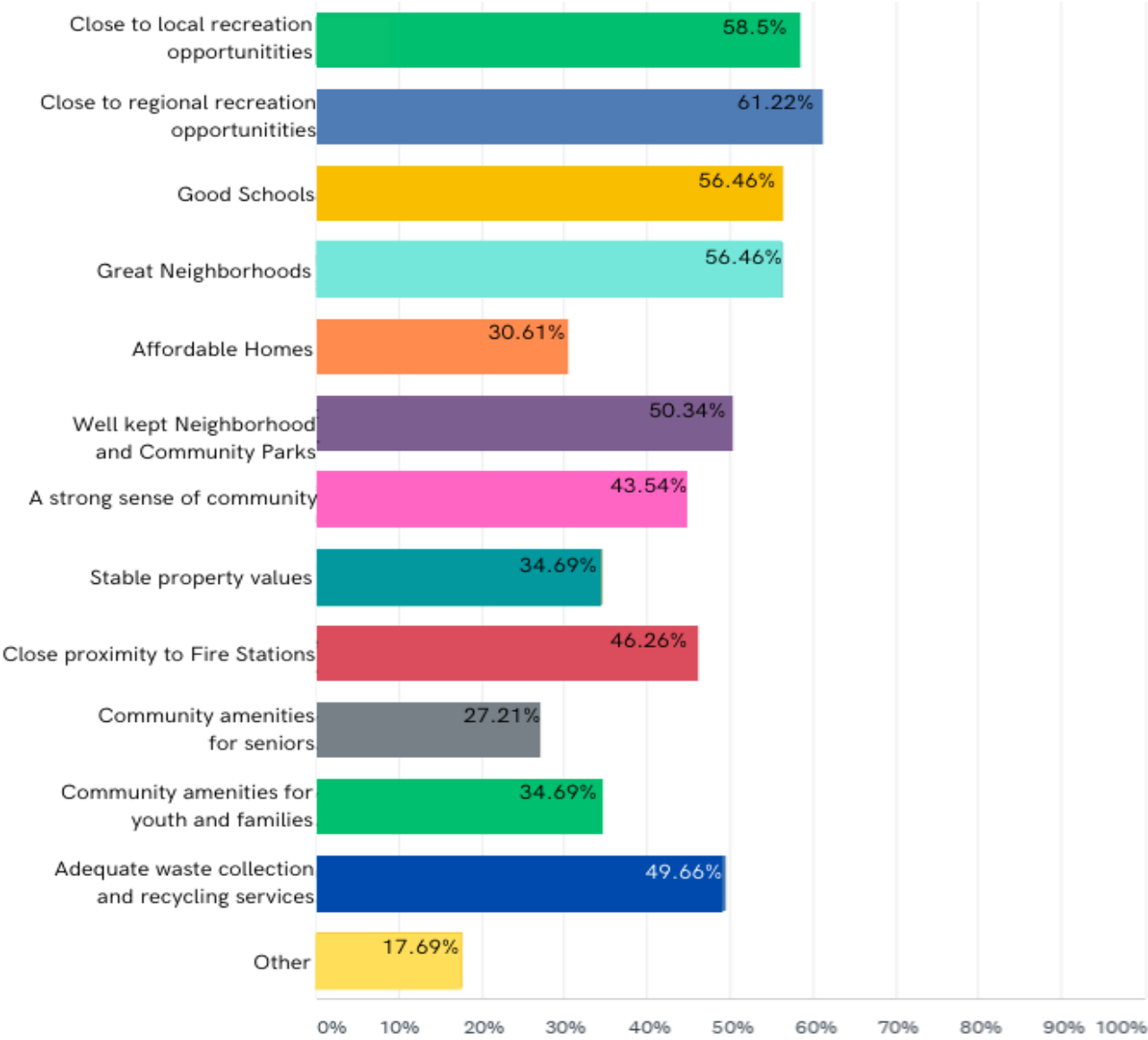
Strategic Plan – Financial Outlook

	FY2019-20 Final Budget	FY2020-21 Projected Budget	FY2021-22 Projected Budget	FY2022-23 Projected Budget	FY2023-24 Projected Budget	FY2024-25 Projected Budget
Beginning Fund Balance	(3,462,750)	(3,280,259)	(3,205,710)	(3,098,140)	(2,979,793)	(2,849,986)
Operating Revenue						
Property Taxes	(4,184,387)	(4,309,919)	(4,439,216)	(4,572,393)	(4,709,564)	(4,850,851)
Other Revenues	(2,438,562)	(2,490,375)	(2,492,130)	(2,517,411)	(2,543,228)	(2,569,594)
Total Operating Revenue	(6,622,949)	(6,800,294)	(6,931,346)	(7,089,804)	(7,252,792)	(7,420,445)
Expenditures						
Total Wages & Benefits	1,338,988	1,364,470	1,385,390	1,407,743	1,431,486	1,456,583
Total Services & Supplies	5,466,452	5,510,373	5,653,526	5,800,407	5,951,113	6,083,891
Total Expenditures	6,805,440	6,874,843	7,038,916	7,208,150	7,382,599	7,540,473
Total Revenues	(6,622,949)	(6,800,294)	(6,931,346)	(7,089,804)	(7,252,792)	(7,420,445)
Net Revenue Over Expenditures	<u>182,491</u>	<u>74,549</u>	<u>107,570</u>	<u>118,347</u>	<u>129,807</u>	<u>120,028</u>
percent deficit	3%	1%	2%	2%	2%	2%
Ending Fund Balance	(3,280,259)	(3,205,710)	(3,098,140)	(2,979,793)	(2,849,986)	(2,729,958)

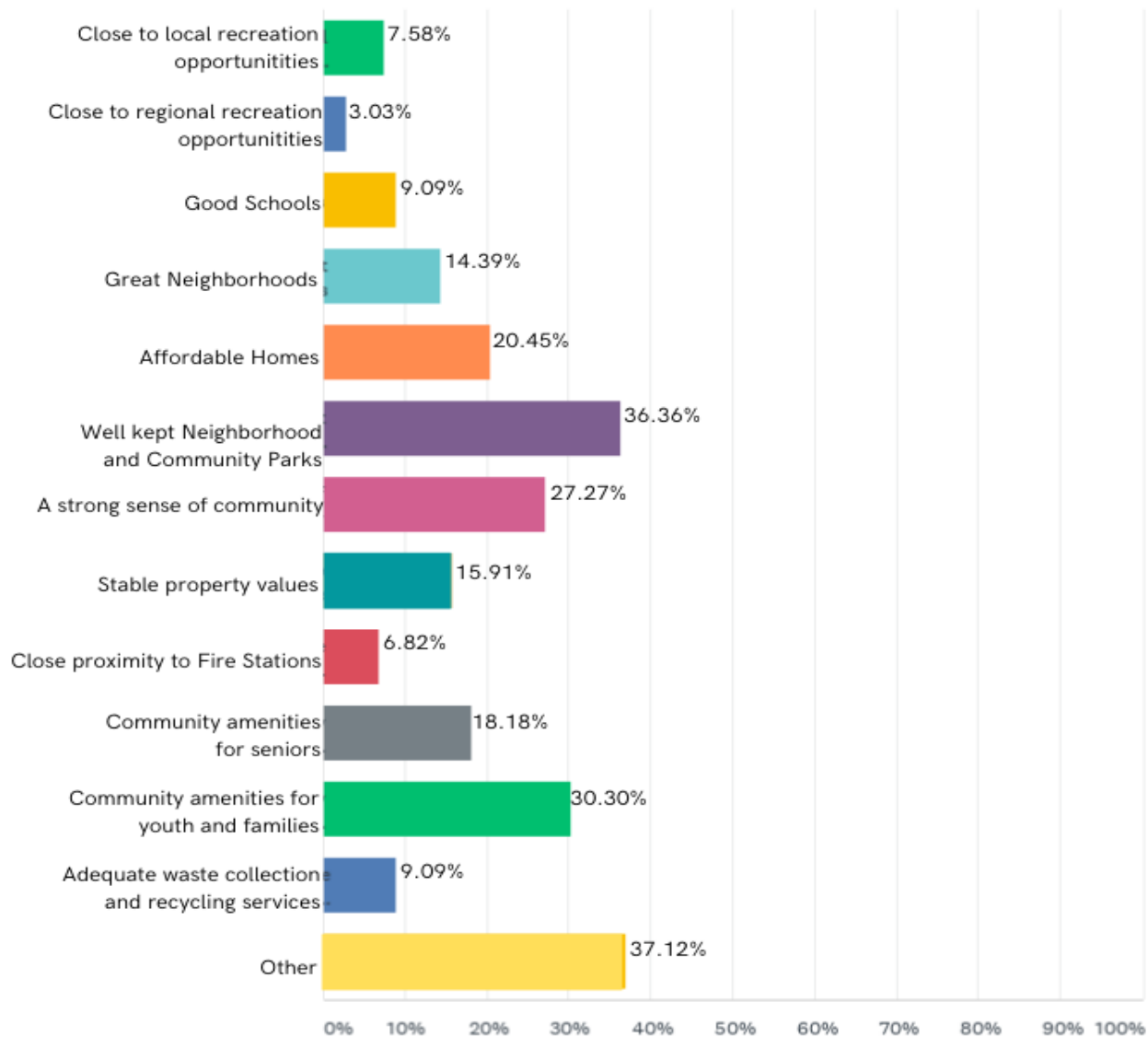
Strategic Plan Community Survey Results

A Community Survey was released on December 7th and remains open. The following results reflect information collected through January 7th.

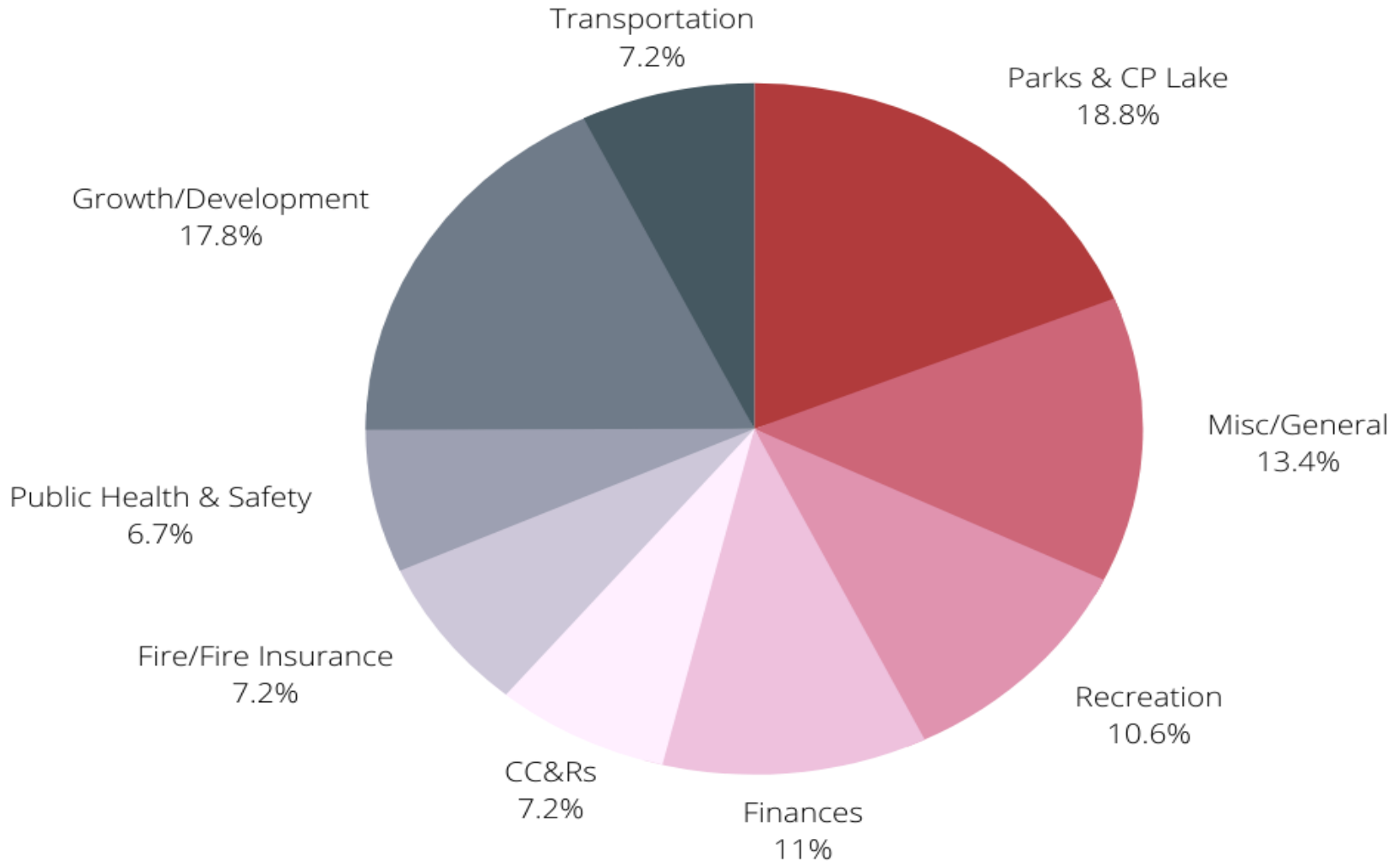
Q1 What things make Cameron Park a "Special Place to Live?" Please check the items that you feel are currently TRUE of Cameron Park.



Q2 What things would make Cameron Park a more "Special Place to Live?" Please check the items that you feel are NOT TRUE of Cameron Park.



Q3 What would you say are the most important issues or challenges facing the Cameron Park Community Services District in the next 5 years?



Please see supplemental handout to see the specific, free form answers given in the Strategic Plan Community Survey.

Cameron Park Community Services District Strategic Plan Community Survey

Question #1: What things make Cameron Park a “Special Place to Live?” Answers from people who selected “Other”

Notes: The following statements are copy and pasted from Question 1 of the Community Survey where respondents selected “Other” and then used the space below to specify.

- Everything was spell checked, but grammatical changes were not made

Other (i.e things that make Cameron Park a Special Place to Live):

- Rural atmosphere without city bureaucracies
- Cameron Park Lake facilities (was the lagoon)
- Rasmussen Park and the trails and pond behind it
- Enforcement of CC&Rs
- Great churches
- I enjoy Cameron Park being far enough away from bigger cities yet close enough to lakes, mountains and recreational areas.
- More actives for seniors
- The beautiful old trees!
- Shopping is close
- Caring neighbors
- Library, pharmacies,
- Better and more local representation to various living zones and neighborhood issues. Having lived in CP for over 40 years, this is the first "survey" we've been asked. Even it is inadequate.

- An airport
- I like how it's a small town and should stay a small town.
- The rural feeling of the area, yet still having neighborhoods
- All types of residential properties are available; single family detached homes on large lots, including 5 acres south of Hwy 50, and small lots, condos, townhomes, a mobile home park, apartments, homes along a golf course, homes in airpark, homes with wonderful views and more, and vacant residential lots where people can design and build their dream home. Larry Cameron was a visionary.
- Cameron Park Lake Park
- Trees and hills
- Away from urban buildup
- Walk ability: access to shops and recreation by foot.
- The lagoon is gone, the train is gone, santa parade is gone gone, summer spectacular is gone. I'm heartbroken this is not a special place anymore. You've let it fall apart.
- I would hope that the Fireworks show can return
- Staying rural
- Beautiful pool
- The Airpark and location close to both rural and urban activities.