City of Santa Rosa Council Priority Setting Workshop February 19, 2025







The JGA Facilitation Team

Jacob Green, MPA Principal-in-Charge / Lead Facilitator



Greg Devereaux, JD Senior Facilitator







Jacob Green and Associates, Inc. A California Company



JACOBGREENANDASSOCIATES.COM

Strategic Planning Teambuilding Training



Goal Setting Agenda

- 1. Welcome (Completed)
- 2. Budget Findings & Approach Alvarez & Marsal (Completed)
- 3. State of the Budget
- 4. Roadmap to Fiscal Success
- 5. Vision
- 6. "Basic Services" Exercise
- 7. Two-Year Goals Solidification
- 8. Next Steps Budget Adoption





Today's Purpose – Just a Start!

Council direction to staff for budget preparation.





Evolution not Revolution

Building Organizational Alignment







Strategic Plan Roadmap



State of the Budget





Budget Best Practice Policies (Examples)

- 1. Match ongoing expenditures with ongoing revenues.
- 2. Do not use one-time funds to fund ongoing operational costs.
- 3. Continue to prepare multi-year forecasts of financial operations for the General Fund.
- 4. Regularly update fees and charges utilizing full direct and indirect costs.
- 5. Maintain adequate reserves.
- Identify projected staffing, operation maintenance, and utility costs as part of the approval process for each capital project. Do not budget a capital project unless there are reasonable expectations that resources will be available to pay for the project.



Updated Vision





Vision Statement

A Vision Statement describes in graphic terms where you as an organization want to see yourselves in the future.

An image of the future we seek to create.

Guiding beacon.





Santa Rosa Vision – Current Statement

"Santa Rosa -Leading the North Bay"





Vision – Proposed Statement

"Santa Rosa will be the North Bay's leader for innovation, economic development, and fiscal success"





Basic Services Solidification





Basic Services

What do you consider to be the fundamental/basic services?





Basic Services – Prioritization Time!



Goals Update





Goals Shift

	Rank Order	Existing Goal Order	Proposed Goal Order
	1	Promote Citywide Economic Development	Achieve and Maintain Budgeting Excellence and Fiscal Sustainability
	2	Achieve and Maintain Fiscal Sustainability	Invest in the Development and Maintenance of the City's Infrastructure
	3	Create an Environment that Supports Staff and Operational Excellence	Promote Citywide Economic Development
	4	Invest in the Development and Maintenance of the City's Infrastructure	Foster a Safe, Healthy, and Inclusive Community
	5	Plan for and Encourage Housing for All and Reduce Homelessness	Plan for and Encourage Housing for All and Reduce Homelessness
	6	Address Climate Change	Create an Environment that Supports Staff and Operational Excellence
	7	Foster a Safe, Healthy, and Inclusive Community	Address Climate Change

Goal 1: Achieve and Maintain Fiscal Sustainability and Budgeting Excellence

Objectives

- 1. Adopt budget best practice policies (see previous slide)
- 2. Align Budgeting Strategies with City Priorities
- 3. Enhance revenue diversification
- 4. Reduce debt dependency and strengthen credit ratings
- 5. Improve financial transparency and public engagement





Objectives Brainstorm



Next Steps

1. Staff builds objectives based on Council Vision & Goals

- 2. Budget Adoption
- 3. Staff returns with work plans



