City of Sunnyvale
City Council Study Session

Study Issues Process Discussion Workbook

August 26, 2025

RAFTELIS

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Meeting Objectives

- Provide an overview of consultant observations and strategies for improvement
- Receive Council feedback on Raftelis' preliminary observations
- Receive Council feedback on what will work well and/or concerns with the strategies for improvement

Discussion Agenda

1. Introductions and Project Objective
2. Review Background and Methodology
3. Review Preliminary Observations
4. Review Preliminary Strategies for Improvement
5. Review Next Steps

Workbook Contents

List of Appendices

Executive Summary

Raftelis is pleased to provide our preliminary observations and strategies for improvement resulting from our evaluation of the City's long-standing study issues process. Raftelis' work resulted from Study Issue OCM 24-02, "Evaluate the City of Sunnyvale Study Issues Process." A comprehensive report will be presented to the City Council on October 21, 2025, with recommended policy changes by City staff.

Our suggestions would result in some aspects of the current study issues proposal process being retained and others being changed. The objectives of our suggestions are to simplify the process, increase efficiency, produce significant cost savings to the City, and free up staff time for implementation.
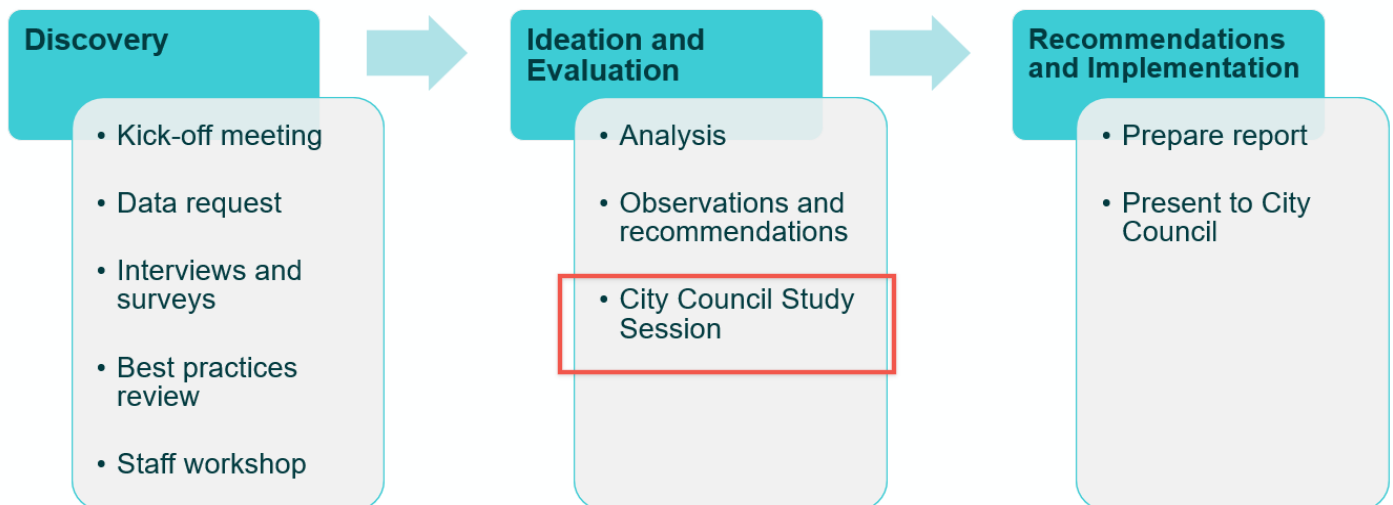
PROJECT OBJECTIVE

Conduct a comprehensive assessment of the City's longstanding study issues process to develop recommendations that lead to the **most efficient and effective approach to identify, prioritize, and analyze policy priorities.**

> *"Almost all quality improvement comes via simplification of design, manufacturing, layout, processes, and procedures."*
>
> Tom Peters, Management Author

PROJECT PROCESS AND SCHEDULE

Discovery
- Kick-off meeting
- Data request
- Interviews and surveys
- Best practices review
- Staff workshop

Ideation and Evaluation
- Analysis
- Observations and recommendations
- City Council Study Session

Recommendations and Implementation
- Prepare report
- Present to City Council

KEY THEMES

Through gathering information and analysis, a few key themes emerged:

- Councilmembers' key concern is the length of time for the process overall (from sponsorship to study completion)

- Study issues are part of a larger system but treated as separate

- Some items now proposed for study issues are within the City Manager's or City Attorney's purview to determine action and may not need routing through formal prioritization process

- Case study cities have disciplined ways of setting priorities that are less complicated

- Councilmembers like having a way to prioritize ideas

- Staff's key concerns are the amount of time devoted to the process and impact on delivery of core services

- Boards and Commissions want to have input, but agree the process is overly complex

- Study issue proposal process is expensive and time consuming, and detracts from service and project delivery

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Background and Methodology

The study issue process was first part of the City's Planning and Management System (PAMS), which was initiated in the mid-1970s. The 2009 PAMS manual states in the introduction (page 2): ***"PAMS is a comprehensive and integrated system that links together the City's General Plan, budget and long-term financial plan, policy development, public involvement and evaluation of staff performance."***

The stated intent of the study issue process was to connect new items with long-range comprehensive planning, short-range action planning and service delivery, and performance reporting and evaluation.

The City Council serves in the critical policy role of setting overall priorities for the City. That is done through:

- Identifying and adopting broad desired outcomes through Strategic Priorities.
- Adopting the operating and capital improvement budgets.
- Adopting long-range plans and programs that guide the City's future, including the General Plan, Housing Element, Active Transportation Plan, Climate Action Playbook, and others.
- Bringing new issues and projects forward for consideration to meet the changing needs of the community.

INFORMATION GATHERED

The preliminary observations and strategies for improvement are the result of information gathering and analysis of data provided by the city, which included:

- **Interviews**: All City Council members and 16 senior staff who spend significant time on study issues.
- **Two Surveys**: Responses from 39 staff who regularly interact with the process and 21 of a possible 60 board and commission members.
- **Case Studies**: Eight cities with sound priority setting practices with which Raftelis were familiar – Elk Grove, Fremont, Gilroy, Pleasanton, Redwood City, Rohnert Park, San Mateo, Victorville.
- **Data Analysis**: Estimating time spent on the process and associated cost, summarizing volume and assignments of new study issues, select analysis of proposal and implementation timelines.

Appendix A provides a high-level summary of stakeholder input. Appendix C provides detail on the case study cities.

DATA ANALYSIS

In our analysis, our team focused most on the study issue **proposal process** (from sponsorship to funding) for two reasons: (1) that is where significant time is spent before any study issue process becomes an actual project, and (2) where more detailed data was available for analysis.

A previous analysis by City staff of implementation timelines for the 44 approved study issues completed between June 20th, 2017, and January 28th, 2025, found that nearly one third (32%) were completed within one year. Cumulatively, the **majority (55% of 44) were completed within two years**, and 80% of 44 were completed within three years.

Raftelis evaluated proposal timelines for seven randomly-selected study issues from sponsorship to approval/funding. For these study issues, the **proposal (pre-implementation) process ranged from 182 days to 1,704 days, with an average of 618 days (over 20 months)**. Raftelis also evaluated timelines for eight randomly-selected study issues once approved and funded. Timing for completion/implementation ranged between 182 days to 1,451 days, with an average of 976 days from funding to completion (over 32 months).

There are some commonalities that drive timelines (such as being deferred to the next year's workshop and procurement time for consultant selection), but other variables are unique to each study issue project. Study issue scopes vary widely, as does the volume of other workload items that compete with study issues during a given time period. Additional tracking would be needed to properly assess where efficiencies could be gained.

City staff are nearing completion of a dashboard that will provide more accessible information about the status of study issues and other major workplan projects in each department that support Council strategic priorities. That dashboard will be useful to the multiple parties with interests in the various projects of the City.

See Appendix B for more details on the analysis and results.

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Interview and Survey Themes

Engagement was done through interviews with Councilmembers and City staff, as well as through a survey distributed to City staff and members of the City's Boards and Commissions. Below is a high-level summary of outcomes, with details provided in Appendix A.

INTERVIEWS:

City Council: All members interviewed
- Like having a process to prioritize
- Major criticism is that the process, overall, takes too long – from start to finish
- Over-reliance on consultants adds time

City Staff: Total of 16 interviewed
- Like having a process for prioritization of new requests
- Concerns about workload, amount of time spent on study issue process and distraction from core services
- Likes City Manager's "Above The Line (ATL)/ Below The Line (BTL)"

Areas of Agreement:
- Having a way to set priorities is useful
- The study issue process takes too long from start to finish
- The "ATL/BTL" call by the City Manager is useful

KEY THEME:
CHANGE IT, BUT DON'T ELIMINATE A WAY TO PRIORITIZE

Opportunities for Improvement
- Reduce time for the annual ranking process
- Tie study issues to Strategic Priorities
- Reduce the length of time deferred study issues remain on the list
- Clarify study issue scopes at start and along the way
- Reduce the reliance on consultants; this could speed up the timelines
- Refine what should constitute a "study issue"

SURVEYS:

- **City Staff survey:** 39 responses, either partial or complete
- **Boards and Commissions survey:** 21 complete responses out of a possible 60 total members

Areas of Agreement between staff and Boards/Commissions:
- Effectiveness rating of study issues process was **4.8 out of 10**
- Too many study issues proposed
- Timeline from study issue creation to project completion is too long
- Too much effort spent preparing a proposal that may go nowhere
- Too many deferrals/non-ranked that carry over from year to year
- Not all study issues have same potential for impact

Board/Commission Member survey themes:

- Appreciate the opportunity to submit issues and hope it continues
- Frustration with length of time to complete a study
- Awareness/appreciation that the current process forces prioritization
- Process can feel opaque, especially ATL/BTL decisions

Staff survey themes:

- Study issues process takes time away from core work, including mandates and other Council goals
- Not all ideas are equal in level of effort or impact on the community
- Study issues don't align with goals or adopted plans, and sometimes are counter to them
- Discouraging to incorporate "never ending" study issues into existing workloads, concerns about volume
- Six of 10 responding directors said the process either somewhat or significantly hinders their ability to meet core responsibilities

NOTES AND DISCUSSION

What was surprising? Did you hear what you expected to hear? Anything concerning?

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Case Study Cities and Best Practices

Based on Raftelis' knowledge of their effective practices, eight cities were selected to provide information on how they approach setting priorities with their City Councils. **Appendix B** contains information about each City's processes.

Elk Grove	**Redwood City**
Fremont	**Rohnert Park**
Gilroy	**San Mateo**
Pleasanton	**Victorville**

These cities each have a **disciplined, streamlined process** that is adhered to. They review and update annually, but **plan longer term**.

COMMON CHARACTERISTICS OF CASE STUDY PROCESSES

- **Alignment** with a strategic plan or adopted goals and priorities
- **Respects the ongoing work** of departments and understand that day-to-day operations must be well managed – and that takes time
- **Set priorities with workload and staff capacity in mind**, as determined by the City Manager
- **Majority of Council support** required for items (through the budget process or to be added in other ways)
- **No involvement of boards and commissions** in Council priority setting
- **Clear roles between Council and staff**, with Council focusing on policy and top priorities, and the City Manager determining what is realistic to be achieved with staff resources

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Preliminary Observations

This section contains Raftelis' key preliminary observations from our analysis of the study issue process.

a. **The cost is high for the study issues process from sponsorship to approval for funding**. Based on staff estimates, the annual cost is over 2,500 staff hours, which equates to 64 weeks of staff time and over $347,000 in salary and benefits. This excludes the cost and staff time to implement study results. Of this proposal time, an estimated 610 hours at $78,000 are spent supporting the board and commission proposal process. Raftelis notes that time spent on the overall study issue proposal process takes time away from implementation of study issues approved in the budget, as well as other Council priorities and core services. See Appendix B for data analysis.

b. **Significant time is spent by staff in meetings and report writing for study issues that do not get ranked by Council nor approved by the City Manager for funding and implementation**. Of study issues sponsored by boards and commissions in the past six years, almost two-thirds do not get approved and implemented. Of study issues sponsored by the City Council in the past six years, half do not get approved and implemented. The meeting and report-writing time associated with that work represents hours that could go into achieving Council's priority projects and implementing study issues. See Appendix B.

c. **Board and commission involvement in the proposal process is unique**. Sunnyvale is atypical among cities in asking its boards and commissions to propose projects for City staff to work on. The typical role of advisory bodies is narrowly defined to advise the City Council on specific matters as defined in authorizing ordinances or resolutions. As noted in item 1 above, the current type of involvement is expensive for the City in time and money.

d. **Study issues are part of a larger management system but not enough focus is provided on the overall context to integrate them among other City priorities**. The City's primary responsibility and allocation of staff time is on core services and its many approved projects. When study issue projects are viewed separately, this larger context can be clouded. Study issues are new projects added to staff workload and greater context may help convey that better. The new strategic priorities "work plan" is a useful tool in conveying the larger context of projects.

e. **False expectations can be raised about study issue approval when a study issue is on the deferral list for multiple years**. On average, only about 25% of study issues prioritized by City Council during the February workshop make it "Above the Line" for implementation. The remaining issues are carried forward year after year, which can create unrealistic expectations that these study issues will eventually be approved. Many may never move forward due to limited resources, changes in Council priorities, or other intervening factors. Additionally, deferring these projects requires ongoing staff time each year to update analyses, adding to the workload without guaranteeing progress.

f. **Terminology is confusing**. The historic use of the term "study issue" can imply that a matter is simply being studied. A study issue can be a policy matter or a project, and, over the years, study issues have been of both types. Since any item being approved is expected to have a beginning and an end, everything approved is actually a project of one type or another. Some may be best directed toward the capital improvement plan and not designated as a "study issue." *[Suggested changes to terms are offered below in strategies for improvement.]*

g. **Tracking and visibility could be improved.** Approved major projects and Council priorities are updated by City staff now on a quarterly basis. Staff are working on a new reporting dashboard. This will be helpful for the

Council, public, boards and commissions and City staff as an easy reference point as to the status of approved projects and priorities. Currently, study issue tracking after approval for implementation is at a high level and is not broken down into phases in reporting. As a result, easy analysis of time spent on major tasks, including how specific portions of the implementation processes might be improved, is not feasible.

h. **There is no need for two separate forms for study issues and budget proposals.** For streamlining purposes as well as clarity as to how the proposed item fits into various systems (i.e., study issues, operating budget, capital budget), proposals can be consolidated.

i. **Some proposed items can be handled through the City Manager's discretion in directing City operations.** The City Manager's guidance to City staff and understanding of workloads as well as existing Council policy can be used to decide some actions outside a formal study issue process. This is sometimes referred to as "just do it" by the City Manager. It is normal within a city manager's authority in the council/manager form of government. This is also the case with some items that may otherwise come through the study issue process for the City Attorney, who should be able to decide whether it can fit within that office's workload, as long as it is within current policy.

j. **Strategic Priorities are multi-year in nature and can be reviewed every two years.** Having consistency and continuity is important for planning purposes as well as resourcing at the staff level. This is also where terminology could be modified so that the use of the word "priority" is not used in multiple ways. As is suggested below in "strategies for improvement," changing "Strategic Priorities" to "Strategic Goals" would differentiate this set of desired outcomes from the list of Council priority work efforts, or "projects."

k. **The major pieces are in place for a comprehensive Strategic Plan.** Alignment of vision, mission, values, strategic priorities, and major projects to achieve the strategic priorities would unify the perspective for Council and staff. All new proposals can be evaluated as to whether they support the Citywide strategic plan or not, focusing the work of staff and boards and commissions toward the achievement of over-arching Citywide goals. The Strategic Framework Workplan recently developed is a good implementation tool for a Strategic Plan.

NOTES AND DISCUSSION

What resonates from the preliminary observations? What was surprising? Did you hear what you expected to hear? Anything concerning?

For Discussion: Preliminary Strategies for Improvement

This section contains preliminary strategies for improvement in three areas:
- **A.** The study issue proposal process (from sponsorship to funding)
- **B.** The implementation process to complete study issues (from funding to completion of the work)
- **C.** Related prioritization and resourcing processes

The strategies, which are explained in further detail in this section, are summarized in the table below.

LIST OF PRELIMINARY STRATEGIES FOR IMPROVEMENT	
A. Study Issues Proposal Process	
1	Eliminate most study issue papers pertaining to the study issue proposal process
2	Review the board and commission input process
3	Eliminate the January public hearing on potential Council study issues and budget proposals
4	Expand the focus of the February Council workshop to incorporate a review of key projects, a check-in on Council Strategic Priorities, and a broad fiscal outlook
5	Modify terminology for clarity
6	Eliminate any deferral of study issues. Study issues not approved for implementation will not remain on a deferral list.
7	Create one consolidated form for a defined maximum number of potential study issues and budget proposals (Council Priority Projects) to be submitted in January in advance of the February workshop
8	Prepare a clear description of the new Council Priority Projects that are recommended in the budget, for review and approval by the City Council at the Budget Workshop in May
B. Process to Complete Study Issues	
9	Establish a transparent and informative reporting dashboard
10	Provide targeted project update discussions with the Council on an as-needed basis
11	Identify key tasks or phases that would be value-added for tracking staff time
C. Related Prioritization and Resourcing Processes	
12	Conduct a biennial review of the Council's Strategic Priorities
13	Create a comprehensive Strategic Plan
14	Apply an agreed-upon set of criteria for adding projects mid-year (and readjusting Workplan)

A. STUDY ISSUE PROPOSAL PROCESS

We have identified eight strategies related to the study issue proposal process that, if taken together, will reduce the time staff spend on this component of study issues. Given the significant staff time spent on the proposal process, reducing time here will allow staff to reallocate hours toward implementing Council priorities as well as the ongoing service delivery work of the City. An underlying premise is that the study issue proposal process can be streamlined and integrated into the City's budget process.

> **The objectives of suggested changes in the proposal process are to:**
> ✓ **Save time for everyone involved**
> ✓ **Simplify the process**
> ✓ **Retain board and commission input**
> ✓ **Retain Council authority to set top priorities**

1. **Eliminate most study issue papers pertaining to the study issue proposal process.** The only study issue papers for newly-sponsored study issues would be a final few following a narrowing process to be held in February with the City Council *(described below).* Only the top items supported by a quorum of Council would be fully analyzed for final resourcing and budgeting decisions.

2. **Revise the board and commission input process.** These are summarized here and presented in more detail further below.

   a. **Option #1** mirrors the typical practices of other cities, which is that individual members share their ideas with members of the Council who would then decide whether to move a suggestion forward in a future discussion.
   b. **Option #2** involves discussion at one meeting of the advisory body and by majority vote of the board or commission, one proposal to move forward to the Council for consideration. No study issue papers would be prepared; evaluation would be based upon the submitted form and a staff evaluation in the form of a paragraph or two. No research would be conducted. Boards and commissions would not rank the proposals as this would remain solely within the Council's purview. *[See description below.]*

3. **Eliminate the January public hearing on potential Council study issues and budget proposals.** This would not be needed under the simplified process. The February workshop would be the key time for the Council to review any ideas submitted from the public or boards and commissions. Public comments can be provided per Brown Act requirements at the February workshop as well as at the budget public hearing in May.

4. **Expand the focus of the February Council workshop to incorporate a review of key projects in the City.** The current focus is on ranking study issues. The new focus would be on considering study issues ("Council Priority Projects") as part of the overall City Council goals and priorities process. At this workshop, the discussion would begin with a financial update and City Manager's assessment of staff capacity to take on new items. Next, there would be a review of existing approved Workplan items (including study issues but also other significant work efforts) and confirming or modifying the project list. Then the Council would discuss the proposed study issues and budget proposals ("Council Priority Projects") and through majority vote would determine which several would move forward for a staff report on feasibility. The City Manager would then use that information to inform their recommendations regarding which items could be implemented to be presented in the proposed budget. *[See more complete description of February workshop below.]*

5. **Modify terminology for clarity, as follows.**

   a. **Rename "study issue" to "Council Priority Projects."** This is intended to clarify that the items approved in the budget and/or associated staff workplan are priorities. Additionally, for any project to ultimately be implemented, appropriate feasibility assessments will need to be done. That is the "study" phase but does not need to be in the name of the item. Further, for change management effectiveness, renaming "study issue" to "Council priority project" may convey more clearly that the item is a priority and is a project.

b. **Rename "Strategic Priorities" to "Strategic Goals"** to differentiate the broad, multi-year desired outcomes from specific Council priority projects. Additionally, as "Council priority projects" are proposed, tie them to the "Strategic Goals" so that as new projects are approved, and funded if needed, they are moving the City forward toward the longer term, desired outcomes reflected in the "Strategic Goals."

c. **Eliminate the terms "above the line" and "below the line"** and replace with City Manager's recommendation for items to be included in the budget. Only a subset of proposed items can be resourced in the budget and through staff capacity in any given year, and this will be a straightforward method of addressing that reality.

6. **Eliminate any deferral of study issues.** Study issues not approved for implementation will not remain on a deferral list. Items can be raised again in the following year's priority setting process. Eliminating deferrals will meet the objective of simplifying the process, reducing process-related staff time and expenditures, and focusing attention each year on what is most important to the seated City Council in the current City context.

7. **Create one consolidated form for study issues and budget proposals to be submitted in January** ("Council Priority Projects")**.** Since most new projects are likely to have a budget impact, having one form will be efficient. If the proposed project pertains to capital improvement, it will be an opportunity to consider it within that arena. Narrow the window for submitting the form to November through January, rather than year-round. These forms would come from Councilmembers to the City Manager for two or three ideas per Councilmember per year, in advance of the Council Goals and Priorities Workshop. There may also be up to one form per Board or Commission per year, depending on Council's direction on engaging Board and Commission input (see options below).

8. **Prepare a clear description of the new Council Priority Projects that are recommended in the budget, for review and approval by the Council.** Staff's understanding of the Council's intent regarding approved new Priority Projects would be documented in writing for the Council to review and approve as part of the budget process. The City Manager retains the ability to include a subset of items that Council directs staff to study in the recommended budget, and to explain why others may not be recommended (e.g. insufficient funding and/or staff capacity, external timing factors, new legislation, etc.).

B. PROCESS TO COMPLETE STUDY ISSUES

Three strategies are suggested in this section, which is the process from funding approval until the study issue is completed. As noted above, **by eliminating the vast majority of time that staff spends working on proposals and meetings associated with that process, hours can be reallocated for this completion process.**

9. **Establish a transparent and informative dashboard.** Regularly update the Council and community via a dashboard on the City's website on the Council's Priority Projects and other major projects. This is underway now by the City Manager's Office. The "work plan" that has been developed will be part of this reporting. Reporting could be in two parts: (a) Council Priority Projects and (2) Major Organizational and Departmental Projects.

10. **Provide targeted project update discussions with the Council on an as-needed basis.** Members of Council expressed an interest in a mid-point update or review of study issues (Council priority projects) to be informed and to ensure that the intent of the project remains on track. City management would provide such opportunities as needed, within the confines of Council meeting agenda cadence, via regular updates to the public dashboard, or other means (to be determined).

11. **Identify key tasks or phases that would be value-added for tracking staff time.** If City management and Council would like to understand what goes into implementing any given study issue ("Council priority project"), identifying key tasks or phases and tracking time against those tasks will provide that information. Management will then be able to see trends, what systems may need attention or improvement, and what factors are helping or hindering implementation. Continuous improvement can then be applied once greater information is available. Given the diverse scope of Council priority projects, this tracking may look different for different projects.

C. RELATED PRIORITIZATION AND RESOURCING PROCESSES

The City's key prioritization process is periodic review of the Council's Strategic Priorities (to be renamed "Strategic Goals"), and the City's key resourcing process is the budget process.

No changes are proposed to the budget process specifically. Approved study issues ("Council priority projects") are budgeted or, if no new dollars are needed, are assigned for work in a City department. Three other processes are suggested below for discussion with the Council.

12. **Conduct a biennial review of the Council's Strategic Priorities (to be renamed "Strategic Goals").** These goals are broad in nature and would typically not change from year to year. A schedule of every two years would give the Council and executive management an opportunity to reflect on whether a new condition has arisen or major factor has changed that would warrant a modification to one or more of the goals.

13. **Create a comprehensive Strategic Plan.** The City has important components of a comprehensive Strategic Plan. Pulling them together may be helpful in clearly focusing Council priorities for accomplishment. Progress would be reported not only on discrete projects but on how the projects move the City toward achieving the outcomes intended in the Strategic Goals in the Strategic Plan, and overall vision of the City.

14. **Apply an agreed-upon set of criteria for adding projects mid-year**. Case study cities are disciplined in focusing on the established priorities and/or strategic plan. When new issues arise, they are handled either (1) by the City Manager if a matter can be comfortably incorporated into daily operations, or (2) considered by the full Council based on input from the City Manager regarding resource capacity and impact on other work. Otherwise, a new project will wait until the next budget cycle. Sometimes issues arise that require immediate attention, such as the list shown below.

    The City's Colleague Memo policy could be modified to incorporate suggested criteria for considering when a new project should be added. Such criteria are:
    a. Emergency (natural disaster, pandemic, civil unrest)
    b. New outside funding opportunity that is time sensitive
    c. New multi-agency opportunity that cannot be delayed
    d. Community safety issue that must be addressed in near term
    e. Changes in laws or mandates requiring immediate City action.

NOTES AND DISCUSSION

What do you think will work well regarding the preliminary strategies for improvement? What concerns do you have?

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Options for involving Boards and Commissions

Raftelis heard from members of Council as well as respondents to the board and commission survey that retaining input from advisory bodies is important.

- Raftelis' data analysis shows that the current process is expensive in time and dollars. Time is spent by staff writing or reviewing reports related to proposals from advisory body members. Time is also spent in multiple meetings with boards and commissions directly related to the proposal process.

- Since the majority of such proposals are not ranked highly by Council, neither in the "above the line" category of the City Manager, nor approved in the budget, our suggestion is that time be reallocated from such tasks to free up time for implementation of study issues.

> The objective of the two options we have outlined below is as follows: ***Retain some ability for input by advisory body members while eliminating proposal staff reports and most of the meeting time associated with the study issue proposal process.***

These options are significantly different from each other.
- The first is consistent with other cities, in that advisory body members do not typically have a formal role in suggesting Council priorities, but are invited to participate as members of the public to provide input on priorities.
- The second option retains some level of formal involvement, but streamlined.

Under either option, staff reports would be eliminated. Additionally, board and commission ranking of study issue proposals would be eliminated and placed solely in the Council's purview.

OPTION #1: INDIVIDUAL IDEAS ARE SHARED BY BOARD AND COMMISSION MEMBERS TO CITY COUNCIL

This option would eliminate any discussion at advisory body meetings of proposals, and no forms would be filled out. Individual members of advisory bodies would share their ideas regarding new study issues with members of the Council. Councilmembers could then determine whether any of those should be turned into proposals to be discussed in February.

- With this option, each Councilmember would be able to submit up to three proposals individually each year in advance of the February workshop outlined below (for a maximum total of 21 proposals to review at the February Workshop).
- Board and commission members, as well as members of the public, could suggest ideas individually to Councilmembers to put forward in February, consistent with other cities' practices.

OPTION #2: EACH BOARD/COMMISSION CAN MAKE ONE SUBMITTAL PER YEAR

This option retains the board and commission input as a body but eliminates study issue papers.

- At one board/commission meeting by the end of December, the advisory body would determine (by majority vote) if it would like to suggest *one issue to move forward* to the February Workshop.
- Staff would write a one to two paragraph description of the advisory body proposal that would go forward to the City Council in February.
- The proposals would be on a list that the Council would discuss at the February workshop (explained below).
- With this option, up to 10 proposals could be submitted each year from Boards and Commissions. As a result, the number of proposals submitted by each Councilmember would be limited to two each year (for a maximum total of 24 proposals to review at the February Workshop).

As always, members of the public are welcome and encouraged to suggest ideas at public meetings and to members of Council.

NOTES AND DISCUSSION

How would you like to balance input from boards and commissions with the objectives of simplifying and saving time/resources? Do you have a preference for one of the two options outlined above?

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Reframe the February Council Workshop

The February Council Goals and Priorities Workshop would be reframed with a broader purpose to place new projects into context with all other workload. The following is what the major contents of that workshop could look like.

1. **Review existing major projects (Council Priority Projects and Key Departmental Projects)**
   - Staff would provide updates on changes that would cause drop-offs or modifications to the workplan, ascertain whether Council direction has changed, and get Council confirmation on changes to or deletions from the list (additions would be handled as new project proposals)
2. **City Manager to provide financial update and guidance on capacity for staff to take on new projects**
   - Both the financial and capacity updates would set the stage for discussion of the new project proposals
   - Capacity may be available in some departments but not others, and will vary from year to year
3. **Review the new Council Priority Project proposals (formerly study issues) to be considered**
   - Council would review the full list of new proposals and determine which subset are of sufficient (majority) interest to the Council for potentially being funded in the upcoming budget and in light of the City Manager's assessment of staff capacity
   - Hear staff and Council ideas about what existing projects could be eliminated to make room for new projects

After the February workshop, the following would take place:
1. **Staff would prepare summary reports**
   - Short (3 – 5 pages) reports only on the subset of priority projects for further consideration in the budget, pending City Manager's recommendation of what is achievable.
2. **City Manager utilizes staff analysis to inform what is included in the recommended budget**
   - Returns this to the Council at May budget workshop for consideration, including seeking Council assurance that the scope of work outlined for priority projects that are moving forward aligns with Council's intent.

Every two years, the Strategic Goals would be reviewed and, if needed, modified to meet changing conditions.

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Summary of Proposed Revised Process

Incorporating the preliminary strategies for improvement, the practical elements of a revised study issue ("Council Priority Projects") proposal process are outlined below.

1. One form (combined "Council priority project" proposal/budget proposal) submitted by members of Council (up to 2 or 3 depending on whether boards and commissions will also submit) in January

2. Submitted form would be reviewed by the City Manager to determine whether the desired project could be incorporated into City operations in some other way ("just do it")

    [January public hearing eliminated]

3. February workshop retained

4. Staff would prepare reports on the agreed upon subset of study issues ("Council Priority Projects") with majority Council support after the February workshop

5. City Manager's recommendations on what is able to be added to the budget and workplan retained and presented at Budget Workshop in May

6. Final determination of "Council Priority Projects" made with budget adoption in June

7. City Manager's Office responsible for tracking progress and providing status updates to Council

July – Dec Staff focus on Implementing current year priority projects → **Jan – Feb** Gather ideas on next year's priority projects → **March – May** Write up and City Manager subset in budget → **May** Budget workshop and discuss priority project scopes → **June** Budget adoption → **July** Projects start - workplan updated

Next Steps

The next steps for Raftelis are:
- Incorporate feedback received from the City Council as we prepare our report.
- Present our report to the City Council on October 21, 2025.

NOTES

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Appendix A – Summary of Stakeholder Input

This appendix contains a summary of stakeholder input from interviews with members of Council, staff involved in the study issue process, and members of boards and commissions who responded to a survey.

Key Interview Themes

Highlights of interviews with members of Council and staff (points in common) were:

- Important to have a way to set priorities
- Study issue process (including proposal process and implementation) takes too long
- The "above the line" (ATL) and "below the line" (BTL) call by the City Manager is useful in understanding his priorities and staff capacity

Some specific opportunities for improvement noted in the interviews (Council and staff combined) were to:

- Clarify study issue scopes at the start and, if needed, at a mid-point.
- More frequent project status updates once approved.
- Reduce time for the annual ranking process.
- Reduce reliance on consultants to speed up the timeline.
- Refine definition of what should constitute a study issue.
- Tie study issues to Strategic Priorities.
- Provide more clarity about workload and what staff capacity exists to work on study issues.
- Reduce length of time that proposed but not approved study issues remain on a list (deferrals).

Summary of Surveys

Themes in common between staff and the board and commission members were:

- The volume of proposed study issues is too high (too many proposed).
- Typical timeline from study issue creation (proposal) to project completion is too long.
- Much effort can be spent on a proposal for a study issue that goes nowhere.
- Too many deferrals, non-ranked proposals that carry over from year to year.
- Not all study issues have the same potential for impact.
- The amount of time preparing and considering a study issue proposal is the same regardless of whether it is a small or large impact item.

Themes from board and commission survey:

- Appreciation for opportunity to submit issues and hope this continues.
  - Several feel able to recommend ideas to Council in other ways.
  - Most understand that the time investment does not match the outcomes.
- Frustration with length of time to complete a study.
- Awareness or appreciation that the current process forces prioritization.
- The process, especially "above the line" and "below the line" or ranking decisions, can feel opaque.

- Most respondents were not very familiar with the budget proposal process.

The table below shows the Board and Commission (B/C) members who were sent the survey and the number responding from each. After the initial email sending the survey, at least two additional email reminders were sent to Board and Commission members to complete the survey. Overall response rate was 35%.

Board or Commission	Number of Members	Complete Responses
Arts Commission	5	3
Parks and Recreation Commission	5	3
Planning Commission	7	4
Housing and Human Services Commission	7	3
Bicycle and Pedestrian Advisory Commission	7	2
Heritage Preservation Commission	7	2
Sustainability Commission	7	2
Board of Library Trustees	5	1
Human Relations Commission	5	1
Personnel Board	5	0
Total	**60**	**21**

Themes from staff survey:

- Study issues process and time to complete the study takes time away from core work, including mandated actions and other Council goals.
- Not all ideas for study are equal in level of effort or impact on the community.
- Study issues do not consistently align with goals or adopted plans, and sometimes are counter to them.
- Incorporating approved study issues into existing workloads can feel frustrating, discouraging, "never-ending"; frequent concerns on total volume.
- Strong support for ranking all the study issues together annually to help filter and prioritize in holistic setting.
- Concerns about some of the study issues being sponsored by a board or commission (e.g., some studies could lead to conclusions that would not be acted on for financial or political reasons).
- Some study issues proposed impact more than one department, beyond one board or commission's purview; interdepartmental staff review of the various board and commission proposals beyond the specific liaison adds more time to the proposal process.

Appendix B: Data Analysis

Significant time was spent by Raftelis analyzing data provided by City staff. Available data included:

- Estimates of hours spent on study issue proposals by major step
- List of study issues going to the February Workshop from 2016 through 2026 (ten years)
- Indication of who sponsored each study issue from 2020 – 2025 (six years)
- Completion dates of 44 study issues since 2020, when tracking started

Data to show time spent on various tasks on study issues once approved in the budget for implementation is not currently available. The City's tracking system would need to include input of information regarding each step along the way in implementation. The development of a dashboard that is underway now will aid in that effort. At present, however, this data was not available for analysis.
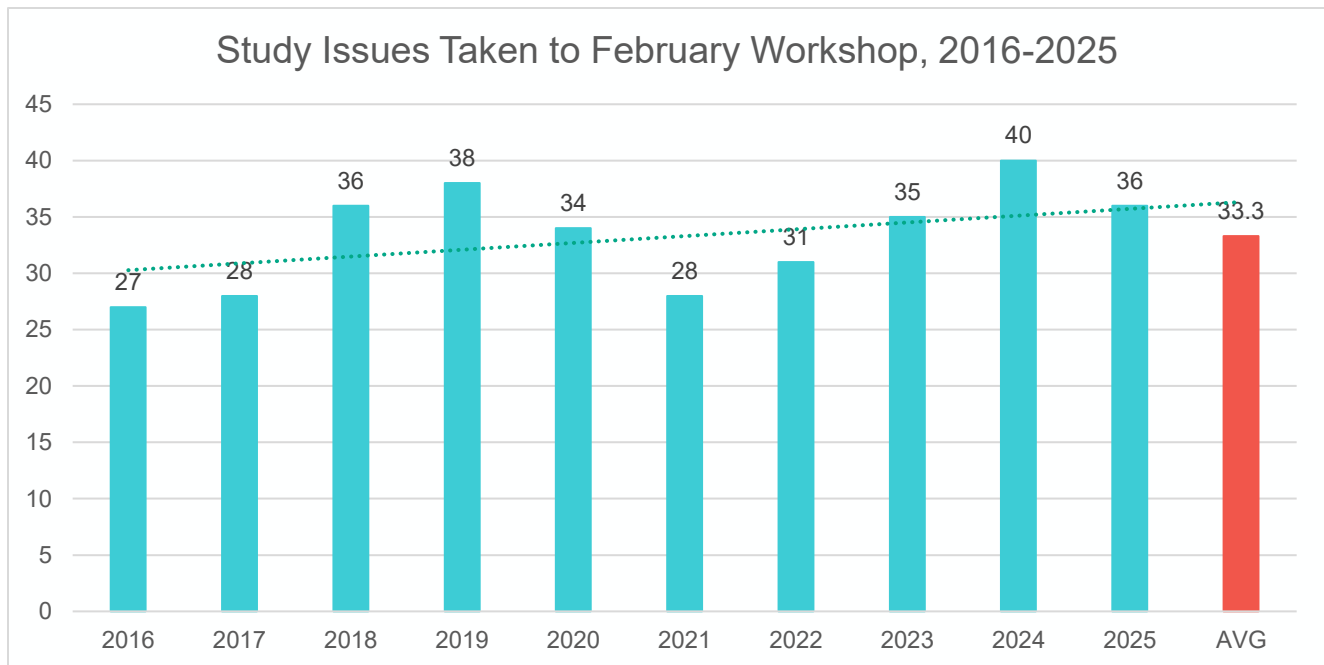
Number of Study Issue Papers Prepared by Staff by Year

Based upon data from 2016 – 2025, there are an average of 37.8 study issue papers prepared by staff each year. This is the total prior to Board and Commission deferral/drop decisions and includes papers for both newly-sponsored and ongoing (previously deferred) study issues.
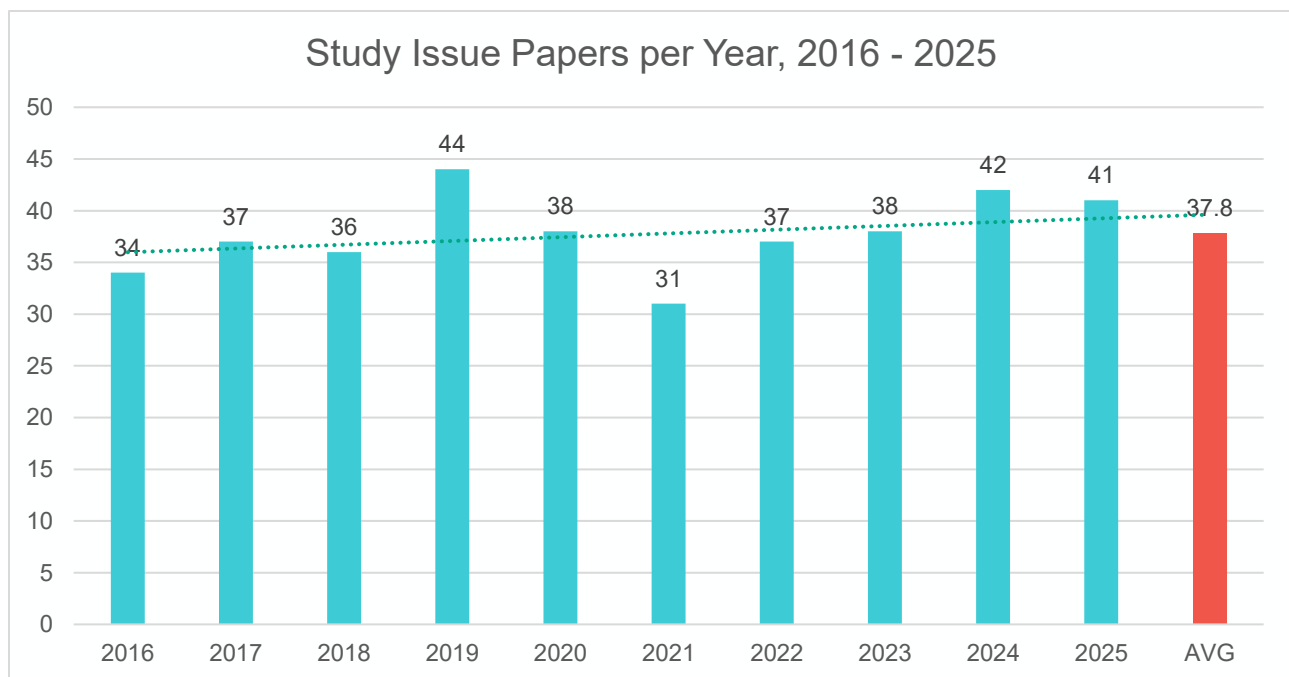
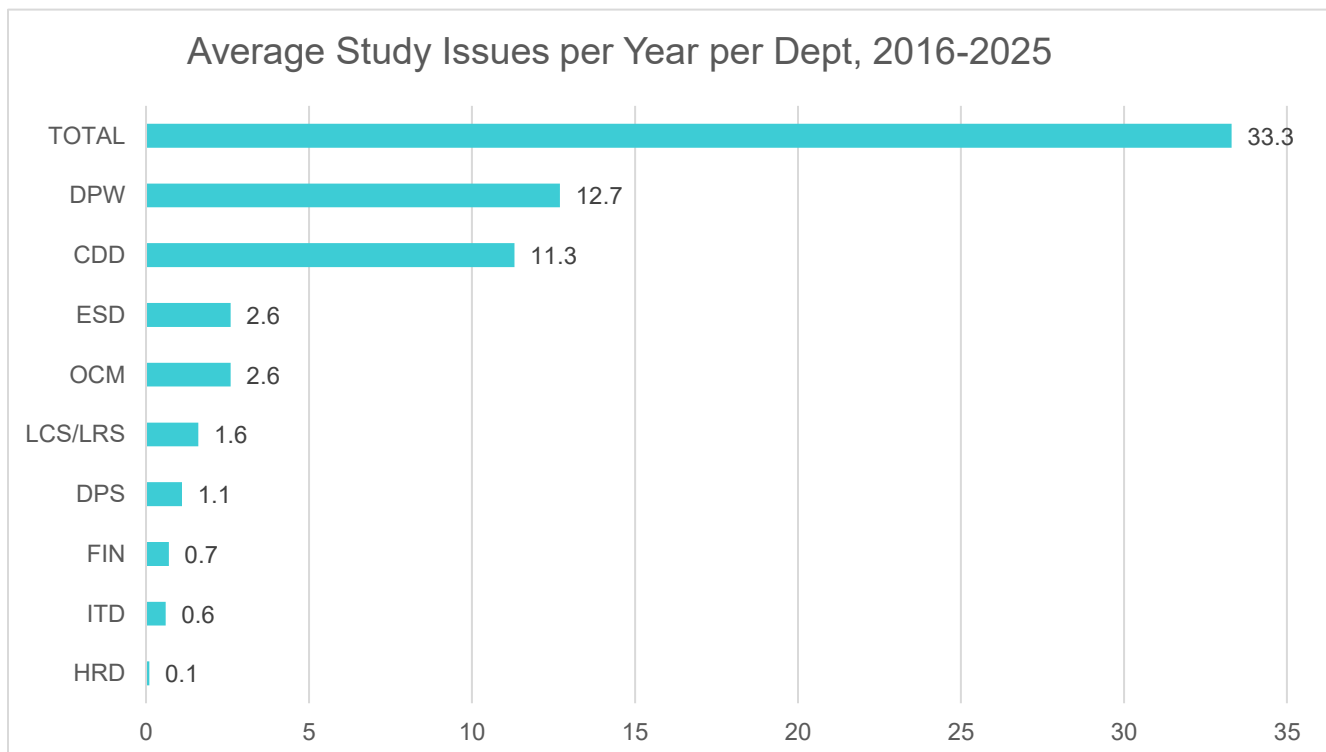# Number of Study Issues Taken to February Workshop

Based upon data from 2016 – 2025, there are an average of 33.3 study issues brought forth at each annual workshop. On average over the 10 years, Boards and Commissions have deferred an average of two study issues and dropped two prior to the workshop each year.

Study Issues Taken to February Workshop, 2016-2025

Year	Value
2016	27
2017	28
2018	36
2019	38
2020	34
2021	28
2022	31
2023	35
2024	40
2025	36
AVG	33.3

Average Number of Study Issues per Year by Department

The chart below shows average study issues by department assigned over a 10-year period from 2016-2025. As would be expected, the majority are assigned to the Department of Public Works (DPW) and the Community Development Department (CDD). A key to department acronyms is provided below.

Acronym	Department
DPW	Department of Public Works
CDD	Community Development Department
ESD	Environmental Services Department
OCM	Office of the City Manager
LCS/LRS[1]	Library and Community Services/ Library and Recreation Services
DPS	Department of Public Safety
FIN	Finance Department
ITD	Information Technology Department
HRD	Human Resources Department

Average Study Issues per Year per Dept, 2016-2025

| Department	Value
TOTAL	33.3
DPW	12.7
CDD	11.3
ESD	2.6
OCM	2.6
LCS/LRS	1.6
DPS	1.1
FIN	0.7
ITD	0.6
HRD	0.1

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[1] The Department name was changed from LCS to LRS, effective 9/1/2020 (RTC 20-0761).

Study Issue Disposition, Sponsorship, and Budget

The chart below shows the study issues taken to the annual February workshop in **dark green**, the number ranked to proceed by the City Council in **light green**, and the number that were deemed Above The Line (ATL) and moved forward for implementation by the City Manager in **blue** from 2016 – 2025 (ten years).

Of study issues taken to the February Workshop, an average of 53.6% are ranked to proceed by the City Council.

Of total study issues taken to the February Workshop, an average of 25.1% are deemed Above The Line by the City Manager and moved forward for implementation.

Disposition of Study Issues from February Workshop (2020 - 2025)
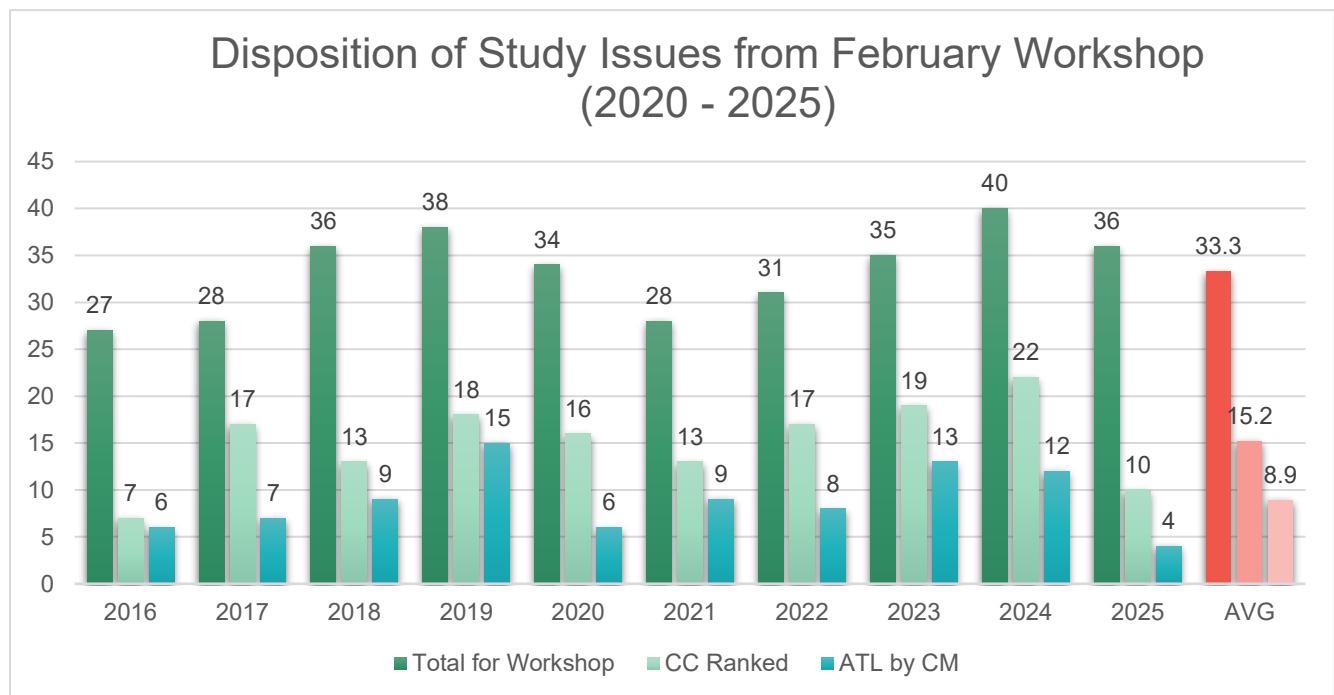
Other key findings:

Of total "Above The Line" study issues in the past six years from 2020-2025, **36.5% were sponsored by a board or commission**.

Of total "Above The Line" study issues in the past six years from 2020-2025, **50.0% were sponsored by members of the City Council**.

Of total "Above The Line" study issues in the past six years from 2020-2025, **78.9% require budget request/supplement** and move into the City's budget review process

Study Issues Proposal Process Timelines (Pre-Implementation)

As part of this review, Raftelis created a process map for the overall study issue proposal creation process. While the map outlines the steps involved, it was not instructive on timeline details and, therefore, was not used for timeline purposes. The City's tracking of study issue related data has changed over time and, to this day, lacks detailed task and phase information, limiting our ability to identify process map timelines with accuracy.

Seven Case Studies for Analysis

To gain some level of understanding of how City staff time is spent on study issue proposals, Raftelis selected seven specific case studies (actual past study issues) to analyze. These were randomly selected based upon available data and with the majority from the DPW and CDD departments, since they handle most study issue proposals.

Using information available in the City's tracking system (which has changed over time), we identified key milestones in each study issues' proposal development; these vary depending upon the information in the City's tracking system. These milestones are documents in the graphics below, which shown the number of months for each portion of the proposal process.

The study issue proposal process ranges from 182 days to 1,704 days, with an average across the seven study issues below of 618 days.
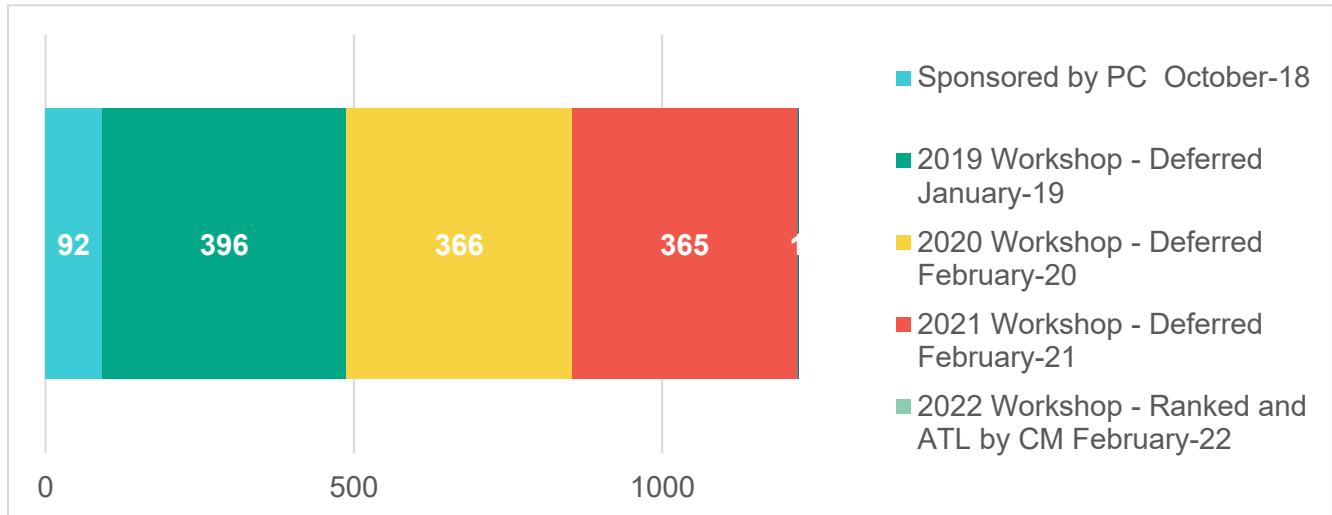
CDD 19-04: Historical Contributions Made by Asian Americans and Other Minority Groups

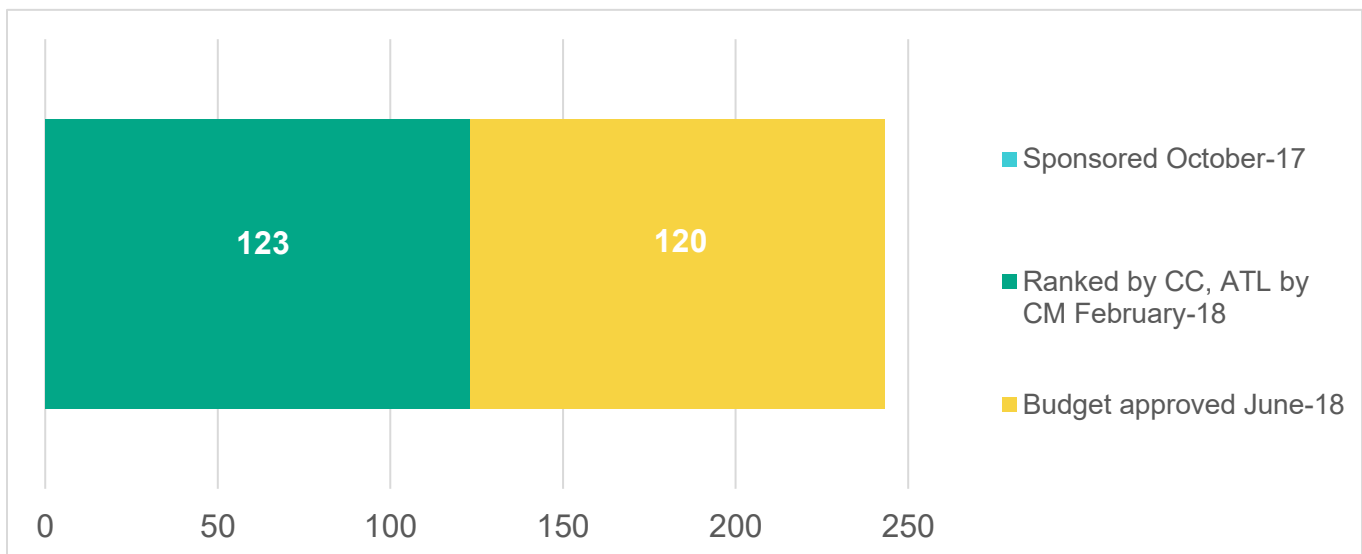Total Days from Sponsorship to Funding = 1,704
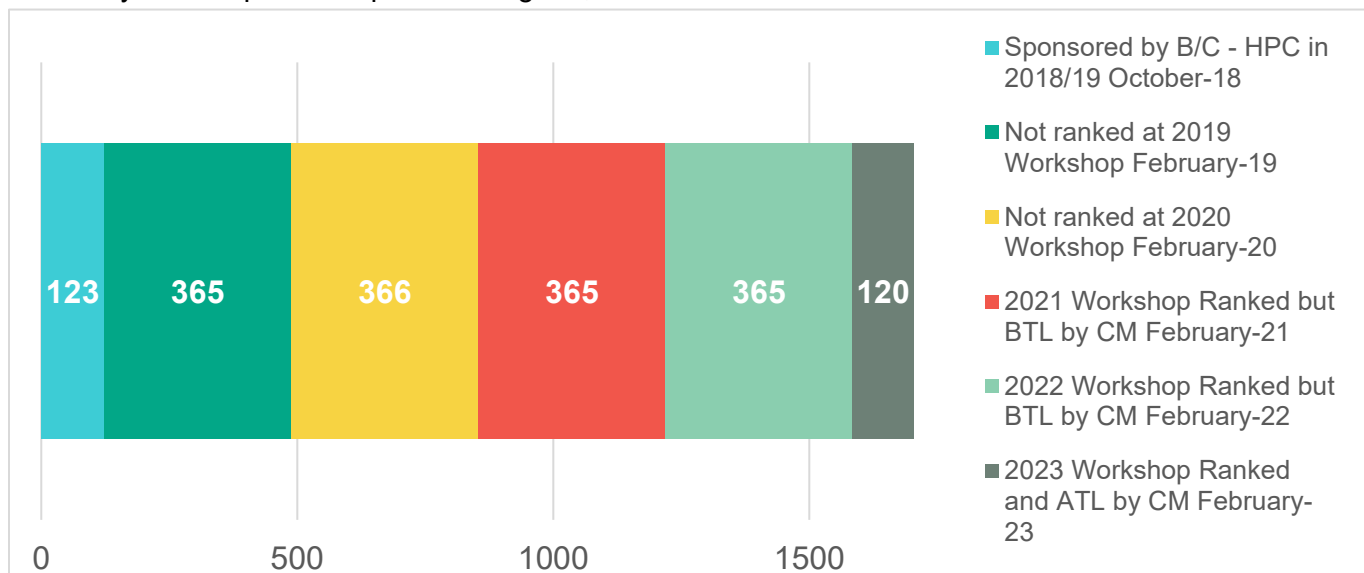
CDD 19-07: Evaluate the Minimum Parking Requirements for Residential Uses

Sponsorship to ATL = 1,219

Legend:
- Sponsored by PC October-18
- 2019 Workshop - Deferred January-19
- 2020 Workshop - Deferred February-20
- 2021 Workshop - Deferred February-21
- 2022 Workshop - Ranked and ATL by CM February-22

Bar values: 92, 396, 366, 365

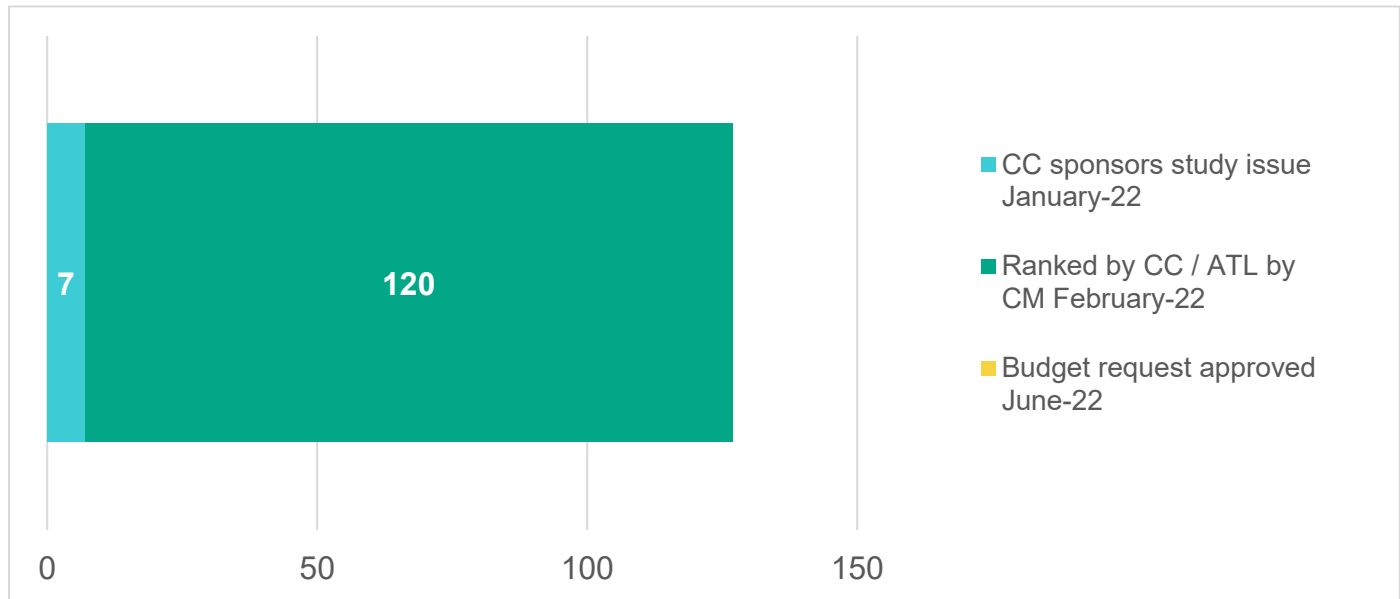## DPW 18-07: Feasibility of Acquiring Control of Caltrans Traffic Signals on El Camino Real

Sponsored to Funding = 243 days

Legend:
- Sponsored October-17
- Ranked by CC, ATL by CM February-18
- Budget approved June-18

Bar values: 123, 120

DPW 22-06: Reevaluate traffic calming program and policy including thresholds to begin a project and types of measures available

Sponsorship to Funding = 127 days

Legend:
- CC sponsors study issue January-22
- Ranked by CC / ATL by CM February-22
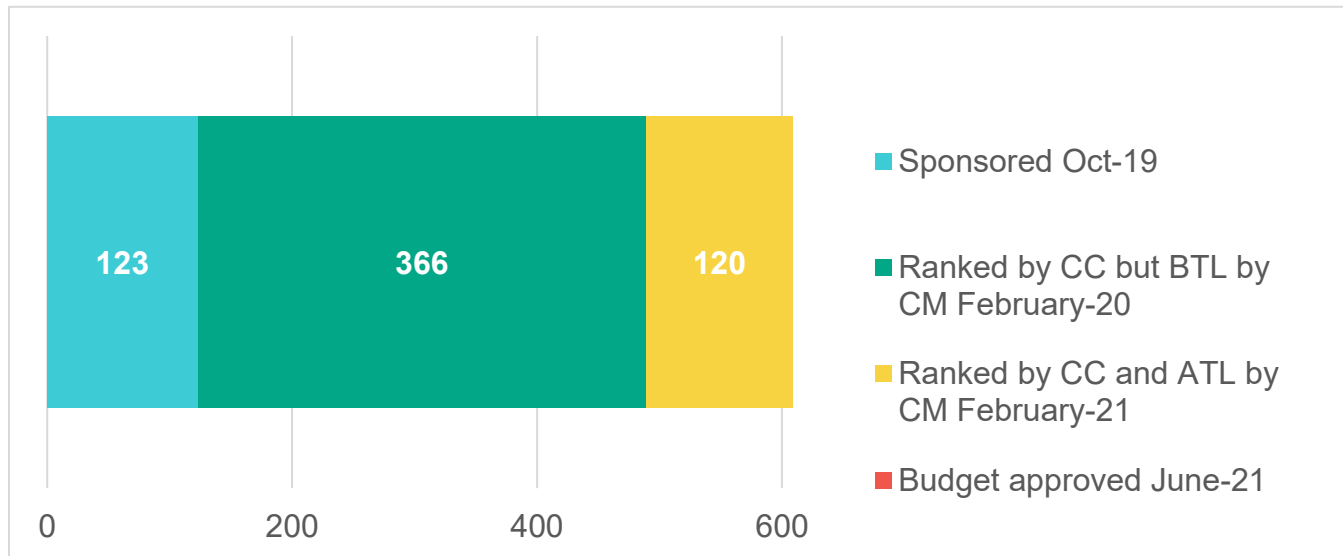- Budget request approved June-22

Bar values: 7, 120

DPW 24-09: Evaluate the Addition of Pedestrian Scrambles During School Peak Hours at Sunnyvale-Saratoga Road/Fremont Avenue and at Homestead Road/Kennewick Drive
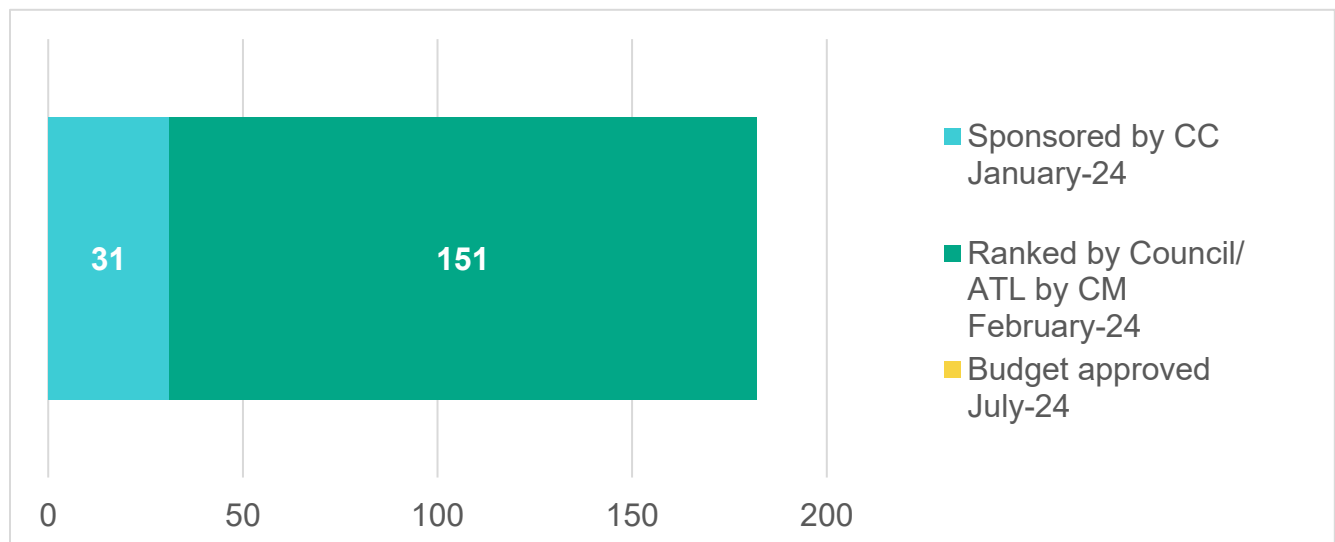
Sponsorship to Funding = 244 days

Legend:
- Sponsored October-23
- CC ranked / ATL by CM February-24

Bar values: 123, 121
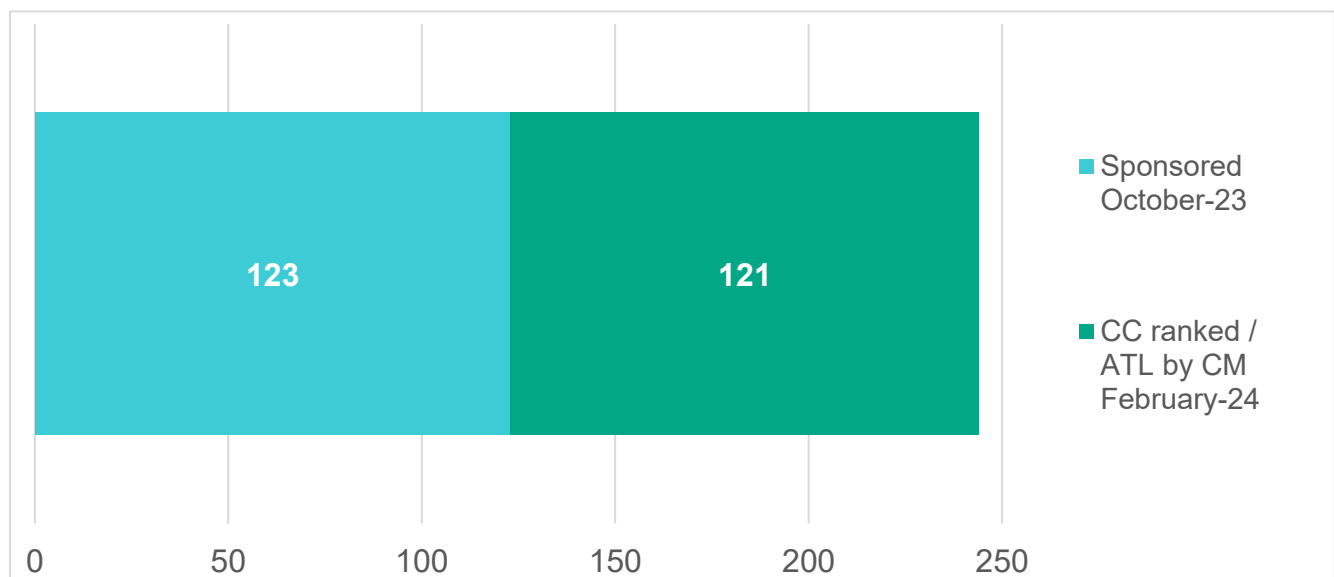
ITD 20-01: Establish a Formal Smart Cities Initiative and Potential Program.

Sponsorship to Funding = 609 days

Legend:
- ■ Sponsored Oct-19 — 123
- ■ Ranked by CC but BTL by CM February-20 — 366
- ■ Ranked by CC and ATL by CM February-21 — 120
- ■ Budget approved June-21

OCM 24-02: Evaluate the City of Sunnyvale Study Issues Process.

Sponsorship to Funding = 182 days

Legend:
- ■ Sponsored by CC January-24 — 31
- ■ Ranked by Council/ ATL by CM February-24 — 151
- ■ Budget approved July-24

Study Issues Completion Process Timelines (Implementation)

Overall, prior staff analysis shows that most study issues, once funded, are completed within two years. Of 44 approved study issues that were completed between June 20, 2017 and January 28, 2025, 24 (55%) were completed within two years and, cumulatively, 35 (80%) were completed within three years. The median completion time across all 44 issues during this period was 22 months, or 1.8 years, and all but two study issues were completed in less than four years.

In this sample, all of the study issues requiring three or more years to complete were assigned to the Departments of Community Development or Public Works, including topics like "Develop a Vision Zero Plan," "2017 Housing Strategy," and "Comprehensive Updates of the Precise Plan for El Camino Real."

On a more detailed level, the City's internal tracking system for study issues has limited data on specific steps and phases by City staff in completing the study issue work product. For this reason, timeline details are incomplete.

Eight Case Studies for Analysis

As with the study issue proposal process above, to gain some level of understanding of how City staff time is spent on the completion of study issues, Raftelis selected eight specific case studies (actual study issues) to analyze, including this review on the study issue process. These were randomly selected based upon available data and with the majority from the DPW and CDD departments, since they handle most study issues.

This analysis was intended to:
- Show the major categories where time is spent in days per step
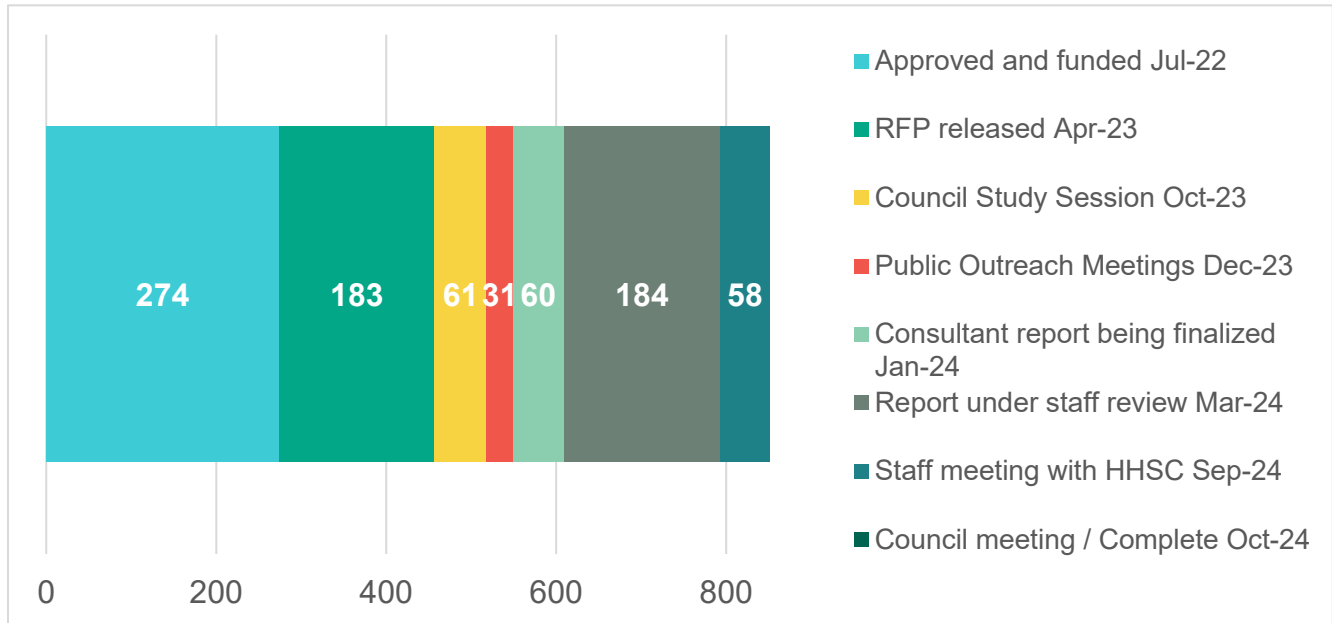- Show differences and similarities between study issues – but no two are alike

Completion ranges between 182 days and 1,451 days for the eight study issues below, with an average of 976 days from funding to completion (32 months).

In reviewing the study issues process from proposal to completion, a few factors appear to account for significant amounts of time:
- Time for procurement to hire a consultant (approximately five to six months)
- Time waiting on external entities such as Caltrans
- Time spent on any public outreach processes
- Delays due to staff vacancies; this was noted in a few cases we reviewed
- In some cases, delays due to the inability to meet during the COVID-19 pandemic.
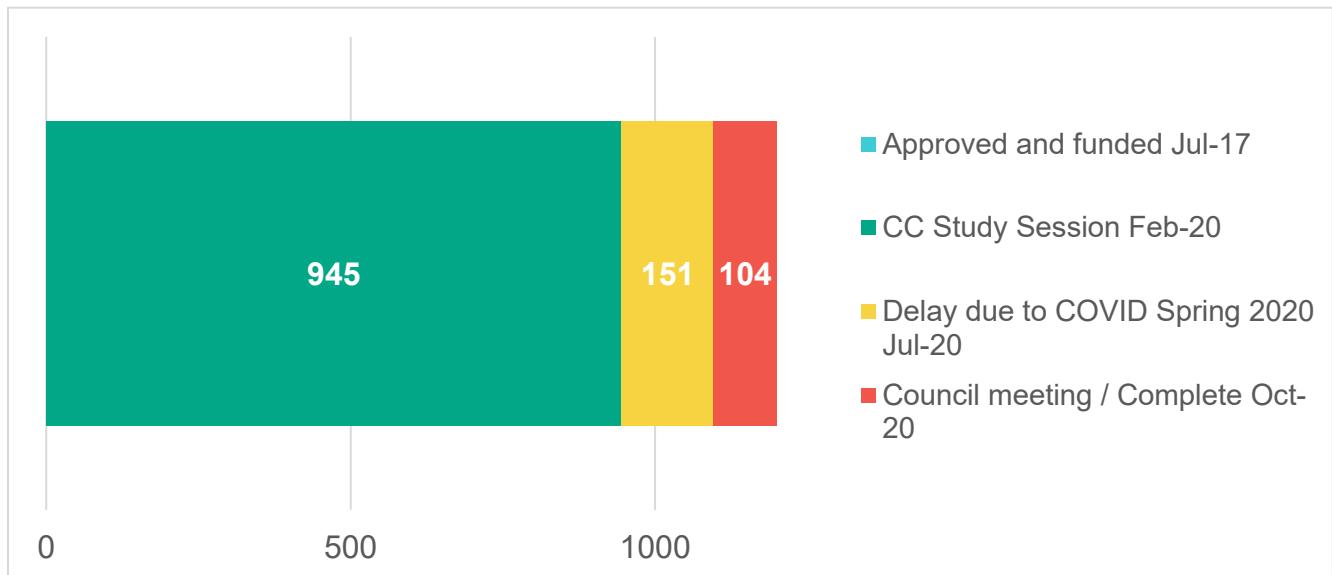
CDD 22-07: Evaluate a Pilot Program for Universal Basic Income including Potential Funding Sources

Funding to Completion = 851 days

Legend:
- Approved and funded Jul-22
- RFP released Apr-23
- Council Study Session Oct-23
- Public Outreach Meetings Dec-23
- Consultant report being finalized Jan-24
- Report under staff review Mar-24
- Staff meeting with HHSC Sep-24
- Council meeting / Complete Oct-24

Bar values: 274, 183, 61, 31, 60, 184, 58

CDD 17-09: 2017 Housing Strategy

Funding to Completion = 1,200 days

Legend:
- Approved and funded Jul-17
- CC Study Session Feb-20
- Delay due to COVID Spring 2020 Jul-20
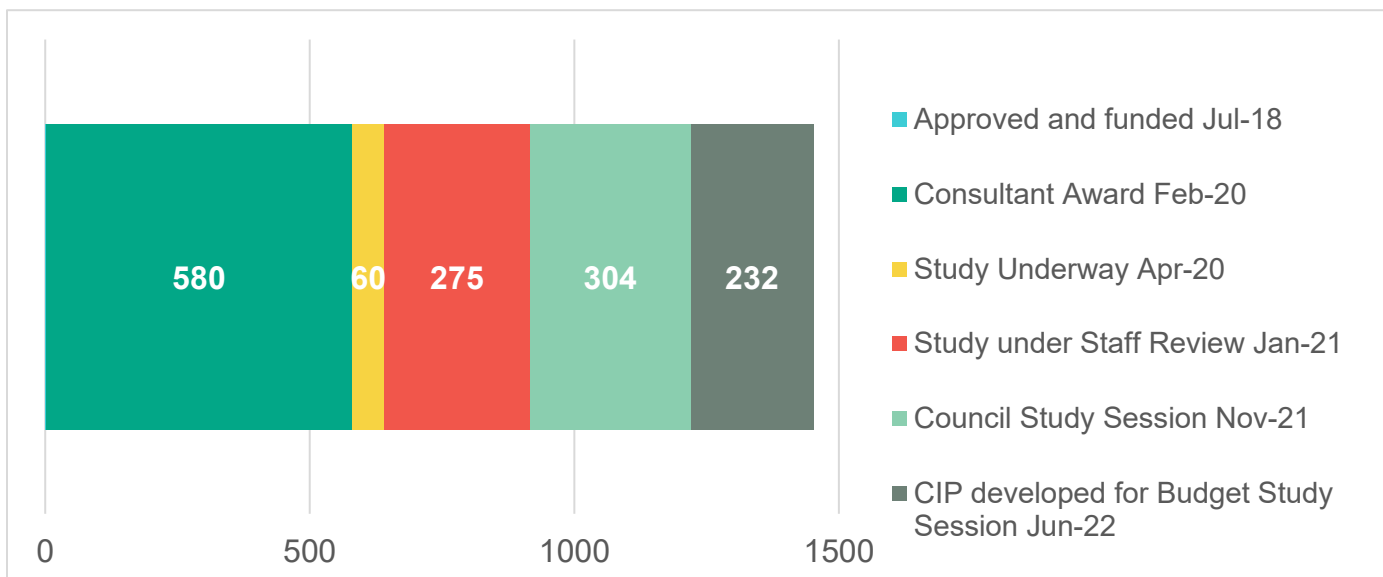- Council meeting / Complete Oct-20

Bar values: 945, 151, 104

DPW 18-07: Feasibility of Acquiring Control of Caltrans Traffic Signals on El Camino Real

Funding to Completion = 1,374 days

Legend:
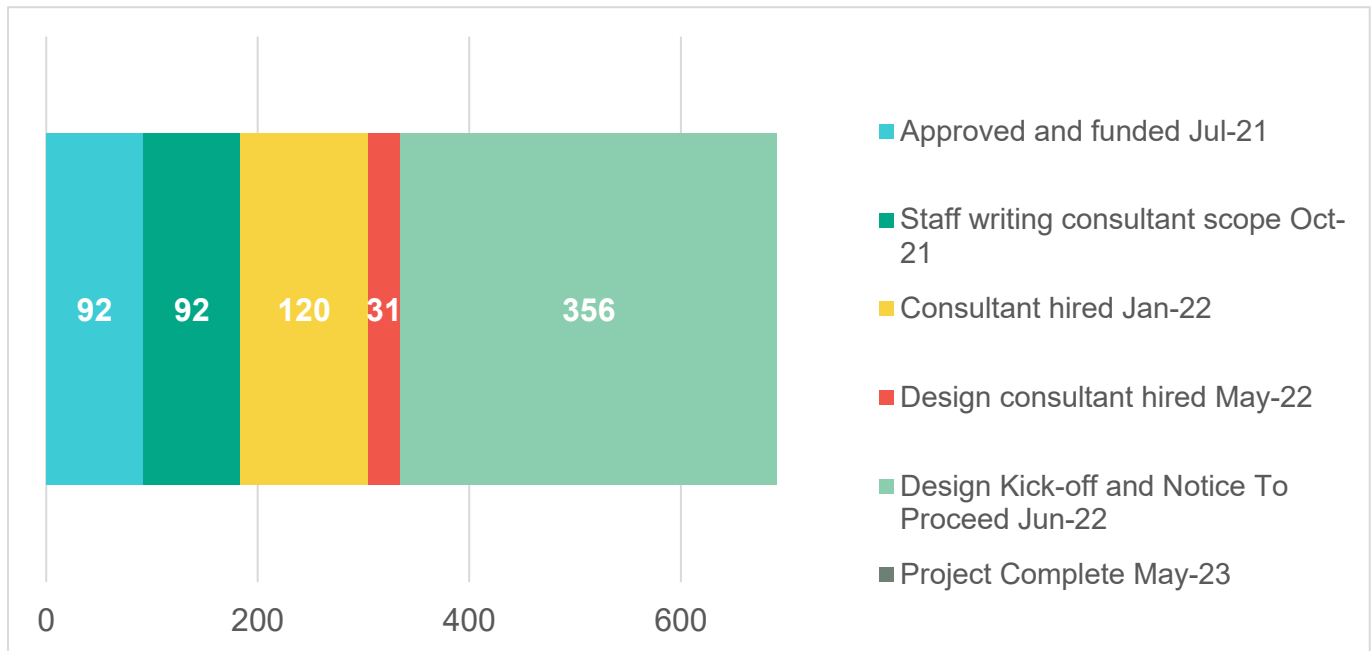- Approved and funded Jul-18 — 396
- Consultant Contract Award Aug-19 — 184
- Caltrans meeting Feb-20 — 243
- Awaiting Caltrans reponse Oct-20 — 61
- Caltrans response Dec-20 — 151
- Consultant studying maintenance costs May-21 — 61
- Receive draft study from consultant Jul-21 — 123
- Council study session Nov-21 — 155
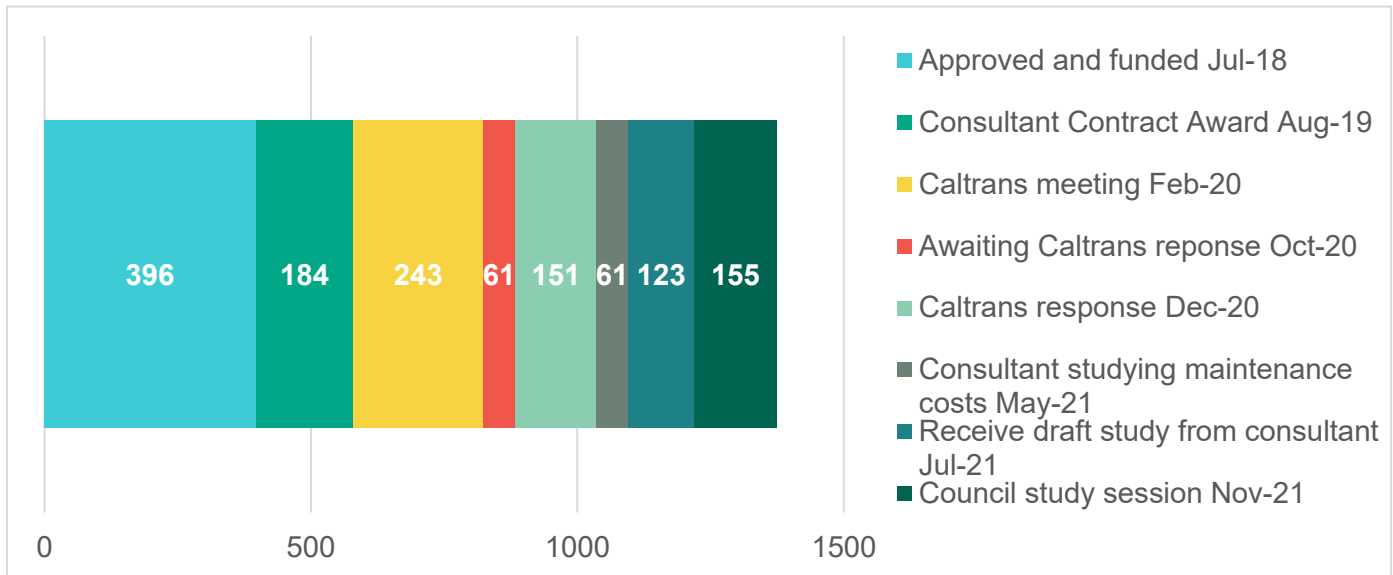
DPW 18-11: Analysis of Sunnyvale Golf Program and Property Options

Funding to Completion = 1,451 days

Legend:
- Approved and funded Jul-18
- Consultant Award Feb-20 — 580
- Study Underway Apr-20 — 60
- Study under Staff Review Jan-21 — 275
- Council Study Session Nov-21 — 304
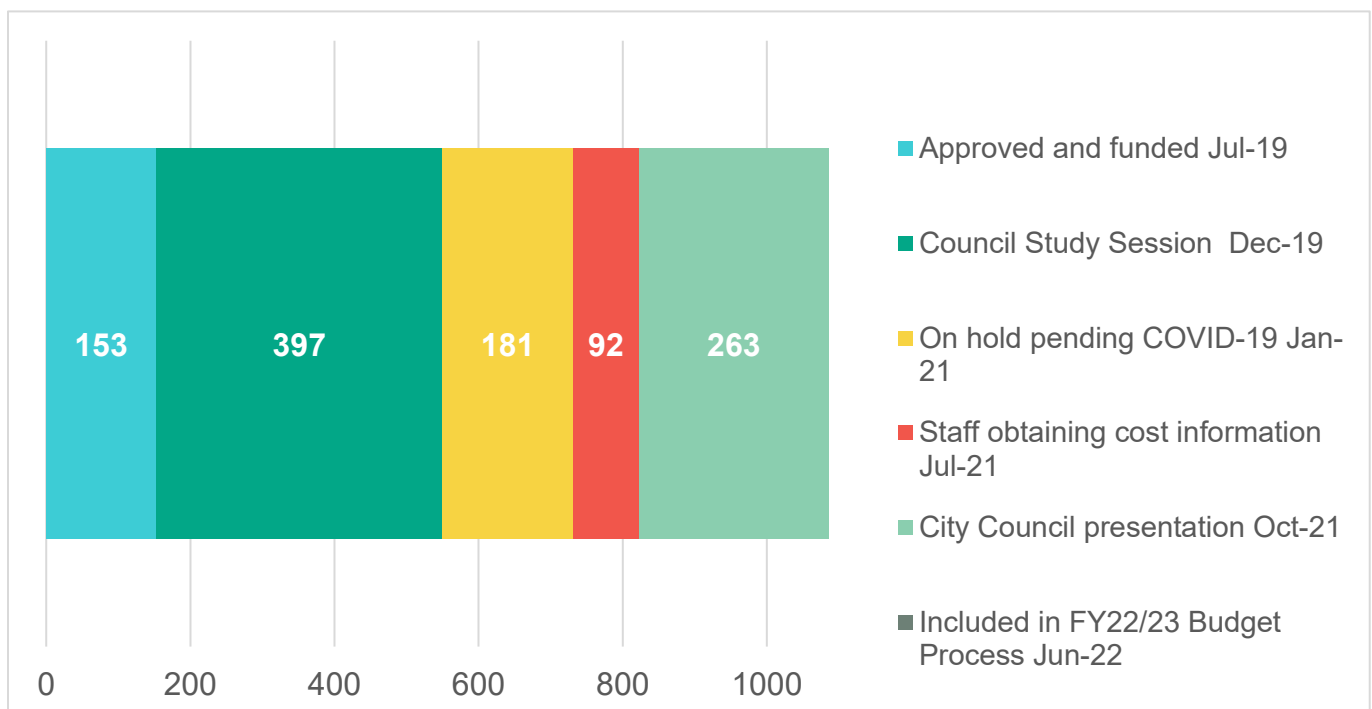- CIP developed for Budget Study Session Jun-22 — 232

DPW 21-04: Complete Missing Gaps of Sidewalk on East Side of Poplar Avenue between El Camino Real and Peterson Middle School

Funding to Completion = 691 days

Legend:
- Approved and funded Jul-21
- Staff writing consultant scope Oct-21
- Consultant hired Jan-22
- Design consultant hired May-22
- Design Kick-off and Notice To Proceed Jun-22
- Project Complete May-23

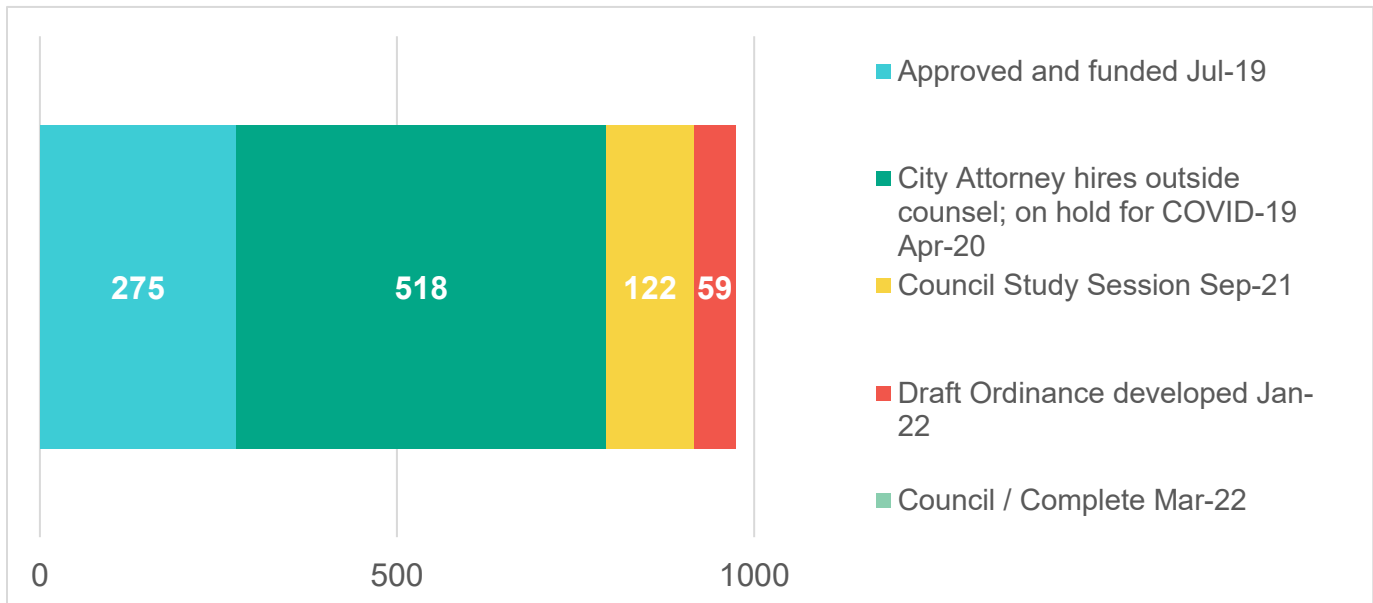Bar values: 92, 92, 120, 31, 356

HRD 19-01: Develop a Workforce Initiative That Creates Partnerships to Develop a Pipeline for Students to Enter Public Sector Employment

Funding to Complete = 1,086 days

Legend:
- Approved and funded Jul-19
- Council Study Session Dec-19
- On hold pending COVID-19 Jan-21
- Staff obtaining cost information Jul-21
- City Council presentation Oct-21
- Included in FY22/23 Budget Process Jun-22

Bar values: 153, 397, 181, 92, 263

OCM 19-02: Responsible Construction Ordinance

Funding to Completion = 974 days

Legend:
- Approved and funded Jul-19
- City Attorney hires outside counsel; on hold for COVID-19 Apr-20
- Council Study Session Sep-21
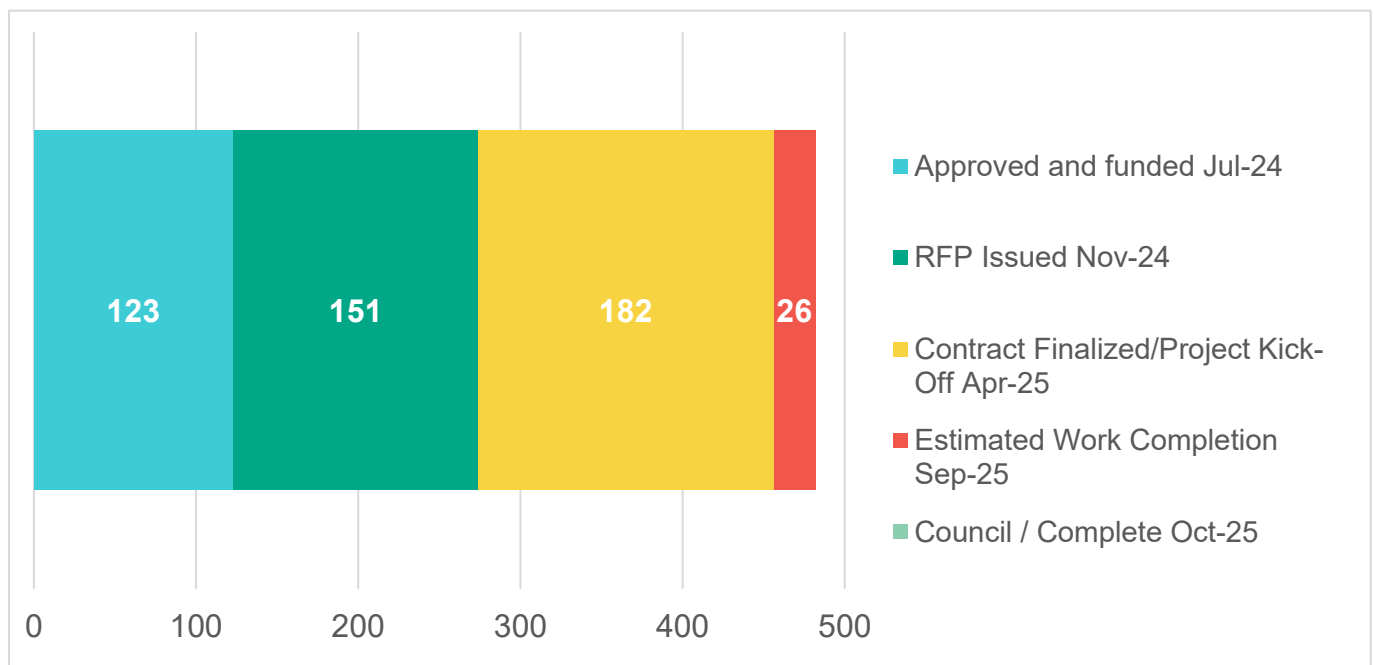- Draft Ordinance developed Jan-22
- Council / Complete Mar-22

Bar values: 275, 518, 122, 59

OCM 24-02: Evaluate the City of Sunnyvale Study Issues Process

Estimated Funding to Estimated Completion: 482 days
Note: Time from RFP issuance to contract (151 days) is almost the same as the actual consulting work time (182 days).

Legend:
- Approved and funded Jul-24
- RFP Issued Nov-24
- Contract Finalized/Project Kick-Off Apr-25
- Estimated Work Completion Sep-25
- Council / Complete Oct-25

Bar values: 123, 151, 182, 26

Time and Cost Estimate for Study Issue Proposal Process

The table below is a time and cost estimate on the study issues proposal process (prior to funding and completion). Raftelis prepared an estimate of all staff involved and their time spent on specific process steps. Estimates have been reviewed with the City and are considered to be conservative.

The estimates below show that the City is spending **over $347,000** annually in staff time just on the study issue proposal review process. This includes preparation and review of study issue papers, ranking workshop, and budget requests.

Total time spent is estimated at over **2,500 hours,** or **64 weeks of staff time**. As noted earlier, only 25.1% of total study issues brought to each year's workshop move forward and make it "Above The Line." The implication is that 75% of this effort is not productive, and time spent on the proposal process could be used instead for implementing approved projects.

Activity	Estimated Hours per Study Issue	Average Number of Study Issues 2016 - 2025	Estimated Hours for all Study Issues	Average Loaded Hourly Rate (Salary plus Benefits)	Total Annual
Prepare and Review Study Issues Paper /Budget Proposal (including deferred updates)	23.8	37	878.8	$136.03	$119,545
Board/Commission Review on Fall Agenda	16.5	37	610.5	$128.95	$78,724
February Study Issues Ranking Workshop Preparation	27.5	33	907.5	$137.11	$124,427
Above the Line Items to Funding	21.5	8	172.0	$145.24	$24,981
Total	**89.3**		**2,568.8**		**$347,677**

Appendix C – Best Practices

This Appendix provides context in three areas:
- Roles of the Council, City Manager, and Boards and Commission
- Minimize adding new projects mid-year and criteria for doing so
- Learnings from case study cities

Roles

City of Sunnyvale elected officials and staff are fully aware of the primary roles of the Council, City Manager, and the Boards and Commissions. They are shown below.

Council	City Manager	Boards and Commissions
• Set policy • Adopt budget • Appoint City Manager and City Attorney • Stay connected with community concerns	• Manage operations • Appoint and supervise • Recommend policy • Recommend budget	• Carry out designated assignments • Advise City Council in specific areas

The City Council's primary responsibilities as shown are to make decisions as a body about policies and to adopt a budget. Seeking input from a wide variety of community members, including boards and commissions, is good government and upholds democratic ideals.

However, asking boards and commissions to provide their opinion and recommendations on all study issues is atypical. Not only does it take added time and effort by staff to place those discussions on the board or commission agenda, but it is an expansion of their role as an advisory body. It can also establish unfulfilled expectations by members of those advisory bodies when their recommendations are not followed.

Minimize Adding New Projects During the Year

The case study cities (as many others) have methods for members of Council to suggest new projects (whether large or small) during the year. The question is not whether or how, but capacity to do that new work within context of the already approved work.

The best practice approach is to:
- **Focus**: do not take staff time away from established priorities and work plans that support those priorities
- **Full Council Support:** Once decisions are made, support them and the implementation involved
- **Choices:** What drops off or is delayed if something is added?

Best practice criteria for adding projects mid-year:
- Emergency (natural disaster, pandemic, civil unrest)
- New outside funding opportunity that is time sensitive
- New multi-agency opportunity that cannot be delayed
- Community safety issue that must be addressed in near term
- Changes in laws or mandates

Projects can be added by the City Manager advising the Council of these situations and gaining Council direction, or through an establish process of the Council (such as Colleagues' Memo in Sunnyvale) to bring such a situation to the attention of the full Council. In the latter approach, the Councilmember would first have a discussion with the City Manager to obtain professional perspective and information from staff. Otherwise, wait until the next budget cycle to consider.

Case Study Cities

Each of the case study cities has a structured process that is tied to the budget, either on an annual or every two year basis. For these cities, this is the primary method of establishing Council priorities and enabling the City Manager to manage workload and advise the Council most effectively on what realistically can be accomplished, along with timelines.

Additionally, all cities, including our case study cities, have methods for members of Council to raise issues outside an annual (or every two year) priority setting process. These include informal discussions with the City Manager, and formal processes set for in a Council procedures manual. The City Manager has an important role of determining what staff capacity is available to handle requests, as well as determining whether the request is consistent with Council policy. The formal method of having an item placed before the Council is a common method for a City Council, as a body, to determine whether the request is both within staff capacity and consistent with what the Council as a whole wishes to pursue.

One city manager's quote is representative of what was heard in other interviews with case study cities: "Councilmembers here have recognized that having too many priorities means you have none."

Profile of the Cities

Of the eight cities listed, six have members of Council elected by district with the remaining two elected at-large. One of those two will be moving to election by district. The cities are a combination of charter and general law cities, with a range of populations.

City	Population (Jan. 2025)	County	Council Size	Mayor Selection	Council Election	Charter or General Law
Sunnyvale	159,673	Santa Clara	7	Elected At-Large	District	Charter
Elk Grove	182,842	Sacramento	5	Elected At-Large	District	General Law
Fremont	232,619	Alameda	7	Elected At-Large	District	General Law
Gilroy	62,205	Santa Clara	7	Elected At-Large	At-Large*	Charter
Pleasanton	77,232	Alameda	5	Elected At-Large	District	General Law
Redwood City	82,073	San Mateo	7	Selected by Council	District	Charter
Rohnert Park	44,062	Sonoma	5	Selected by Council	District	General Law
San Mateo	104,315	San Mateo	5	Rotational sequence	At-Large	Charter
Victorville	141,013	San Bernardino	5	Selected by Council	District	Charter

Will be moving to District elections

Priority Setting Frameworks

City	Priority Setting Description	Keys to Success
Elk Grove	Council has an adopted Mission, Vision, and broad Goals. Reviews and adopts Priority Projects at biannual retreat	• Disciplined process • Cohesive framework

City	Priority Setting Description	Keys to Success
	that support the identified goals. City Manager and all department heads participate in this retreat. Comprehensive dashboard on the City's website. Staff provides updates twice a year. Additionally, the City Manager provides an Administrative Report at each City Council meeting that updates the Council on a variety of items including several standing citywide initiatives.	• Retains focus from year to year • Respect for roles and staff time • Effective online dashboard for Priority Projects • Strong communication between Council and City Manager • Tied to the budget process
Fremont	Council sets annual priorities in a retreat. Typically limited to four priorities. Staff provides mid-year and annual report on progress of the goals set in the prior year.	• Provides direction on an annual basis • Tied to the budget process • Progress reports provided (mid-year and annual) • Strong communication between Council and City Manager (including comprehensive monthly briefings regarding priority projects/initiatives)
Gilroy	Council has an annual Legislative Agenda and Work Plan process which involves several meetings. It begins in February to review the existing goals and priorities; next meeting is the mid-year budget forecast; followed by Council determining a set of annual goals. After this session, the staff returns with refinement of these goals into "legislative" (policy) and operational work plans (mandated, core, discretionary).	• Disciplined process • Cohesive framework that takes into account Council priorities and staff workload • Strong communication between Council and City Manager • Tied to the budget process
Pleasanton	Council adopted a five-year Strategic Plan which serves as the basis of its priorities. Each year, Council identifies limited number of "Council priorities" (ranges from 4 to 7) from within strategic plan	• Overall Strategic Plan framework is helpful • Communication regarding resources required to implement priorities is essential to help manage workload • Tied to the budget process
Redwood City	Council sets goals annually tied into multi-year strategic plan. Priorities are set for several years. The process begins in January or February with a facilitated offsite meeting with the Council to preview fiscal trends, and for Councilmembers to surface their current priorities (limited to 2-3 each). The City Manager indicates how those are related to the existing work plan *(work assigned through activities in the budget, prior Council direction, or routine practices such as budget adoption)* and/or what would be needed to advance them. The purpose of this is to assist in channeling these interests through the work plan throughout the year.	• Disciplined process • Council focuses on the goals established • Established priorities provide clear direction • Respect for roles and staff time • Supports workload management • Strong communication between Council and City Manager • Tied to the budget process
Rohnert Park	Council has a strategic framework and four broad, multi-year goals. Council annually sets three priorities that support and are in context of the goals. City staff reports progress to the City Council on these priorities, as well as other work plan items.	• Disciplined process • Cohesive framework • Respect for roles and staff time • Department heads determine timeframes of specific projects and actions within the priorities • Strong communication between Council and City Manager • Tied to the budget process
San Mateo	Long standing "blue sky" annual priority setting process in advance of the budget. Priorities are tied to the Council's strategic goals and vision. Council meets annually to set goals. Priorities are assigned timeframes of (1) upcoming fiscal year, (2) two to five years, and (3) five or more years. Staff identifies resources and timeframe necessary,	• Disciplined process • Suggestions from Councilmembers limited to a small number and must have support of majority for consideration • Strong communication between Council and City Manager

City	Priority Setting Description	Keys to Success
	returns to Council, and the approved one-year priorities are included in the budget. Study sessions are held for each major policy item and staff brings back the options. City Manager updates Council on progress mid-year.	• Tied to the budget process • Future step for City is to create a Strategic Plan to enhance alignment with of Council priorities
Victorville	In second three-year Strategic Plan which serves as the guiding framework for work plans and budgets. Through the budget process, the City Manager adds items of interest to the Council as resources permit. The City Manager prepares a scorecard annually which updates the Council about staff's progress in achieving each of the adopted goals.	• Disciplined process • City Manager prepares a budget in alignment with Strategic Plan • Emerging items can be incorporated into the budget if majority of Council agrees and resources permit • Strong communication between Council and City Manager • Tied to the budget process

Other Methods of Raising Issues

City	Methods of Raising Issues Outside Priority Setting Processes
Elk Grove	• Councilmembers can raise issues for consideration through (1) biannual priority setting session, (2) budget process, (3) mid-year for an operational need or key opportunity, or (4) protocol for requesting an item to be considered on a future agenda per the Council's Norms and Procedures Manual • Councilmember can request, if majority agrees then staff prepares a report to bring to Council • *City Council Norms and Procedures Manual* • The City Manager's Administrative Report provided at each Council meeting includes the status of Council direction on matters raised at Council meetings. Some of these items are addressed through the budget process and in other cases staff prepares a report to present at a future meeting. The list usually has about five or six items on it.
Fremont	• Councilmembers can raise an issue informally to the City Manager through regular briefings; City Manager can act on the item if within operational context and consistent with policy and resource availability • Councilmembers can raise an issue formally through a "Council Referral" process for placing an item on the agenda for consideration by colleagues; City Manager can either ask staff to review or bring it through the budget development process; if the item is administratively easy it will be implemented; if not, staff will tell Council the time, cost, and operational consequences • City Council Handbook of Rules and Procedures (page 10, section 5: City Council Referrals, describes the process for a Councilmember to place an item on the Council agenda)
Gilroy	• Councilmembers can bring up issues with the City Administrator who can determine whether to take action. • Councilmembers can bring up an issue through the Future Agenda Item Report (FAIR) process which is a formal policy. Requires the councilmember to write a report to put it on the agenda, then get a majority of council to support the item at the council meeting. If the Council supports it, then the City Manager provides the full list of priorities, including the Legislative Agenda and Work Plan and asks the Council where they see this new item fitting into the priorities. This policy requires the councilmember to discuss the item with the City Administrator before it goes onto the agenda, which allows the City Administrator to see if there is another way to accomplish the item, and to understand the work involved and make clear what the impact of this new item will be. • City Council Norms policy document (item 2.1) establishes the ability of Councilmembers to propose items for the agenda. The FAIR process describes how this specifically works.
Pleasanton	• Process uses "matters initiated" during meeting Agenda for Council to raise new priorities or projects; City Council's Rules of Procedures (page 15, item 9.6: Matters Initiated by Council and Council Reports) • Mayor or Councilmember gives City Manager a heads up, usually for discussion/initial thoughts

City	Methods of Raising Issues Outside Priority Setting Processes
	• Proponent raises the topic, if majority agrees then staff commits to bringing the item back at a future meeting for more discussion/consideration, which Clerk tracks • City Manager updates council in one-on-ones and might give general estimate on when it will return to Council; if a large item, staff will give more information
Redwood City	• Councilmembers can raise issues with the City Manager during their briefings. She reinforces the "one hour" rule in place (amount of time staff can spend studying a topic absent direction from the full Council), or suggests the item be referred to a Council committee, or use the Council referral process. • Council referral process allows individual councilmembers to raise topics they would like staff to address; if a Council majority supports action the City Manager provides a timeline for when this can be accommodated in light of other planned work. Typically, only 1-2 a year come through this process which are raised during the "matters of Council interest" portion of the agenda with procedures set forth in the City Council's document: A Guide to City Council Communications and Business.
Rohnert Park	• When a new issue comes up that may require staff's attention the City Manager advises the Council about staff capacity and impact on the established priorities • If the City Manager determines issue needs to be addressed immediately, meets with Department heads to decide the timeframe to address issue, and updates Council on the plan • City Manager meets weekly with each Councilmember; strong communication • The adopted City Council Protocols document provides procedures for Councilmembers to add items to the agenda (page 5, section G)
San Mateo	• If Council requests new items they are held until the next "blue sky" session or City Manager asks Council what will come off of the list or be deferred • City Council's Rules and Procedures Manual provides the procedure for a Councilmember to request an item to be considered on a future agenda. The policy requires that before a decision is made to place an item on the agenda, staff provide information how much staff time is estimated to be required to produce the agenda report. Then a majority vote or consensus of Council is required for the staff to prepare an agenda report and place the item on a future agenda.
Victorville	• Councilmembers can bring up issues during their regular briefings with the City Manager. City Manager can decide whether to take care of the issue through operations if consistent with policy and if resources are available. • Councilmembers can also bring up items at the Council meeting through the established protocol in the Council Policy and Procedures Manual.

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