

City of Sunnyvale

**Evaluation of Study Issues Process
Project Report Presentation**

October 21, 2025

Project Background

Study Issue OCM 24-02:

Evaluate the City of Sunnyvale Study Issues Process

Project Objective

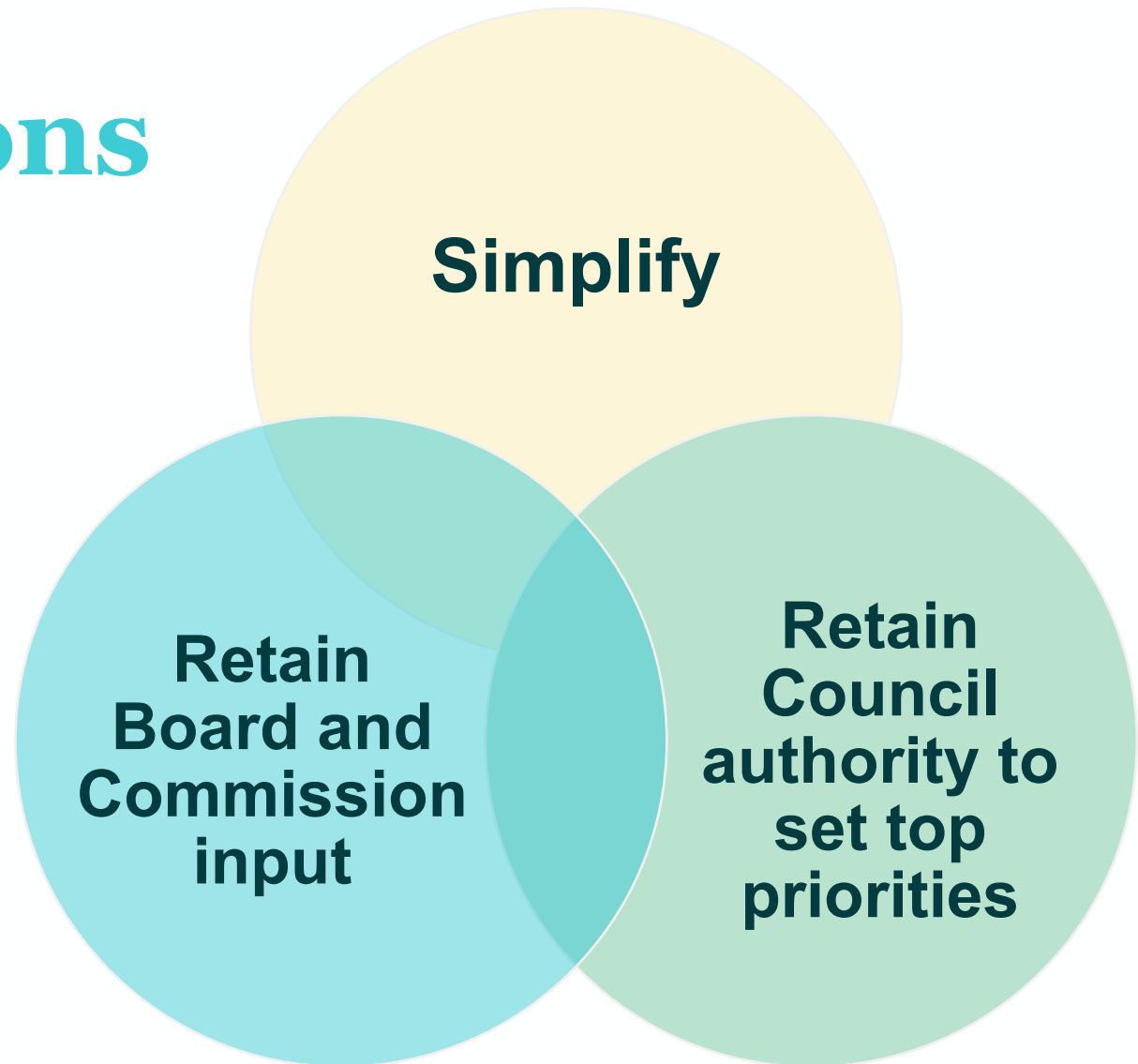
Conduct a comprehensive assessment of the City's longstanding study issues process to develop recommendations that lead to the **most efficient and effective approach to identify, prioritize, and analyze policy priorities.**

Our Approach

- City Council and Staff Interviews
- Online Survey of Board and Commission Members
- Online Survey of City Staff
- Data and Process Analysis
- Review of Case Study Cities and Best Practices
- Workshop with City Staff (July 2)
- Study Session with City Council (August 26)

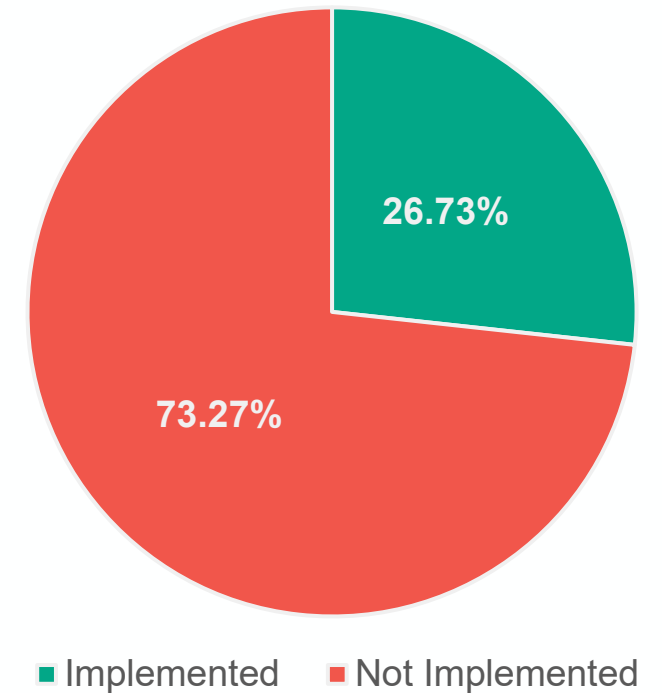
Goals of Our Recommendations

**To Save Time for
Everyone Involved**



Key Themes from Raftelis Analysis

- Per interviews and surveys: “**Change It But Don’t Eliminate a Way to Prioritize**”
- Study issues proposal process is time consuming and expensive, and **detracts from service and project delivery** (over 2500 staff hours per year)
- Only 26.73% of proposed study issues are implemented annually; staff capacity is not available for all ideas
- Boards and Commission input important for deliberation of ideas but can be streamlined
- Case study cities have streamlined and disciplined process linking staff work to citywide strategic priorities
- More frequent status updates needed during implementation



Recommendations



Suggested Terminology Changes

For Clarity

Current

New

- Study Issue → Council Priority Projects
- Strategic Priorities → Strategic Goals
- Above the line/below the line → Delete – *replace with City Manager's recommendation for items to be included in the budget*



15 Recommendations

Three Categories

- A. Study Issues Proposal Process
- B. Process to Complete Study Issues
- C. Related Prioritization and Resourcing Processes

Strategies for Improvement: Study Issues Proposal Process

A. Study Issues Proposals Process

1	Eliminate most study issue papers pertaining to the study issue proposal process.
2	Modify 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 to be submitted by Councilmembers to the City Manager in January for Council Priority Projects (to capture both study issues and budget proposals).
8	Prepare a clear description of the new Council Priority Projects and scopes of work recommended in the budget for review and approval by the Council.

Strategies for Improvement: Process to Complete Study Issues

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

Strategies for Improvement: Related Prioritization and Resourcing Processes

C. Related Prioritization and Resourcing Processes

12

Conduct a biennial review of the Council's Strategic Priorities (to be renamed "Strategic Goals").

13

Create a comprehensive Strategic Plan.

14

Apply an agreed-upon set of criteria for adding projects mid-year.

15

Conduct a review of the effectiveness of the City's budget and strategic priorities process every five years.

Board and Commission Input

Each body can submit one Council Priority Project idea

Board/Commission

- Each body can hold an optional agendaized discussion by November of each year to select one Council Priority Project idea by majority vote; no ranking to occur
- Staff Liaison sends idea to Office of City Manager to be posted online as a potential idea

Council

- Each Council member may submit up to three Council Priority Project ideas each year to City Manager for consideration at February Workshop (submittals to include any Board/Commission project ideas the Council member decides should be one of his/her three items)

Staff/City Manager

- Staff prepares a report only for the highest priority Council Priority Projects that received majority Council vote at February Workshop within framework of City Manager's guidance on staff capacity.
- These reports/Council Priority Projects are considered by City Manager in budget recommendations

Reframe the February Workshop

Review the Strategic Priorities only every two years to see if conditions have changed

1

Review existing major projects

2

City Manager to provide financial update and guidance on capacity for Council and staff to take on new projects

3

Review the new proposals for Council Priority Project (formerly study issues) to be considered

4

Staff would prepare reports on subset

5

City Manager utilizes that information for his recommendations for the budget

Summary of Proposed Revised Process

JULY-DEC.

Staff focus on
implementing
current year
priority projects

NOV. - JAN.

Gather ideas on
next year's
priority projects

FEBRUARY

Prioritization
Workshop

MARCH - APRIL

Staff prepare
scopes for subset
of priority
projects

MAY

Budget workshop
and discuss
priority project
scopes

JUNE

Budget adoption,
workplan updated

Transition Plan

Month	Activities
October 2025	<ul style="list-style-type: none"> Communicate with boards and commissions about the new process
November 2025	<ul style="list-style-type: none"> Prepare guidelines and update all forms Create a combined “Budget Submittal and Council Priority Project Form” Remove all study issues currently on the deferral list. The result is that proposals to be reviewed at the 2026 February Workshop would be those emerging from the new process, with the Council starting with a “blank slate.” Ideas on the deferral list could be proposed as part of Councilmembers’ limited number of proposed Council Priority Projects, if desired.
January 2026	<ul style="list-style-type: none"> Create a reference a list of dropped or deferred items, and up to one idea (listed item, not papers) from each board or commission via staff liaisons. Post this list on the City’s website. Update the list after each year to include items from the prior year that did not move forward and new board or commission ideas. This list will not be analyzed by staff and should be treated as a brainstorm list of unvetted items.
February 2026	<ul style="list-style-type: none"> Conduct a revamped annual February Workshop. Vote of Council majority required to move proposed Council Priority Projects forward.
After February Workshop during Budget Preparation	<ul style="list-style-type: none"> Staff prepare reports on the subset of Priority Projects approved by the majority of Council. The City Manager will utilize this staff analysis to inform decisions as to what is included in the recommended budget. Recommendations will be presented to the Council at the May Budget Meeting.
FY2026-27	<ul style="list-style-type: none"> Develop a timeline for creating a comprehensive Strategic Plan.



Sunnyvale

Council Policy Updates

Michelle Zahraie, Senior Management Analyst

Summary of Proposed Changes to Council Policies

Council Policy 7.1.7 *Budget Proposal Process*

Delete Policy. Incorporate language into revised Study Issues Process policy.

Council Policy 7.2.19 *Boards and Commissions*

Proposed Revision. Updated 1.A. Policy Statement and 2. Board and Commission Bylaws H. Duties sections to reflect modified board and commission members input in the Council Priority Projects process.

Council Policy 7.3.19 *Council Meetings*

Proposed Revision. Updated policy language under the Colleagues Memorandum section to include criteria for mid-year project consideration.

Council Policy 7.3.26 *Study Issues Process*

Proposed Revision. Updated policy title and language to reflect Council Priority Projects process changes.

Council Direction

- Receive and file the Raftelis Evaluation Report
- Approve proposed policy revisions to Council Policies:
 - ◆ *7.1.7 Budget Proposal Process*
 - ◆ *7.2.19 Boards and Commissions*
 - ◆ *7.3.19 Council Meetings*
 - ◆ *7.3.26 Study Issues Process*
- Provide other direction on changes to the Study Issues Process



Thank you

Questions?