



**City of Union City
Strategic Planning Update Workshop
Held August 5, 2021**

August 2021

**Management
Partners**



Table of Contents

Workshop Report	1
Workshop Overview.....	1
Welcome and Opening Comments	3
Ice Breaker	4
Changes Since Adoption of Strategic Plan	4
Vision, Mission and Values.....	8
Discussion of Priorities for the Coming Year.....	9
Communicating Progress on the Strategic Plan	12
Strengthening Teamwork.....	13
Adopted Council Norms	13
Governance Roles	14
Council Liaison Roles and Expectations	15
Workshop Wrap Up.....	15

Workshop Report

The City of Union City held a strategic planning retreat on August 5, 2021 from 9:30 a.m. to 2:30 p.m. via Zoom. The retreat provided an opportunity for Councilmembers and Executive Team members to review and discuss the midpoint Strategic Plan, establish Council priorities for the next two years, and strengthen teamwork. This report contains a summary of the results of the workshop.

Jan Perkins (Vice President) and Susan Keene (Special Advisor) with Management Partners facilitated the workshop. They were assisted by Michelle New (Senior Management Analyst), who served as recorder.



Workshop Overview

Objectives

- Understand the updated schedule for the strategies in the Strategic Plan
- Establish Council priorities for focused attention
- Strengthen teamwork

Agenda

- Welcome from the Mayor
- Public comments
- Comments from the City Manager
- Icebreaker
- Review changes since adoption of strategic plan
- Establish Council two-year priorities for focused attention
- Strengthening our teamwork
- Wrap up and next steps

Participants

Mayor and Council

Mayor
Carol Dutra-Vernaci



Vice Mayor
Pat Gacocos



Councilmember
Emily Duncan



Councilmember
Jaime Patino



Councilmember
Gary Singh



Executive Staff

- City Manager, Joan Malloy
- Deputy City Manager, Mark Evanhoff
- Public Works Director, Marilou Ayupan
- Economic and Community Development Director, Carmela Campbell
- Budget Manager, Anita Castillo
- Community and Recreation Director, Corina Hahn
- Chief Human Resources, Lillybell Nakamura
- Police Chief, Jared Rinetti
- Assistant to the City Manager, Lauren Sugayan
- Chief Technology Officer, Mario Vallejo

Workshop Ground Rules. At the start of the workshop, Jan suggested several ground rules to help the group have a successful workshop.

- Listen to understand each other's point of view
- Seek consensus
- Assume good intent
- Speak up if we need course correction
- Stay focused
- Council/City Manager – keep video on
- Raise Zoom hand to speak
- Patience

Workshop Preparation. In preparation for the workshop, Jan Perkins and Susan Keene conducted individual interviews with Councilmembers, and held a meeting with the Executive Team, and collaborated with the City Manager and Assistant to the City Manager about materials for the session.

Welcome and Opening Comments

The workshop began with a welcome and call to order from Mayor Carol Dutra-Vernaci. She invited members of the public to speak.

City Manager Joan Malloy then offered opening comments about why the workshop was important and what she hoped the group would gain from the day's discussions. She expressed the importance of revisiting the Strategic Plan and reprioritizing, especially since much has changed since the adoption of the strategic plan. She commented that due to the City's small staff and the number of vacant positions, it is especially important that project work be aligned with Council's priorities. The City Manager emphasized that staff aims to serve the Council and the entire Union City community, and benefits from clear direction from the Council on priorities.

The City Manager then turned the session over to the facilitators, who reviewed the objectives of Councilmembers and executive staff for the workshop. The objectives are provided below.

Objectives of Councilmembers

- Reach consensus on **priorities**
- Strengthen **teamwork**

Objectives of Executive Staff

- Clarity of Council **priorities** and alignment with department initiatives
- Strengthen **relationships** with Council

Jan Perkins reviewed the agenda, ground rules, and explained the purpose of the "bike rack", which is a time management tool.

Ice Breaker

One Word to Describe Union City

To begin the retreat, the Council and executive staff participated in an icebreaker exercise. Each offered one word that they would like to see used to describe Union City.

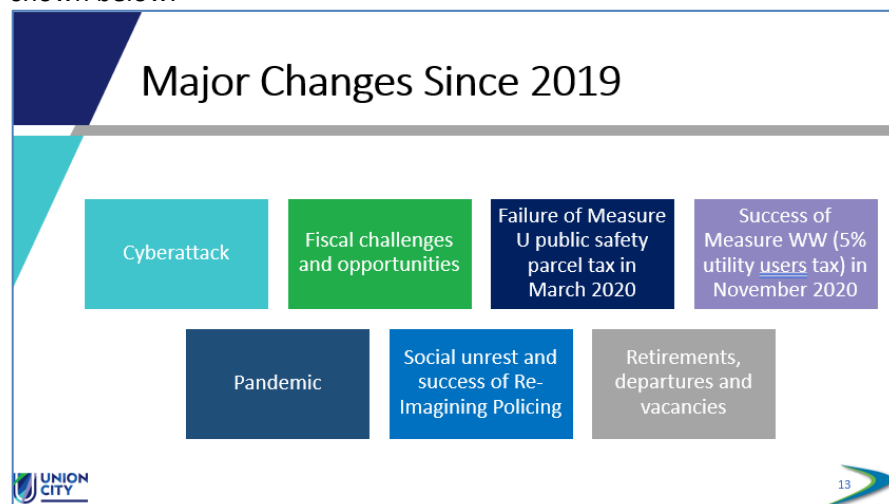
A word cloud was created and is shown in Figure 1 below. The words that appear larger were suggested multiple times.

Figure 1. Ice Breaker Word Cloud



Changes Since Adoption of Strategic Plan

Several changes have occurred since the adoption of the Strategic Plan in October 2019. The City Manager reviewed some of the major factors that have had an impact on the City in the last two years. The slide that was presented is shown below.



Results of Resident Satisfaction Survey

Assistant to the City Manager Lauren Sugayan reviewed the results of the Resident Satisfaction Survey conducted in July 2021. She noted that there is about 60% support for extending the sales tax measure, which has been the typical level of support in Union City over the years. She also stated that the City's website is the top method of information sharing, which aligns with the work of IT Department staff. A summary of key points is listed below.

- General satisfaction with city services and quality of life (with room for improvement).
- Dissatisfaction with the City in addressing homelessness, providing neighborhood police patrols, preventing illegal dumping, and street and pothole repair.
- General satisfaction and trust levels with Union City Police Department (with room for improvement).
- Support remains high for extending the half-cent sales tax.
- City website, email, activity guide, mailers, Facebook and NextDoor are the most preferred sources of information.
- With the pandemic ending soon, most residents prefer to conduct business with the City online rather than in City Hall.

Fiscal Outlook

The City Manager reviewed the City's financial forecast, with and without renewal of Measure AA. Measure AA expires during FY 2024-25. Key points are:

- Restoration of staffing and services can only happen with Measure AA, Measure WW and ARPA funds.
- Without Measure AA renewal, fiscal sustainability is expected for three more years, and reserves will be fully depleted by FY 2027-28.

Key Accomplishments

The City Manager reviewed the City's key accomplishments on Council priorities during the last fiscal year. A summary is provided in Table 1 below.

Table 1. Progress on Council's Top Priorities Established in August 2020

Priority	Accomplishments
Address the City's financial shortfalls, loss of revenue due to COVID-19	<ul style="list-style-type: none">▪ Passage of Measure WW▪ Union Landing rezoned to support the opening of cannabis retail
Respond to concerns raised by community members during Black Lives Matter discussions	<ul style="list-style-type: none">▪ Re-Imagine Policing initiative▪ Human Relations Commission studying diversity, equity and inclusion
Attract businesses and assist existing ones	<ul style="list-style-type: none">▪ Funding to help stabilize existing small businesses during COVID-19▪ Mass outreach effort during COVID-19 to connect them to resources▪ Union Landing Property-Based Business Improvement District renewed

Priority	Accomplishments
Develop a plan to reduce the costs and increase revenue for Community and Recreation services	<ul style="list-style-type: none">City Council considered options for raising fees and recovering costs. They directed staff to raise sports field rates from a 9% recovery rate to a recovery rate of approximately 30%.
Recover from cyberattack	<ul style="list-style-type: none">Financial infrastructure is fully restored; financial data recovery efforts completed; insurance claim completed; HR system not restored.

Other key accomplishments from the past year were highlighted. The City Manager explained that as a result of COVID-19, the City reestablished community services as a top priority. She said that though fire station #30 closed, the station was repurposed to house Falck Alameda County, Alameda County's emergency medical response and primary 911 transport service provider. The list of accomplishments reviewed is below.

- Kept the City running and safe during COVID-19
- Measure WW (Utility User Tax)
- Created Police and Community Engagement Committee to initiate Police Department re-imagining process
- Renovated Contempo Park
- Advanced major projects: Station District and Quarry Lakes Parkway
- Established and continued community food distribution
- Established cannabis as new revenue source
- Adopted Council Norms (Resolution No. 5703-21), and board and commission norms and guidelines
- Promoted staff
- Reduced fire services costs

Councilmembers provided the following comments:

- Want to give staff credit because they really rolled with the punches and we got through it all.
- Re-Imagining Police was a big help to heal and show the community our Police Department is one of the best.
- Very appreciative of the City Manager, she is proactive and having her is an accomplishment. We are doing a good job.
- Thank you to Joan for summarizing the accomplishments. It's been so disruptive over the last few years and seeing the summary puts things in perspective.
- We've made some major progress, learned a lot, grown a lot, accomplished a lot.
- We can easily forget everything we've accomplished. Staff does a wonderful job adapting. Staff is the cream of the crop. Lean and mean.
- Food drive for seniors and community should be added as an accomplishment.
- Staff is doing a wonderful job.

Highlights of Midpoint Updates

Strategic Plan Schedule

The Assistant to the City Manager reviewed a slide that summarized the schedule for the strategies identified in the Strategic Plan. She explained that many projects are ongoing and will require staff time over multiple fiscal years.

Major Projects

Joan reviewed a list of some of the major projects moving forward and stated that staff are very busy. The list of major projects is below.

- **Quarry Lakes** Parkway and Trails,
- **Station District** Specific Plan and **Hillside** Specific Plan,
- **New housing developments**: over 1,800 units approved or in planning stage,
- **Technology** improvements, and
- Police Department Strategic Plan with **Re-Imagining Policing**.

New Strategies

Joan also reviewed new strategies that will be added to the midpoint update Strategic Plan, as shown in the following slide.

New Strategies Added	
Goal A	Study and prepare for placement of a revenue measure for the November 2022 election that addresses the expiration of the half-cent sales tax ; or prepare for \$6 million in service cuts .
	Determine the feasibility of a revenue ballot measure for November 2024 and/or November 2026 that could consider a new landscape and lighting district (indexed to CPI) and/or a tax to fund a new City Hall/library .
	Study the benefits and opportunity to update the City's business license tax for voter consideration.
Goal C	Facilitate the sale and development entitlements of the Gateway property to generate revenue to fund the construction of Phases 3 and 4 of the Quarry Lakes Parkway.
	Continue providing support to City residents and businesses related to COVID-19 recovery.
Goal D	Prepare RFP for franchise agreements for solid waste and recycling collections with emphasis on selecting vendor with resources to implement SB 1383 requirements.
	Enable a robust cyber security and information technology disaster recovery service.
Goal E	Develop and implement a diversity, equity and inclusion approach to citywide communications and outreach.

Council Comments

Council provided the following comments about the new items for the Strategic Plan.

- We need to have conversations about revenue measures.
- There is concern about a new library or city hall due to the significant cost.
- Union City has the oldest library in the County; we have been talking about this for a long time.



Vision, Mission and Values

The Council reviewed and discussed the suggested changes to the City's mission and values proposed by the Human Relations Commission as part of their diversity, equity, and inclusion work. The Commission suggested some modifications to the mission and the addition of two values.

The Council concurred with the proposed versions, as shown below.

Vision

To be a vibrant, inclusive and prosperous community where residents and businesses thrive, and innovation grows. [No changes made.]

Mission

Our mission is to create and provide effective, valued services that foster high quality of life and economic vitality for the community. [Modified version]

Values

- **Sustainability**
Plan for the long term in all that we do to ensure financial, environmental, and community well-being.

- **Professionalism**
Deliver high-quality services to members of the community while investing in employee development.
- **Accountability/Integrity [combined]**
Serve in the best interests of the community as responsible stewards of public resources, with trust and transparency.
- **Belonging [added]**
The City strives to instill a sense of belonging for all our community of residents, workers and visitors.
- **Respectfulness [added]**
Show respect, fairness, and equity in our jobs, each other and the community we serve.



Discussion of Priorities for the Coming Year

Following a brief stretch break, the group reconvened for the priority setting portion of the workshop. The purpose of this discussion was to reach consensus on top priorities for the next two years. The City Manager noted that all the items within the Strategic Plan will continue to move forward, and that the schedule has been updated.

Key Challenges. The Council reviewed key challenges they mentioned during their interviews with the facilitators and the Executive Team in their workshop planning meeting. As can be seen, the Council and executive team mentioned some similar challenges in some cases. The following slide was presented.

Key Challenges

Highlighted by Members of Council	Highlighted by Executive Team
<ul style="list-style-type: none">• Opening the city back up• Creating long-term fiscal sustainability• Generating more tax revenue• Adding needed staff• Developing Station District• Providing accurate information to the community regarding Quarry Lakes Parkway project• Improving and streamlining development process• Addressing homelessness• Providing positive information about police in media	<ul style="list-style-type: none">• Reopening after COVID-19• Ongoing fiscal sustainability – need additional revenue• Understaffing in relation to expectations of major work programs• Ability to recruit and retain• Adjusting to telecommuting, working as a team in a virtual world, reimagining city government, and readjusting to onsite work• Preparing for 1000+ housing units to be built in next 5 years



Council's **top five priorities** for the next two years, as determined by the virtual polling exercise, are listed in Table 2 below.

Reopening following COVID-19. The Council also determined that one of the choices shown on the original list regarding continuing the reopening of the City following COVID-19 is a **fundamental priority** that will need to be carried out regardless of other work, and therefore did not need to be specifically prioritized.

Table 2. Council's Top Priorities for FY 2021-22 and FY 2022-23

Top Council Priorities
Generate more tax revenue needed for long-term fiscal sustainability
Improve and streamline development process
Address homelessness
Staff recruitment, retention and succession planning
Build staffing and technological infrastructure to develop Station District, construct Quarry Lakes Parkway and prepare for future housing units

The full list of items discussed by the Council is provided below. *All of these are already included in the Strategic Plan, with the exception of items 10 and 11 which are new and were added by Council vote to the Strategic Plan. The timeline will be determined.*

1. Generate more **tax revenue** needed for long-term **fiscal sustainability**
2. Continue **reopening** after COVID-19
3. Implement **Re-Imagining Policing**
4. Improve and **streamline development** process
5. **Address homelessness**
6. Advocate for **transportation funding** for South County
7. **Build staffing and technological** infrastructure to develop Station District, construct Quarry Lakes Parkway and prepare for future housing units
8. Provide support for **diversity, equity, and inclusion**
9. **Staff recruitment, retention and succession planning**
10. *Consider future of city hall/library*
11. *Murals at Kennedy Park BART pillars in collaboration with BART and Union City Arts and Culture Commission*

Notes from the Council Discussion

The following is a summary of the discussion about several of the items above.

Improve and streamline development process

This is in the existing Strategic Plan.

- Staff provided information on this item and noted that it initially came from the last strategic planning process and is currently in the Strategic Plan. Other staff comments included streamlining is happening at the state level and we are following suit, accessory dwelling units do not need to be

reviewed by Planning, we are seeking feedback about our processes to determine how we can streamline, at Union Landing we removed a lot of process to get tenant spaces filled quicker, and the goal is to very clearly identify requirements to reduce back and forth and reduce timelines.

Advocate for transportation funding for South County

This is in the existing Strategic Plan.

- Important as part of Quarry Lakes funding.
- Need to advocate for South County. We are all connected, share transportation systems.
- Develop partnerships (Union City, Fremont, and Newark) to identify funding priorities. Mayor has been engaged with other two Mayors.
- We need to work together to advocate for real dollars and reinvestment in our region.

Build staffing and technological infrastructure to develop Station District, construct Quarry Lakes Parkway and prepare for future housing units

This is in the existing Strategic Plan.

- This is about what we would need to do internally to facilitate development (updating permit system, more staff, update technology to process digitally).
- Over 1,000 housing units during the next couple of years; in the next five to ten years, we will likely be adding significant population to the city.
- What additional/increased city services would we need to support the growth (recreation, public safety, community services, etc.)?
- Significant build out near the BART station.

Staff recruitment, retention, and succession

This is in the existing Strategic Plan.

- This is a big issue and is impacting our city as well as other cities.
- Reopening is dependent on our ability to have sufficient staffing.
- For public safety, so much of what we did is dependent on our staff. It relates to having the resources to do it. We have many great plans, but building staff is critical for our future. We will have 20 vacancies in the Police Department by the end of the year.

Consider future of city hall/library

This is not in the existing Strategic Plan but the Council voted to add it at this workshop.

- Need to see costs and what this would entail before we consider it.
- Need to be considerate of tax proposals coming forward; don't want people to feel overburdened and say no to both.
- Don't mind going through initial phases.
- It is very important to have updated library and city hall. These were put on the ballot when Mark Green was Mayor.
- Very important for the future of Union City. All cities our size have a beautiful city hall.

- Nice to have but would rather look at the overall asset management strategy.
- Diverse population with people with young kids.

Create Murals at Kennedy Park BART pillars in collaboration with BART and Union City Arts and Culture Commission

This is not in the existing Strategic Plan but the Council voted to add it at this workshop.

- Our new Arts and Culture Commission needs to handle this because that's what their charge is.

Communicating Progress on the Strategic Plan

The priority setting portion of the workshop wrapped up with a discussion about how the City will communicate progress on the strategies to the public, how progress will be tracked, and how staff will handle new requests that could take them away from Council's priorities.

The City Manager explained there is new technology that will track the activities in the Strategic Plan. A communications team will help communicate progress internally and with the public. Communication will also come from the Fiscal Sustainability Committee, and progress will be discussed during budget briefings and in the annual budget message. New requests that require budgeting or staffing will need to come through the Council. New priorities would require other items to slow down or fall off the list.

Strengthening Teamwork

The remainder of the workshop focused on strengthening City Council teamwork. The facilitators lead Council discussions pertaining to roles, and Council's liaison function with its boards and commissions, as well as how to make Council norms more prominent.

Exceptional City Councils

The facilitators presented a refresher on best governance practices to set a framework for discussing Union City's governance roles and norms. The group reviewed the Institute of Local Governments (ILG) article entitled, *Attributes of Exceptional Councils*, which the group had discussed at last year's workshop. Jan explained the importance of showing respect and supportive teamwork in all arenas, whether that be on social media, during special events, in Council meetings, or in one-on-one discussions.

Exceptional City Councils...

1. Have a sense of team; a partnership with the city manager to govern and manage the city
2. Clear roles and responsibilities that are understood and adhered
3. Honor the relationship with staff and each other
4. Routinely conduct effective meetings
5. Hold themselves and the city accountable
6. Have members who practice continuous improvement

Adopted Council Norms

The group reviewed the Council norms that were developed and adopted in January 2021 and discussed how to operationalize them. The purpose of developing Council norms was to create a shared understanding about how the Council wants to operate as a governing body.

Councilmembers concurred with the suggestion to display the norms in prominent locations, such as the Council webpage and in a regular location on Council meeting agendas.

The seven Council norms are listed below.

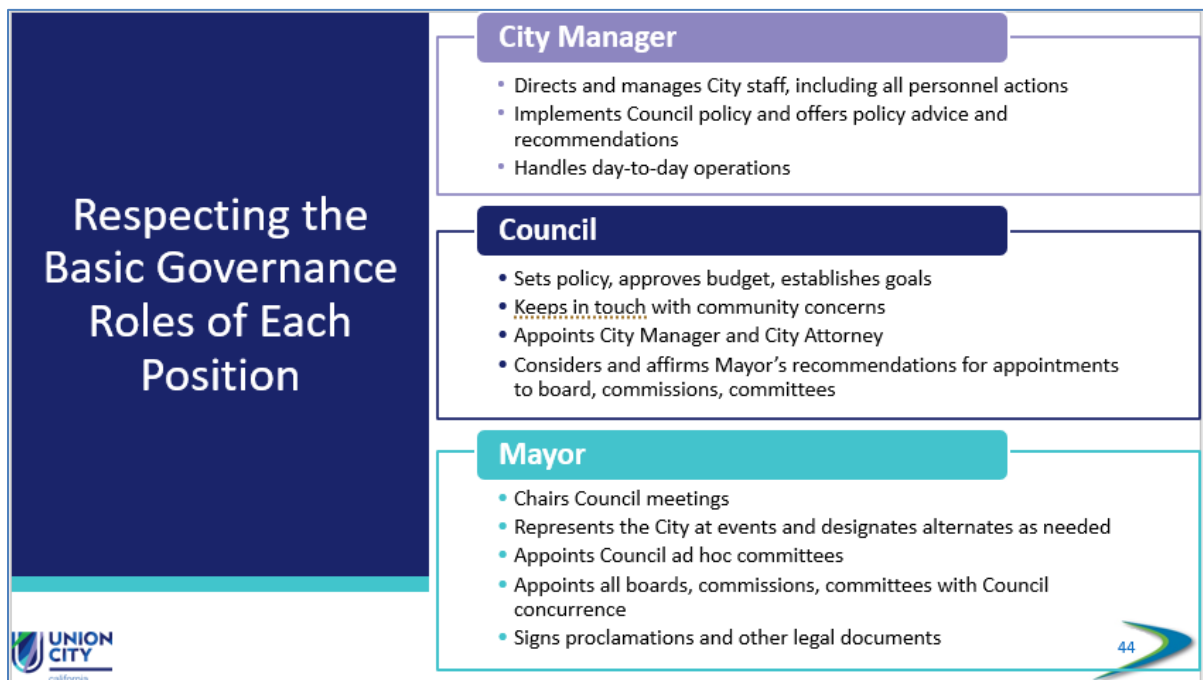
1. We conduct ourselves in a **professional manner and treat everyone with respect**, and act with high integrity, always putting the interests of the City of Union City ahead of self-interests in accordance with our code of ethics.
2. We respect the **Council/Manager form of government**, and do not interfere with the City Manager's role or any professional duties of City staff.
3. We keep confidential matters **confidential**.

4. We **respect each other's opinions** and ensure that all voices are heard. We do not criticize others for having a different point of view, and we agree to disagree respectfully.
5. We understand that the **Council acts as a body**, all members are equal, and policy direction is only given by a majority vote of the Council. Once a decision is made, all members of the Council must respect the Council's direction.
6. We are **prepared for Council meetings** and ask our questions of the City Manager in advance so we can avoid surprising staff at our meetings.
7. We **do not criticize staff** to them or others. We take our concerns to the City Manager.

Governance Roles

The next segment of the workshop focused on providing a refresher on the governance roles of the Council as it relates to the Council/Manager form of government, and the roles of Council liaisons. Susan Keene kicked off this part of the workshop by explaining how the roles of Council and the Mayor are inter-related.

Jan Perkins reiterated that respecting and understanding roles and responsibilities is one of the important elements of effective Councils. The slide that summarized roles of the City Manager, Council, and Mayor is provided below.



Bike Rack Item. Council briefly discussed how the City would implement the new district model. Councilmembers agreed it would be helpful to have a future discussion about how they can continue to operate as one city, while being mindful of districts. A future discussion was added to the Bike Rack.

Council Liaison Roles and Expectations

Jan reviewed the new role of Council Liaison, which is to develop a shared understanding about how Council can provide clear direction to boards and commissions.

The basic principles underlying the new Council Liaison role are listed below.

- Council policy is determined by the full Council, not by one member.
- The role of boards and commissions is to advise the City Council, with exceptions for quasi-judicial commissions that act under their authorized ordinances.
- Any actions by an individual Councilmember must be consistent with the Council/Manager form of government, with direction to staff provided by the City Manager, not by any member of Council.

Jan and Susan set the stage for a successful Council Liaison role. The facilitators explained that course correction procedures should only be used when things are not going smoothly.

All Councilmembers concurred with the tips and things to avoid, as well as expectations and course corrections shown on the slides below.

Tips and Things to Avoid Council Liaisons to Boards and Commissions

Tips for Effective Use of Liaisons

- Regularly **monitor** meetings, without in-person attendance
- **Observation**, not participation
- When guidance needed, first speak with Chair and staff **prior** to meeting
- If called upon to provide input at meeting, communicate/clarify **Council direction**

Things to Avoid

- Acting as a **Commissioner**
- Setting Commission priorities **without** full Council input
- Skewing Commission recommendations based on **personal** agenda

Expectations and Course Corrections Council Liaisons to Boards and Commissions

Expectations

- Any **guidance will be consistent with adopted** City Council policy, or the liaison will bring a question or matter to the City Manager for clarification or the full council for consideration
- Liaisons will **not interfere** with normal commission agenda setting processes, or direct staff work, attempt to set priorities, or interfere with the City Manager's authority

Course Corrections

- **City Manager** will advise a Council liaison if he or she is in effect directing staff and request that it be stopped
- **Mayor or other members of Council** may bring to the City Manager or the full Council any concerns about the guidance being provided by a liaison to a commission, to ensure it is consistent with full Council policy and formal direction

Workshop Wrap Up

Reflections from Council

To conclude the workshop, the Mayor, Councilmembers, and the City Manager each shared comments and observations about the value of the retreat to them. A summary of these reflections is provided below.

Comments from Councilmembers

- These retreats are always useful. Value is self-evident; gives us an opportunity to have conversations during the day. Gives us the opportunity to discuss things that weren't on the agenda
- I appreciate the work of the Management Partners team. I am looking forward to making progress on the priorities. Making the City move forward.

- This workshop allowed for some relationship building. It is different from our formal structure and process during regular Council meetings. This workshop provided an opportunity to talk to each other without following the same formality.
- Discussion on priority setting was valuable so we can focus our energies in the same direction.
- The workshop was great. It's a lot easier to speak in this format. Re-focuses us; a lot has happened since the last one.
- I appreciate the workshop. There are a few things we need to fix. The City Manager has done a wonderful job. Great to spend some time together.

Comments from the City Manager

- I appreciate having an opportunity for Council to talk outside of the regular Council format. I appreciate the chance to reflect on the mission, vision and values and bring us back to where we need to be. I also believe this has been a very valuable discussion for staff. We are all on the same team and it helps us move forward in the same direction.

