

**Town of Yountville**

**Strategic Planning Retreat**  
**Report**

**February 2017**



# Town of Yountville Strategic Planning

## Draft Framework

### Vision

Yountville embraces its small town charm while welcoming the world to enjoy life here in the heart of Napa Valley.

### Critical Success Factors

- **Exceptional Town Services and Staff**  
The Town supports its talented staff who deliver high quality municipal programs and services while maintaining public infrastructure for the benefit of the community.
- **Engaged Residents**  
The Town embraces our residents' commitment to community as seen through volunteerism, civic engagement and public participation that enhances the quality of life in Yountville.
- **Visionary Leadership**  
The Town's leadership maintains an open-minded, forward-thinking decision-making process. We value engagement and participation from all members of the community as we work together to create policies and plan for the future.
- **Responsible Fiscal Policy**  
The Town maintains its fiscal health through policies designed to maximize economic opportunities, manage expenses, and ensure prudent reserves.
- **Premier Destination**  
The Town values its rich history, natural environment, culinary excellence, arts and culture, and distinguished businesses that make our home a premier destination.
- **Quality Amenities**  
Enhancing the livability of Yountville by providing well-maintained parks, trails, and facilities, and quality programs and events which contribute to our unique sense of place.

The Town of Yountville held a strategic planning session on February 27-28, 2017. The retreat was facilitated by Julia Novak and Michelle Ferguson from The Novak Consulting Group. The purpose of the retreat was to develop a strategic planning framework for the Town.

## Setting the Stage

The Town Council and the Management Team met in the afternoon of Day One to begin the process of developing the strategic plan framework. The retreat began with several introductory comments by the facilitator. The group reviewed the agenda and agreed to adhere to the following norms throughout the retreat:

- Be BOLD
- Be positive, realistic, candid, honest, patient, respectful, engaged, fully present
- Listen with respect
  - Let others finish before speaking
  - Be attentive to the speaker
  - Disagree agreeably
- Strive for consensus
- Remember the power of 'if' and 'and'

The group then shared their expectations for the strategic planning process.

- Would like to see where we have similarities in our vision to build off and discuss those areas where we have less agreement
- Looking forward to seeing how close our visions are and what it will be for the future
- No strong expectations; looking forward to learning about the process
- Everyone going through this process together, to experience it as a group, flexible environment to exchange ideas
- Learn Council's vision for the future
- Want to know direction we are headed
- Use strategic plan to make decisions in our departments and ensure we are supporting the Council's vision
- Turn Council's vision into implementation
- Shared vision
- Learn and listen
- Excited about where I see this process going; last strategic plan served community and organization well; we've grown as an organization and want to build off our past
- Great representation across the Council so excited to hear each other's vision
- Excited to have a forward-thinking conversation as a group

## "This I Believe..."

Each member of the Council was given 3 to 5 minutes to share "what they believe" about the future of the City organization. The exercise is loosely based on the "This I Believe" essay format made popular on National Public Radio.

- Tell a story: Be specific. Take your belief from the events of your life that have shaped how you look at and experience the role of leadership in government.
- Name your belief: Focus on a core belief and talk about why it is true.
- Be positive: This is what you DO believe, not what you DON'T believe. Avoid speaking in the editorial "we," and make sure this is about what you believe. Speak in the first person.
- Be personal: Write in words and phrases that are comfortable for you to speak.

The following is a summary of the key themes of each person's statement.

**Margie Mohler** – I believe that our community is now and is going to see a lot more change; dynamics of how we all interact with each other – residents and businesses – will continue to change; many more retirees, second home owners, fewer younger families moving into our town; our vision going forward needs to capture that changing dynamic; need to recognize that 1,000 of our residents are at the Veterans Home – the one constant of our community.

**Vice Mayor Marita Dorenbecher** – When John and I moved to Yountville from San Francisco in 1999, we did not anticipate the changes for the better we would participate in – as residents. The French Laundry under Thomas Keller's direction was about 5 years old and just about to bound into the limelight and catapult all of us onto the world's dance card. About a year later, in 2000, I started getting involved – volunteering at Chamber Events; The Festival of Lights; the Taste of Yountville, which had been founded by George Rothwell who owned an antique store in town, and was part of the Mustard Festival which ran its course; and Yountville Days, of course. These were the first events that made me feel that this was a great town. Participation at Chamber events monthly were fun and very well attended.

Much like Pickle Ball today, the Yountville Bocce Club was very small then, but soon began to mushroom. There were perhaps 30 members of the club then and today there are about 150. This was and is a Town that likes to party together. Everyone, or most people, still seems to like to get together. So, in my category of "This I Believe," sharing time and space together makes us not only a success for the events we put on, but for the quality of life we share in Town.

Back then, almost every corner had an antique store or an art gallery. Piatti was the favorite local restaurant where Redd is today. Pacific Blues was also the real local hangout. On any given morning, half of town would be there reading their papers and having coffee.

This sense of Community I saw has waxed and waned. But lately it seems to be rekindled in at least the interest in what Council and Commissions are doing. Participation is up again with the appointment of the Food Advisory Council. The interest in the Update of the General Plan seems quite heartening. *Core Belief: Inclusiveness and participation are healthy goals for our future.*

I remember when I first moved to Town, the Yountville Sun hadn't been around for long either. I had not been here long before the Out and About Column under Lois Riker wrote in it one day, "Marita Dorenbecher, you should play Bocce!" I was so glad I took that advice and showed up. I then realized how

important communication is in Town. Now I look daily at Nextdoor, at our Town Website, and have checked out most of the ways we communicate in Town. I would like to see us promote even more communication with residents and businesses. *Core Belief: Communication is a healthy goal.*

As our business landscape has changed, with several chefs owning more than one restaurant in Town, retail becoming more centralized in V Marketplace, and luxury hotels becoming the norm, the Town has become financially stable and able to put aside reserves to take us through tough times we may encounter. With that success, I also feel challenged to find the balance between the businesses and the residents. I would like to see a “Golden Ticket” (much like the Park and Rec Department has for classes, etc.) developed through our chamber so that residents also benefit from the successful businesses with “special” treatment or special “days,” ala the French Laundry’s lottery day for residents. I believe sharing the opportunities to enjoy the food and wine that has made us famous would be a good tool for community building balance and an appreciation for and identification WITH the businesses. Some of the Tasting Rooms do provide a local’s discount. It would go a long way, I believe, for the restaurants to offer something special, too. *Core Belief: Balance between the residents and the businesses in town is a healthy goal for our future.*

I am blessed to live within 25 steps of Vineyard Park! I really love the parks and walking paths in our Town and am very happy with enhancements and accessibility, a priority in Town. I hope to see Music in the Veterans Park Amphitheatre become a regular occurrence. I also really like the Art Walk and the work that the Arts Commission has done. As a matter of fact, I believe that the Park and Rec Department and Commission and the Arts Commission are key to the health and well-being of our Town. The Library, too, has a special place in the hearts of residents. I am happy that the Arts Commission addresses the literary arts interests through Yountville Reads and other programs, even poetry readings. *Core Belief: Parks and the arts area healthy values for our town.*

Entering budget season, I am keenly aware that we are in a healthy financial position in Town. I credit Town Manager and staff, as well as the Council for looking very carefully at fiscal strengths and planning for the future. *Core Belief: Prudent fiscal guidance is important.*

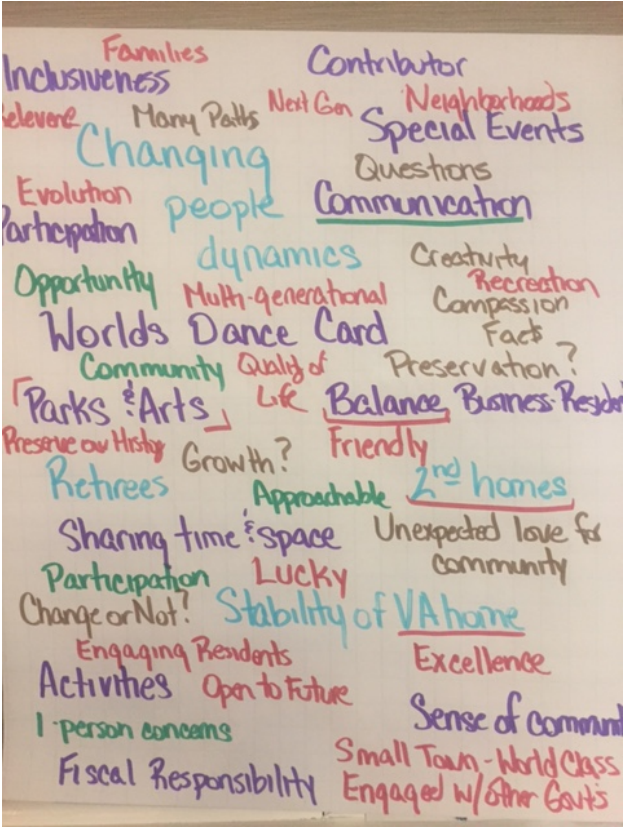
I personally enjoy the interaction I have on the Boards and Committees on which I serve. I enjoy learning about how other jurisdictions face challenges and I believe it is beneficial to our Town to interact with the County and Cities in Napa County and across the state to learn best practices. *Core Value: Being a contributing partner in the larger community is a healthy value for me.*

**Kerri Dorman** – I’ve always been curious, wondered what if, how can we do something, sponge for information, I have a lot of questions, and I believe others have similar questions; do I want the Town to keep growing? How can we creatively define growth and preserve resources and character? How do I know which parts need improving or to stay the same? How do we get residents invested in implementing change? How can we make decisions that honor the opinions of our residents? Creativity, compassion, and facts all play a part in defining the path forward; it is community in action that accomplishes more than any one individual.

**Jeffrey Durham** – I believe all politics are local; huge opportunity with everyone that is elected, works here, business owner, to participate and make a difference; communication is vital for our community; through office hours and approachability, we create an opportunity for businesses and community members to engage; we have 1% concerns; we are very fortunate; we can be appreciative of that; I believe in the community as a whole.

**Mayor John Dunbar** – We fell in love with the Town because we immediately engaged with people just walking down the street; community is about the people who live here; what really makes it the most amazing place to live is the people and that engagement; we are in one of the most unique communities anywhere because we have that small town feel while being a world class destination; this is also a challenge for the Council to balance the priorities; evolution – this town has evolved over 50+ years and I hope it continues to evolve; that keeps energy here; other communities have stagnated and struggled and lost the human element of it all, which we embrace; multigenerational components; different types of neighborhoods; challenge to bring in new families and help with next generation; high priority to continue to deliver high quality, excellent services; all employees act like they live here, even if they don't; it's important that we preserve our history and be openminded about our future; how can technology enhance our lives here; continue to provide great recreational opportunities; enjoy interaction with each other; we are lucky to live here; preserve our relationship with the Veterans Home – we can be a strong partner with them as they evolve; we need to be engaged at all levels of government; we can't wait for things to happen to us; help define the future; there is nothing broken here, but that doesn't mean there aren't things to do; need to stay relevant to economic development and balance the trends in our neighborhoods (short term rentals, second home ownership, etc.); how do we evolve as a community and prepare for the next generation?

The following image depicts some of the key words and themes of the statements.



## Sharing a Common History

The participants worked in small groups to identify the people, events, and actions that have defined each period in Yountville. Following the exercise, the group was asked to name each of the periods.

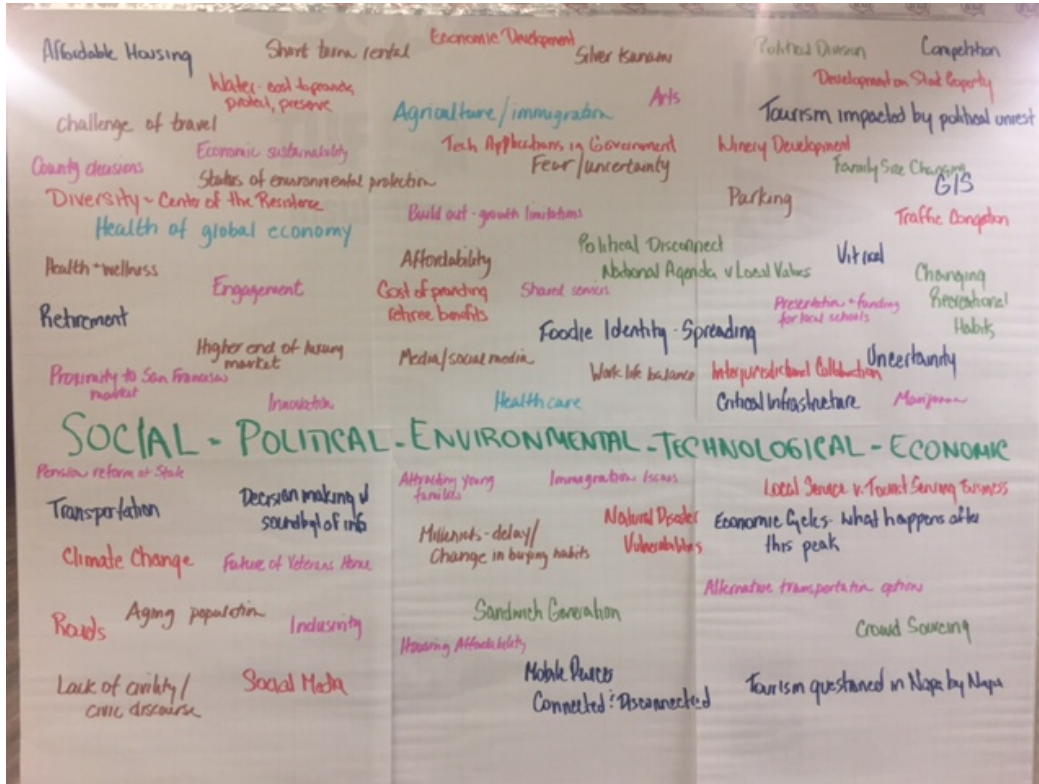
	<b>Pre-1977 Foundation</b>	<b>1977 to 1986 Building &amp; Improvement</b>	<b>1987 to 1996 Embracing Tourism</b>	<b>1997 to 2006 Culinary Destination</b>	<b>2007 to 2016 Refinement and Transformation</b>
<b>People</b>	<ul style="list-style-type: none"> <li>• Groezingers</li> <li>• Don and Salley Schmidt</li> <li>• Eagan Family</li> <li>• Virginia Crow</li> <li>• Bud and Barbara Dulinsky</li> <li>• Halpern walked to Yountville</li> <li>• Lou Jefferson</li> <li>• George Yount</li> <li>• Bardessono's</li> <li>• Ella Thurman Gates</li> <li>• Ray and Barbara Monte</li> <li>• Solis Family</li> </ul>	<ul style="list-style-type: none"> <li>• Steve Bardessono on Town Council</li> <li>• Schmitt</li> <li>• Rockwell</li> <li>• Casandra (diner)</li> <li>• Vintage estate group – Tim Eagan</li> <li>• Housley family</li> </ul>	<ul style="list-style-type: none"> <li>• Carlee Leftwich</li> <li>• Thomas Keller moves to Yountville</li> </ul>	<ul style="list-style-type: none"> <li>• Philippe Jeanty</li> <li>• Bob Hurley</li> <li>• Thomas Keller</li> <li>• Richard Reddington</li> </ul>	<ul style="list-style-type: none"> <li>• Steve Rogers comes to our neighborhood</li> <li>• Michael Chiarello</li> <li>• Thomas Keller</li> </ul>
<b>Events</b>	<ul style="list-style-type: none"> <li>• Vintage 1870 – tourist attraction</li> <li>• Relocation of Hwy 29 bypass – Washington Street</li> <li>• 40 taxi cabs</li> <li>• 14 bars</li> <li>• 200 garages for Vets</li> <li>• Liquor banned 1.5 miles around Vet's Home</li> <li>• Lots of bars and taxi-cabs – Negative perception of Yountville</li> <li>• Town incorporation</li> <li>• First town council</li> <li>• Original general plan</li> </ul>	<ul style="list-style-type: none"> <li>• Napa Valley Lodge</li> <li>• Flood of 1986</li> <li>• Vintage Inn</li> <li>• Maison Fleurie reopens</li> <li>• Recycled water</li> <li>• Domaine Chandon opens restaurant</li> </ul>	<ul style="list-style-type: none"> <li>• Propane tank explosion</li> <li>• Flood of 1994-1995</li> <li>• Fire station</li> <li>• Thomas Keller – French Laundry</li> <li>• Parking, bike riders not stopping, speeding</li> <li>• Villagio, Whistle Stop, Yountville Bar and Grill</li> </ul>	<ul style="list-style-type: none"> <li>• 2000 earthquake</li> <li>• Villagio built</li> <li>• Keller won 3 Michelin starts</li> <li>• French Laundry names best restaurant</li> <li>• Yountville restaurants helped establish farm to table concept</li> <li>• Bouchon, Bouchon Bakery, Ad Hoc</li> </ul>	<ul style="list-style-type: none"> <li>• 2014 earthquake</li> <li>• Town Hall historic landmark</li> <li>• Art walk</li> <li>• Mural finalized</li> <li>• 50<sup>th</sup> anniversary of the Town</li> <li>• Bardessono Inn and Spa</li> <li>• Fire above VA home</li> <li>• Yountville Mile</li> <li>• Renovation of Yountville Park</li> </ul>

	<b>Pre-1977 Foundation</b>	<b>1977 to 1986 Building &amp; Improvement</b>	<b>1987 to 1996 Embracing Tourism</b>	<b>1997 to 2006 Culinary Destination</b>	<b>2007 to 2016 Refinement and Transformation</b>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Opening of Veterans Home</li> <li>• Ag Preserve created</li> <li>• Incorporation for streets and wastewater</li> <li>• Contract for law enforcement services</li> <li>• General plan includes discussion of Wine/Ag impacts on town</li> <li>• Volunteer fire department</li> </ul>	<ul style="list-style-type: none"> <li>• City to Town</li> <li>• Half of land in Town was vineyard, orchard or undeveloped – push to restrict commercial uses</li> </ul>	<ul style="list-style-type: none"> <li>• Water moratorium</li> <li>• Shared services model with County, Veterans Home, and Town to fund fire station</li> </ul>	<ul style="list-style-type: none"> <li>• Consolidated elections</li> <li>• Stand-alone elections</li> <li>• Flood wall completed</li> <li>• Reconstruction of the Y</li> <li>• Washington Park sub division</li> </ul>	<ul style="list-style-type: none"> <li>• Community Center opened</li> <li>• Seismic retrofit of Town Hall</li> <li>• Yountville Arts created</li> <li>• Yountville Arts becomes a commission</li> <li>• Chaos Pamplona</li> <li>• Saving Y.E.S – Yountville school foundation</li> <li>• Change from Town Administrator to Manager government</li> <li>• Commitment to affordable housing</li> <li>• Highest rated roads in Napa County</li> <li>• Equal rights resolution</li> <li>• Unintended consequence of County ag/winery definition ordinance results in boom for tasting rooms</li> </ul>



## What do we know to be true today?

Next, the group brainstormed global economic, technological, environmental, political, and social trends. The group also brainstormed the specific Town trends that are having/will have an impact on Yountville.



Next, the group engaged in a conversation about the Town’s Strengths, Weaknesses, Opportunities, and Challenges/Threats.

Strengths	Weaknesses	Opportunities	Challenges/Threats
<ul style="list-style-type: none"> <li>• Fiscally sound</li> <li>• Scenic beauty</li> <li>• World class destination</li> <li>• Stable council</li> <li>• Dedicated staff</li> <li>• Engaged with the community</li> <li>• Have residents with longevity, chronologically – a lot of perspectives, history</li> <li>• Value diversity</li> <li>• Veterans Home</li> <li>• Culinary scene</li> <li>• Parks programming</li> <li>• Quality infrastructure</li> <li>• Supportive residents, staff, Council, businesses</li> <li>• Good customer service</li> <li>• Transparent</li> <li>• Infectious community spirit; strong sense of self</li> <li>• High amount of engaged residents</li> <li>• Delivery on quality</li> <li>• Safe Town</li> <li>• Forward thinking</li> <li>• Luxury market – not affected by economic downturn</li> <li>• Scalability and approachable</li> </ul>	<ul style="list-style-type: none"> <li>• Significantly reliant on tourism</li> <li>• Built out environment</li> <li>• Skewed demographic – threatens vitality of local school</li> <li>• One dimensional visitor experience – food, wine, art</li> <li>• Physical size of the community</li> <li>• Housing is not affordable</li> <li>• High percentage of second home owners</li> <li>• Less full-time residents to build legacy</li> <li>• Property tax does not pay public safety cost</li> <li>• 1/3 of our population live in a State facility the Town does not control</li> <li>• No control over State use of their property</li> <li>• Contracts for water services</li> <li>• Uncertainty of data based decision making</li> <li>• Traffic and parking</li> <li>• Lean organization</li> <li>• Lack of capacity to meet increased service demands</li> </ul>	<ul style="list-style-type: none"> <li>• Fiscal stability allow us to deal with some external threats</li> <li>• New ways to engage community</li> <li>• Technology</li> <li>• Changing dynamics of millennial expectations</li> <li>• Workforce housing</li> <li>• New ways to deliver services through technology innovations</li> <li>• Measure T – Transportation funding</li> <li>• Partnership or collaboration with other communities in the Valley</li> <li>• Millennial tourist</li> <li>• Completion of General Plan Update – Envision Yountville</li> <li>• Luxury tourism market</li> <li>• Expand library hours</li> <li>• Small enough to encourage resident participation</li> <li>• New hotel property ownership</li> </ul>	<ul style="list-style-type: none"> <li>• Impending retirements of Town staff/succession planning</li> <li>• Immigration policy</li> <li>• Long term fiscal uncertainty for built out community</li> <li>• Sustainable workforce for local businesses</li> <li>• Lack of affordable housing</li> <li>• Small agency – overwhelming to respond to regulatory environment</li> <li>• Evolving civic engagement processes</li> <li>• Preservation and maintenance of infrastructure</li> <li>• Long term viability of YES</li> <li>• Size limits ability to absorb impact of changes</li> <li>• Transient millennial workforce</li> <li>• Changing nature of PERS – hard to hire contractors</li> <li>• PERS is not a friend of local government</li> <li>• Maintaining a design aesthetic – protect community character</li> <li>• Natural disasters</li> </ul>

## Defining Our Legacy

At the conclusion of Day One, the group was asked to think about the next decade in the Town of Yountville and write a headline they would like to see in the future.

- Streamlined and planning
- Sustained community and economic health
- Innovation and leadership
- Planned, thoughtful, and reinvented
- Forward thinking
- Good stewards
- Thriving and engaged
- Enhancement and refinement
- Keep the good, seeking the better
- Exceptional place
- Maintain community spirit
- Alive and well
- Maintaining our heart
- Aged to perfection
- Bucket list destination

## **Day Two**

At the start of Day Two, the group was asked to share one word to describe how they were feeling today:

- Enthusiastic x3
- Engagement x2
- Excited x2
- Optimistic
- Excited
- Collaborative
- Encouraged by yesterday's progress
- Encouraged
- Informed
- Open minded
- Curious
- Team

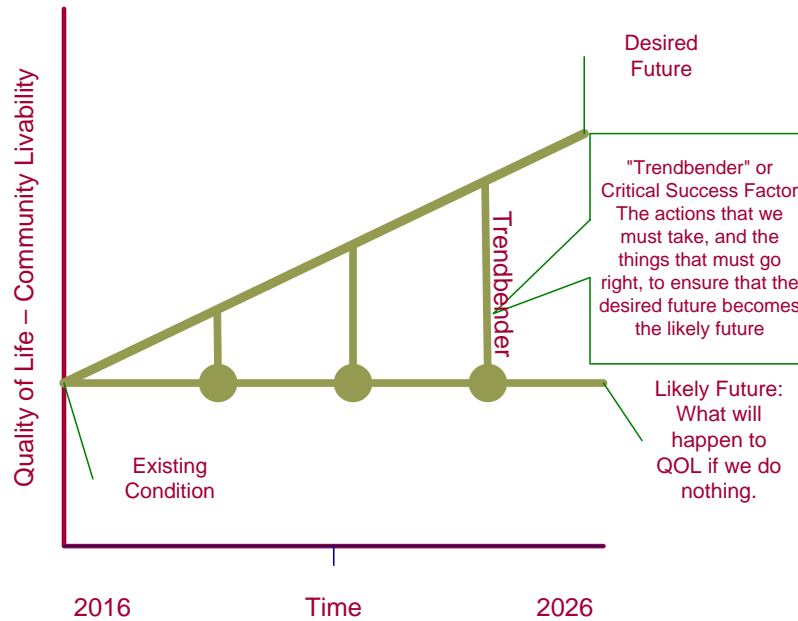
## **Vision and Critical Success Factors**

The facilitator discussed the process to develop a vision and critical success factors. A vision statement is an aspirational statement that characterizes what you hope to be known for in the future. Critical success factors are those things that must go well in order to achieve the vision. Several draft vision statements were discussed.

Following discussion, a small group was tasked with refining the vision. The Council agreed on the following vision statement:

Yountville embraces its small town charm while welcoming the world to enjoy life here in the heart of Napa Valley.

A “trendbender” diagram was presented which illustrates the concept that critical success factors or goals influence the development of a community’s quality of life. The group was asked to rate the current quality of life in relation to the draft vision in Yountville on a scale of 0% – 100%. The trendbender diagram is reproduced below for reference.



The group was then asked to imagine that the Town did not plan for the future or think about where it wanted to go, and to rank where the Town's quality of life would be after ten years. The group was then asked to think about what must go well in order for the vision of Yountville to be realized. The group then condensed these suggestions into broad critical success factors for the Town.

These critical success factors included:

#### Quality Amenities

- Walkability
- Recreational activities
- Park enhancements
- Community activities

#### Responsible Fiscal Policy

- Continue and/or increase revenue sufficient to support services
- Money
- Economic diversity

#### Exceptional Town Services & Staff

- Skilled professionals
- Maintain and recruit engaged and excellent staff
- Water infrastructure
- Continue preventive infrastructure type projects

#### Visionary Leadership

- Thoughtful leadership
- Forward thinking
- Proactive decision making

- Collaboration
- Communicate
- Talk to in a meaningful way – residents, businesses, owners, tourists
- Historical perspective

#### **Premier Destination**

- Top tier businesses
- Destination
- Tourism
- Arts expansion
- Art and culture
- Maintain beauty of local environment
- Historic preservation tourism and awareness

#### **Engaged Residents**

- Engaged community
- Continue and enhance resident services and engagement

### **What Do We Mean By...**

Next, directional statements were developed and refined for each of the critical success factors.

#### **Exceptional Town Services and Staff**

The Town supports its talented staff who deliver high quality municipal programs and services while maintaining public infrastructure for the benefit of the community.

#### **Engaged Residents**

The Town embraces our residents' commitment to community as seen through volunteerism, civic engagement and public participation that enhances the quality of life in Yountville.

#### **Visionary Leadership**

The Town's leadership maintains an open-minded, forward-thinking decision-making process. We value engagement and participation from all members of the community as we work together to create policies and plan for the future.

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The Town maintains its fiscal health through policies designed to maximize economic opportunities, manage expenses, and ensure prudent reserves.

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The Town values its rich history, natural environment, culinary excellence, arts and culture, and distinguished businesses that make our home a premier destination.

#### **Quality Amenities**

Enhancing the livability of Yountville by providing well-maintained parks, trails, and facilities, and quality programs and events which contribute to our unique sense of place.

## **Closing/Next Steps**

With the elements of the strategic plan framework drafted, the group discussed next steps. A series of community meetings will be held in April to solicit input from the community on the draft framework. The input received will be shared with the Council so that the group can make any necessary refinements to the strategic plan.

At the close of the retreat, the facilitator asked participants to share a parting thought.

- Thank you; has been a great event
- Thank you
- Great day
- Surprised got it all down
- Enthusiastic
- Nice process
- Happy we are all behind this
- Go team
- This will only have value if we need to live it