

**T O W N O F Y O U N T V I L L E**  
**STRATEGIC PLANNING WORKSHOP**

**8 June 2021 • via Zoom**

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**MISSION STATEMENT**

The mission of the Town of Yountville is to provide exceptional public services in a fiscally responsible manner to meet and exceed the needs of our residents, visitors, and business community, while maintaining the unique quality and character that is Yountville.

**VISION STATEMENT**

The Town of Yountville City Council’s vision is to provide leadership, inspire community spirit, maintain fiscal health and offer a high level of service to the residents, businesses and visitors to Yountville.

**ORGANIZATIONAL VALUES**

Hard working  
Ethical  
Adaptable  
Respectful  
Teamwork

**CRITICAL SUCCESS FACTORS**

Exceptional Town Services and Staff  
Engaged Residents  
Responsible Fiscal Policy  
Quality of Life  
Premier Destination  
Visionary Leadership

**THREE-YEAR GOALS**

2021-2024 \* not in priority order

- ▶  Develop and execute succession planning for Council, staff, and boards and commissions
- ▶ Attract, develop and retain highly qualified staff
- ▶ Develop the disposition and future uses of the YES site
- ▶ Strengthen the relationship with CalVet

## **NEXT STEPS/FOLLOW-UP PROCESS**

<b>WHEN</b>	<b>WHO</b>	<b>WHAT</b>
Tuesday, June 8	Town Manager	Distribute the retreat record to all invitees
Within 48 hours of receipt	All recipients	Read the retreat record.
June 15, 2021	Town Manager – lead and Management Team	Review the “Current Internal Weaknesses/Challenges” list for possible action items.
June 18, 2021	Department Heads and Managers	Share and discuss the Strategic Plan with staff face-to-face.
By June 18, 2021	Town Clerk	Post the Mission, Vision, Organizational Values, Critical Success Factors, Three-Year Goals and Strengths/ Accomplishments on the town's website.
Monthly	Town Manager - lead and Department Heads	Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.
Monthly	Town Manager - lead and Department Heads	Prepare and distribute the updated Strategic Plan Monitoring Matrix
December 7, 2021	Town Manager	Present a Six-Month Update on the Strategic Plan to the Town Council.

## **S.W.O.T. ANALYSIS**

Strengths – Weaknesses - Opportunities - Threats

### **STRENGTHS AND ACCOMPLISHMENTS OF THE TOWN OF YOUNTVILLE IN THE PAST YEAR**

#### **Brainstormed perceptions from all participants:**

- Pandemic and wildfires response and recovery
- Economic support of local businesses
- Smart fiscal management insulating pandemic and wildfire impacts
- Uninterrupted service despite changing work conditions
- Extraordinary Town Manager with excellent leadership
- Forward thinking fiscal policies and financial management
- Incredible Customer Service from all levels of all departments
- Having the ability to weather extended emergencies like the pandemic and also the short-term events such as fires, active shooters and power outages
- Adapt to a challenging environment due to COVID19
- Maintain high level of work despite working remotely
- Communicating effectively through electronic means
- Strong leadership from Town Manager and department heads
- Continuation of services during pandemic and significant revenue loss
- Capable and dedicated management team
- Completion of CIP projects, Oak Circle paving, Oak Circle path, Washington Park Emergency Water Line Replacement and paving this week.
- Town Employees Recognized by Chamber as Partner of the Year
- Residents that are Empathetic, Astute, and Resilient. – Active, good listeners.
- Dedicated and passionate town staff and first responders protecting our community.
- Insightful and prescient fiscal planning and execution. Exceptional budget preparation.
- Resilient and adaptable business community.
- We survived a lot of changes migrating to Zoom.
- Handled the fiscal challenges well.
- Maintained excellent service for residents and businesses
- Maintained parks well and finished Oak Circle Path
- Financial Reserves
- Town Manager and Quality Dedicated Employees
- Partnership with Chamber of Commerce
- Business Economic Recovery Plan
- Walking Town - completion of bridge over Hopper Creek
- Kept the Town functioning at a high-level while being flexible with individual needs.
- Experienced Management Team – Ranging from 7 to 16 Years Working Together
- Team worked well to adapt to COVID-19, implemented new technology for remote meetings and for signing paperwork electronically.
- Strong financial reserves to help with a significant loss of TOT and Sales Tax revenue.
- Quickly establishing programs to support business during COVID
- Implementing options for communications and submittals
- Strong teamwork mindset
- Ability not just to adapt, but excel
- Providing the community with up-to-date information regarding CV-19
- Adapting quickly to working from home, departments still performed work efficiently
- Departments ensuring to keep expenses down and being willing to pass on bonuses/raises
- Working together as a team and putting the Town's needs first instead of individuals or individual departments

- Adapting to changes due to COVID
- No Layoffs despite the economic impacts of COVID
- Long tenured staff throughout the Organization.
- Completed Oak Circle Bridge and Path. Completing the North-South path system.
- Helped local businesses deal with the downturn caused by the pandemic.
- Continued to provide essential services during a challenging time.
- TOY staff was adaptable and resilient in the face of obstacles and uncertainty.
- Effectively shifting to accommodate COVID restrictions
- Maintaining a high level of services through the COVID stay-at-home order
- Informative up to date communication with the community.
- Internal & External Communication
- Teamwork to continue providing services and protect each other from COVID
- Pivoting into remote work & remote/online programs& services
- Supporting co-workers and the community emotionally, mentally & physically
- Managed to keep the ship sailing through COVID-19
- Very difficult year to assess because of COVID – maintaining *status quo* was a feat in itself – the fact that we added/morphed services to fill voids is fantastic
- Staff kept us, and our residents, up and running during COVID (thank you!)
- Council continued work via Zoom and was open to assisting residents and businesses
- Adapting to the changing conditions of a Global Pandemic
- Maintaining stable service levels through the year with illness, childcare issues, closures etc.
- Supporting our Community (Residents and Businesses) with accurate and timely information and resources in relation to the COVID-19 Pandemic
- Encouraging and supporting strong partnerships with other agencies, businesses etc.
- There were other strengths/accomplishments (e.g., built neighborhoods with improved paving), but COVID dominated everything

## **CURRENT INTERNAL WEAKNESSES/CHALLENGES OF THE TOWN OF YOUNTVILLE**

### **Brainstormed perceptions from all participants:**

- Conflicting Council perspectives on direction and priorities
- Town staff senior management transitions
- Overreaction to minority public viewpoints
- Poor communication with CalVet
- Challenge of succession planning for key management personnel reaching retirement age
- Challenge of maintaining high levels of service while maintaining lean workforce
- Challenge of managing the fate of the Elementary School site
- Managing the vocal minority trying to influence the use of public parks
- Conflicts regarding Vice Mayor selection
- Having a small staff to handle multiple projects
- No internal IT expertise
- Need for succession planning – Council and Management Team Transitions
- Financial Recovery from Pandemic
- Water Fund challenges
- Overall challenging relationship with CDVA, local home, water, housing
- Communication and Collaboration with Veterans Home members and CDVA.
- Economic Sustainability and Development – Understanding future economic trends.
- Emergency Preparedness – Community Education and Training.
- Understanding and balancing wants vs needs.
- Changes will have to be made to reopen Town Hall and other facilities to public
- Weakness in TOT and sales Tax have to be carefully handled
- Preparing for election year ahead.

- Changes in staff – for example loss of Town Clerk of 15 years.
- Housing opportunities
- Rebuilding local economy
- YES
- Potential retirement of experienced Management Team in next 1 to 3 years. Significant loss of institutional knowledge.
- 2022 Election and possible change in Council leadership.
- Being proactive with Succession Planning.
- Not wanting to hire new FTE's.
- Small staff
- Heavy workload
- Fast pace
- Ongoing remote work from home
- Many of the senior staff are approaching retirement window
- Not enough succession planning for retirement
- Too much pandering to a very small group of vocal residents
- Outgrowing facilities to adequately provide for staff space.
- Long lead time for staffing turnover.
- Sometimes unpredictable workloads with no elasticity in staffing.
- Working in close quarters while on zoom / conference calls has presented issues.
- Experiencing staff turnover can be challenging
- Concern about COVID exposure related to reopening
- Community involvement in public meetings is challenging when using Zoom
- Staff that are opposed to vaccination
- Small staff, lots of projects
- Outgrowing Town Hall, lack of privacy, lack of sound proof work space in certain areas of Town Hall (Public Works and Planning work area)
- A year without face-to-face meetings and having only one meeting per month has challenged Council discussion and dynamics
- Need to be more forward (or perhaps broad? creative? all of these and more?) in our thinking and planning – easy to say, difficult to define and do – ex: need to watch the trap of “We’re Yountville, so we’ll be okay” mindset – ex: new ways to engage more of our community in important issues
- Monoculture and continuation of long term issues, including apparent legal inability to change ordinances re use permits, parking, etc.
- A disconnect between the Council and the Boards/Commissions at times. Need space for them to discuss issues together.
- Small organization and balancing public outreach in all areas (Paper, Website, Social Media, Emergency) can be challenging without a designated person. Could be a full-time job.
- Perceived expectation to react immediately to all complaints and concerns.
- Retirements necessitating succession planning are happening earlier than expected – we have 3 current announcements
- Challenge of recruiting and onboarding 6 positions at one time
- Uncertain at this time as to whether the town will consider allowing remote work to attract new staff

**Other Internal Factors - not negative or positive – just existing factors**

- Impact(s) of significant tenures of Staff (especially Management Team) and Council Members

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON THE TOWN OF YOUNTVILLE IN THE NEXT THREE YEARS**

### **Brainstormed perceptions from all participants:**

- Resurgence of tourism
- Expanded disaster preparedness
- Affordable housing development
- Town well positioned to advance climate initiatives
- Social Pandemic recovery and the return of visitors to the town
- Pro-active countywide awareness of managing seasonal fire risk
- The joining of PARSAC and REMIF into one
- Greater awakening of the public consciousness about social justice and equality for all
- Acquired newer technology to provide services
- Residents are adapting to using technology to receive information
- Yountville is seen as a great destination which helps our economic intake
- Additional affordable housing – YES site, Veterans Home
- Tourism recovery, financial recovery
- Capable staff
- Strong financial reserves and related funds such as OPEB, Pension, 50, 81, and 82
- Healthy Community. Residents that can meet, dialog, and celebrate life and community.
- Pandemic Relief – Economic Revitalization - Public's willingness to travel and visit the Napa Valley and Yountville.
- Housing Element Update – opportunity to promote a sustainable, small town, residential community.
- The demand for wine country experiences has been pent up for 14 months.
- Finding and hiring workers at businesses in Town may be challenging.
- The desire to travel in Bay Area/California will lead to more visitors.
- Work in most of the park has been completed.
- Economic Recovery
- Change to County BOS
- Climate change policies and SB 1383 mandates
- Vaccinations to improve health, which reopens economy.
- Being able to fully utilize our current technology in new ways.
- Sale of the Yountville Elementary School Site and future Master Plan.
- Return of Tourism and TOT.
- Wine industry growth and dominion (domination ?)
- Overall desirability as a tourist destination
- Increased use of technology
- Business ability to adapt
- Well positioned in location and brand management to take advantage of a vibrant economy
- Technology investment will continue to payoff in an efficient and effective operations technology allows for leveraging by our lean operation
- COVID has increased the year-round living option for many who previously only considered Yountville for part time /vacation living.
- The good will this staff has built with residents, businesses, and visitors will continue to pay dividends both large and small.
- Factors like remote working mean many younger people are moving to smaller towns rather than cities.
- Investment in infrastructure could result in better connectivity for Yountville (Wine Train as commuter train); this would also decrease parking demand.
- Pent up travel and restaurant demand could mean a boom for local businesses.
- As restrictions are lifted the town should see revenues returning to normal
- Return of tourism
- Ability to resume community activities, programs & events
- Ability to have in person meetings

- Change in elected officials
- Hopeful to see tourism pick back up
- Town wide Wi-Fi
- Revenge (because of COVID) travel (but short term) - pent up demand for travel
- Possibility of local Supervisor
- Fortunate to have residents and businesses invested in success and livability of Town
- Development of school site
- Change in Town Council/Mayor seats
- Directive on adding additional affordable/workforce housing (In Town and on State Property)
- New federal and state support with funding and resources for the town
- Potential infrastructure funding

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON THE TOWN OF YOUNTVILLE IN THE NEXT THREE YEARS**

### **Brainstormed perceptions from all participants:**

- Wildfires, power shutoffs or other catastrophic events
- Dry and severe weather conditions
- Water scarcity
- Limited experienced candidates for Town Council 2022 election
- Environmental factors i.e.: Drought, Fires, Floods
- Economic challenges of the rising housing market and lack of diverse citizenry
- The old & older demographic aging out and who will replace them
- The decline of retail & service diversity within the business district
- Economic impact of COVID could still happen
- Rising move to subscription-based technology could become more expensive
- The state sees the Yountville as a small town with less expenses and we receive less economic support compared to bigger cities
- Revenues hitting a plateau due to build out, no new commercial activity.
- Next 5 year utility rate setting process – community acceptance?
- V Marketplace retail vacancies due to ownership
- Uncertainty with potential significant changes with Mayor/Council in 2022
- Climate Change Impacts – Drought and wildfire threat to residents, agriculture, and the environment.
- Transportation issues - Traffic congestion on Highway 29
- The possibility of a fire is a distinct threat.
- The drought will not get any better.
- Understanding the long term consequences of the worldwide shut down
- Unrest due to racial inequality and the rise of domestic terrorism
- Fires, Drought, Earthquakes, Floods
- Covid
- Loss of full-time residents
- Outside Ownership of the Town's Hotels and V-Marketplace.
- State Mandates for a variety of things (i.e. ADUs, parking requirements) and no longer having local control.
- Wildfires, PSPS, high wind and temperatures.
- 2022 Presidential Election
- Wine industry lack of diversity
- (Some, not all) business' lack of concern for residents
- Residents entitled attitudes.
- California state mandates
- Drought affecting water costs
- Fires affecting TOT revenue
- The Council will change and what that means remains to be seen.

- Affordable housing will continue to be a challenge unless the school property and the Vets Home allow for additional homes/apartments.
- Increase in visitors will continue to put pressure on our town infrastructure and residents. While we gain many positives from this not all residents appreciate that fact.
- Built out environment will put tremendous pressure on home prices and other available building sites that may not have been previously considered
- Climate change means more fires, which may cause more people to move out of fire-prone areas like Napa Valley. Drought could also negatively affect the winemaking industry.
- Increasing levels of income disparity mean Yountville will become more monolithic in the type of people that live here.
- As an already largely retirement-age population continues to age, TOY staff and businesses will have to accommodate the changing needs of residents.
- Environmental factors i.e.: Drought, Fires, Floods
- Economic challenges of the rising housing market and lack of diverse citizenry
- The old & older demographic aging out and who will replace them
- The decline of retail & service diversity within the business district.
- Certain neighborhoods/residents feel that their needs are the most important, at times taking away from what is the best for the community as a whole.
- The town residents' resistance to change.
- Possibility of pandemic relapse
- Change in elected officials
- Drought conditions
- COVID-19 aftermath
- Wildfires and drought – impact on farming, tourism and population
- Consumer fear of travel, reluctance of businesses/business travel
- Housing availability and cost (although we're working on this) – includes related land availability and workforce issues
- Lack of meaningful, workable, creative economic development direction away from monoculture (ex: broad-based and independent Yountville-centric Economic Development Task Force)
- Active State government attempts to restrict local control (ex: housing density, parking)
- Aging demographic
- Second Homeowners
- Continued Wildfire risks and drought
- Change in Town Council/Mayor seats
- Continued unknowns with Pandemic
- Retirements
- Increased competition throughout the valley
- Transition of new leadership in staff
- Affordable housing issues; some staff will have to commute into town for their jobs; impacts climate change
- May not have a large, high quality applicant pool available for our town positions
- Drought and lack of water resources
- Lack of affordable housing
- Schools closing as cost of living for families is high
- Personalization of politics and policies and general polarization
- Integrating the soon-to-be built skilled nursing facility at the Veterans Home
- Impact of construction of the building of the skilled nursing facility

**Other External Factors - not negative or positive – just existing factors**

- We have an older demographic, we are largely built out in classic residential areas
- Vets Home: large percentage of our residents and large employer – ideal to work toward more/improved communication and shared opportunities
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## **IDENTIFY THREE-YEAR GOALS**

**Brainstormed list of possible goals from which the Three-Year Goals for 2021-2024 were developed**

- Develop and execute succession plans for supervisor management, and director positions
- Determine funding level goals for long term liability ie: OPEB, Pension Costs, Internal Repair and Replacement Funds.
- Increase community involvement
- Establish a program for remote work
- Prepare and train all staff, Council, Board and Commissioners for technology as well as community.
- Re-Establish staff connection opportunities. Employee Activities and Group trainings.
- Continue to upgrade technology to adapt to increased needs.
- Evaluate and insure sufficient funding for Utility Enterprise Funds and Replacement Capital
- Create Independent Economic Development Committee
- Attract, Retain and Develop New Employees
- Prioritize and Improve relationship with VH/CDVA
- Attract, develop and retain highly qualified staff (need to seriously consider remote work) –
- Organize and implement Emergency Preparedness and develop teams in each neighborhood
- Build relationships at Vets Home and YES to support Affordable Housing.
- Increase affordable housing opportunities.
- Institute more active and ongoing succession planning for both council and staff.
- Integrate upcoming construction and development of skilled nursing facility and Vets campus housing, both logistically and in terms of human impacts.
- Develop disposition and future uses on YES site.
- Continue developing climate action initiatives in town and in partnership with neighboring jurisdictions.
- Develop a strategy for allocating federal and state relief funds.

# **STRATEGIC PLAN ELEMENTS**

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## **“SWOT” ANALYSIS**

Assess the organization's:

- Internal **S**trengths      - Internal **W**eaknesses
- External **O**pportunities      - External **T**hreats

## **MISSION/PURPOSE STATEMENT**

States WHY the organization exists and WHOM it serves

## **VISION STATEMENT**

A vivid, descriptive image of the future—what the organization will BECOME

## **CORE VALUES**

What the organization values, recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

## **THREE YEAR GOALS**

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) – usually limited to 4 or 5 key areas

## **KEY PERFORMANCE MEASURES**

What success will look like upon achievement of the goal

## **SIX MONTH STRATEGIC OBJECTIVES**

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

## **FOLLOW-UP PROCESS**

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months