

CIT  
SAN JOAQUIN  
COUNTY  
STRATEGIC  
PLAN

A copy of the proposed San Joaquin County Strategic Plan was presented for Council's perusal. San Joaquin County Supervisor George Barber had attended an earlier Informal Informational Meeting of the Council and reviewed the proposed plan. Council was apprised that this process, linking the efforts of representatives of private enterprise with public sector administrators and elected officials, is a proven one and designed to produce several benefits. It will:

- Focus community efforts on the key factors in San Joaquin's future
- Improve communications between the various City and County governments
- Improve communications between the business community and the public sector
- Develop an action plan and implementation process for shaping San Joaquin's future
- Provide a business community voice in the public sector planning process that is as acceptable and objective as possible

As explained in the Project Overview, the strategic planning process was begun in San Joaquin County because of concern over the great amount of change experienced in the county in the past ten years. This change has been brought about by demographic shifts, changing industry and employment patterns and a deterioration in the County's goal of forming a partnership among the cities and unincorporated areas. These and other factors have contributed to a variety of problems such as deteriorating physical infrastructure, loss of businesses and loss of jobs.

The amount of funds requested represents a per capita

Continued August 15, 1984

As explained in the Project Overview, the strategic planning process was begun in San Joaquin County because of concern over the great amount of change experienced in the county in the past ten years. This change has been brought about by demographic shifts, changing industry and employment patterns and a deterioration in the County's goal of forming a partnership among the cities and unincorporated areas. These and other factors have contributed to a variety of problems such as deteriorating physical infrastructure, loss of businesses and jobs and so on.

The amount of funds requested represents a per capita division, with the County being asked to represent the unincorporated areas and each incorporated city for their populations. The City of Tracy has already considered our request and allocated their share of the total budget of \$165,000. In addition to requests of each of the cities and County, the private sector in each city has to provide funding on a similar basis.

No single government could address all the demands for services its constituents might place upon it. Similarly, no plan could address every problem and set forth an implementable solution. It is through strategic planning that efforts are combined, a common view of the future is developed, and implementable solutions are identified.

For these reasons, and with a sincere desire to contribute to the well-being of current and future residents of the city of Lodi and San Joaquin County, the management committee of the San Joaquin County Strategic Plan respectfully request your appropriation of \$10,050.00.

Mr. George A. Chimiklus, Coordinator, addressed the Council regarding the matter, and responded to questions as were posed by the Council.

Following discussion, on motion of Council Member Olson, Reid second, Council appropriated \$10,050.00 for funding of the subject plan, contingent upon the private sectors participation for its projected commitment, and the participation of the other cities in the County.

The motion was carried by the following vote:

Ayes: Council Members - Olson, Pinkerton, Reid,  
and Snider (Mayor)

Noes: Council Members - Hinchman

Absent: Council Members - None

Further, following additional discussion, on motion of Council Member Olson, Reid second, Council authorized the appropriation of these funds (\$10,050.00) when they are ready to be dispursed to be made from the General Fund Operating Reserve. The motion carried by the following vote:

Ayes: Council Members - Olson, Reid and Snider  
(Mayor)

Noes: Council Members - Hinchman, and Pinkerton

Absent: Council Members - None

TIME SCHEDULE OF TASKS, REPORTS AND WORKSHOPS

Task	Time Frame	Report Dates *	Workshop Dates	Name of Workshop
<u>START-UP PHASE</u>				
A. Start-up and Orientation	May 20th - June 7th	May 31st	June 3rd	Orientation
B. Review Existing Data, Synthesize and Fill Data Gaps	June 10th- July 5th	June 28th	July 3rd	Data Synthesis
<u>ECONOMIC AUDIT - PHASE I</u>				
C. Analysis of Local Market Conditions	July 8th - July 19th	July 12th	July 17th July 18th (Policy Group)	Needs
D. Perform System Assessment/ Analyze Competitive Position	July 22nd - August 9th	August 2nd	August 7th August 8th (Policy Group)	Goals
<u>STRATEGY DEVELOPMENT - PHASE II</u>				
E. Establish Development Priorities	August 12th - September 6th	August 30th	September 4th September 5th (Policy Group)	Objectives
F. Evaluate Strategic Alternatives and Expected Outcomes	September 9th - September 27th	September 20th	September 25th September 26th (Policy Workshop)	Options
G. Produce Recommended Action Plan	September 30th - November 1st	October 11th	October 16th	Draft Plan
		November 1st		Final Plan

\* Week Ending

## EXHIBIT A

### Strategy Team Responsibilities

- Approve Work Program
- Schedule Interviews and Task Force Debriefings

- Validate Findings and Review Data Synthesis
- Set Research Agenda

- Identify and Document Needs
- Identify Competitors

- Define Goals
- Focus on Strategy Efforts

- Establish Criteria for Targeting
- Screen for Target Businesses

- Establish Priorities
- Select Strategy Components

- Commit Resources
- Establish Milestones

- Define Organizational Structures and Responsibilities  
(Public Debriefing)

SCHEDULE OF TASKS, REPORTS AND WORKSHOPS

TASK	MAY	JUNE	JULY	AUGUST	SEPTEMBER
START-UP PHASE					
A. Decision-Making Process - Finalize Study Design - Orientation	Report	Workshop June 3rd			
B. Review/Synthesis of Data - Review Existing Data - Task Force Debriefing - Interviews - Business Surveys		Report on Data Synthesis	Workshop to Review Database - July 3rd		
ECONOMIC AUDIT - PHASE I					
C. Analysis of Local Market Conditions - Location factors - Linkage Analysis - "Do-Nothing" Scenario - Needs Workshop			Report,  Workshop July 17th  Policy Group Workshop July 18th		
D. System Assessment - Competitive Position - Barriers/Potentials - Goals Workshop				Report, Workshop August 8th Policy Group Workshop Aug. 9th	
STRATEGY DEVELOPMENT PHASE II					
E. Establish Development Priorities - Market Potentials - Business Targets - Objectives Workshop				Report	Workshop - September 4th Policy Group Workshop September 5th

EXHIBIT B

P. 1

OCTOBER

NOVEMBER


Continued

SCHEDULE OF TASKS, REPORTS AND WORKSHOPS

TASK	MAY	JUNE	JULY	AUGUST
STRATEGY DEVELOPMENT PHASE II (continued)				
F. Evaluate Strategic Alternatives and Expected Outcomes - Resource Analysis - Tools Inventory - Requirements Analysis - Options Workshop				
G. Produce Recommended Action Plan - Draft Report - Implementation Workshop - Submit Final Report				

SEPTEMBER	OCTOBER	NOVEMBER
Report, Workshop Sept. 25th,  Policy Group Workshop Sept. 26th		
	Report - Draft Final Plan,  Workshop Oct. 16th	Final Report