

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 review 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 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

CITY COUNCIL

JOHN R. (Randy) SNIDER, Mayor
DAVID M. HINCHMAN
Mayor Pro Tempore
EVELYN M. OLSON
JAMES W. PINKERTON, Jr.
FRED M. REID

CITY OF LODI

CITY HALL, 221 WEST PINE STREET
POST OFFICE BOX 320
LODI, CALIFORNIA 95241
(209) 334-5634

HENRY A. GLAVES, Jr.
City Manager

ALICE M. REIMCHE
City Clerk

RONALD M. STEIN
City Attorney

September 5, 1984

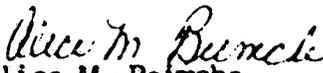
Mr. George A. Chimiklis
Coordinator
San Joaquin County Strategic Plan
2700 Country Club Boulevard
Stockton, CA

Dear Mr. Chimiklis:

This letter will confirm the action taken by the Lodi City Council at its regular meeting of August 15, 1984 whereby the Council appropriated \$10,050.00 from the General Fund Operating Reserve for funding of the San Joaquin County Strategic Plan, contingent upon the private sectors participation for its projected commitment and the participation of other cities in the County.

Should you have any questions regarding the actions taken, please do not hesitate to call this office.

Very truly yours,


Alice M. Reimche
City Clerk

AMR:jj



San Joaquin County Strategic Plan

Strategies For A Successful Tomorrow

Hand (Info Only)
George asked me to sit on this task force. As part of the info I received it showed Lodi as participating to the sum of \$10,050. I don't recall seeing that amount in our budget.

Jack

Management Committee

J. Foster Fluetsch
Chairman

George Barber
Candace Blue
Carl Burton
Robert Cabral
Ron Coale
Edward J. Craig
John E. Cyr

Dana Fagundes
Michael E. Locke
Marcelo A. Lopez
J. A. Loutsenhiser
John R. Lucke
Glenn Page
Gaye Pappis
James Parkinson

Carolyn Russell
George Sangster
Larry Sorini
Wayne Trevena
Sidney Turoff
Phillip B. Wallace

George A. Chimiklis
Coordinator

To: Infrastructure Task Force Participants

From: George Barber
Ron Coale
Task Force Co-Chairs

Dear Participant,

Thank you for your interest in the San Joaquin County Strategic Plan. As you know, we are now at the start of Phase II where we will begin work at the Task Force level. The key objective of your Task Force will be to identify a set of external and internal factors that will have an impact upon San Joaquin County. From this, we will begin to identify goals, objectives and strategies for improving our strengths while mitigating any weaknesses.

As a member of the Infrastructure Task Force your contribution will vitally affect the recommendations and strategies THE STRATEGIC PLAN will produce. The role played by Infrastructure in the San Joaquin County cannot be separated from the resolution of any major problem. Again, your input and ideas are necessary to the success of our mission.

I have enclosed an "information package" that introduces the purpose of the Strategic Plan, the process we will follow and its operations. If you have any further questions about the project, please contact us or our Project Coordinator, George Chimiklis, at 944-5729.

Sincerely,

George Barber
Task Force

RECEIVED

JUL 6 1984



	Public Sector	Private Sector
Stockton	\$ 43,950	\$41,570
Lodi	10,050	9,510
Manteca	7,310	6,915
Tracy	5,420	5,125
Ripon	1,100	1,040
Escalon	890	840
County	31,280	---
	-----	-----
	\$100,000	\$65,000
	*****	*****

Attachment E gives the overall timeframe of the project.

Benefits

The Strategic Plan for San Joaquin County 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 plans and an implementation process for shaping San Joaquin's future.

- . Overall strategic plan. This should be in executive summary format. This will ensure broad communication within both the public and private sectors.
- . Performance monitoring plan to track the progress of implementing the strategic plan.
- . Procedure for updating the Strategic Plan.

Relationship to Other Planning Efforts

A number of important planning processes and economic development efforts are currently underway or being contemplated in San Joaquin County. It is important that this strategic plan process does not duplicate these processes and that the results from the Strategic Plan have an impact upon the County's plans and progress. It is important that representatives from each city, and the unincorporated areas throughout the County have input and involvement in the strategic plan. In order to bring together the efforts of the Strategic Plan and to ensure its success, an active, involved commitment from private and public sector representatives is vital.

Project's Budget, Funding Sources and Schedule

The strategic plan budget is \$165,000. This figure includes the salary of the project coordinator, summer interns, administrative support, overhead and fees for Arthur Andersen & Co.. This budget assumes a generous amount of support from the San Joaquin business community both in terms of time and support services.

Funding for the project is proposed to come from a broad base of the business community as well as the various local governments. Sources of funding is proposed to be allocated by population, across the various areas as follows:



San Joaquin County Strategic Plan

STRATEGIES FOR A SUCCESSFUL TOMORROW

PROJECT OVERVIEW

JULY 1984



San Joaquin County Strategic Plan

Strategies For A Successful Tomorrow

Management Committee

J. Foster Fluetsch
Chairman

George Barber
Candace Blue
Carl Burton
Robert Cabral
Ron Coale
Edward J. Craig
John E. Cyr
Dana Fagundes
Barbara Fass
Michael E. Locke
Marcelo A. Lopez
J.A. Loutzenhiser
John R. Lucke
Glenn Page
Gaye Papais
James Parkinson
Carolyn Russell
George Sangster
Jack Snyder
Larry Sorini
George Tabuchi
Wayne Trevena
Sidney Turoff
Phillip B. Wallace

George A. Chimiklis
Coordinator

Thank you for your interest in the San Joaquin County Strategic Plan. The Plan is being developed by a broad base of individuals from the public and private sectors. The project is being directed by a Management Committee made up of individuals from the business community and from the different cities and county.

What follows is an "information package" which introduces the purpose of the Strategic Plan, the process we will follow and its operation. If you have any further questions about the project, please contact our Project Coordinator, George Chimiklis, at (209) 944-5728.

Sincerely,

The Management Committee of
The San Joaquin County
Strategic Plan

SAN JOAQUIN COUNTY STRATEGIC PLAN

"STRATEGIES FOR A SUCCESSFUL TOMORROW"

PROJECT OVERVIEW

SAN JOAQUIN COUNTY STRATEGIC PLAN

"STRATEGIES FOR A SUCCESSFUL TOMORROW"

Background

Over the past five to ten years San Joaquin County has experienced a great deal of change. 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. There is a concern that the County is fragmented with many business organizations and different points of view.

Out of these concerns and issues came the idea for the development of a strategic plan for San Joaquin County. The plan will look at demographic and social trends as well as economic and fiscal issues. The efforts of this project will represent the ideas of many representatives from city and county government, businesses, organizations and individuals within San Joaquin County.

Methodology

The San Joaquin Strategic Plan is being developed using strategic planning concepts developed by Arthur Andersen & Co. and successfully applied in cities and counties throughout the Nation. The San Joaquin Strategic Plan will be conducted in four distinct phases as illustrated by Attachment A. The identification of each phase and the associated objectives are as follows:

- . **Phase I - Organization and External Scan**

- . To finalize project objectives, scope and work approach.
- . To organize the project so as to facilitate effective group dynamics and decision making. The project team assignments, time-frames and reporting mechanisms must be mutually acceptable to all teams members.
- . To obtain an understanding of the trends which are most likely to impact San Joaquin County in the future.
- . To obtain concurrence on the key external factors and issues to be addressed.

- . **Phase II - External and Internal Analyses**

- . To obtain an understanding of each external factor and issue being addressed, and the nature and scope of the effect on San Joaquin County.
- . To obtain an understanding of the internal strengths and weaknesses of San Joaquin County and how it compares to other metropolitan areas in that regard.
- . To narrow the scope of the issues for which goals, objectives and strategies will be established.

- . **Phase III - Goals, Objectives and Strategies**

- . To set realistic goals and objectives based on an understanding of the key issues, to include:
 - . Desired long-term results
 - . Quantifiable targets for each area reviewed
- . To prioritize objectives and goals to be addressed.
- . To identify potential action plans (strategies) to achieve desired goals for each strategic area.

- . **Phase IV - Plan Development, Implementation and Monitoring**

- . To develop individual strategies and consolidate them into an overall strategic plan.
- . To develop a mechanism for monitoring performance, reporting progress and updating strategies, as appropriate.

In summary, the first step in the process is to analyze the factors shaping the future of the county with particular emphasis on the economic, demographic, fiscal and social trends. From this analysis the six or seven key issues shaping the future of San Joaquin County in the next 10 - 20 years are identified. Once a broad consensus about the issues is reached, task

forces are formed to analyze each of the issues in detail. The task forces develop goals, objectives and strategies to deal with the issues. More importantly, an implementation plan will be developed along with a process to ensure that the plan is monitored and revised as necessary.

Organization

The San Joaquin County Strategic Plan is comprised of a broad base of interests from both the public and the private sectors. The project is directed by a Management Committee (see Attachment B) made up of individuals from the business community and from the different cities and County. The Committee is chaired by J. Foster Fluetsch, Chairman of the Board of American Savings and Loan Association. Consulting assistance is provided by Arthur Andersen & Co. (see Attachment C for the overall project organization).

At the end of Phase I, the key strategic issues identified as having the biggest impact upon the County were defined. The issues identified include economic development, housing, education, quality of life and public sector financing. A task force is being formed for each strategic issue. Each task force is co-chaired to ensure a broad representation of the County and mix of private and public sectors. Attachment D describes the task forces and lists the Chairmen. Throughout the remainder of the project the task force is responsible for the development of the specific goals, objectives and strategies for that issue. Each task force will be composed of a committee of public and private sector representatives.

The need for active participation on the part of the business community is critical to the success of the project. Their purpose is to provide an objective and diverse look at the issues, and to assist in the collection and analysis of data specific to their field of experience and expertise.

Having the project structured in this way serves to provide broad business community participation and commitment to the strategic plan. This project organization also provided the level of resources required to effectively analyze and plan for a diverse range of major planning issues.

End Products

This section identifies the major products to be produced:

- . **Phase I - Organization and Environmental Scan**

- . Preliminary statement of objectives
- . A detailed work program
- . Identification of the key strategic areas requiring in-depth analysis
- . List of the several major issues to be studied by selected Task Forces (See Phase II)

- . **Phase II - External and Internal Analysis**

For each key issue the following products will be prepared:

- . Detailed external analysis of each issue, identifying the key threats and opportunities facing San Joaquin County.
- . Detailed internal analysis, identifying the key strengths and weaknesses for which goals, objectives and strategies will be developed.
- . Revised Statement of Objectives.

- . **Phase III - Goals, Objectives and Strategies**

For each key issue the following products will be prepared:

- . Initial statement of overall goals and objectives.
- . Summary of the interrelationship between the goals and between the issues.
- . Prioritized list of potential strategies for each key area. This includes identification of the important financial, policy and legislative implications for the key strategies, along with the resources needed to implement them.

- . **Phase IV - Plan Development, Implementation and Monitoring**

- . An implementation plan for each key strategy which includes:
 - . Tasks to be accomplished
 - . Assigned responsibilities
 - . Critical milestones
 - . Key deliverables
 - . Other critical data to assist in controlling the effort

- . Overall strategic plan. This should be in executive summary format. This will ensure broad communication within both the public and private sectors.
- . Performance monitoring plan to track the progress of implementing the strategic plan.
- . Procedure for updating the Strategic Plan.

Relationship to Other Planning Efforts

A number of important planning processes and economic development efforts are currently underway or being contemplated in San Joaquin County. It is important that this strategic plan process does not duplicate these processes and that the results from the Strategic Plan have an impact upon the County's plans and progress. It is important that representatives from each city, and the unincorporated areas throughout the County have input and involvement in the strategic plan. In order to bring together the efforts of the Strategic Plan and to ensure its success, an active, involved commitment from private and public sector representatives is vital.

Project's Budget, Funding Sources and Schedule

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- . Develop plans and an 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.

The Strategic Plan is not a document that will sit on the shelves of city officials or business executives. It can be a road map that will indicate actions that, if taken, can make San Joaquin a better environment. The completion of the strategic plan will be the beginning of a focused, concerted business and public sector effort helping to shape the future of San Joaquin County.

Key Success Factors

In order to make the project a success, there must be:

- . Strong leadership
- . Active participation from the business community, public sector and other County representatives
- . Effective management and coordination
- . Public sector support
- . Sufficient resources
- . A commitment to, and a process for implementation

The Management Committee has been providing strong and effective leadership. They and several other business and civic leaders are actively involved with the project. Throughout the life of the project this kind of involvement is critical. As the project progresses, such involvement by others throughout the community will be equally important.

The project's goals and methodology have been communicated to several of the largest businesses in San Joaquin County. This communication must expand to include all of the major business organizations as well as each

of the city offices. Increased communication and cooperation between each of the cities and the unincorporated areas is a major goal and a vital concern of the plan.

Public sector support has been actively, and fairly successfully, solicited. Each City Hall has been contacted and has agreed to some level of support. Overall, reception to the project has been extremely positive and good lines of communication have been opened.

The overall success of the Strategic Plan hinges upon the implementation process. To insure successful implementation, such strategies must be developed early. From the beginning stages of the plan, every effort has been made to develop a process that will enable future implementation.

SAN JOAQUIN COUNTY STRATEGIC PLAN

FOUR PHASE APPROACH

PHASE I	PHASE II	PHASE III	PHASE IV
ORGANIZATION AND ENVIRONMENTAL SCAN	EXTERNAL AND INTERNAL ANALYSIS	GOALS, OBJECTIVES AND STRATEGIES	PLAN DEVELOPMENT, IMPLEMENTATION AND MONITORING

SAN JOAQUIN COUNTY STRATEGIC PLAN

MANAGEMENT COMMITTEE LIST

J. Foster Fluetsch
Chairman of the Board
American Savings and Loan
Association

George A. Barber
County Board of Supervisors

Candace Blue
Project Step
Women's Center of San Joaquin
County

Carl A. Burton
Past President
San Joaquin County
Economic Development

Bob Cabral
San Joaquin County Farm Bureau

George A. Chimiklis
Economic Development Coordinator
San Joaquin County
Economic Development Association

Ron Coale
Councilman
City of Stockton

Ed Craig
Owner
Bailey's Nursery, Inc.

John E. Cyr
President
John Cyr Realtors, Inc.

Dena Fagundes
Acting Manager
Tracy Chamber of Commerce

Barbara Fass
Stockton City Council

Michael E. Locke
City Manager
City of Tracy

Marcelo A. Lopez
Director PIC/DET

J.A. Loutzenhiser
Plant Manager
Owens-Illinois
Glass Container Division

John Lucke
American Savings and Loan
Association

Glenn Page
Mountain Valley Express
County Chamber of Commerce

Gaye Papais
Associate Planner
Community Development Department
City of Lodi

Jim Parkinson
Vice Mayor
City of Stockton

Carolyn Russell
Corporate Communications
The Grupe Company

George Sangster
Economic Development Director
Greater Stockton Chamber of Commerce

Larry Sorini
Field Representative
Senator John Garamendi

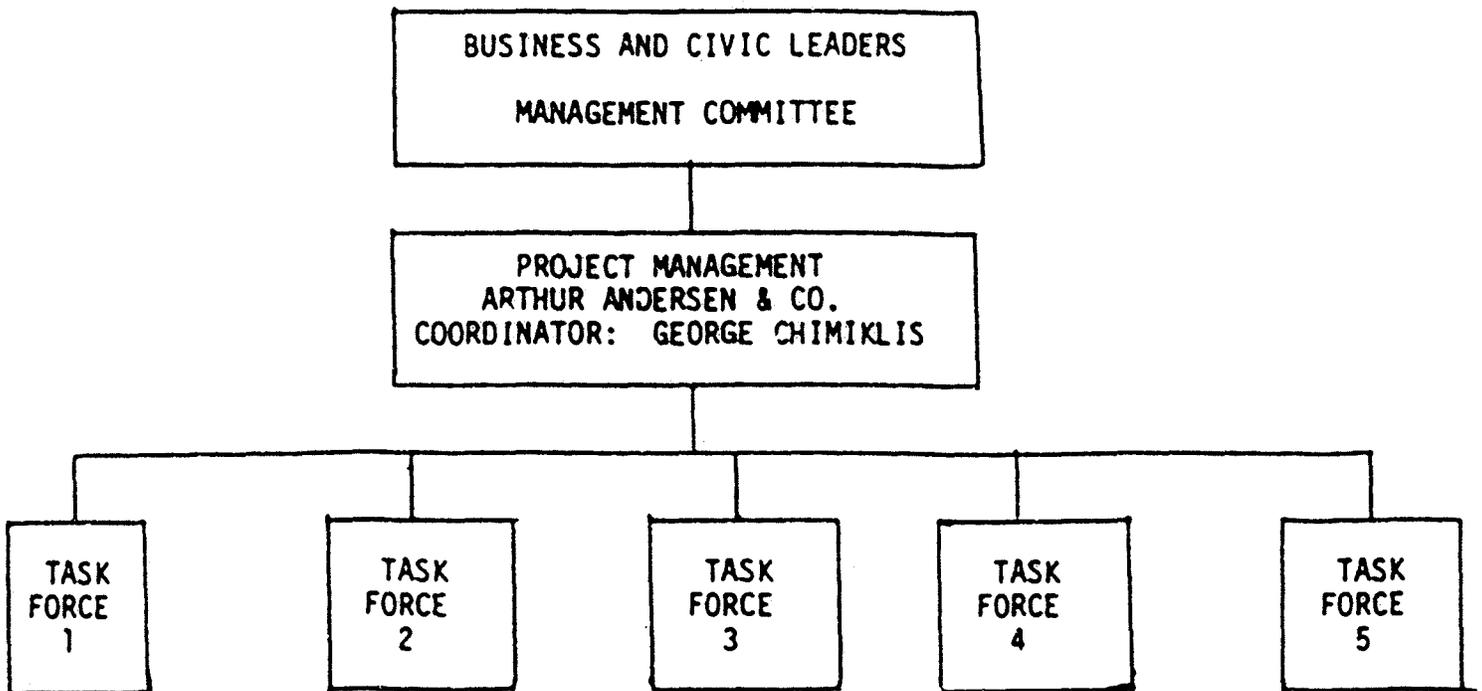
George Tabuchi
County Industrial
Revolving Fund

Wayne Trevena
Commercial Associate
Moss, Craig & Wiggins

Sidney Turoff
Professor, Business Administration
School of Business and Public
Administration
University of the Pacific

Philip B. Wallace
Western Empire Investment Co.

SAN JOAQUIN COUNTY STRATEGIC PLAN
"STRATEGIES FOR A SUCCESSFUL TOMORROW"
PROJECT ORGANIZATION



SAN JOAQUIN COUNTY STRATEGIC PLAN
TASK FORCES ORGANIZATION

HOUSING

- JOHN CYR
- GAYE PAPAIS

EDUCATION

- CARL BURTON
- DEAN MCNEILLY

INFRASTRUCTURE

- GEORGE BARBER
- RON COALE

QUALITY OF LIFE

- CANDACE BLUE
- WAYNE TREVENA

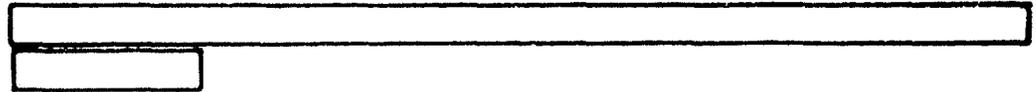
ECONOMIC DEVELOPMENT		
• SID TUROFF		
AGRICULTURE	SMALL BUSINESS	INDUSTRY
• ED CRAIG	• BARBARA FASS	• MIKE LOCKE

**SAN JOAQUIN COUNTY STRATEGIC PLAN
 "STRATEGIES FOR A SUCCESSFUL TOMORROW"
 OVERALL PROJECT SCHEDULE**

MAY JUNE JULY AUG SEPT OCT NOV DEC JAN FEB

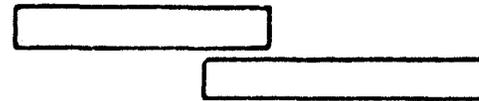
PHASE I

- 1. PROJECT ORGANIZATION AND ADMINISTRATION
- 2. ENVIRONMENTAL SCAN



PHASE II

- 1. EXTERNAL ANALYSIS
- 2. INTERNAL ANALYSIS



PHASE III

- 1. GOALS AND OBJECTIVES DEVELOPMENT
- 2. STRATEGY IDENTIFICATION



PHASE IV

- 1. PLAN DEVELOPMENT AND IMPLEMENTATION
- 2. MONITORING PLAN



MEETINGS:

- MANAGEMENT COMMITTEE
- TASK FORCES
- STRATEGY BRAINSTORMING
- COMMUNITY FORUMS
- PRESS CONFERENCE

