

Cameron Park CSD Strategic Plan

Board Planning Workshop

February 24, 2021

BHI Management Consulting (2021)



Introduction

- INTRODUCTION(s)
 - Brent Ives, BHI Management Consulting
 - Organizational consultant to Special Districts (20 years)
 - Strategic Planning - Supervisor training - Board/manager interactions - workshops, etc.
 - 25 years engineering manager at LLNL
 - USF - Organizational Development
 - 23 years on Tracy City Council prior to last 8 years as elected Mayor, various local and regional Boards/Commissions

Parking Lot

- Anything you want to be sure we'll discuss today or throughout this process?
- *What will we really look like in five years?*
- *What does it mean to be a CSD at this time?*
- *A GM that makes the public feel comfortable...*
- *Think about our strategic partners and relations with them*
- *Effectiveness and efficiency of our committee*
- *Discussion on environmental policy*
- *Firming up financial position*
- *Our Community is well connected with the CSD*



Background

Board decision on a new 5-year Strategic Plan

- Includes inputs from Board members, survey and staff leadership
- This workshop allows you to discuss and set *foundation and direction for strategy*
- *Review, update and document 5 years of direction*



The Process Today

- We'll discuss strategy in general
- Consider District status – *financial/otherwise*
- We'll look at the inputs (*Yours – stakeholders, anyone watching*)
- Ask you to consider the current foundational statements for strategy, those being: **MISSION – VALUES - VISION**
- Discuss and develop strategic focus areas that may have emerged
- These will update the current organization
- Discuss path forward for next workshop, **with staff**



Content and Linkage

- Mission
- Vision
- Strategic Elements or Strategic Focus Areas
 - Objective and Strategic statements
- Strategic Actions/Initiatives
- Strategic Implementation Plan

Inputs

Board perspective shared with you today allows you to hear from a variety of sources as you planning.

1. Your individual inputs (collected)
2. Staff Leadership
3. Stakeholders/Survey
4. Financial Status
5. Overall Position of the District in light of planning

Strategic Plan Community Survey Results

A Community Survey was released on December 7th and is now closed. The following results reflect information collected.

CPCSD Mission Draft

It is the Mission of the Cameron Park Community Services District to preserve and enhance the quality of life and to safeguard the health, safety and welfare of our community. (30)

CPCSD Mission Draft (1/20/21)

Our Mission is to preserve and enhance the quality of life of our community including the health, safety and wellbeing of our residents. (23)

CPCSD Values

- Values are your decision filters – to always be considered when making decisions
- Think of, (*To these we are fiercely dedicated”!*)
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CPCSD Values Input

We value:

- *stable and sustainable finances.*
- *responsible stewardship of District assets.*
- *creating community identity and pride.*
- *environmental sustainability.*
- *engagement with the public and our partners.*
- *respectful and collaborative leadership.*
- *serving the diverse makeup of our community.*

Vision derived focus areas

(Where we'd like to be in the 2026)

- Describes the future;
 - Where are we going?, or
 - How we would like to describe ourselves in five years?, or
 - What we'd like to say in a “*State of the District*” address in the year 2026?
 - Where do we want to go or what do we need to do that we are not doing currently?
- The Vision uses our Values drives the Mission forward
- The Vision demands strategy and action!

CPCSD Vision Input - 5 years

- **Financially stable** – ready for anything
 - *not running a deficit, funding reserves,*
- **Develop an integrated fire risk mitigation plan**
 - *fire-safe community, risk WUI fire safe protection plan, mutual aid clarity,*
- **Improved communications** with our community and **our strategic partners**, and sense of community
 - *Facilitate discussions on community concerns and ideas (fire safety, Q&A on director role, criminal, multi-lingual communications, clarity with scholarship/support info, provide enhanced info on District opportunities for service, addressing levels of service expectations*
- **Effective governance through Board development**
 - **Transparency certificate, District of distinction, new Board orientation and officer positions. Etc.**
- **Providing the right services** to the most people
 - *continue needs assessment, “create meaningful community experiences”, re-creating community through people, parks, programs, proactive park and facility asset management*
- **Develop an environmental sustainability policy**
 - *innovative waste handling opportunities*
- **A plan for overall staff Succession**
 - **continued professional and organizational development,**

CPCSD Vision Statement 2026

Vision FIVE YEAR STRATEGIC FOCUS – (WE FILL TOGETHER)

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--**Example**--

STRATEGIC FOCUS AREA
FISCAL STABILITY

Objective: *In FY 2026/27, the District holds a strong financial foundation with appropriate income/cost balance, proper reserves for rainy days and specific financial plans for upcoming projects and initiatives.*

-- EXAMPLE --

STRATEGIC FOCUS AREA COMMUNICATION

Goal: By FY2026, the District will have made great significant measureable strides toward proactively reaching out and connecting with Cameron Park community and the District's strategic partners to possess strong layers of support and understanding of our Mission and strategies.

Actions/Initiatives:

1.0 Develop communications survey to set baseline metrics for community connection

- Assigned Department:*
- Estimated Costs:*
- Goal Completion:*

2.0 Schedule planned and regular meetings with stakeholder individuals and organizations for mutual benefit.

- Assigned Department:*
- Estimated Costs:*
- Goal Completion:*

3.0 Develop a clear plan for incremental response to inputs gained

CPCSD Strategic Plan

Pathway Forward:

- **Utilizing the outline process, each strategic focus area developed today will be completed with Actions, Initiatives and Plans. These will discuss in the next meeting (on the subject.**
 - **At that meeting you may find some that may be added or deleted for a number of reasons.**
 - **Staff will keep you informed about when this next meeting will occur•**
- I will assist staff in the development of these next stages of the plan**