



Council Agenda Correspondence

DATE: March 27, 2025
TO: Mayor and Council
FROM: Whitney McDonald, City Manager
SUBJECT: Council Retreat Agenda and Materials

Below is the agenda for the April 4, 2025, Council Retreat, along with several attachments and links to helpful reference materials for Council to review ahead of the meeting and during the retreat discussions.

Facilitator: Sommer Kehrl, Ph. D., Chief Executive Officer,
The Centre for Organizational Effectiveness

8:30 AM – 9:00 AM | Welcome & Opening Remarks

- Mayor's introduction
- Retreat Goals: Discuss Council Communication Strategies and Onboarding, the Major City Goal process, and Potential Preparation of a Strategic Plan
- Overview of the day's agenda and expectations

9:00AM - 10:00AM | Communication and Collaboration Strategies as a Council

- Discussion on Communication Modes & Methods
- Open Dialogue

10:00AM – 10: 30 AM | Onboarding Process and Updates

- Discussion of new Council Member onboarding process and progress

10:30 – 10:45AM | Break

10:45 AM – 12:00 PM | Reflection on Major City Goals and Strategic Approach

- Purpose of the session: Discussion of Major City Goals and Potential Development of a Strategic Plan
- Recap of recently adopted Major City Goals (2025-2027)
- Facilitated discussion on successes, challenges, and lessons learned from previous goal-setting processes:
 - What aspects of the current goal-setting process works well and should continue?
 - What challenges have we encountered with the 2-year cycle/MCGs?
 - What has worked? What could be improved?

12:00 AM – 12:30 PM | Lunch Break

12:30 AM – 1:30 PM | Strategic Planning Framework Discussion

- Presentation: Examples of successful long-term strategic plans in other cities (**Attachment A**)
- Review and Discussion of Preliminary Pieces:
 - [Organizational Values](#) (*do these need re-visiting?*)
 - [Vision](#) & [Mission](#) (*do these need re-visiting?*)
 - Review Existing Strategic Plans
 - City Plans, Priorities, and Workflow Combined (**Attachment B**)
 - Preliminary Prioritization of Key Focus Areas
 - Development of Measurable Outcomes
- Facilitated discussion on what works for SLO:
 - What should be included in San Luis Obispo's Strategic Plan framework?
 - What aspects of the current goal-setting process should be retained?

1:30 PM – 2:15PM | Community Engagement & Accountability

- How to engage the public and stakeholders in the planning process
- Defining clear accountability measures and tracking progress
- Tools for communicating a Strategic Plan's progress to the community

2:15 PM – 2:30 PM | Break**2:30 PM – 3:00 PM | Council Discussion & Next Steps**

- Council feedback and key takeaways from the retreat
- Confirming next steps
- Closing remarks

Attachment A – Strategic Plan Examples

Attachment B – Existing City plans, priorities, and work programs