



## Legislation Text

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**File #:** 2023-0017, **Version:** 1

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**To:** Sonoma County Board of Supervisors

**Department or Agency Name(s):** County Administrator's Office

**Staff Name and Phone Number:** Christel Querijero 565-7071, Yvonne Shu 565-1739

**Vote Requirement:** Majority

**Supervisorial District(s):** Countywide

**Title:**

Strategic Plan Annual Report and Funding Recommendations

**Recommended Action:**

- A) Receive Strategic Plan annual update
- B) Approve Year 2 Strategic Plan funding recommendations

**Executive Summary:**

This item provides an update on the County's progress on the 5-Year Strategic Plan and also provides recommendations on funding requests for year 2 Strategic Plan implementation.

**Discussion:**

**Background.** The County's 5-Year Strategic Plan, approved in March 2021, has completed its first full year. The Plan's five pillars -- Healthy and Safe Communities, Organizational Excellence, Racial Equity and Social Justice, Climate Action and Resiliency, and Resilient Infrastructure - represent priorities for both the Board and the community. Implementation leads in the departments are working toward achieving the 23 goals through completion of 76 identified objectives that underlie these pillars, with coordination support from the County Administrator's Office Policy, Grants and Special Projects (PGSP) division.

The Strategic Plan is guided by three principles, which are applied to each of the five pillars. The principles, with some examples, are as follows:

- **Geographic equity:** access to services should be equitably distributed across the county
  - Purchase of satellite site to deliver services in the unincorporated area
  - County support of behavioral health mobile crisis teams in the cities of Santa Rosa, Petaluma, Rohnert Park and Cotati
- **Leveraging funds:** By using innovative funding strategies and leveraging grants, the County can advance its strategic priorities without impacting baseline service provision
  - \$3 million to enhance broadband connectivity for unserved and underserved residents
  - \$5.7 million to bolster wildfire resiliency
- **Partnerships with cities and community stakeholders:** collaboration with local jurisdictions and community stakeholders is essential to advancing countywide strategic priorities.
  - County support of Homekey projects in unincorporated west county, Healdsburg, Petaluma and Rohnert Park

Year 1 Strategic Plan Projects. The Board approved \$5 million in one-time funds from the General Fund in February 2022; **Attachment 1** summarizes the status of each. The 2022 Strategic Plan Year 1 Highlights document (**Attachment 2**) features some of these funded projects as well as other Strategic Plan accomplishments from the past year.

Year 2 Funding Recommendations. During the [June 2022 budget hearings <https://sonoma-county.legistar.com/LegislationDetail.aspx?ID=5679627&GUID=DE64364A-0AF8-4930-ADC4-FDFEB75F985B>](https://sonoma-county.legistar.com/LegislationDetail.aspx?ID=5679627&GUID=DE64364A-0AF8-4930-ADC4-FDFEB75F985B), your Board approved funding from the General Fund for year 2 Strategic Plan projects, comprised of \$4 million for one-time requests and \$1 million for on-going requests. Any approved on-going requests would be added to baseline budgets for the respective departments.

30 submissions for Year 2 Strategic Plan Funding were received. All were reviewed by County Administrator Office staff, and Human Resources reviewed position requests. Position requests for on-going funding illustrated the need for additional capacity to adequately track and accomplish strategic plan goals related to equity program delivery, securing climate grant funding, and continuing the County's efforts to support clean vehicles. The shift toward Anti-Racist Results-Based Accountability, beginning in the Department of Human Services, also resulted in funding requests to ensure a strong foundation for this effort. Upon approval by your Board, staff will program funding allocations from Strategic Plan Year 2 funds through the consolidated budget adjustment process. The funding recommendations are listed in **Attachment 3**.

Modifications to Project Scope or Budget. Understanding that projects initially conceived at the onset of the Plan may require adjustments - due to timing, resource considerations, new information, or other extenuating circumstances - implementation leads will work with their respective Strategic Plan coordinators to update project scopes, and, if applicable, related metrics. Any such changes will not diminish or alter the original intent of the Board-approved objectives and will be reviewed by the respective pillar coordinator and appropriate budget analyst, if necessary.

Because funding requests were estimates based on the best knowledge at the time, actual project costs may be over or under the allocated Strategic Plan funding. Consistent with established budget development practices, Departments will coordinate with the County Administrator's Office to reflect actual project costs in budget projections and to seek to resolve any over-expenditures within current budgets. Like significant changes in project scope, if and when funded Strategic Plan projects become unviable or costs cannot be absorbed by current department budgets, the County Administrator's Office will work with Departments to determine a plan to address unspent funds.

After review by the County Administrator's Office, proposed project adjustments that significantly deviate from the stated Plan objective or budget will be brought to the Board for consideration and approval. Staff expects to bring an item noting any major changes to the Board in August 2023.

Dashboard. Future updates to the Board will occur annually, or as requested by the Board. Detailed information on achievements by pillar, goal and objective can be found online through the Strategic Plan dashboard at [SOCOStrategicPlan.org <https://socostrategicplan.org/>](https://socostrategicplan.org). This first iteration of the dashboard contains a narrative status update for each Plan objective. The next iteration of the dashboard is expected to include an easier view of the metrics for each objective, which are currently part of the narrative.

**Strategic Plan:**

<https://socostrategicplan.org/>

**Prior Board Actions:**

2/1/22 Received update and approved year 1 funding recommendations

3/2/21 Approved 5-Year Strategic Plan

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY 22-23 Adopted</b>	<b>FY23-24 Projected</b>	<b>FY 24-25 Projected</b>
Budgeted Expenses	\$5,000,000		
Additional Appropriation Requested			
<b>Total Expenditures</b>	<b>\$5,000,000</b>		
<b>Funding Sources</b>			
General Fund/WA GF	\$5,000,000		
State/Federal			
Fees/Other			
Use of Fund Balance			
Contingencies			
<b>Total Sources</b>	<b>\$5,000,000</b>		

**Narrative Explanation of Fiscal Impacts:**

The fiscal year 2022-23 budget contains General Fund expenditure appropriations of \$5 million for the Strategic Plan, with \$4 million for one-time expenditures and \$1 million in on-going expenditures. County Administrator staff will return during the second quarter consolidated budget adjustment process in March 2023 to present departmental budget changes for the Board’s consideration, based on the approvals from this item.

**Narrative Explanation of Staffing Impacts (If Required):**

The fiscal year 2022-23 budget contains General Fund expenditure appropriations of \$5 million for the Strategic Plan, with \$4 million for one-time expenditures and \$1 million in on-going expenditures. County Administrator budget staff will return during the second quarter consolidated budget adjustment process in March 2023 to authorize departmental personnel adjustments, based on approvals from this item.

**Attachments:**

- 1 - Year 1 funded projects status summary
- 2a - Year 1 highlights (English)
- 2b - Year 1 highlights (Spanish)
- 3 - Year 2 recommended funding request summary

**Related Items “On File” with the Clerk of the Board:**

None