

From: [Manager Internet Email](#)
To: [City Clerk](#)
Subject: FW: Goal Setting Comments
Date: Thursday, February 11, 2021 8:35:16 AM

From: Linda Geldner <linda@geldner.com>
Sent: Wednesday, February 10, 2021 4:36 PM
To: Matthew Hall <Matt.Hall@carlsbadca.gov>; Keith Blackburn <Keith.Blackburn@carlsbadca.gov>; Cori Schumacher <Cori.Schumacher@carlsbadca.gov>; Priya Bhat-Patel <Priya.Bhat-Patel@carlsbadca.gov>; Teresa Acosta <Teresa.Acosta@carlsbadca.gov>; Manager Internet Email <Manager@CarlsbadCA.gov>
Subject: Goal Setting Comments

Honorable Mayor, City Council and City Manager,

I watched your goal setting (Strategic Planning) meeting of February 4th and the one in 2019. Thanks to all of you for your service and openness. I also appreciate the opportunity to comment.

Based on what I heard and my observations of the organization I am providing some thoughts and ideas for your consideration. I have been a facilitator for many years. As an example I facilitated the weekly Executive Steering Committee meetings and multiple Strategic Planning sessions at NAVFAC SW for several Commanding Officers (over 3-4 years). So I have probably generated more ideas here than you can implement, but hopefully you will find something useful.

- Mr. Chadwick's presentation was very powerful, informative and forthright. Good job!
- There was a comment about buckets, which I agree could be a good approach and I have some ideas based on the 3 that were proposed:
 - Process discussions work best when preceded by a discussion of roles/responsibilities and when they include a discussion on organizational structure, since both affect process.
 - Project discussions at a strategic level work best when started with a discussion on the big picture and an agreement on priorities. It is often easier to categorize project priority as A, B or C vs trying to rank them. Next it is important to focus on the actions needed to implement a few key projects. It also seems to me projects fall into two categories services/support or facilities.
 - Goals should be revisited at the end of your Strategic Planning session along with items from the bicycle rack to decide if the Vision/Big Picture Goals need to be adjusted.
- It was also great to hear the idea of a comprehensive Coastal (Action) Plan gain some traction. As an idea, you could develop a framework/roadmap for that Action Plan and also use the process as an exercise in goal setting. That way you create something useful (meat and potatoes), while learning how to work together to set goals. It would also allow you to discuss existing roles/responsibilities and how processes work across departments. Adding a discussion afterwards about how you worked together, how to improve processes and possible organizational improvements could help build trust. BTW- I added the term action to the name of the plan because I believe it is important for Carlsbad to become more action oriented to move things forward.
- Breakout teams were mentioned and I think could be used to help develop implementation (action) plans. It could help encourage work across departments and hopefully accomplish more in a shorter timeframe. The breakout teams could include one or two Council members (or you could include the City Manager and have 3 teams of 2) plus a staff member from each department involved. Facilitation and clear expectations will help. Having the breakout teams report back for discussion and then working together as a whole Council to reach consensus on an Action Plan could also help build trust.

Your Strategic Planning is very important and I believe it has the potential to bring us together as a community. I trust you to work together for the community and wish you great success. Thanks so much.

Kind Regards,

Linda Geldner

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