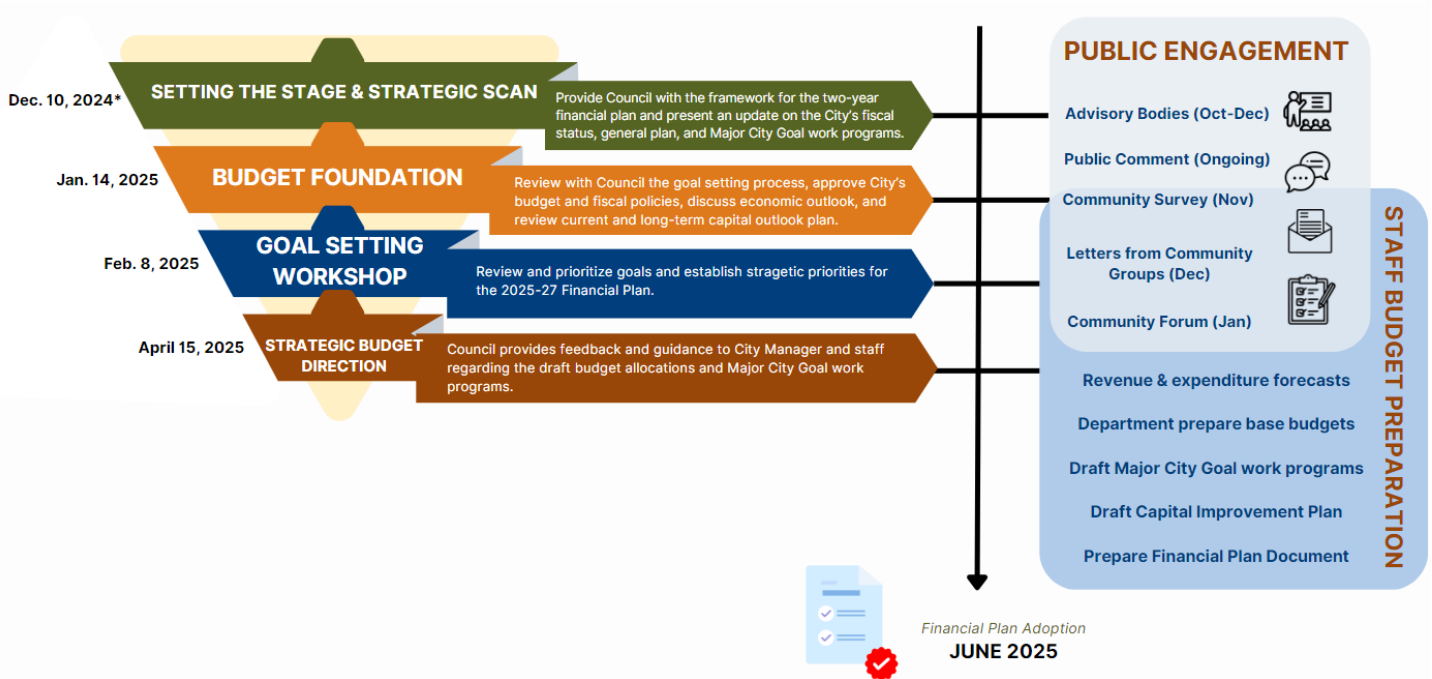


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There are a number of opportunities to provide input to the City Council to establish Major City Goals with the community’s interest in mind. These opportunities are highlighted on the following chart and also listed by date at the bottom of this document. Any specific dates identified in this document are estimated and subject to change.



*December 10th meeting subject to Council approval of an additional meeting date

1. **Pre-work and Community Outreach:** The initial phase of the Public Engagement process involves assessing the community's priorities prior to Council discussions scheduled for the following months. Compiling a preliminary list of relevant topics enables staff to refine the focus of the Community Forum and ensure that the appropriate subject-matter experts and information are available as the process progresses. The pre-work includes:
 - a. **Community Outreach Efforts.** The City uses its [Public Engagement and Noticing Manual](#) as the guide for encouraging the broadest possible participation in the community engagement process. Staff plans to place display ads in The Tribune, SLO Journal, and New Times and use social media to promote participation. Information about the goal-setting and budget process will be placed on the City’s web site and at City Hall. There will also be an informational flyer in the November utility bills (in English and Spanish) inviting the public to participate in the online Community Priorities Survey, Community Forum, goal-setting, and budget process.
 - b. **The Community Priorities Survey).** The survey is an effective tool for collecting feedback from a substantial number of community members. The participation rate has increased with each Financial Plan, reaching over 1,300 responses for the 2023-25 survey. This survey will be accessible from November 12, 2024, to December 13, 2024. Feedback from previous surveys and broader research indicate that a duration of three to four weeks is optimal for a web-based survey. Furthermore, concluding the survey in mid-December enables staff to obtain community feedback prior to the holiday season, a period when many individuals may be less accessible.

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- c. **Review of Financial Plan policies contained in the 2023-25 Financial Plan and update or recommend changes as appropriate.** This may include proposed changes to the existing fund balance targets for enterprise funds and the capital replacement funds.
 - d. **Review the organization of the Financial Plan and obtain Council guidance regarding the style of presentation expected or preferred by Council.**
 - e. **Review the long-term economic forecast.**
 - f. **Discuss additional discretionary payments (ADPs) to CalPERS intended to expedite paydown unfunded pension liabilities.** This will include an overview of the City's adopted plan to paying down pension debt and consideration of increasing the annual ADP to reflect increases to staffing costs over the last several years.
 - g. **Review Long-Range Capital Improvement Plan (CIP).** The Long-Range CIP provides a look at future infrastructure needs as envisioned by the General Plan and other Council-adopted plans. The Long-Range CIP is presented to Council as part of the Budget Foundation discussion and Goal Setting Process to provide context for future capital needs.
4. **Community Forum.** The Community Forum is a public event held in person, designed for community members to engage in discussions regarding possible goals and feedback from the advisory bodies, community organizations, and individuals who participated in the online survey. The structure of this event will closely resemble that of the 2023-25 Community Forum, featuring a walk-through environment and interactive booths where attendees can interact with City staff and fellow community members. Participants will have the opportunity to scan a QR code using their mobile devices, or with assistance from staff, to rank various methods by which the City could achieve the potential Major City Goals. Attendees will be encouraged to submit additional suggestions or feedback that Council should consider that was not part of the ranking process. Community members can also email ideas to communityforum@slocity.org if they are unable to attend the forum in person. The Community Forum is a joint meeting of the City Council and Revenue Enhancement Oversight Commission (REOC).
5. **Council Goal-Setting Workshop.** Following collection of feedback during the Community Forum, the Council goal-setting workshop will be held on **Saturday, February 8, 2025**, in the Council Chambers. This will be an all-day workshop to answer the question, "What are the most important, highest priority things for the City to accomplish over the next two years?" Council will be asked to provide up to five goals before the workshop which staff will organize and distribute prior to the workshop. Use of an independent facilitator will allow all Council members to participate fully in the process; and allows staff to devote their efforts to listening to the discussion. Moreover, the facilitator can assist the Council to ensure that the number and scope of the goals established are appropriate.
6. **Mid-Year Report and Guiding Principles for Allocation of Resources.** The Mid-Year Review and review of the updated Five-Year Forecast, scheduled for **Tuesday, February 18, 2025**, will allow the Council an early opportunity to provide guiding principles and direction for paying down unfunded pension liabilities and efficient allocation of resources with the 2025-27 Financial Plan, focusing on community priorities.
7. **Major City Goal Work Programs and Strategic Budget Direction.** On **Tuesday, April 15, 2025**, staff will present the Major City Goal Work Programs developed out of the Goal-Setting Workshop and seek

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strategic budget direction from Council on both the operating budget and Capital Improvement Plan. This process affords the City Council an opportunity to review the draft work programs and associated financial resources proposed to support existing services and accomplish Major City Goals established by the City Council in February. At this stage of the process, the City Council provides direction on any changes needed to refine these work programs and resource allocations to better achieve the desired outcomes. Additionally, the City Council is asked to provide the City Manager with the key policy direction needed to allocate resources in line with Council's expectations or to further amend budget or fiscal policies that align with Council direction. This process is extremely helpful so that the Preliminary Financial Plan that is presented to the City Council and community in June accurately reflects the Council's expectations.

At this meeting, staff will present detailed work programs for the *Major City Goals* in order to:

- a. Clearly define and scope the work programs.
- b. Ensure that there is a clear understanding of the means used in pursuing the goal.
- c. Convert the general goal into specific action steps, so progress can be measured.

Each work program will provide the following information:

Objective. What is to be accomplished? (This will be based on the objective adopted by the Council at the goal-setting workshop.)

Discussion. What are the factors driving the need for this goal? What actions have already been taken in trying to resolve this problem area? What are the key assumptions? What key challenges, constraints or obstacles can be expected in achieving this goal? What concerns, or issues will remain unresolved even if the goal is achieved? Who are the key stakeholders?

Action Plan. What specific tasks will need to be accomplished in order to achieve the goal, and when will they be completed? These "action steps" are the fundamental building blocks in defining and scoping the work program, and in monitoring the progress in accomplishing the goal over the next two years.

Responsible Department. Who is accountable for getting it done?

Financial and Staff Resources Required to Achieve the Goal. What will it take to achieve the goal? Will resources be needed (staffing, contract services, CIP project) to do this?

Outcome: Final Work Product. What are the "deliverables?"

8. **Budget Hearing and Budget Adoption.** The Budget Hearing is scheduled for **Tuesday, June 3, 2025**. State law requires that the City may not spend public funds without the authority to do so. The budget appropriates public funds, thereby providing the legal authorization from the governing body to expend these funds on operations and capital projects. Section 803 of the City Charter sets forth a requirement for a public hearing to consider adoption of the annual budget. The budget hearing is scheduled for the first meeting in June in order to hold time for the possibility of a second hearing, so that the budget can be adopted before the next fiscal year begins on July 1, 2025, pursuant to Section 804 of the City Charter.

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Budget Calendar Summary

Item #	Tentative Dates	Who	Action
1	September 26, 2024	Finance	Release of goal template and instructions to advisory body liaisons.
2	October 1, 2024	Council	Review FY 2023-24 Year End Report and approve the 2025-27 Financial Plan schedule and survey tool
3	October 31, 2024	Council	Quarterly Mayor/Advisory Body Chairs Meeting
4	November 12, 2024	Finance/Admin	Release Community Priorities Survey
5	December 10, 2024	Council	Hold Setting the Stage & the Strategic Scan workshop (Operating and CIP)
6	December 11, 2024	Finance	Receive written comments from community groups and interested individuals, and goals from advisory bodies
7	December 13, 2024	Finance/Admin	Community Priorities Survey closes
8	January 7 or 14, 2025	Council	Review Budget Foundation report and provide guidance to staff on development of operating budget and CIP
9	January/February 2025 (exact date TBD)	Council	Receive FY 2023-24 Audit and Annual Comprehensive Financial Report (ACFR)
10	January 23, 2025	Council/REOC/ Staff	Community Forum
11	February 8, 2025	Council	Council Goal Setting Workshop (on Saturday)
12	February 18, 2025	Council	Review FY 2024-25 Mid-Year Budget Report including allocation of FY 2023-24 unassigned fund balance
13	March, 2025	REOC	Review Capital Improvement Plan for projects utilizing Local Revenue Measure funding
14	April 15, 2025	Council	Review strategic budget direction report (including CIP) and provide direction to staff
15	April 15, 2025	Council	Review Impact Fee Study and Capital projects associated with those impact fees and provide direction to staff.
16	May 14, 2025	Planning Commission	Review Capital Improvement Plan for conformity with General Plan
17	May 20, 2025	Council	Review FY 2024-25 Q3 Budget Report
18	May 23, 2025	City Manager	Issue proposed budget
19	June 3, 2025	Council	Budget Hearing and adoption of budget and CIP
20	June 17, 2025	Council	Continued Budget Hearing and adoption of budget and CIP (if necessary)