

City of Oakland
FY 2025-2028 Strategic Plan Implementation Charter

I. Background

In early March 2024, a strategic planning process commenced to facilitate a thoughtful and responsive process for the development of a Strategic Plan that addresses Oakland’s resource and budget constraints, challenges and opportunities, ensuring short-term and long-term plans for its workforce and residents. The Strategic Plan development journey includes:

- **Management-level Retreat:** 1.5-day retreat with Agency Directors to build trust, encourage healthy conflict, foster commitment, and enhance citywide priorities.
- **Data and Document Review:** A comprehensive review of 100+ data sources, including community findings, policies, budgets, and plans, to inform interviews and engagement activities.
- **Strategic Planning Design Team (SPDT) Application and Launch:** A citywide survey selected 25 City of Oakland staff to serve as SPDT members, ensuring diverse representation based on identity, capacity, experience, collaboration, and public-facing roles.
- **Interviews and Focus Groups:** Conducted one-on-one discussions with 15 Agency Directors and five focus groups to explore their visions for Oakland, core services, challenges, and collaboration needs.
- **City Data Gathering & Analysis:** Interviews and research across 10 cities and counties identified best practices in strategic budgeting, crime prevention, economic development, and housing support.
- **SPDT Workshops:** Three SPDT workshops aligned on citywide priorities, cost-savings and revenue opportunities, and co-designed an implementation plan aligned with the City’s goals.

The Strategic Plan will be presented as an Informational Report to the Finance and Management Committee on April 9, 2025 and to the full City Council on April 14, 2025.

II. Implementation Team Purpose

The City Administrator’s Office is fully aware of the critical need to strengthen Oakland’s internal systems and processes to deliver equitable and sustainable services for all. By enhancing these foundational structures, we aim to improve efficiency, transparency, and accountability across our departments, ensuring that resources are directed where they are most needed, especially as we navigate financial limitations.

III. Guiding Vision, Strategic Plan Overview, and Assumptions

- A. Guiding Vision:** As Oakland faces financial challenges, it is committed to fostering a thriving and equitable community. The City emphasizes transparency, accountability, and compassionate approach to public needs. While making tough decisions, Oakland aims to balance immediate demands with future growth,

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prioritizing fiscal responsibility and economic development to build resilience and lasting equity for all residents.

B. Strategic Plan Overview: This plan is designed to guide the City through the complex process of fiscal recovery while ensuring that core services and programs remain aligned with the aspirations of our Community and workforce. The focus is on balancing the necessity of fiscal responsibility with the fundamental needs of Oakland residents, creating a path forward that is both responsive and inclusive.

C. Guiding Assumptions¹:

- Race matters: Almost every indicator of well-being shows troubling disparities by race.
- Disparities are created and maintained, often inadvertently, through institutionalized policies and practices that contain barriers to opportunity.
- If opportunities in all key areas of well-being are equitable, then equitable results will follow.
- Given the right message, analysis, and tools, people will work toward racial equity.

IV. Selection of Steering Committee and Implementation Team

- Agency Directors received a presentation on the Strategic Plan and were asked to identify staff members who would add value to a successful implementation team. Key factors for a successful implementation team member included:
 - Strategic
 - Agile and Solutions Focused
 - Growth Mind Set
 - Justice Focused
 - Collaborative
- Members of the Strategic Planning Design Team received a presentation of the Strategic Plan and were asked to self-nominate if they would like to continue with the Implementation Phase.
- Implementation Team Co-Leads reviewed all the nominated individuals for alignment with the identified key factors, representation of Oakland’s demographic diversity, broad representation of Departments
- To round out the Implementation Team options to ensure that there was a good representation of staff across Departments, reflective of Oakland’s demographic diversity, and aligned with the key factors, additional staff were identified and interviewed for interest and capacity to participate on the team.

¹ The Department of Race & Equity operates under these assumptions adapted from the Annie E. Casey Race Matters Toolkit.

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V. Expectations and Responsibilities

A. City Administrator

- Convenes all leadership bodies in support of implementation.
- Advises the Steering Committee.

B. Steering Committee

- Develops implementation recommendations.
- Provides strategic thinking.
- Lends thought leadership.
- Rotates each year – Year One, Two, and Three Actions.
- Members should represent each Evaluation Criteria Category.

C. Implementation Team Co-Leads

- Leads the Implementation Team to accomplish its charge.
- Manages all communication updates.
- Coordinates between CAO, Steering Committee, and Implementation Team.

D. Implementation Team

- Join a working a working group to drive Actions.
- Meet monthly to drive Year One Actions.
- Facilitate communication back to various internal committees.
- May designate one person to attend meetings in their unavailability.
- Support messaging needed for press and media.

VI. Logistics

A. Steering Committee Meetings

- **Schedule:** Meet quarterly.
- **RSVPs Required and Attendance:** Responses to calendar invitations are required and if you are not able to attend, please respond accordingly so that the meeting can be rescheduled to ensure critical mass.
- **Location:** Virtually.
- **Meeting Materials:** The Implementation Team Co-Leads will send out a draft agenda and related information or documents at least (1) week prior to the scheduled meeting.
- **Meeting Notes and Follow-Up Actions:** A note-taker will be designated at the beginning of each meeting. Draft summary notes and action items will be distributed for review within three (3) working days of the meeting.

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B. Implementation Team Meeting

- **Schedule:** Meet monthly.
- **RSVPs Required and Attendance:** Responses to calendar invitations are required and if you are not able to attend, you will need to designate an alternate from your Department to attend in your place, and respond accordingly to the meeting invitation.
- **Location:** Annual meeting in person, with most meetings held virtually.
- **Meeting Materials:** The Implementation Team Co-Leads will send out a draft agenda and any related information or documents at least (1) week prior to the scheduled meeting.
- **Meeting Notes and Follow-Up Actions:** A note-taker will be designated at the beginning of each meeting. Draft summary notes and action items will be distributed for review within three (3) working days of the meeting.
- **Contact Information for Implementation Co-Leads:**
 - Monica Elise Davis, Deputy City Administrator, mdavis2@oaklandca.gov, 510-495-4810 (C), 510-238-7689 (O)
 - Candice Parker-Trigg, City Administrator Analyst, cparker@oaklandca.gov
 - Visraant Iyer, Director, Innovation Team, viyer@oaklandca.gov, 630-639-8928 (C)
 - Patricia Merino Price, Civic Designer, Innovation Team, pmprice@oaklandca.gov, 510-684-7568 (C)

VII. Outcomes

- Every six months, there will be regular progress reports on the Strategic Priorities and related Action Items.
- The selected Action Items will be completed over the course of the three years of implementation.
- At the end of the three years, the data indicators included in the Strategic Plan will be refreshed and reviewed.
- Near the end of the three years of implementation, research and discussed options for organizational structure to continue this work will be determined.

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Attachment 1: Strategic Priority Action Items

Attachment 2: Initial Membership

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Attachment 1: Strategic Priority Action Items

1. Streamline Operations

Strategic Priority (Action)	Actions (Tasks/Details/Process)	Year 1	Year 2	Year 3	Lead Department
Simplify Procurement Contracting Processes	Create process, timeline, and begin to implement Priority 1 recommendations from Baker Tilly report. Evaluate and improve efficiency on the contracting process, payment schedule, and timelines.				Finance
Centralize Payroll Policies and Practices	Streamline and enhance payroll processing and systems. Create citywide policies and standardized practices with consideration for department policies and structure (e.g., overtime policies).				Finance
Strengthen Hiring Practice Transparency	Continue to regularly meet with departments to review their hiring priorities and provide timelines to achieve filling their vacancies. Human Resources to promote and encourage departments to consistently utilize and reconcile the monthly Position Control Report to provide a transparent view of all vacant and frozen positions, across all levels of City departments. Develop resources to communicate available career pathways to enable employees to explore promotional opportunities across departments.				Human Resources Management
Standardize Onboarding	Administer and review New Hire Experience Survey and use survey feedback to ensure the				Human Resources Management

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	<p>Citywide New Employee Orientation provides new employees with required and useful information. New Hire Experience Survey will be re-implemented in January 2025 after NEO and feedback will be shared with the Recruitment & Classification Division and HR SPOCS on a quarterly basis.</p> <p>Each City department will consult with Human Resources Management to formalize, expand, and promote its departmental onboarding program. Standardization of the onboarding process will improve the new employee experience, focusing on staff-identified priorities, including the employee’s role in achieving the department’s mission, workload management, and training on the use of resources and tools to perform their duties.</p> <p>HRM will leverage the automation and technology of NEOGOV Onboard to create consistent processes and workflows for employees and departmental partners.</p>				
<p>Develop a Citywide Accessible Policy Archive</p>	<p>Create a well-organized filing system of policies and procedures with access for all City staff with sub-folders for each department.</p>				<p>City Administrator’s Office</p>
<p>Integrate Finance and Budget Process Updates into Performance Management Framework</p>	<p>Align finance and budget process updates with the City’s performance management framework, guided by the CAO. Continue to embed KPIs to track budget goals and build a public facing portal for transparency, allowing residents to monitor progress and enhance accountability across departments.</p>				<p>City Administrator’s Office</p>

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Enhance Communication Between Finance and Other Departments	Building upon the already established fiscal managers’ budget update process, create an enhanced budget process communications strategy that includes standard practices for disseminating information from Directors to staff, regular staff wide town halls, and regular updates on budget status at Agency Directors’ meetings.				Finance
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2. Foster Cross-Departmental Collaboration

Strategic Priority (Action)	Actions (Tasks/Details/Process)	Year 1	Year 2	Year 3	Lead Department
Coordinate City Housing Strategic Plans	<p>Establish a coordination strategy among departments managing the City’s housing plans – capital-focused, anti-displacement, and homelessness – to align goals.</p> <p>Schedule regular cross-departmental check-ins with key stakeholders and divisions to streamline communication and coordination, track initiatives, set joint decision-making protocols, prioritize county engagement, and integrate homelessness support actions into the broader housing strategy.</p> <p>Actualize existing capital affordable housing strategic plan developed by Housing & Community Development Department Administer remaining U dollars via NOFA programs (new construction, preservation, etc.).</p>				City Administrator’s Office

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	<p>Establish HCD annual reporting on affordable housing development progress to City Council to accompany the Annual Progress Report (APR).</p> <p>Create formalized stakeholder feedback loops to inform future implementation efforts.</p> <p>Engage Alameda County on methods to increase funding sources for capital, operating, and services dollars.</p> <p>Continue to pursue advocacy at the State to leverage local resources and increase funding for pipeline projects.</p>				
<p>Building a Holistic Approach to Public Safety Including Emergency Preparedness</p>	<p>Establish structured, regular joint meetings between Police, Fire, Department of Violence Prevention, Finance, and CAO to foster open communication and address support and resource allocation. Create a shared action plan that outlines mutual responsibilities during emergencies, with clear expectations on how police can better support fire operations. Implement cross-training opportunities to enhance understanding of each department's roles and challenges.</p>				<p>City Administrator's Office</p>
<p>Continue to Leverage & Maximize Community Engagement Outreach & Data Working Groups</p>	<p>Create a cross-departmental team of Community Engagement & Digital Communications Leads to coordinate each department's engagement efforts, ensuring a unified voice in digital platforms, public engagements, and overall messaging.</p>				<p>City Administrator's Office</p>

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<p>Engage Middle Management in Decision Making Processes</p>	<p>Engaging middle management in decision-making fosters a collaborative, transparent environment where leaders feel valued and connected to organizational goals. As the closest link to frontline staff, middle managers bring insights into daily operations and employee morale that inform practical, effective strategies. Use town halls or quarterly listening sessions to share context and establish feedback loops with middle managers.</p>				<p>City Administrator's Office</p>
<p>Strengthen Governance and Coordination for Economic and Workforce Development</p>	<p>Integrate workforce development strategies into all development plans. Refine the governance structure for the existing development meetings to include establishing cadence, renaming these meetings to "Development Coordination" meetings, extending invitations beyond Housing & Community Development, Planning& Building, Economic and Workforce Development to also include the Communications representatives from CAO, Transportation, Human Resources, Procurement, and Finance. Enhance existing shared tracking system to monitor key project progress. Consider replicating the Department of Transportation's tracking tool to enhance efficiency, improve service delivery, and ensure alignment with citywide goals and strategic priorities.</p>				<p>City Administrator's Office</p>

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3. Enhance Communication and Coordination

Strategic Priority (Action)	Actions (Tasks/Details/Process)	Year 1	Year 2	Year 3	Lead Department
Strengthen Internal Citywide Communication Practices	Evaluate and update policies and practices for enhancing citywide communications. Based on findings from this evaluation, implement needed improvements. These improvements could include but are not limited to: using the Intranet as a centralized communication platform, monthly interdepartmental newsletters, standardized communication templates, regular communication training, quarterly all-hands meetings, internal feedback channels, department liaisons for communications, weekly update emails on key projects and policies, and emergency communication protocol.				City Administrator's Office
Streamline Communication Channels between CAO and City Council	Implement an internal communication framework that ensures timely updates from City Council and the City Administrator's office are shared across all levels of staff. This can include regular bulletins, a dedicated internal newsletter, or town hall meetings to keep staff informed about major initiatives and goals.				City Administrator's Office
Enhancing Decision Transparency and Staff Engagement	CAO to identify potential policies and practices for sharing the impact and purpose of decisions/decision making. These could include decision rational reports, regular decision making updates, developing case studies that outline specific decisions, post-implementation reviews, and annual decision-making process training that includes the				City Administrator's Office

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	<p>review of Evaluation Criteria. Establish a system for gathering staff input on challenges and successes in aligning with city priorities. This will include surveys, feedback sessions, and open forums to ensure a continuous loop of communication and improvement.</p>				
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4. Optimize Workforce Management

Strategic Priority (Action)	Actions (Tasks/Details/Process)	Year 1	Year 2	Year 3	Lead Department
<p>Strengthening Employee Performance and HR Coordination</p>	<p>Department managers will collaborate to streamline workload management and training resources, aligned with budget impacts, to effectively support staff performance. Evaluate and enhance roles and responsibilities of Single Points of Contact (SPOCs) to improve coordination and support across departments. This approach promotes shared responsibility and reinforces HR’s capacity to meet employee needs effectively.</p>				<p>City Administrator’s Office</p>
<p>Increase Communication and Resources Related to Equity Indicators and Goals</p>	<p>Promote the refreshed Equity Indicators Report citywide to enhance individual staff understanding, department-level roles, and citywide impact. Develop coordinated cross-departmental mechanism to align department-level activities/efforts to internal equity goals.</p>				<p>City Administrator’s Office</p>
<p>Optimize Intranet for Enhanced Communication and Transparency</p>	<p>Optimize the centralized intranet for improved information sharing and transparency across departments. Communications CAO representatives to establish Department page templates. Each department manages and</p>				<p>City Administrator’s Office</p>

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	updates its page, supported by a citywide website update in the upcoming fiscal year for easy access to basic information for staff and constituents. Implement staff training on accessing and providing feedback on employee resources through the intranet.				
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5. Align Budget with Citywide Priorities

Strategic Priority (Action)	Actions (Tasks/Details/Process)	Year 1	Year 2	Year 3	Lead Department
Launch Evaluation Criteria Citywide in Preparation for Budget Process	Implement a department-level strategy for using the Strategic Plan-developed evaluation criteria to review project and service recommendations, ensuring decisions align with budget realities while balancing racial equity in prioritization and resource allocation.				Finance
Establish Aligned Priorities for Integration into Departmental Work Plans	Establish a priority alignment process among the Mayor’s Office, City Council, City Administrator's Office, and key leadership to set unified priorities that reflect budget realities. Ensure these priorities are consistently integrated into departmental work plans and resource allocations, providing clear directives and measurable outputs that enhance accountability and coherence across city initiatives.				City Administrator’s Office

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Attachment 2: Initial Membership

Steering Committee

First Name	Last Name	Department
Tony	Batalla	ITD
Sean	Maher	Communications/CAO
Ashleigh	Kanat	EWDD
Erin	Roseman	Finance
Andrea	Mariano	HRM
Jaime	Turbak	Library

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Implementation Team

First Name	Last Name	Title	Department
Tanisha	Tucker	Captain Training Division	OFD
Michelle	NewRingeisen	Information Systems Manager II	ITD
Ali	Gaylord	Deputy Director of Housing Development	HCD
Nina	Lindsay	Associate Director	OPL
Sarah	Herbelin	Assistant To the Director	Finance
Rodolfo	Duenas	Business Analyst III	PBD
Gaspar	Montoya	Administrative Analyst II	EWD
Chris	Norman	Chief of Staff	HCD
Justice	Bolden	Recreation General Supervisor	OPRYD
Robin	Abad	Project Manager III	CAO
Keary	Brink	Park Supervisor II	OPW
Carina	Lieu	City Administrator Analyst	CAO
Sofia	Navarro	Deputy Director	EWD
Liam	Garland	Assistant To the Director	OPW
Monica	Pelayo-Lock	PIO II	Police Commission
Lakshmi	Rajagopalan	Planner IV	PBD
Barbara	DeSalvo	Volunteer Program Specialist II	OPD
Jasmine	Pomar	Program Analyst III	DOT
Andrea	Mariano	Human Resource Manager	HRM
Casey	Johnson	Deputy Chief	OPD
Jenera	Burton	Supervising Librarian	OPL
Juliet	Huang	Assistant To the Director	DWES
Demond	Simmons	Deputy Chief Support Services	OFD
Denise	Aaron	ASM	OPRYD
Shayna	Hirshfield-Gold	Program Analyst III	CAO
Mailee	Wang	Deputy Chief of Administration	DVP
Tiffany	Kirkpatrick	Budget Analyst	Finance
Megan	Wier	Assistant Director	DOT