



AGENDA and Notice of  
Community Visioning Work Group

---

The Community Visioning Work Group of the City of Newport will hold a meeting on Wednesday, July 29, 2015, at 10:00 A.M., in Conference Room A, at the Newport City Hall, 169 S.W. Coast Highway, Newport, Oregon 97365. A copy of the agenda follows.

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired, or for other accommodations for persons with disabilities, should be made at least 48 hours in advance of the meeting to Peggy Hawker, City Recorder 541.574.0613.

The Community Visioning Work Group reserves the right to add or delete items as needed, change the order of the agenda, and discuss any other business deemed necessary at the time of the meeting.

---

Community Visioning Work Group  
Wednesday, July 29, 2015 - 10:00 A.M.  
Conference Room A

- I. Call to Order
- II. Additions/Deletions to the Agenda
- III. Review of 2020 Vision Plan - Lorna Davis
- IV. Review of Upcoming Plans/Plan Updates Guiding City Development
- V. Report on Community Visioning and Strategic Planning Workshop Presented by the League of Oregon Cities - Engler and Perry
- VI. Development of a Recommendation on the Scope of a Visioning Effort
- VII. Develop Next Agenda
- VIII. Establish Next Meeting Date
- IX. Public Comment
- X. Work Group Comment
- XI. Adjournment





Spencer Nebel  
City Manager  
CITY OF NEWPORT  
169 S.W. Coast Hwy.  
Newport, OR 97365  
[s.nebel@newportoregon.gov](mailto:s.nebel@newportoregon.gov)

## MEMO

DATE: July 27, 2015

TO: Community Visioning Work Group

FROM: Spencer Nebel, City Manager

SUBJECT: Background Information for the Meeting on July 29<sup>th</sup>

---

On Wednesday, July 29, 2015, at 10:00 A.M. the Community Visioning Work Group will be meeting in Conference Room A to continue developing a recommendation on visioning for the City Council's consideration. On Friday I met with Work Group Chair Carl Perry and Councilor Wendy Engler to discuss next steps with this process. It is our suggestion to the Work Group that the July 29<sup>th</sup> meeting focus on developing the recommendation to the City Council of what components and scope would be included in a visioning process for the City of Newport with the following meeting being used to discuss the mechanics of how we would get to that point. I have outlined several categories of issues that the Work Group can utilize for discussion purposes and in developing a recommendation to the City Council. I have broken the categories out into various subheadings.

### Geography

In the community visioning process a decision would need to be made as to the geographic area that would be considered part of the visioning exercise. This could be the current city limits, the current urban growth boundaries, a larger geographic area (i.e. Cape Foulweather to Seal Rock), or as former City Manager Don Davis suggested looking at the Yaquina Bay Water Shed as that community development area. The Work Group should identify the geographic area for the focus of the visioning effort.

### Stakeholders

The Work Group should identify key stakeholders within the area identified for the visioning process. Some of these stakeholder groups would include:

- The Lincoln County School District

- Lincoln County
- Port of Newport
- Oregon Coast Community College
- Oregon State University
- Chamber of Commerce
- Various commercial districts in Newport
- Neighborhood districts in Newport
- Non-profit organizations
- The Economic Alliance
- Oregon Coast Aquarium
- Commercial fishing industry
- Other similar groups
- City Council
- City advisory boards and committees
- City administration and employees

It would be good for the Work Group to identify other key stakeholders in this process as well.

#### Potential Components of a Community Visioning

- Education
- Health
- Economic Development
  - Tourism
  - Research/Science Community
  - Commercial Fishers Community
  - Governmental Communities (NOAA, US Coast Guard, OSU, EPA, and others)
- Infrastructure
- Maritime
- Safety
- Neighborhoods and Districts

The Work Group should identify other potential components that should be addressed in a community visioning effort.

#### Guiding Principles for the Visioning Process

In reviewing the City of Lebanon's visioning effort, three guiding principle were identified as part of the visioning effort:

1. Encourage the community to thoroughly participate and engage.
2. Strength relationships between city leaders and community.
3. Create a value base approach to addressing complex issues.

These principles were addressed in Lebanon with the following approach:

1. Build personal relationships with participants.
2. Create a welcoming atmosphere.
3. Increase accessibility.
4. Develop alternative methods for engagement.
5. Maintain a presence in the community.
6. Partner with diverse community organizations.

The work group should outline the principles that should guide the City of Newport visioning efforts.

### Tools

There are a number of tools that can be used in a visioning process which include:

- Public opinion surveys
- Stakeholder's surveys
- Focus group discussions
- One on one interviews
- Use of existing advisory boards and committees
- Participation by other governmental entities
- A speaker's bureau
- Community events
- Public meetings
- Online interaction
- Newsletters
- Other similar means in order to involve the community in these types of discussions

It is certainly appropriate for the Work Group to review these items and add or delete items that could be part of the visioning exercise for the City of Newport.

### Components of Strategic Planning

Erik Gensen, Principal with Gensen Strategies, LLC. Indicated during the L.O.C. conference that the community visioning process should guide the development of the following elements for a community which include:

1. Mission
2. Core values
3. Goals/objectives
4. Strategies

5. Organization-wide actions
6. Department level/business strategic plans

Furthermore, in order to keep a community vision as a focal point of future planning and development efforts within the community it is critical to develop an action plan, monitor that action plan, review and make minor adjustments to the community vision when changes are needed. Mr. Gensen suggests that an annual town meeting be held for the purpose of reviewing an annual progress report on the visioning process to keep this effort alive and important in the overall future planning efforts for the community. I think it is important to have a good understanding of how this vision will be used by the community prior to embarking on this effort since this will be key to the longevity of this effort.

The above information has been compiled for the purposes of guiding discussion and thoughts about what can be included or not included in a community visioning process for the City of Newport. We also need to clearly answer the question as to whether the timing is right to proceed with a visioning process at this time.

Once we complete this meeting, the final meeting will focus on more of the mechanics of how we would accomplish this effort including contractual services, budget, timetable, staff support, and other issues related to the ability to conduct this overall effort. I look forward to meeting with you on Wednesday to discuss these elements and any other issues that the Work Group may have regarding the development of a visioning process outline for the City of Newport.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "S. R. Nebel", written in a cursive style.

Spencer R. Nebel  
City Manager

June 30, 2015  
2:00 P.M.  
Newport, Oregon

The Community Visioning Work Group met, for its first meeting, at the above date and time in Conference Room A of the Newport City Hall. In attendance were: Carla Perry, Mayor Sandy Roumagoux, Cathey Briggs, James Patrick, Chris Spaulding, Councilor Wendy Engler, Ken Brown, and Lorna Davis. Staff attending were Spencer Nebel, City Manager, Derrick Tokos, Community Development Director, and Peggy Hawker, City Recorder/Special Projects Director.

### CALL TO ORDER

Nebel called the meeting to order as a chair had yet to be selected. He distributed information that included the Vision 2020 Plan and excerpts from other plans/projects that guide city activities, including: Newport Peninsula Urban Design Plan; Bayfront Plan; Agate Beach Neighborhood Plan; South Beach Neighborhood Plan; Transportation System Plan; South Beach Peninsula Transportation Refinement Plan; Coho/Brant Infrastructure Refinement Plan; North Side Local Street Plan; Bicycle/Pedestrian Plan; Public Facilities; Park System Master Plan; Comprehensive Plan; Urbanization; Library Services; Fire Emergency Services; Police Services; School Services; Entertainment and the Arts; History; Natural Resources; Newport Economic Opportunity Analysis; Lincoln County Economic Development Strategies; Newport Housing Needs Analysis; and the Newport Student Housing Study - OSU Expansion.

Nebel thanked the Work Group members for agreeing to participate in the discussion to address how the city should proceed with a community visioning process. He reviewed the task that the Work Group had been charged with, and that is how, or whether, to proceed with a visioning process; whether this time is right; how the visioning process, if the recommendation is to move forward, would be structured; the goals of the process; and that a report/recommendation is due to the City Council by mid-August.

Nebel stated that he believes it is important for the city to include a broad base of the community in providing the necessary guidance and understanding about collective visions built from individual views of what citizens would like Newport to look like at some point in the future. He noted that in a visioning process, typically there needs to be concurrence about the time period in which the long-term vision is accomplished, whether it be 10 years, 20 years, 30 years, or some other time frame. He added that once a vision is in place, it empowers community stakeholders to develop long-term goals to implement aspects of the vision.

Nebel reported that the Newport 2020 Plan, completed in 2005, was an effort coordinated by the Greater Newport Chamber of Commerce, with participation from various stakeholders.

Nebel reported that upon acceptance of the goals for the 2015/2016 fiscal year, the City Council requested a report on updating the community vision. He noted that Tokos estimates from conversations with planning consultants that a facilitated master planning process for the city could cost anywhere from \$40,000 to \$100,000 depending on the

processes that would be included as part of the visioning effort. He stated that issues that would push the cost up would be if a statistically accurate community survey was conducted as part of the process; utilization of online presence for collecting data; video work; and other similar components. He added that while the city has certain capabilities at a staff level to facilitate aspects of a visioning process, it is unlikely that staff has adequate time to conduct a highly engaged process with high citizen involvement, while continuing with other obligations that the Council has identified, without the assistance of a consultant. He reported that in checking with the City Manager's listserv, he got specific information about costs and firms utilized by a number of communities, which included; Monmouth, who was working with Barney and Worth at a cost of \$45,000; the Dallas, which conducted a 2030 vision in 2013 at a cost of \$50,000 utilizing Zenn Associates; and Lebanon which has budgeted \$50,000 to conduct a 2040 vision utilizing BDS Planning and Development. He added that The Dalles is applying for funds through the RARE Program to get a graduate student to work on a main street vision at a cost of about \$22,000 for its share of the graduate student, and the City of Donald has used the University of Oregon Green Cities Class to do some visioning work for that community.

Nebel reported that once a community vision is adopted, it will serve as a guideline for the continued processes of reviewing and adapting the city's Comprehensive Plan to make sure it is consistent with the vision. He noted that it would guide the annual goal setting process for the departments and the Council to continue moving the city toward realizing this vision.

Nebel reported that a community vision needs to be a living document that has flexibility and is easily updated. He added that it should be reviewed annually by the City Council and other key stakeholders, particularly at the time of goal setting and/or budgeting, to make sure that the direction is complementing the vision of where Newport wants to be at some point in the future. He stated that he believes that the final document should not be a highly technical document, but should convey a sense of those areas where there is community buy-in for moving the city in a forward direction. He noted that over time, the Comprehensive Plan should provide the roadmap to direct the community toward those concepts that have been accepted through this process.

Nebel reported that the city has a lot of very positive things going for it, including: the successful effort of the community to attract the NOAA facility; the announcement that OSU will be creating an undergraduate marine studies program at the Hatfield Marine Science Center; OMSI establishing a coastal discovery camp in South Beach; the community's effort to retain the U.S. Coast Guard Air Facility; and other efforts show how closely this community can work together on common goals. He stated that he believes that a community vision would foster further direction and cooperation to move the community forward in other areas as well.

Engler asked whether money was budgeted for a visioning process, and Nebel reported that there is sufficient capacity in contingency to fund this effort.

## INTRODUCTIONS

Everyone introduced themselves.



## ELECTION OF CHAIR

Briggs nominated Perry. There were no other nominations, and Perry was declared chair.

## REVIEW OF THE TASK OF THE WORK GROUP

Nebel reiterated that the Council is looking for a recommendation on how to proceed with this issue by August 15. Engler noted that she would like to hear more about the visioning efforts of other communities.

## REVIEW OF EXISTING PLANS AND DOCUMENTS GUIDING CITY DEVELOPMENT

Nebel noted that this information was included in the handout distributed at the outset of this meeting. He asked that Work Group members review this information prior to the next meeting. It was suggested that a discussion of Vision 2020 and why it is not happening should be an item on the next meeting agenda.

## DISCUSSION OF A VISIONING PROCESS FOR THE CITY

Perry stated that it is critical to weave a process that keeps the vision on the forefront with a scheduled annual review. Nebel noted that the vision could be reviewed annually prior to the Council goal setting session. Davis noted that there was an economic development study in 2012 on which the City Council adopted goals. She added that the goals were eliminated with a new Council.

Tokos suggested reviewing the planning initiatives that are underway or planned in the next few years, and how the vision fits with these plans. He suggested that an overarching and broad vision conceptually works best, but that structurally, must be developed to define how the plans underway fit with the vision. Engler noted that she hopes that the vision could be incorporated into the Comprehensive Plan as a "go-to" document.

A discussion ensued regarding the potential duration of a visioning plan. Perry suggested a maximum duration of 50 years, noting that the goal could be to make sure the city is livable in 50 years. Engler agreed that 50 years is a good plan duration. Brown noted that a 50 year plan would require broad changes throughout the duration. Davis suggested a duration in between noting that no one would have any idea where the city will be in 50 years. She noted that this group has great hindsight, but needs to keep in mind that the planning is for the next generation. Briggs suggested a strong public process which would include engaging people on the heart, quality, and values level. Nebel noted that determining the community's core values should be a part of the process in creating a vision. Patrick noted that a broad outline is needed, but that bigger plans are a necessity.

Nebel asked how the Work Group envisions the process, and asked what should be discussed at the next meeting. Items suggested for discussion at the next meeting include: geography of area; budget; elements in the visioning process (what do we focus on); process strategy; and how to start the process. Nebel reported that he would bring information from other cities. Engler reported that she is planning to attend a League of

Oregon Cities training on visioning on July 14, and suggested that if others wish to attend, to let staff know for registration purposes. Briggs noted that she would like a quick overview of the other plans and proposed plans.

### DEVELOP AGENDA FOR NEXT MEETING

It was agreed to include the following items on the next agenda:

Other planning issues;  
Continued discussion on geography;  
Past planning efforts;  
Lessons learned from the Vision 2020 Plan;  
Update on other city's visioning efforts.

### NEXT MEETING DATE

Staff will distribute a doodle poll for use in scheduling the next meeting.

### WORK GROUP COMMENTS

Perry suggested that a heavy marketing effort be made to kick-off the visioning process.


Each Work Group member discussed their personal interest in this process.

A discussion ensued regarding the length of the meetings, and it was the consensus of the group that the meetings last no longer than two hours, and preferably approximately one and one-half hours.

### ADJOURNMENT

Having no further business, the meeting adjourned at 3:22 P.M.

# Memorandum

To: Community Visioning Work Group  
From: Derrick Tokos, Community Development Director   
Date: July 24, 2015  
Re: Current and Future Planning Initiatives

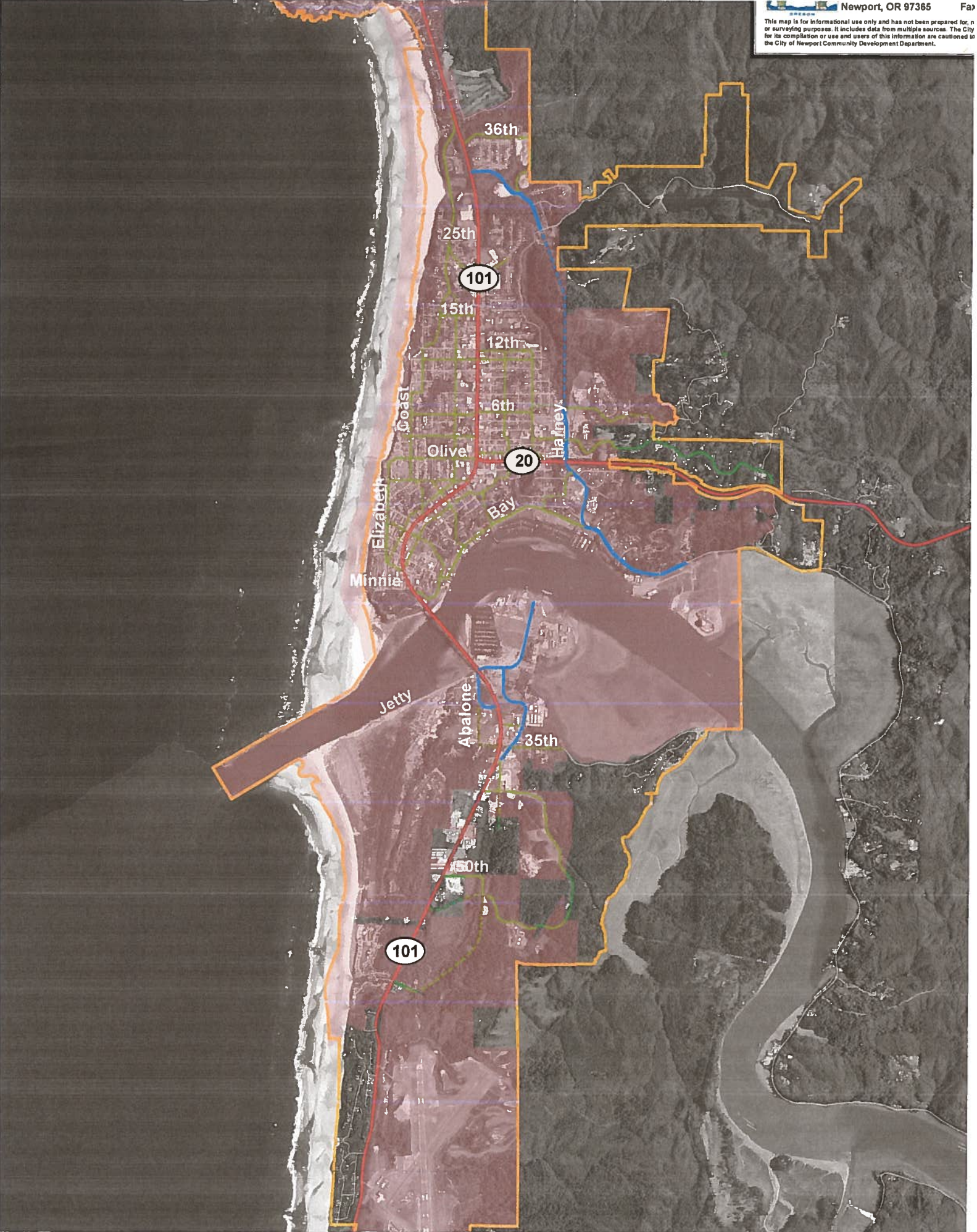
---

The following is a summary of planning projects within the community that are underway or will be initiated in the next few years. I recognize that the hospital expansion is construction, as opposed to planning, but its impact is significant enough that it seemed appropriate to include on the list.

<u>Planning Project</u>	<u>Timeframe</u>
New Northside and McLean Point Urban Renewal Areas	2014-2015
Park System Master Plan	2016-2019
Stormwater Master Plan	2013-2017
Wastewater System Master Plan	2014-2018
Airport Master Plan Update	2015-2017
Bridge Alternatives/Northside Transportation System Plan Update (ODOT funding)	2014-2020
Downtown Revitalization Plan (Urban Renewal Funded)	2018-2020
Agate Beach Neighborhood Plan (Urban Renewal Funded)	2018-2020
Parking Study (Bayfront/Nye Beach/City Center)	2015-2016
Port of Newport Vision Plan	2016-2017
Lincoln County Schools Facility Master Plan	2016-2017
Future of the Lincoln County Fairgrounds	2014-2016
State Park Master Plan Update (Beverly Beach – South Beach)	2014-2016
Hospital Redevelopment and Expansion	2015-2018











## Community Visioning & Strategic Planning



Oregon  
Local  
Leadership  
Institute



Jensen Strategies, LLC

SUMMER 2015



## Erik Jensen



- **Principal, Jensen Strategies, LLC**
  - Policy and Organizational Development Consulting
  
- **Past Experience:**
  - Public Administrator
  - Policy Development Project Manager - Strategic Planning
  - Public Policy Consultant

## + Agenda



1. **Workshop Overview**
2. **Long Term Planning**
3. **Overview: Community Visioning and Strategic Planning**
4. **Community Visioning**
5. **Strategic Planning**
6. **Recap and Wrap-up**

## + Introductions



- Name
- City / Organization
- Role
- What experience do you have with visioning and/or strategic planning?
- What do you hope to get out of this workshop?





# LONG TERM PLANNING

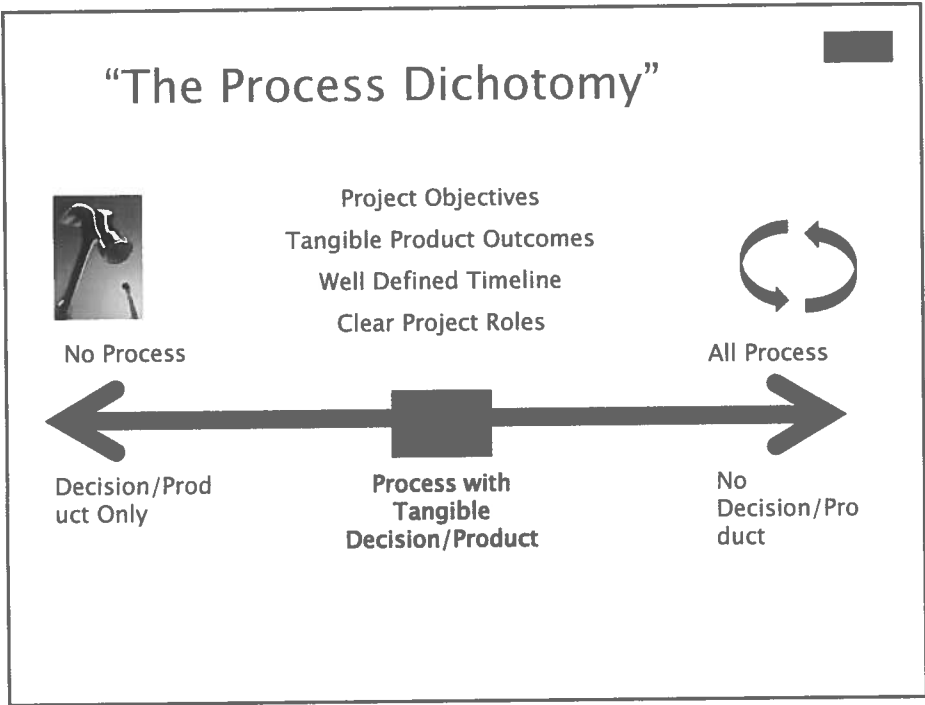
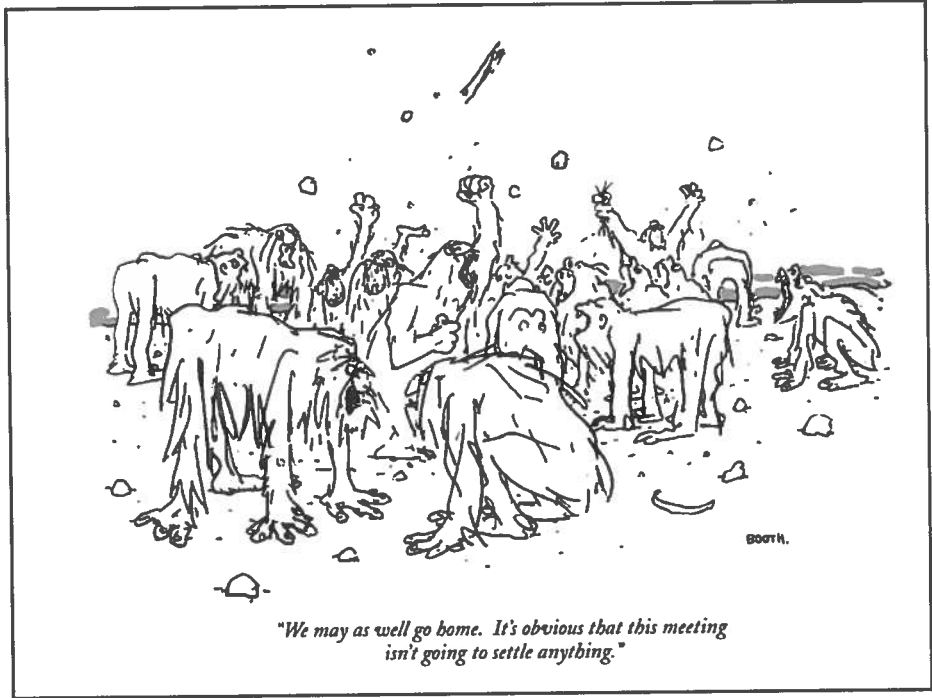


## LONG TERM PLANNING EXPERIENCES

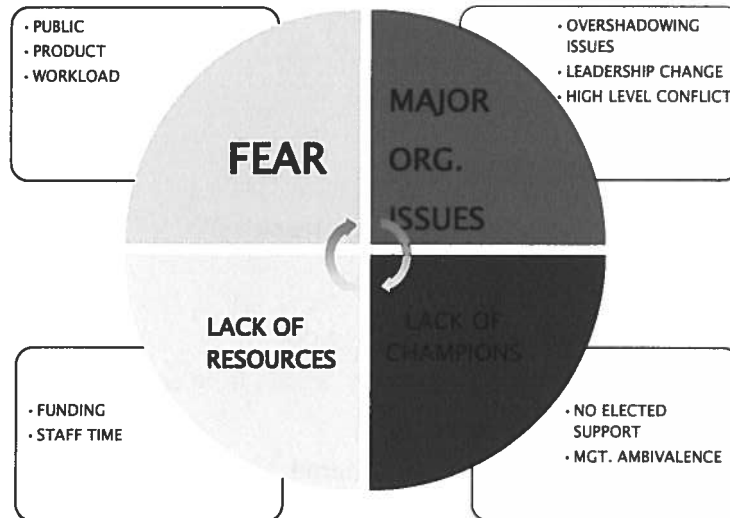


Discuss what long term planning efforts with which you have been involved. Based on these experiences:

1. Were those experiences positive or negative? Why?
2. What worked well?
3. What types of problems or obstacles did you encounter?
4. In the end, was the process successful?



## “PLANNING PARALYSIS”



## + Stakeholders

“A stakeholder is any person, group, or organization that can make a claim on an organization's attention resources, or output -- or that is affected by the organization's output.” *(Bryson)*

“A stakeholder is anyone who can throw a wrench into the process and stop it before implementation.” *(E. Jensen)*

## + Public Involvement



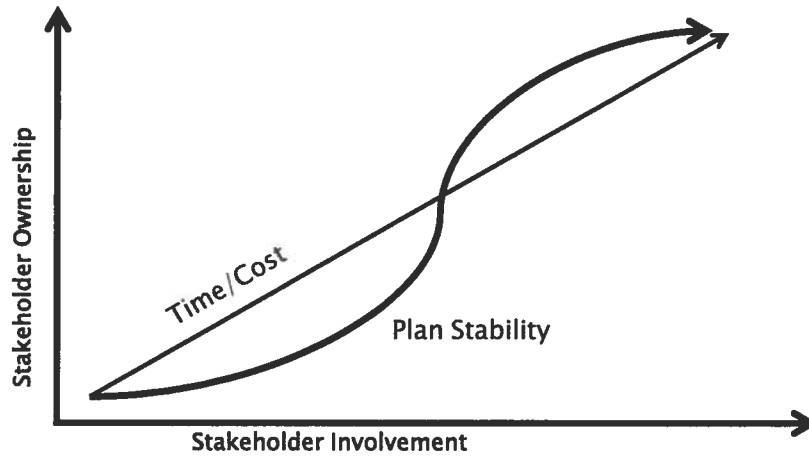
- Needs to be genuine
- Define the dialogue
- Clarity of participation (roles, opportunities)
- When not to seek public input:
  - There is no choice about what to do
  - The issue is has reached "crisis" and is time critical
  - No one cares about the issue
  - Citizen input will not be considered

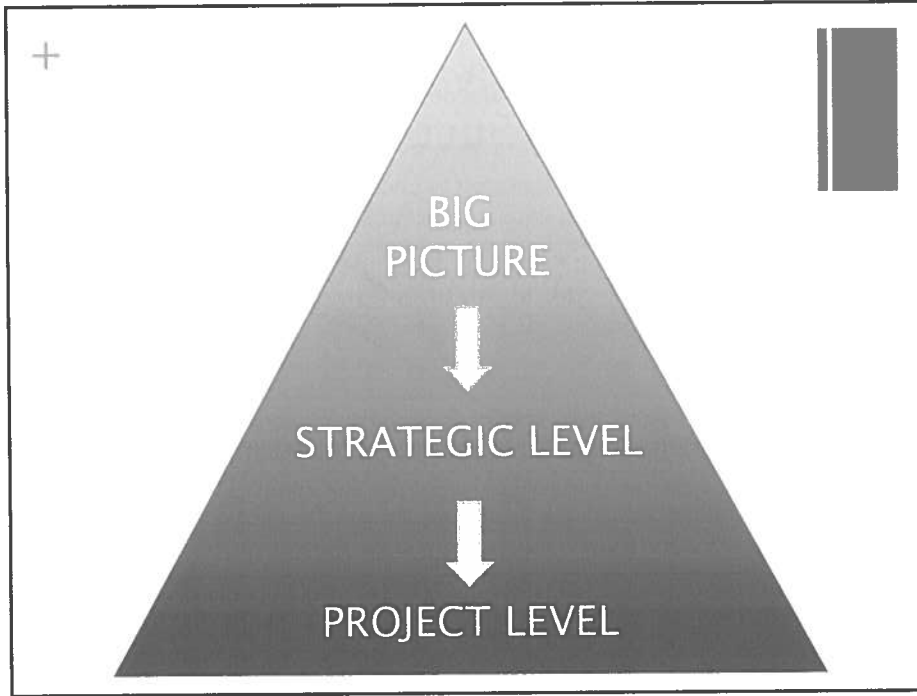
## + Employee Involvement



Planning is everyone's business, and experience has shown that employees are most likely to participate when they help identify issues.

# Stakeholder Involvement & Maximizing Success





COMMUNITY VISIONING  
&  
STRATEGIC PLANNING

## + Visioning

- The process of identifying what a community and/or organization should look like within a designated period of time.
- Involves a broad range of external and internal stakeholders
- Allows for creative or “out-of-the-box” brainstorming

## + Strategic Planning

“A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why it does it.”

*John M. Bryson (1988) Strategic Planning for Public and Nonprofit Organizations (San Francisco, CA: Jossey-Bass) 3rd. Edition (2004)*



## + Visioning & Strategic Planning: Common Elements

- Proactive approaches
- Effective tools for inter-disciplinary long-term planning
- Interconnected
- Shared principles of process and engagement



## + Visioning & Strategic Planning: Common Elements (cont.)

- Stakeholder engagement key in development
- Shared vision/goals
- Big picture perspective
- Provides policy guidance or direction

## Core Steps for Long Term Planning

### Generic Long-Term Planning



### Visioning



### Strategic Planning



	Community Visioning	Strategic Planning
Purpose	Identify what a community and should look like within a designated period of time.	Develop mission, core values, long-term goals, strategies and actions to guide decision-making and budgeting.
Typical Time Period	20-30 Years	5 Years (or less)
Key Stakeholders	Community (Public) Key External Interests Elected & Appointed Officials Staff	<i>Community</i> <i>Key External Customers</i> Elected & Appointed Officials Staff
Action Plan	As part of vision or incorporated into organization strategic planning process	Involves multi-levels from strategies to specific actions

# COMMUNITY VISIONING



## + Community Visioning: Products

- **Vision Statement:**

Broad-brush description of a community and/or organization when the designated date is reached.

- **Action Plan:**

Strategies and/or specific actions to achieve the Vision Statement.

## + Community Visioning: Deciding & Preparing to Launch



- Reasons to conduct a vision project:
  - Build community identity
  - Hear the community's vision for the future
  - Build community ownership in a shared vision
  - Foster partnerships and joint ventures
- Reasons not to conduct a vision project:
  - Elected body is divided
  - Distracting or controversial community issues
  - Resources (personnel or funds) are not available
  - The outcome is pre-determined

## + Questions Before Starting Community Visioning

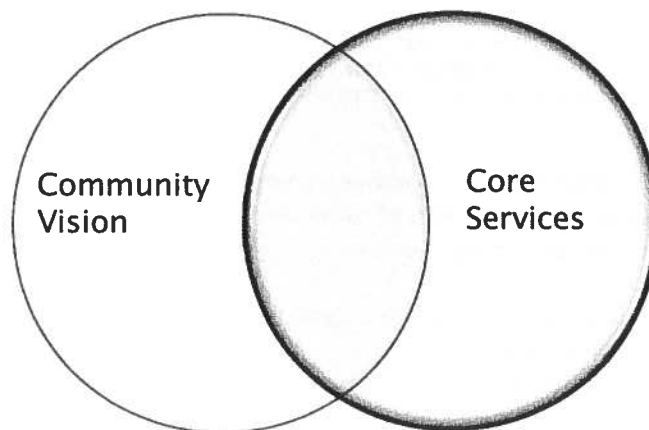


- Why do you want to do a community vision? What is your objective?
- Is your elected body in UNANIMOUS agreement to move forward and prepared to publicly give support?
- Are you going to use a consultant?
- Do you have the funding and personnel resources to proceed with the project?

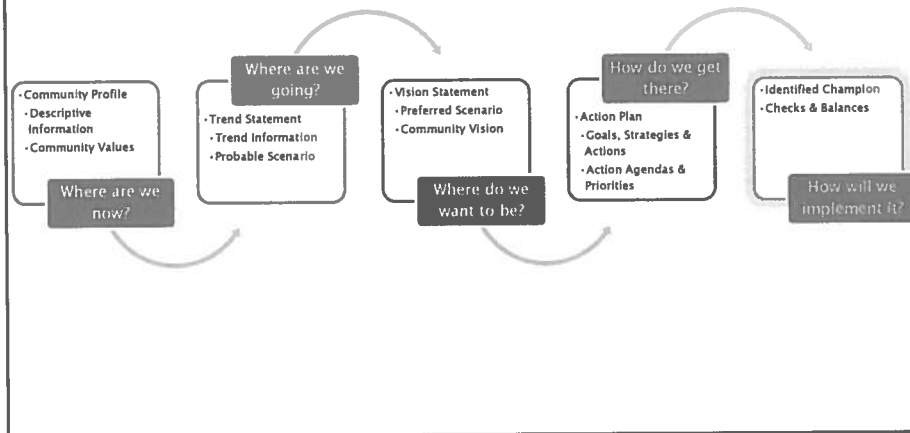
## + Community Vision Development Objectives

- Identify community trends and needs
- Use a transparent process
- Seek, listen and incorporate community input
- Bring equity and balance to the discussions
- Use as many diverse outreach tools as possible
- Tangible products and documentation

## Community Vision Relationship to Core Services



## + Community Visioning Model



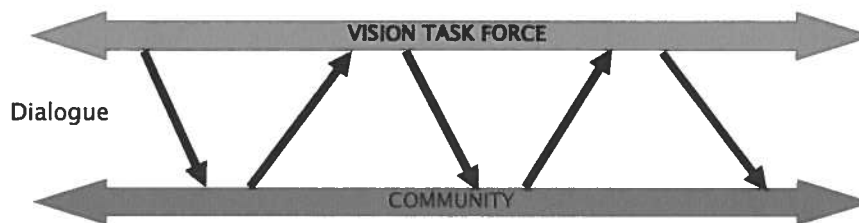
## + Community Visioning: Environmental Scan

- Considers the various environments that have an impact on a community and/or organization. Where are you now and where are you going based on current trends?
  - Community values and perspectives (current)
  - Business environment – types of businesses, work force
  - Economic trends (national, state, local)
  - Education
  - Regulatory trends (e.g., unfunded mandates)
  - Revenue projections
  - Demographic trends
  - Other factors – key community issues

## + Community Visioning: Public Engagement Framework

- Appoint a citizen task force of key community interests
  - Formal appointment by elected body with charge and timeline
  - Appoint a chairperson (at-large, no special interests)
  - Task force charge : develop/recommend vision and action plan
- Design a parallel and integrated (to task force) public involvement process:
  - Use diverse outreach venues (Web, print, meetings, etc.)
  - Utilize existing resources (newsletters, regular meetings, etc.)
  - Clearly communicate opportunities for input
  - Solicit input about areas the public can influence

## + Community Visioning: Parallel Public Engagement Structure



## + Community Visioning: Public Involvement Framework

- **Brand your process** – name/logo
- **Be strategic in timing and tools**
  - Avoid public involvement activities during summer/holidays
  - Link public input windows with Task Force decisions
  - Use diverse communication tools– print, online and in-person
  - Consider target audiences and best ways to reach
- **Define the community conversation**
  - Set content parameters for public dialogue
  - Ask for input on areas where public can potentially influence





## + Community Visioning: Task Force

- **Target Size:** 12-15
- **Identify interests** first, not individuals
- **Membership:**
  - representative
  - committed
  - constructive
  - supports process
- **Chair:** "at-large," leader, politically savvy, spokesperson
- **Clear charge, timeline and expectations**

## + Community Visioning: Participant Roles

- **Task Force:** Represent the process, develop the products based on community input
- **Elected Officials:** Visioning ambassadors, formal adoption
- **Project Staff:** Visioning champions, process facilitators
- **Consultants (if any):** Third party facilitators, process advisors, and other roles as needed
- **Organization Staff:**
  - External: Listeners, visioning champions, ambassadors, resources
  - Internal: Provide input and ideas, resources

## + Community Visioning: Sample Public Involvement Tools



- Stakeholder Surveys (Env. Scan)
- Public Opinion Surveys (Env. Scan)
- Speakers' Bureau (Vision Dev.)
- Community Events (Vision Dev.)
- Public Meetings (Vision Dev.)
- Online: Surveys, Project Website, Facebook (Vision Dev.)
- Newsletters (Vision Dev.)
- Direct Mail (Vision Dev.)
- Work Groups (Action Plan Dev.)

## + Community Visioning: Action Planning



- Task Force to develop based on ideas from public input
  - Consider using citizen/TF work groups for specific areas
  - Community input continues but at reduced level
  - Involve potential partners and implementers
- Key steps:
  - Develop strategies/objectives first – based on vision statement
  - Develop actions second – based on strategies / objectives
  - Community review and input
  - Test ideas and get buy-in with proposed implementers

## + Community Visioning: Celebrate the Vision



- Formal adoption by elected body
- Thank you event for participants
- Formal distribution of document (hard copy or electronic)
- Public communication strategy: media, public

## + Vision Implementation: Key Elements



- Resource Allocation
- Champions:
  - Committee (with charge/accountability)
  - Staff / Consultant
  - Leadership: Electeds, Administrators
  - Lead Partners
- Processes for Updates
- Community Awareness Strategy

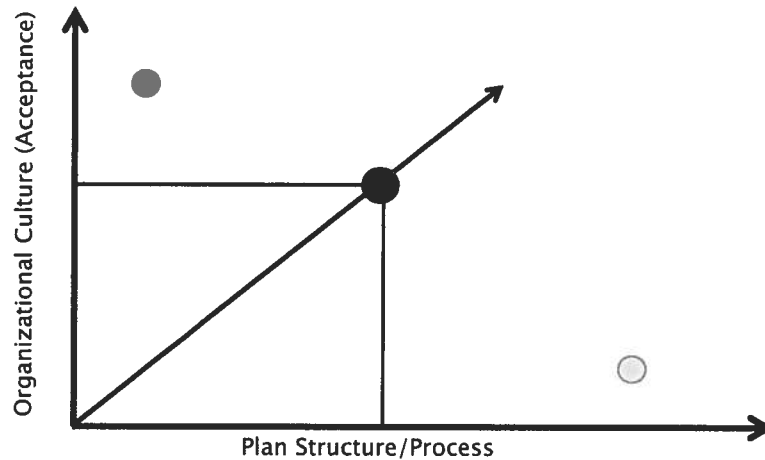
## + Vision Implementation Committee

- Appointed by elected body
- Membership:
  - Lead partners
  - Key community interests
  - Elected body liaison
  - Include cross-over from Vision Task Force
- Staffing
- Establish regular work program and reporting
- Involve with community awareness activities

## + Vision Implementation: Within the Organization

- **Communicate commitment to staff** (from electeds/mgt.)
- **Assign actions to departments**
- **Incorporate in budgeting**
  - Departments identify what monies allocated to vision plan
  - Annually report on vision progress in budget
- **Incorporate into policy decisions (esp. at elected level)**
  - Staff reports state if item is related to vision
  - As appropriate, link to other long term planning

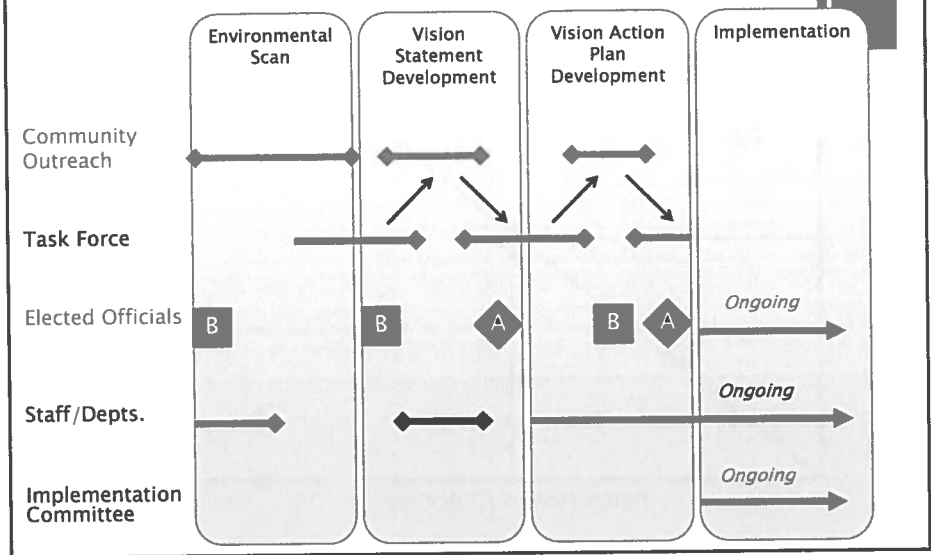
## Plan Integration with Organization/Operations



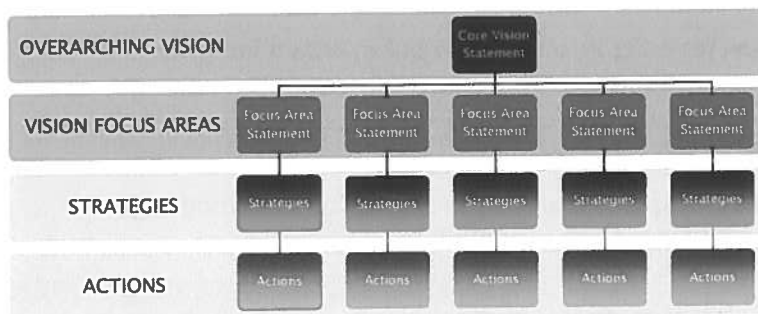
## + Vision Implementation: “A Living Document”

- Avoid the document becoming “stale”
- Allow for edits in action plan but maintain integrity :
  - Minor edits which do not impact the intent of an action item
  - Major edits which impact the intent or add new ideas/strategies
- Build in regular intervals (5+ years) for “revisiting” the action plan with the community

## + Sample Community Visioning Process



## Vision and Action Plan Structure

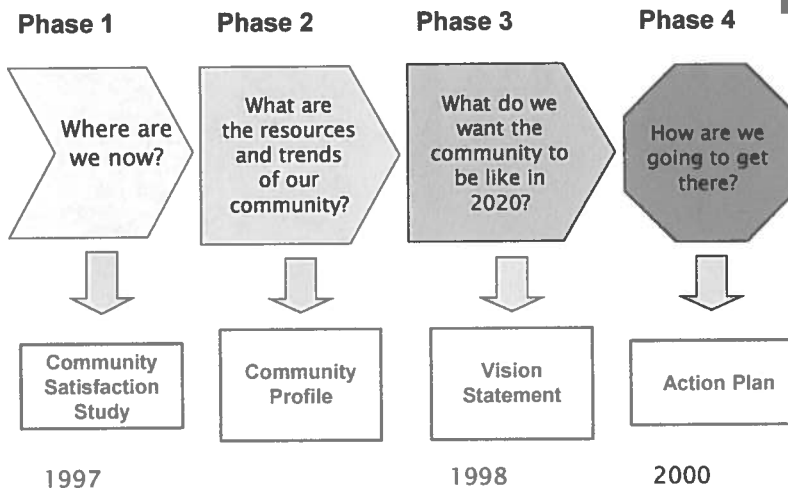




+ Hillsboro 2020  
Vision Development



+ Hillsboro 2020  
Vision Development

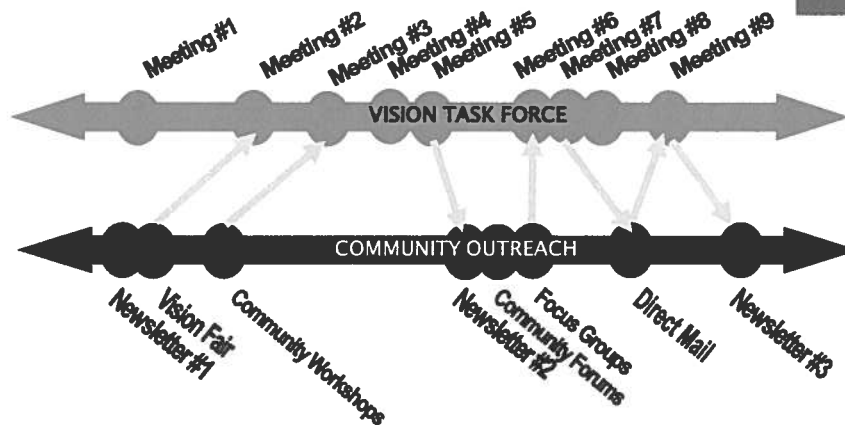




+ Hillsboro 2020  
Vision Development



+ Hillsboro 2020  
Vision Development



## + Hillsboro 2020 Vision Development

### Community Involvement:

- Vision Fair
- Workshops & Forums
- Speakers Bureau
- Newsletters
- Special Interest Focus Groups
- Direct Mailings
- Project Web Page
- Spanish Language Hot Line



+ Hillsboro 2020  
Action Plan Development



+ Hillsboro 2020  
Action Plan Development

- Vision Task Force
- Six Vision Action Teams
- Project Newsletters
- Community Partners Involved



## + Hillsboro 2020 Action Plan Development

- Community Partners
- Action Teams
- Pre-Adoption Commitments
- Identified in Action Plan
- Results:
  - Promoted Ownership of Plan
  - Linked Plan to Implementation



## + Hillsboro 2020 Vision Implementation



Visionary Artwork by MeiLin Yent, Grade 6

## + Hillsboro 2020 Vision Implementation

### Key Elements

- Vision Implementation Committee
- Continued Community Awareness / Involvement
- Lead Partners' Accountability – Annual
- Action Plan Updates (Major reviews every 5 years)
- Staff/Consultant Support

## + Hillsboro 2020 Vision Implementation

### Vision Implementation Committee Charge:

- Monitor & facilitate
- Recommend minor Action Plan revisions
- Annual Town Hall
- Annual progress report



## + Hillsboro 2020 Vision Implementation

### Annual Town Hall

- Public discussion
- Presentations
- Partner Displays
- Awards
- Bilingual



## + Hillsboro 2020 Vision Implementation

### Community Awareness & Involvement

- Speakers Bureau
- Volunteer Program
- Awards
- Program and Project "Branding"
- 4th of July Parade Float



## + Hillsboro 2020 Vision Implementation

### Vision Action Plan Updates

- VIC - Minor Updates (Annually)
- New or Revised Actions (Annually)
- New or Revised Strategies (Five Year)

## + Hillsboro 2020 From Vision to Reality Hillsboro Civic Center

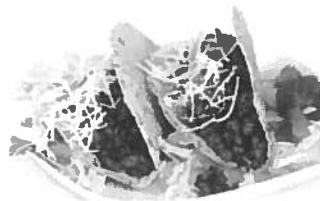


+ Hillsboro 2020  
From Vision to Reality

Hondo Dog Park



**LUNCH!**





# STRATEGIC PLANNING



*"If we're going to prioritize, we're going to need some priorities."*

+



## + Strategic Planning



- Establishes long-term, high-level policy direction for service delivery
- Includes action plan
- Involves key stakeholders
- Planning time frame is usually 5 years or less

## + Strategic Plan: Benefits



- Organizational direction
- Common understanding of policy direction
- Serve as policy guide for decision-making
- Link long-term direction with short-term activity
- Clarify and showcase an agency's intent and budgetary decisions as well as tie the budget to program performance.



## Strategic Plan: Benefits (cont.)



- Create a sense of team and mutual accomplishment.
- Save time and money.
- Build strategic thinking into the organization.
- Serve as the basis for evaluating employee and program performance.



## Strategic Plan: Things It Will Not Do



- Be a panacea for all issues.
- Be a substitute for leadership.
- Be a substitute for strategic thinking, acting and learning carries out by caring and committed people.

## + Reasons Not to Initiate Strategic Planning



- The organization's "roof has fallen in."
- The organization lacks skills, resources, or commitment of key decision makers.

## + Strategic Planning Products



- **Mission:** Statement of purpose and responsibilities of the organization.
- **Core Values:** Philosophy that guides the organization in achieving its mission.
- **Objectives/Goals:** Statement of general direction. "Path of travel."
- **Strategies:** Explains how initiatives/goals will be accomplished.
- **Actions:** Specific projects, programs or tasks.

## + Questions Before Doing Strategic Planning

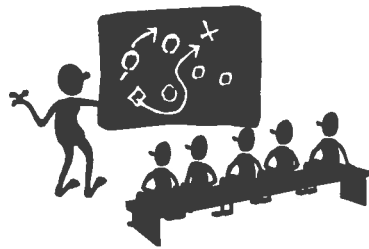
- *Why do you want to do a strategic plan? What is your objective?*
- *Is your elected body in UNANIMOUS agreement to move forward and prepared to publicly give support?*
- *Are you going to use a consultant?*
- *Do you have the funding and personnel resources to proceed with the project?*
- **Have you done a community vision?**

BREAK !



+

## Strategic Plan: Development Process



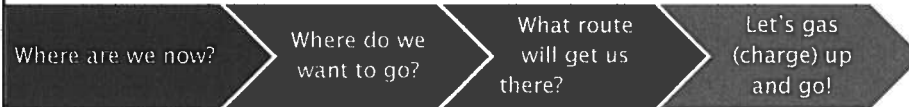
+

## Strategic Planning: Key Phases

1. Environmental Scan: Trends, analysis, and SWOT
2. Mission & Core Values: – develop and/or revisit
3. Goal Development
4. Strategy Development
5. Action Planning
6. Implementation

## Core Steps for Long Term Planning

### Generic Long-Term Planning



### Visioning



### Strategic Planning



## + Strategic Plan: Development Objectives

- Identify the current trends, issues, challenges and opportunities.
- Involve key stakeholders in the process: customers, elected officials, appointed officials, management, unions, staff.
- Develop a mission and core values (if needed), goals, strategies and actions.
- Establish the structure and resources to facilitate implementation.
- Determine appropriate performance measures.

## + Strategic Plan: Development Framework



- Project Manager/Team
- Steering/Advisory Committee
- Engagement Plans
  - Community
  - Electeds
  - Employees
- Formal Milestones
  - Mission Statement
  - Core Values
  - Strategic Plan

## + Strategic Planning: Environmental Scan



- Identifies the current issues, trends, and opportunities
  - External trends: economic, regulatory, demographic
  - Customer service needs and issues
  - Financial outlook
  - Organizational workforce issues



## + Strategic Planning: Environmental Scan – Sample Tools

- Stakeholder interviews (electeds, community leaders, department managers, etc.)
- Community surveys or public opinion polls
- Key customer focus groups
- Employee surveys and/or workshops
- Review of current long-term plans
- Economic analyses
- HR trend data (turnover rates, personnel issues)

## + Strategic Planning: Mission Statement


**A mission statement summarizes the purpose and associated responsibilities of a group or organization**

+

## Mission Statement

Mission statements should be:

- Externally oriented
- Short
- Inspiring



**“We must all efficiently  
Operationalize our strategies  
Invest in world-class technology  
And leverage our core competencies  
In order to holistically administrate  
Exceptional synergy”**

***WEIRD AL YANKOVIC, “MISSION STATEMENT”***

## + Sample Mission Statements



- "Tualatin Valley Fire & Rescue is committed to creating safer communities through prevention preparedness, and effective emergency response."
- "Conserve and protect soil and water resources for people, wildlife, and the environment." (West Multnomah Soil & Water Conservation District)
- "The Port of Astoria seeks to generate economic growth and prosperity in a safe and environmentally responsible manner for its citizens through creation of family wage jobs and prudent management of its assets."

## + Strategic Planning: Core Values



Core values express the internal beliefs or philosophy that directs how an organization carries out its message.

## + Strategic Planning: Core Values



- Serve as a “filter” for carrying out the mission.
- Effective implementation depends upon organizational ownership.

## + Strategic Planning: Adoption of Mission/Core Values



- Formal adoption by the elected body prior to conducting next steps in strategic planning process.
- Provides early success in strategic planning process
- Awareness Initiatives
  - Posting mission statement and core values (website, within facilities, etc.)
  - Electeds and management as champions

## + Strategic Planning: Goals

A goal is a statement of general direction leading toward a desired end state; a “path of travel.”

- What do we want to achieve?
- How do we put our mission and core values into action?

## + Strategies



Strategies are the means for accomplishing goals and objectives. Strategies establish a direction for implementing the plan.

## + Strategic Planning: Actions



Actions are the specific tasks, projects or programs that implement a strategy.

- What specific steps will we take to implement this strategy?
- What entity will be responsible for making each step happen?

## + Strategic Plan Implementation: Key Elements



- Resource Commitment and Allocation
- Champions:
  - Leadership: Electeds, Management
  - Inter-departmental Committee (w/ Lead Partners)
  - Project Staff
- Formal Processes for Updates and Reporting

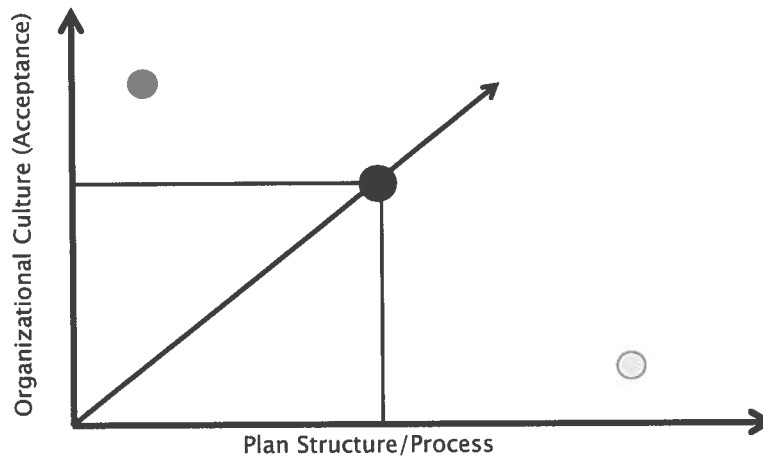
## + Strategic Plan Implementation: Within the Organization

- Formal adoption by elected body
- Staff communication and awareness
  - What does it mean to them?
- Build Core Values into employee evaluations

## + Strategic Plan Implementation: Within the Organization (cont.)

- Incorporate strategic plan in budgeting decisions
  - Departments identify what monies allocated to vision plan
  - Annually report on vision progress in budget
- Incorporate into policy decisions (esp. at elected level)
  - Staff reports to state if item is related to strategic plan
  - As appropriate, link to other long term planning

## Plan Integration with Organization/Operations



## + Action Plan: Sample Format

STRATEGY #1: ENHANCE EMPLOYEE PROFESSIONAL DEVELOPMENT AT ALL STAGES OF EMPLOYMENT				
ACTION DESCRIPTION	LEAD	SUPPORT PARTNERS	TIMELINE	PERFORMANCE MEASUREMENT
Establish an employee orientation program	HR	COO's Office Risk Management SDAO	Complete and start by June 2015	All new employees receive orientation from start date
Prepare succession plan	COO	All divisions	Complete by Jan. 2016	At least three qualified finalist candidates for each recruitment





+

## Success Factors

1. Stakeholder Involvement

- Involving all stakeholders at some level
- Meaningful dialogue & input

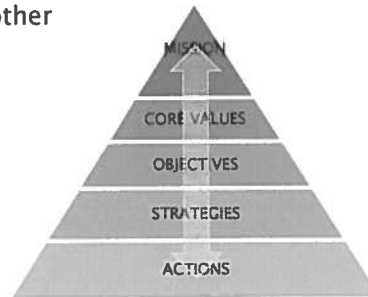
+

## Success Factors



### 2. Connectivity and Consistency

- Plans complement each other – avoid contradicting priorities
- Products build on one another



+

## Success Factors



### 3. Flexibility

- Use verbiage that sets clear direction while avoiding being too restrictive
- Build in ability to update to keep the plan(s) fresh

+

## Success Factors



### 4. Leadership Unity and Advocacy

- Leadership (elected/management) backs process as a team
- Leaders are public advocates



+

## Success Factors



### 5. Implementation Structure/Resources

- Ensure champions - designated leads
- Resource allocation
- Accountability - who reports? What is success?
- Communication strategy
  - Internal - share strategies/goals with staff
  - External - communicate the achievements



"If you don't know what you want to be, then you have no control over what you'll end up being. You won't know until it's too late if you like how you've turned out."

MICHAEL GARRAH, former town manager of Bridgewater, Nova Scotia, Canada

+

Questions?



Erik Jensen  
Jensen Strategies, LLC  
P.O. Box 80122  
Portland, OR 97280-1122

503-307-8020

[erik@jensen-strategies.com](mailto:erik@jensen-strategies.com)

[www.jensen-strategies.com](http://www.jensen-strategies.com)



Thank You!



Oregon Local Leadership Institute  
[www.orcities.org](http://www.orcities.org)

1-800-452-0338

