

A work session of the Astoria Common Council was held at the above place at the hour of 6:00 pm.

Councilors Present: Nemlowill, Herzig, Warr, Price, Mayor LaMear

Councilors Excused: None

Staff Present: City Manager Estes, Assistant City Manager/Police Chief Johnston, Community Development Director Cronin, Parks and Recreation Director Cosby, Finance Director Brooks, Fire Chief Ames, Library Director Tucker, Public Works Director Cook, and City Attorney Henningsgaard. The meeting is recorded and will be transcribed by ABC Transcription Services, Inc.

### **VISION/STRATEGIC PLAN**

Mayor LaMear said Erik Jensen would discuss the differences between vision planning and strategic planning to assist Council in providing direction to staff because the City needs some long-range planning in addition to the Council's annual goals.

Erik Jensen, Jensen Strategies, described the services offered by his consulting firm and noted his experience with visioning processes and strategic planning. His PowerPoint presentation was as follows:

- Community visioning and strategic planning were similar in that both start with the big picture and work down to the on-the-ground activities that make the big picture come to life.
  - Both are also built on stakeholder engagement; the more stakeholders that get involved, the more those stakeholders participate.
  - Both are long term, interdisciplinary planning processes that are proactive instead of reactive.
  - These planning processes also share established goals and objectives, and both offer a framework for policy and operational decisions.
- The differences between community visioning and strategic planning were described as follows:
  - Community visioning is defined as a process of identifying what a community should look and feel like by a certain period of time, usually 20 to 30 years out. The community decides what it wants, so the City can move towards that. Strategic planning is organizationally focused and the entire staff is involved in the process, usually for a 5 year timeframe or less.
  - Stakeholders for both processes include key external interests like the County, Chamber, hospital, elected/appointed officials, and City staff; however, these stakeholders are engaged differently for each process.
  - Though the action plans for each are structured similarly, the content of the plans change depending on the focus. Visioning will have more external activities and actions, and strategic planning will have an internal focus on actions.
  - Both processes inventory current issues and trends, set goals, establish necessary actions needed to achieve the goals, and define how the actions will be implemented. However, the end results of each process will be different.
- How does a community vision relate to a strategic plan? He displayed a pyramid, which he used to explain the process, starting at the top of the pyramid. The Vision gives a big picture of what the community wants. The Organizational Mission is a succinct statement. The Core Values are the values and characteristics employed when doing the work of the mission. The Goals and Objectives are the outcomes of the mission. And the Strategies and Actions are last, at the bottom of the pyramid.
- Community visioning is done to build a community identity, hear the community's vision for the future, build the community's ownership in shared visions, and foster partnerships and joint ventures. Visioning results in a vision statement and action plan and can provide validation of what the City is already doing right.
- In strategic planning, the plan provides organizational direction and serves as a policy guide for decision making, assists staff as they make operational decisions, saves time and money, links long-term direction with short-term actions, and clarifies the organization's intent, which is tied to budget performance. Planning results in a mission, core values, objectives and goals, a strategy for each objective, and actions for each strategy. Planning could also reaffirm existing missions and core values.

- The mission statement is a statement of purpose and responsibilities for the organization. Core values make up the philosophy that guides the organization in achieving its mission. Objectives and goals are the desired outcomes.
- Referring to a pyramid that listed potential stakeholders that should be involved in each level of the processes, he explained how to engage each group of stakeholders at each level, noting the following:
  - Effectively implementing an action plan for both processes requires an entity to take ownership of the action. Each action should identify a party responsible for moving the action forward, not necessarily paying for the action, which causes a lot of confusion sometimes. Each action should also have a timeline.
  - It is important to consider time and cost. More stakeholder engagement will result in a longer process, but also a more sustainable plan. This will cost more time and/or money up front. The more people involved in the process, the better the opportunity for success of the plan. His recommended best-case scenario was to get stakeholders involved as suggested on the pyramid and spend between 6 and 18 months on visioning and 3 to 12 months on strategic planning.
- Success factors for both processes are stakeholder involvement, connectivity and consistency throughout each document, flexibility to modify the documents without impacting the integrity of the plans, leadership and advocacy among City Council and staff, and a framework for implementation.

Mayor LaMear asked how active City Council should be for both processes. Mr. Jensen said Council's external role in the visioning process is to encourage the community to participate. City staff should also encourage community participation. Additionally, when staff is not involved in the process at the right level, staff cannot take ownership in development of the vision. Staff and Council must have a mechanism for submitting input into a broad pool of ideas, with that input being processed equally alongside the ideas from the community. Strategic planning involves policy direction and City Council is the policy making body for the City. Therefore, once data has been gathered, Council's input is important. The leadership team and staff must also participate within the context of the work that they normally do.

Councilor Herzig said Clatsop County recently hired a consultant to assist with their visioning process. The consultant hosted several focus group sessions throughout the county and reported back to the County Commission. However, he believed the County did not go as far down on the pyramid as they should have. The consultant submitted a general statement, only about five or six pages long, to the County Commissioners. The Commission adopted the document as their vision plan, but there was no implementation process. He believed implementation was essential.

Councilor Nemlowill said she appreciated Mr. Jensen's presentation and believed it made a lot of sense. Astoria has a little bit of experience, as the City has been implementing the Riverfront Vision Plan, which was adopted in 2009. The Riverfront Plan is challenging to implement because so much time has gone by since it was adopted. She believed an important part of implementation is that it occurs when ideas are still fresh in the community's mind. She asked if the action plan of a vision statement should specifically relate to a strategic plan or a separate document. Mr. Jensen said the vision statement's action plan needs to be consistent with the strategic plan. Most of the time, the City is responsible for most of the action items on the action plan. Therefore, it is important to marry those action items with the strategic plan so there is consistency between the two documents. The vision should provide an overall guidance on the strategic planning process, but should not be comprehensive because the strategic plan will be much more comprehensive to the City and the services it provides.

Councilor Nemlowill asked how a City would ensure connectivity and consistency between existing documents, like the Comprehensive Plan, which includes a lot of visioning language. Mr. Jensen explained that other long-term plans will exist, like a Parks Master Plan or Capital Improvement Plan. Those plans will eventually have to marry with the vision. Comprehensive Plans are updated every so often, which provides the opportunity to connect the two documents and make them consistent with each other. City Manager Estes added that the vision plan has a multi-year implementation time frame and updating several other plans may take a number of years.

Councilor Nemlowill asked how to get stakeholder involvement in an authentic manner, as opposed to simply compiling the responses of large numbers of people. She also wanted to know how the responses should be synthesized to reflect a true statement of the community's vision. Mr. Jensen said in his experience, it has been helpful to have a Council appointed task force or committee tasked with wording the vision. It is key to ensure

the committee does not operate in a vacuum because it will use information it gets from the community to draft the vision statement. Meaningful public involvement requires the City to demonstrate it is truly listening to what the community and stakeholders say. This is achieved through documentation and by reminding the community throughout the process that their ideas have been heard. This does not mean the City must accept every idea that comes forward. All of the ideas should be put through a filter that helps build the vision while the City demonstrates that all ideas have received serious consideration along the way.

Councilor Price thanked Mr. Jensen. She had seen the Hillsboro 2035 Plan, which was built upon the Hillsboro 2020 Plan. It is an impressive and comprehensive multi-page document; however, Hillsboro has no strategic plan on its website. She wanted to know how Hillsboro viewed the difference between a strategic plan and a visioning plan. After hearing Mr. Jensen describe the process and outcome of a strategic plan, she believed a document created by the City of Albany would make a good template for Astoria. She was most interested in a strategic plan because Astoria has never had one. A strategic plan seems to be such an effective communication tool for current and former City Councilors, citizens, and residents. A vision plan could be created at the same time as a strategic plan, but it would take longer and the two documents would need to be melded together somehow. Mr. Jensen responded it is difficult to create both documents simultaneously because the two documents are created in silos and may or may not mesh. If the documents do not mesh, trying to sort that out could take a long time.

Councilor Price wanted to know where a city with neither document should begin. Mr. Jensen said in an ideal scenario, a city would begin with a vision plan and then move on to a strategic plan. Most of the jurisdictions he works with do not have this luxury because of budgets and timelines. The City will have to consider its needs and priorities. A vision plan can be created after a strategic plan, but it is not ideal. A hybrid document could also be created by combining the two processes, which might take longer than each individual process would normally take. Again, this is not ideal, but the City should do what works for its situation.

Councilor Warr said initially, he was not in favor of having a strategic plan. However, the more he learned about it, the more he became convinced it would be a good way to go. He appreciated Mr. Jensen's input.

Councilor Herzig noted Councilor Nemlowill's concern about getting community input. When the County was going through its visioning process, the consultant had a difficult time engaging the community. He attended at least three public sessions and the consultant was happy when 10 people showed up. He has found with a number of processes that it is difficult to get enough people to show up. When he toured Redmond with the League of Oregon Cities, the community development director spoke about the importance of celebrating every step along the way with a community celebration of each milestone. If Astoria takes the community's input, the City needs to show them their input is being implemented in a timely fashion, not five or 10 years down the line. He referred to a PowerPoint slide that displayed an ascending arrow with time and costs. One reason Astoria wanted to consider a vision and strategic plan was because they hoped the arrow would be descending. The City believes the correct flow down process will expedite strategic decisions and staff operations. He asked if Mr. Jensen meant for the arrow to continue to go up. Mr. Jensen answered no, the arrow represents the development process for either plan, and not what happens after one of the plans has been implemented. He agreed that the plans should bring costs down, but confirmed that there would be an initial investment of time, energy, and costs. However, as planning takes place, those investments should decrease.

Mayor LaMear agreed with Councilor Nemlowill that the Riverfront Vision Plan has taken so long to implement that the community is now saying it has a different vision. The City must tread carefully in order to get enough input without dragging the process out so long that the vision changes. Mr. Jensen said the scenario Mayor LaMear described is common. Local governments in Oregon face a barrage of issues that must be dealt with on a regular basis. It is easy to lose focus even on a large process like a vision plan because so many other things are going on. The momentum of the process is very important to a plan's success. He advised the City to set up their plan so it can be implemented immediately upon completion. Hillsboro set up a citizen oversight committee responsible for moving the vision plan forward and reporting to City Council once a year on the progress of the vision. The committee was made up of many of the partners who were involved in the implementation of the plan.


City Manager Estes added that both processes would require a periodic update process to prevent implementation from going stale. Mr. Jensen suggested minor updates be given annually, and then every five years, hold another public involvement process to check in with and update the community on a larger scale.

Mayor LaMear thanked Mr. Jensen for his presentation, which was very helpful.


**ADJOURNMENT TO REGULAR SESSION**

There being no further business, the work session was adjourned at 6:58 pm to convene the regular session Astoria City Council meeting.

**ATTEST:**

  
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Finance Director

**APPROVED:**

  
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City Manager