

Agenda - Strategic Planning Retreat #1

6:30 pm Wednesday 14 September
Council Chambers

1 Introduction

City Council
Economic Development Commission (EDC)
Planning Board (PB)
Staff and consultant team

2 Define a strategic plan

Objectives and scope
Content and particulars

3 Review scope of work concerning:

Task sequence
Calendar schedule

4 Identify issues of interest

City Council
Economic Development Commission (EDC)
Planning Board (PB)
Others

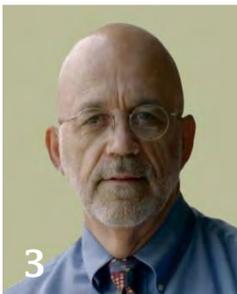
5 Review content in regard to item #3 for:

Task 2 – internal/external scans
Task 3 – stakeholders to be interviewed
Task 5 – owner, employee, customer mail-back surveys
Task 6 – student hand-back/internet survey
Task 7 – resident internet survey #1
Task 9 – charrette delegate recruitment

1: Our consulting team



- 1 Team Leader - Tom Beckwith FAICP
- 2 Economics - Eric Hovee
- 3 Comty Dvpmt - Steve Price
- 4 Economics - Andrea Logue
- 5 Economics - Steve Dennis
- 6 Comty Dvpmt - Nancy Jordan
- 7 Planning - David Schroedel AICP
- 8 Communications - Aimee Beckwith



2a: What is unique about Edmonds?

- Waterfront – including amenity opportunity and access limitations
- Tourism – arts potential and gateway to the Kitsap and Olympic Peninsulas
- Small businesses – sustainable already with large number of self-employed and small business who live/work in city
- Multiple economic centers – Waterfront, Downtown, Westgate, 5 Corners, Highway 99, Hospital
- Demographics – aging households who may want to stay but have different life/housing needs
- “Built-out” status – presumption by some that there is no remaining capacity
- Number of players/partners – Port, Edmonds School District, Swedish Edmonds Hospital, WSDOT
- Fiscal – overt dependence on retail sales tax

2b: Why does Edmonds need a strategic plan – what will it resolve?

- **Trends** – what will Edmonds become if current conditions and policies continue unchanged – especially fiscal?
- **Vision** – what does Edmonds want to be?
- **Feasibility** – what is Edmonds capable of being given current conditions and recent economic trends?
- **Constraints** – what limitations will Edmonds need to resolve in order to realize the strategic vision?
- **Coordination** – what plans, programs, and projects need to be coordinated to realize the strategic plan?
- **Participants** – who should be involved in deciding the vision and strategic plan?
- **Agents** – who should implement the strategic plan once it has been resolved?

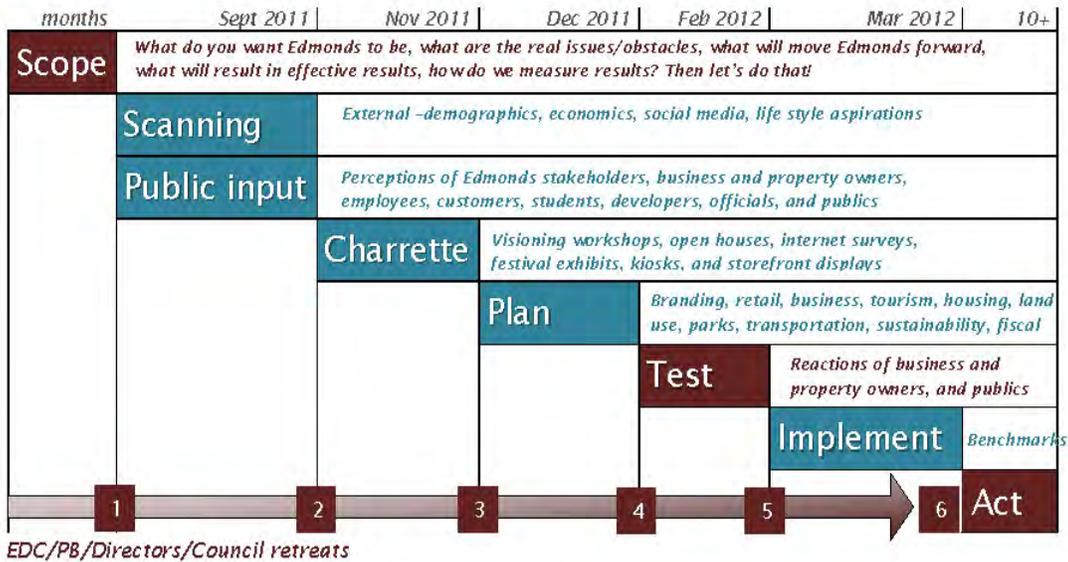
2c: What is a strategic plan?

- Organizes and prioritizes - initiatives and resources to achieve specific goals within *next 3-5 and mid 5-10 year* time periods
- Establishes - near/mid-term goals, tactical approaches, and performance measures
- Coordinates - other city plans and programs to conform to the strategic plan
- Achieves consensus - from public and Council on strategic plan vision

2d: What is a strategic planning process?

- **Analytically based process** – incorporating data on conditions and trends
- **Involving multiple publics** – property and business owners, community organizations, city employees, youth, and public-at-large
- **Utilizing multiple inputs** – interview, focus groups, workshops, open houses, surveys, and Council/EDC/PB retreats
- **Coordinating governing response** – of plans, projects, finances by city staff and Council
- **Analyzing finances** – necessary to realize optimal strategies and directions

3a: How are we going to do it?



3b: How are we going to involve the public?

- 6 Retreats—with you, your Directors, Economic Development Commission (EDC), Planning Board (PB)
- Stakeholder interviews and focus groups
- Mail-back and intercept surveys of business owners, employees, and customers
- Mail-back/ internet survey of middle and high school students
- Website pages and linkages
- E-newsletters
- Internet surveys of all interested parties
- Strategic planning charrette.
- Open houses
- Phone/internet controlled statistical sample
- Planning Board and City Council public hearings

3c: What is our schedule?

14 July 2011

Edmonds Strategic Plan		S	M	T	W	T	F	S	
task number and content		September							
							1	2	
		4	5	6	7	8	9	10	
1	Conduct Council/EDC/PB retreat #1	11	12	13	14	15	16	17	
2-3	Conduct scans/interview stakeholders	18	19	20	21	22	23	24	
5-7	Survey owners, employees, students, residents	25	26	27	28	29	30		
		October							
								1	
		2	3	4	5	6	7	8	
		9	10	11	12	13	14	15	
		16	17	18	19	20	21	22	
4	Conduct Council/EDC/PB retreat #2	23	24	25	26	27	28	29	
9	Recruit delegates and distribute materials	30	31						
		November							
				1	2	3	4	5	
		5	6	8	9	10	11	12	
		13	14	15	16	17	18	19	
8	Conduct Council/EDC/PB retreat #3	20	21	22	23	24	25	26	
10	Conduct charrette with delegates	27	28	29	30				
		December							
11	Collate charrette results					1	2	3	
		4	5	6	7	8	9	10	
		11	12	13	14	15	16	17	
		18	19	20	21	22	23	24	
12	Conduct Council/EDC/PB retreat #4	25	26	27	28	29	30	31	
		January 2012							
13	Draft strategic plan	1	2	3	4	5	6	7	
		8	9	10	11	12	13	14	
		15	16	17	18	19	20	21	
15	Conduct Council/EDC/PB retreat #5	22	23	24	25	26	27	28	
14	Survey city voter households	29	30	31					
		February							
16	Conduct forum(s) w/delegates/public			1	2	3	4		
		5	6	7	8	9	10	11	
		12	13	14	15	16	17	18	
		19	20	21	22	23	24	25	
18	Conduct Council/EDC/PB retreat #6	26	27	28	29				
		March							
19	Finalize/publish strategic plan documents					1	2	3	
		4	5	6	7	8	9	10	
		11	12	13	14	15	16	17	
		18	19	20	21	22	23	24	
20a	Conduct Planning Board hearings	25	26	27	28	29	30	31	
		April							
		1	2	3	4	5	6	7	
		8	9	10	11	12	13	14	
		15	16	17	18	19	20	21	
20b	Conduct Council hearings	22	23	24	25	26	27	28	
		29	30						

11/14 All Council/EDC/PB meetings to be conducted at from pm:
Charrettes and open houses to be conducted pm at

4: What specific issues do we want the strategic plan to address?

- Branding – what is it and how can we enhance it?
- Retail sales – how can we increase it?
- Business – how do we sustain and expand them?
- Tourism – how do we increase expenditures?
- Housing – how do we meet changing lifestyles?
- Affordability – how do we house service workers?
- Land use – what are our opportunities?
- Sustainability – what green and smart measures, and energy, GHG reductions can we make?
- Services – what LOS do we need/desire?
- Fiscal – how can we finance our services?
- Partnerships – what are the options?
- Milestones – how do we program/measure our progress?

Are these the correct issues or do we want to modify or add others – if so, what are they?

5a: What should we assess in task 2 – internal/external scans?

- 2010 Comprehensive Plan – including environment, economic, housing, land use, transportation, parks and recreation, and public facilities goals and projects
- 2011 Budget, Annual Financial Statement, and Capital Improvements Program – including near term and future cost, revenue, and capital financing projections
- Census – comparative data from the 2000 and 2010 census, American Community Survey (ACS), ERSI, and other sources on socioeconomic characteristics and changes in Edmonds, Puget Sound, Washington, US
- OFM, DOR, and Snohomish County data - on retail sales, property values, buildable lands, housing market conditions, etc
- Other? -

5b: Who should we interview in task 3 – stakeholders?

- Key officials – City Council, Port of Edmonds, Edmonds School District, Swedish Edmonds Hospital, Edmonds Community College, Snohomish County ...
- **Property and business owners -**
- **Public organizations -**
- **User groups -**
- **Other parties of interest -**

5c: What should we ask in task 5 – owner, employee, customer mail-back surveys?

Business owner surveys

- reasons - for locating in Edmonds,
- business trends - including impact of internet and finance,
- suggestions and recommendations - concerning market possibilities,
- willingness to participate - or commit to possible strategic planning opportunities.

Employee surveys

- opinions of existing conditions - including job opportunities, housing conditions and costs, training, childcare,
- perceptions - of economic problems or opportunities, and
- characteristics - including place of residence, education, income, household status

Customer surveys

- where customers shop - within the city and with major competitors,
- opinions of existing conditions - including available products and services, parking access and capacities, building conditions, and images,
- perceptions - of problems or opportunities,
- characteristics - including place of residence, employment, income, household status

5d: What should we ask in task 6 – school student hand-back/internet survey?

- **Workforce participation** – including their volunteer, internship, or employment with city organizations, businesses, or other enterprises during the school year, vacations, or summer.
- **Vocational interests** – in occupations or professions offered in high school, vocational school, college, or other instructional programs and the extent to which they believe the city provides opportunities to learn, work, or practice in such.
- **Job and volunteer desires** – on the students part for volunteer, internship, or employment activities which are not currently offered by local organizations or businesses.
- **Characteristics** – including place and length of residence, age and class, and home school.

5e: What should we ask in task 7 – resident internet survey?

- **Existing conditions, strengths, and problems** - of the downtown, Westgate, Five Corners, Highway 99 commercial districts, each neighborhood, and city in general,
- **Possible approaches** - concerning environmental protections, economic opportunities, land use developments, housing conditions, traffic and transit, parks and recreation, general appearances, fiscal concerns, and other particulars,
- **Characteristics** - including age, household type, length of residence, place of work, and other particulars for sample control purposes.

5f: Who and how should we recruit for task 9 – charrette?

Who?

- Key officials – City Council, Port of Edmonds, Edmonds School District, Swedish Edmonds Hospital, Edmonds Community College, Snohomish County ...
- Property and business owners -
- Public organizations -
- User groups -
- Other parties of interest -
- Public-at-large -

How?

- Letters and emails of invitation -
- Newspaper, posters, and open advertisement -

