



Report

on the

Longview City Council Retreat: The Past, Present and Future

held on

January 31 and February 1, 2014

Prepared by



Butkus Consulting, Inc.

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Background

The City Council of Longview has held an annual planning retreat for several years. This practice is similar to those of many other local government bodies in North America. The retreat allows legislative members (the Council) to interact with one another without the pressure of performing other business of the City as would be if business covered at the retreat was held a regular or workshop meeting. Longview retreats are subject to and follow the standards for open public meetings under Washington law. This Report frequently refers to the Agenda packet and as such the Report should be considered as a supplement to the various papers in that Agenda packet.

Retreats frequently use professional facilitators to assist in maintaining the flow of the meeting, to encourage participation by all and record or memorialize the proceedings. Butkus Consulting, Inc. was retained to provide retreat facilitation services. In advance of the Retreat interviews were held with the seven members of the Council, as well as agenda discussions with the City Manager and Assistant City Manager. A summary of the policy issues identified for discussion as a result of the interviews were included with the retreat notebook. The specific ideas brought out in the Council interviews were labeled the "Idea Bucket". At the Retreat an updated Idea Bucket list sorted by the city's existing Strategic Initiatives was provided. This updated list was used in the Retreat.

The Agenda was designed to begin with a celebration of past year actions and then advance to a review of plans for the present budget year. This work was followed by an exploration of the future as presented in the concepts in the Idea Bucket and the identification of the most important ideas to move forward on. The Retreat concluded with the development of goals for 2015-16 based on these highest-priority policy ideas. This Report will follow that same chronological outline.

The consultants wish to acknowledge and recognize the contribution of Human Resources Director Keith Larson, who provided his Retreat notes to supplement the notes and flip chart recordings of the consultants.

The Session

Participants

A half-day session was held on Friday, January 31, 2014 and continued with an all-day session on Saturday, February 1, 2014. The meetings were held at Canterbury Park, 1335 3rd Avenue, Longview. Participants/facilitators in attendance were:

Don Jensen, Mayor	Bob Gregory, City Manager
Mary Jane Melink, Mayor Pro-Tem	David Campbell, Assistant City Manager & Parks and Recreation Director
Mike Wallin, Councilmember	Keith Larson, Human Resources Director
Tom Hutchinson, Councilmember	
Ken Botero, Councilmember	Carole Butkus, Facilitator
Chet Makinster, Councilmember	Pete Butkus, Facilitator
Steve Moon, Councilmember	

Team Building

The consultants recognized that significant parts of the planned sessions would involve the Council working together as a team. Therefore, in order to help participants experience the power of working together, a team building exercise was designed and performed. The exercise involved a visual image with the Council and staff present breaking into two teams to describe the image. The outcome of the exercise resulted in the two teams being able to provide descriptions of the image in more detail than they would have been able to do individually. The purpose of this exercise was to illustrate that by working together, a group can produce more results than an individual would by working solo.

2013 Accomplishments

Accomplishments for 2013 were compiled by City staff and included in the Retreat Agenda packet. City Manager Bob Gregory used this portion of the Retreat to have each member of the Council list their view of significant accomplishments in the City during 2013. That Council-generated list is captured on page 5.

City of Longview
City Council Listed Accomplishments – 2013

- Washington Way – successful process
- Council and Staff did a yeomen’s job of marshalling assistance to those affected by the drinking water quality issue
- Citizen Summit – we were able to get a lot of citizens engaged and the event was well-received.
- Opening the new wells and putting water treatment online – ahead of schedule and under budget.
- I (Steve Moon) was welcomed by the rest of the Council and Staff when I came on board as a new Councilmember.
- Quality of Place
 - Entryway Signage
 - Six new businesses in the Central Business District
- Financial Status – we are viable, and without this we couldn’t have accomplished what we did in 2013
- Longview is moving up
- The City hired 57 new people (external and internal), including filling 3 key positions
- 2013 finances – 2013 was the first year since 2007 to see a financial improvement
- The City of Longview is in good fiscal shape compared to a lot of other cities
- We have reduced energy consumption
- 2013 was a banner year with our Sister City. We hosted two Chinese officials. This relationship could result in a positive impact on our economic future
- Increased year-end fund balance - primarily from employee medical insurance cost reduction
- Quick actions – well informed to take actions on water treatment and roof at McClelland Arts Center
- Looked at our vision(s): community and Council
 - Wastewater treatment lagoons
 - Fairgrounds
 - We were inclusive with our community
 - Creation of a Public Development Authority
- We have a good stormwater program and would like to keep improving it
- The Council’s outreach efforts to the public have helped get ideas across – it has been very successful, e.g. Ken’s liaison between Council and Parks Board
- Birch tree removal – the City has completed the first year of the program. All spaces where birch trees were removed were refilled with new species. A new urban forest is being created.
- City support of community events – the role the City takes in creating successful events.
- Council and Staff did a great job with workshops. A good grasp of the topic, things went more smoothly.
- Cadillac Casino paid some of their taxes in arrears (as agreed)
- Finishing high pressure sewer lines, closing sewer lagoons

Working Together – A review of “How Council and Staff Will Work Together”

It is common for policy bodies to have written guidelines for how the body works together as well as how the policy body works with the executive branch. While many concepts are similar, they are frequently customized to meet the individual community served. The referenced document is included in the Retreat packet.

The document was reviewed and discussed at length. A major point of discussion was how to be true to the standards the document puts forth and still provide citizen input that was learned just minutes before a Council Meeting. The group agreed that the key was in meeting the standards whenever possible but recognizing that some unique circumstances would not meet the “no surprises” standard.

The facilitator and Council engaged in discussion of how to assist the public input process. After idea sharing by all, Councilmember Bolero offered to work with Keith Larson to develop a handout for this purpose. It was agreed that this was a Council initiative that would be drafted, shared, modified as necessary and adopted by the Council. Note: The following morning Councilmember Bolero provided his first draft of a handout to assist the public in making effective presentations to the Council. There was discussion on the draft with agreement that Councilmember Bolero and Larson would continue to work on the document and to consult with the Council in the process.

The final action was the Council affirming that the provided document “How Council and Staff Will Work Together” is how they wish to operate in 2014.

2014 Work Plan

City Manager Bob Gregory introduced this agenda item by noting that it is customary at Longview retreats to review and then confirm or modify (if desired) the staff work plan for the year. It was emphasized that the work plan is used to identify major and/or new initiatives that were addressed via the Budget; it does not identify routine or on-going work activities.

The Council covered several areas where they had questions or where they would like to see additions to the Plan:

- There was strong expression of support for the past efforts to align city wages and benefits with the nearby private sector.
- Does the strikeout of previous activities mean that the activity had met its goal and was being dropped from the work plan or did it mean that the

activity was being dropped for some other reason? Gregory responded that it meant the previous goal had been met.

- There were questions related to effective financial management as to PTO (paid time off) and the cost of in-house indigent defense costs.
- As it relates to public safety, the question was asked: does the budget drive the work plan or does the work plan drive the budget? Gregory responded that they work together, but any new initiatives will certainly need to be captured in the 2015-16 biennial budget. The work plan provides for strategies and deliverables that can be achieved with existing resources. Unless we delete what we are doing now or what is proposed, there are not resources in this biennial budget to expand services.
- In the area of police services it was requested that the Police Executive Research Forum (PERF) Report of 2008 not be dropped from the work plan, but retained and expanded for 2014. Gregory suggested a workshop session in 2014 to discuss. Actions regarding the PERF report will be identified and determined at that time.
- A question was asked about developing a more realistic objective for the police cadet program.
- While not altering the work plan, a desire was expressed to have more information about the comparisons between 2013 and 2014 for the block watch program.
- Discussion ensued about the need for a firearms range. Gregory noted that firearms certification is mandatory and that the change in ownership of the current range may impact police use of that facility.
- West Longview police presence (perceived lack of) was questioned. Gregory suggested that a more complete Council understanding of how police are assigned to patrol areas might be of use to the Council. Gregory noted that the scheduled workshop session for July 15, 2014 would cover this issue.
- Questions arose about Emergency Medical Services (EMS) transport of injured persons. Gregory noted that there have been challenges in the current service delivery and that involving the current Advanced Life Support (ALS) service provider and the medical community might be useful. It was noted that there is a need to provide the greater public with information on when it is appropriate for citizens to call emergency services and when it is appropriate to handle an incident themselves – especially as it relates to transport.

This portion of the 2014 Work Plan review was carried over to the following day:

- Make economic development work more city focused
 - Explore options in 2014 - staff to bring options to the Council to include budget restraints and options

- City-focused publications
- Ask CEDC to increase efforts specific to Longview
- It was a consensus that staff should develop options in 2014 for the 2015-16 Budget to emphasize more city-focused economic development efforts
- Monticello Hotel – Work to avoid having it fall into disrepair, as it is a major city landmark
 - City Manager to monitor status and continue dialogue with the property owner
 - Use available resources to assist where appropriate
- Neighborhoods: Keep strategy “B” regarding annexation
 - Look into annexation policies, i.e.; West Longview
 - Explore Comprehensive Plan boundary designations
 - Meet with other service providers to the area
 - Caution – annexation may cost more in services than would be covered by the increase in revenue
 - The “Island” residents think they live in the city
 - This is a good time to explore further as the County is now reviewing their Comprehensive Plan and related zoning
 - When looking at the potential annexation areas, do cost/benefit analysis. This assists the Council to set priorities and explore annexation with other entities involved
 - Discuss in a workshop session
 - Facilitator note: This item became a Strategic Initiative priority later in the Retreat and is further set forth on page 14.
- Neighborhoods: Keep strategy “D” regarding appearance and quality of life
 - Suggested an intern from the Community College be utilized
 - Provide for outreach to citizens on how to finance improvements
 - If an interest is developed – that would provide some basis for engineering work. Gregory noted a caution here – sometimes it is a substantial investment to provide reliable project cost estimates
 - Staff was requested to explore outside funding (CDBG planning grant?) to help fund preliminary engineering.
- Transportation:
 - It was noted that the dollars remaining available are projected to be in deficit in a few years.

- Quality of Place:
 - Set aside funds to address deferred maintenance and upgrade of golf course
 - Gazebo at lake – noted it is included in the Parks comp plan
 - Consider a (small) fee system to help pay for costs
 - Suggestion that any new revenue go towards maintenance

- Water quality/infrastructure:
 - No items

City Manager Gregory noted that he would make adjustments to the Work Plan in accordance with the input provided.

Team Building

A second team building exercise was conducted. The exercise started with some open-ended directions on designing and building a structure. Building materials were then provided. The group broke into two teams, designed and built a structure and then discussed what was missing from the facilitator-provided directions and how using open-ended directions may (and did) lead to different results. This exercise was used by the facilitator to illustrate the importance of planned work later this day in making the problem/opportunity, goals and desired outcomes clear and understandable to all.

Review Idea Bucket from Interviews; Review Strategic Initiatives-add to Idea Bucket, and; Prioritize Idea Bucket

To simplify and to save space these three Agenda items have been combined in this Report.

Some Idea Bucket items appeared to be covered by the 2014 Work Plan so the Councilmembers were asked to review the Idea Bucket for 2015-16 and identify those that might be covered in the 2014 Work Plan. The Council reviewed, discussed several points with notations being made on the Idea Bucket list which was posted on the walls. Those notations are included below.

The Council was the walked through their Strategic Initiatives and asked to add any desired items for further review to the Idea Bucket.

The Retreat then moved to Council prioritization of the Idea Bucket items for further discussion. Facilitator Pete Butkus described the process of “dot” voting that was going to be used to gain the insight of the Council as a body (as opposed to individual thoughts) and provided the group parameters on the process. The Council members then proceeded to indicate their top priorities for action later in the Retreat. The result of the reviews and the prioritization exercise are summarized below.

Color Key:

BLUE: Additional initiatives added to Idea Bucket during retreat, or change in wording

DATE: (2014) indicates this is 2014 action

RED: Number of votes received (4 or more votes advanced to goal setting)

Continue effective financial management

- *We need to be more efficient with HR practices and align them with the private sector e.g. PTO (2014) (4) (This went on to goal setting)*
- *We need to be market competitive in our hiring (2014) (included in above)*
- *We need to control health benefit costs (2014) (included in above)*
- The budget is the most important policy document and we need to start the budgeting process earlier
- As the economy recovers and revenues increase, we should first restore our reserves before increasing spending
- We should go through the budget department by department and decide what should stay and what should be discontinued, and the council needs to be involved
- Obtain grant writing assistance to help bring in more funding
- Lower costs by streamlining services where appropriate.
- Look at the budget as a whole, not just the specific areas we most interested in.
- Succession planning in advance of the retirement of key employees
- Revitalize the Cowlitz County government summit
- We should plan for the future and increase the utility tax more gradually, rather than jolting the ratepayers with a huge increase. (Manage utility tax)

Enhance public safety & emergency response

- Further reduce the crime rate
- We need to continue to work on crime and lowering the crime rate (1)
- *Continue to review the PERF report (2014 and beyond)*
- *More emphasis on Longview Police Department as resources become available (4)*

Strengthen economic conditions & create new opportunities

- We should put a sustainable economy further up in the priority list

- Protect Longview's interests regarding the Millennium coal project (2)
- Job creation (1)
- Are there too many development restrictions at the Mint Farm?
- Put more resources into economic development
- Move the economy up to our #1 priority. (2)
- **More involvement with downtown redevelopment** (4)
- Is the signage ordinance too restrictive in the downtown core?
- *Stronger relationship with the economic development council (2014)*
- What are the factors in a business choosing to locate in Longview as opposed to the Ports of Kalama or Woodland? OR - the reverse?
- **Work with education providers to provide more programs needed for economic development** (5)

Preserve and enhance neighborhoods

- *Do a better job with the underserved areas of the city. (Highlands 2014) (1)*
- **Address the problem of the island of land not inside the city limits that exists in the west side of the city.** (5)
- Focus on the low-income area near the Mint Farm Industrial Park.

Improve transportation systems

- Infrastructure improvements in west Longview (1)
- **Increase our focus on infrastructure maintenance and improvements (in general)** (4)

Address quality of place issues

- Increase the integration of policy development with neighboring cities and the county
- Streetscape improvements near the College
- *Tennant Way – south end entrance to town (2014 and 2015)*
- Downtown corridor improvements
- Keep people in town, rather than living in Vancouver or Portland
- Finding solutions for vandalism (parks is the focus) (3)
- *We spend most of our parks money on Lake Sacajawea Park, but the other parks need attention, such as the addition of restrooms. (Partial 2014)*
- "Greener" city with an emphasis on walkability (1)
- Explore gazebo at lake (2)
- **Designate a park for allowing alcohol at events** (4)
- Investigate the Main Street Program to provide direction to downtown redevelopment

Provide sustainable water quality & environmental infrastructure

- Infrastructure improvements in west Longview
- *Water treatment plant and unanticipated outcomes (2014) (2)*
- More innovation/creativity in how we approach public works projects (4)

Additional Topics:

Strategic Initiative Review

- The Strategic Initiatives should be revisited for relevancy to the community as it is today and they should be more specific (what would an initiative look like when implemented?) (1)
- Clarify our goals – some are at satellite level, some at 3000 feet. Also, understand what a goal might look like when implemented

Consent Agenda Expansion

- Agreement to defer this to an internal process.

Public Involvement

- Increase involvement from the public
- Better inform and educate the public
- Provide additional opportunities for public input
- Increase community involvement in Boards and Commissions (4)
- Citizen Summit: Revisit the initiatives that are generated (1)

Develop goals and action plans

The items that were chosen by the Council from the Idea Bucket for further action during the Retreat (**above list, items with 4 or more votes**) are shown below in the order of their related Strategic Initiative. Some have no action plan or time frames associated as they were developed into broader statements of policy.

Continue effective financial management

Prioritized from the Idea Bucket: Be more efficient with human resource (HR) practices, align with private sector

Background: Recognizing budget constraints; be more comparable with the private sector. Continue to explore other options in HR practices/benefits, etc. to be cost effective in our HR practices and costs.

Goal 1: Align benefit options to be more consistent with the private sector.

Goal 2: Develop bargaining unit contract negotiation parameters.

Desired Outcome for 1: HR practices that better align with private sector.

Desired outcome for 2: Reduce (City) costs while remaining an attractive employer.

Time Frame: 2014, 2015 and 2016

Enhance public safety and emergency response

Prioritized from the Idea Bucket: As more resources become available, put more emphasis on police services

Background: Over the past years with budget issues, there have been significant cuts in police, while there is an increase in calls for services. This is a #1 priority from citizens.

Facilitator note: A specific example was given of a recent reduction of the CSO function and returning that work to proactive patrol. The Council seeks executive-developed options and recommendations as a part of budget development.

Goal #1: Reduce crime to that of at or below state averages.

Goal #2: Increase visible police presence in the city.

Desired Outcomes: Less crime, more sense of safety and community.

Time Frame: Ongoing as well as the 2015-16 Budget

Strengthen economic conditions and create new opportunities

Prioritized from the Idea Bucket: Work with education providers (more) to have them provide programs needed for labor force and economic development

Background: A well-educated public is an incentive for economic development. We want to work with education providers to encourage the development of programs appropriate to supporting economic development.

Facilitator note: This is a policy goal only and has no associated goal or time frame.

Prioritized from the Idea Bucket: Have more involvement with downtown redevelopment

Background: Vacant and blighted buildings generate public safety problems and detract from quality of life. We need initiatives that provide better results and find a way to create more involvement and participation from property and business owners.

Goal #1: Review pertinent downtown planning documents (e.g., Hyatt Palma plan) – determine where we are and what is possible.

Goal#2: Have a presentation from the Main Street Program.

Goal #3: Ask the Longview Downtown Partnership (LDP) to take the lead in facilitating a meeting with interested property owners, Realtors, developers, city and the LDP to identify problems and potential solutions.

Goal #4: Provide funding for enhanced code enforcement for blighted properties in the downtown business district.

Desired Outcomes: Goals 1, 2 and 3: Gaining understanding, seeking common ground and developing potential future actions with or without budget impact. Goal #4: Increased sales tax revenue from the area and reduced blight.

Time Frame: 2014 for Goals 1, 2 and 3; 2015 for Goal #4.

Preserve and enhance neighborhoods

Prioritized from the Idea Bucket: Address annexing land outside the city limits in West Longview

Background: A large area of unincorporated land is surrounded by the city which is confusing to the citizens. Annexation would give an opportunity to provide consistent land use planning and urban services.

Goal: Do a cost-benefit analysis and a non-financial list of pros and cons and present to the Council as a part of the development of annexation objectives.

Desired outcome: Council has the information needed for future decision making.

Time Frame: 2015

Improve transportation systems

Prioritized from the Idea Bucket: Increase our focus on infrastructure maintenance and improvements

Background: The accelerated deterioration of city streets is a concern.

Goal #1: Appoint an advisory committee (business people, residents, other stakeholders) to recommend transportation priorities and how to fund them.

Goal #2: Identify appropriate funds to implement appropriate recommendations.

Desired outcomes: Have a street plan with funding. Increase the over-all pavement index score.

Time Frame: Goal #1: 2014; Goal #2: 2015 and beyond

Address quality of place issues

Prioritized from the Idea Bucket: Designate a park for allowing alcohol at events

Background: Currently, by past practice, public sale and consumption of alcohol is not allowed in parks. There is a desire to explore allowing alcohol somewhere in the park system for special events.

Goal #1: Identify potentially appropriate park space and events.

Goal #2: Set up policies, rules or procedures for these events.

Goal #3: Be inclusive in the process to include interested parties.

Desired outcome: Have at least one park identified for alcohol-acceptable events to include appropriate standards for such activities.

Time Frame: 2014 and 2015.

Facilitator note: Assistant City Manager/Parks and Recreation Director Campbell noted that these goals may fit well with the planned update of the Parks Comp Plan.

Provide sustainable water quality & environmental infrastructure

Prioritized from the Idea Bucket: More innovation in how we approach public works projects

Background: We could be more innovative and take a broader look at project(s) scope and the project impact on the community.

Goal: Include the broader view when developing viable alternative solutions.

Desired outcome: Include this as a policy statement in the Capital Improvement Plan (CIP) document which is developed as a part of the Budget process. Follow the policy throughout the CIP and budgeting process.

Time frame: 2014 for inclusion in the CIP while developing the 2015-16 Budget and beyond.

Public involvement (New)

Identified, developed and prioritized from the Idea Bucket: Increase community involvement in serving on boards and commissions.

Background: There currently appears to be a low interest in serving on boards and commissions. We receive few applications and we would like to encourage a broader community involvement.

Goal #1: Reach out to the Association of Washington Cities (AWC) and the Municipal Research and Services Center (MRSC) for ideas on how to recruit volunteers for boards and commissions. Determine what does and does not work. AWC might offer a workshop session on this at the Annual Meeting in June if asked.

Goal #2: Market volunteer opportunities at the Citizen Summit and do a better job of getting out information on upcoming vacancies.

Desired outcome: Increase the number of applications for boards and commissions.

Time Frame: Goal #1: 2014; Goal #2: 2015.

Committee Assignments & 2014 Workshop Schedule

City Manager Gregory reviewed the proposed committee assignments and the proposed 2014 workshop schedule.

There were several suggestions for changes in the committee work, including trading assignments by several Councilmembers. Gregory advised that he would revise this list and provide the updated assignments to the Council based on today's input.

The workshop schedule had all members of the Council supporting a "doubling up" of related topics instead of spreading review/discussion over several meetings.

Gregory emphasized the budgetary part of the schedule and specifically noted:

- Budget kick-off is May 3
- A decision on the Utility Tax rate (7% vs. 9.5%) is needed by May 22

Wrap Up and Closing Comments

Facilitator Pete Butkus:

- The community is fortunate that the Council works well together with few “glitches”
- The Council has a good focus on community issues
- The city government has an excellent handle on its finances and has a good relationship with stakeholders
- There is a good mix of industry, commercial and residential with rail, highway, broadband access and a trainable workforce for the future

City Manager Gregory:

- The Council’s thoughts on accomplishments are important
- Council input on the Work Plan will be communicated to appropriate Directors/Chiefs

Councilmembers:

- Candid things were said - but not made personal - good!
- There were some good push backs
- It was good to review and reset
- (I) like working together like we have done
- Terrific session

The meeting was concluded and formally adjourned at 3:57 p.m.

Facilitator Comments (post Retreat)

Based on the several discussions related to economic development it may be a good investment to devote a future session to economic development. Discussion during the Retreat included:

- Want to do more to get jobs in the Mint Farm
- Redevelopment downtown, specifically the value of past efforts in downtown
- Working with economic development partners
- Focusing on Longview-specific opportunities
- Creating new economic opportunities is necessary to move past the Recession that started in 2008

- Discussion of moving economic development up the Strategic Initiatives list to replace the current #1 priority of dealing with crime.

Butkus Consulting appreciates the opportunity to have worked with the elected and appointed officials of the City of Longview.