Speakers

Bill Statler, Consultant/Trainer, Retired Director of Finance & Information Technology, City of San Luis Obispo

Lauren Vasquez, Senior Management Analyst, City of Monrovia City Manager’s Office

Presider

Sarah Rubin, Program Manager, Public Engagement Program, Institute for Local Government
ILG Mission

- Promoting good government at the local level
- Practical, impartial and easy-to-use materials
Public Engagement in Budgeting

Public engagement works to increase the extent to which residents become more informed about local issues and participate more effectively in local decision making. Approaches include:

- Public information
- Public deliberation
- Public consultation
- Sustained public problem solving


Probability: Belief that Sales Tax Rate is "Too High" When People Are:

- 40%
- 60%
- 80%

Publications, tools and case story examples available here:

Meaningfully Engaging the Community in the Budget Process

William C. Statler
Fiscal Policy ■ Financial Planning ■ Analysis ■ Training ■ Organizational Review
Community engagement in the budget process

Doing this meaningfully means first asking:
- Engaging them in what?
- And why?
Why engage the Community?

- The Budget is typically the strongest statement of the City’s priorities for the community. As such, important that its development involve substantial community involvement.

- Meaningful public engagement helps residents understand the hard choices that budgeting entails.

- And assists policy-makers in better understanding programs and services residents value most.

Why Engage the Community?

- Increased public understanding about local agency budgets, including revenues, expenses and challenges can lead to greater support for budgetary decisions as well as for measures to increase effective use of local revenues.

- Transparency about the local agency finances and the budget decision-making process promotes public trust and confidence in stewardship of taxpayer funds.
Why Engage the Community?

- The budgeting process allocates scarce taxpayer dollars to services, programs and facilities that play a key role in determining the community’s quality of life.
- ICMA considers resident participation a core competency for successful public managers.
- Stated simply, meaningfully engaging the community in key policy decisions that affect them is the right thing to do.
Engaged in what?

- What is the desired outcome?
- How will a broad range of stakeholders be engaged?
- How will the input be used in budget decision-making?

Be clear on this at the onset.
Tools to Consider

- Surveys
- Advisory Bodies
- Online Forums (Social Media)
- Workshops
  - Opportunities for information sharing, discussion and feedback on budget goals and issues.
- Deliberative Forum
  - Similar to a workshop but usually involves more information sharing and increased time for participant dialogue
- Participatory Budgeting
A Tale of Two Cities
- 44,000 residents
- Central Coast
- General Fund: $60 million
- Historic Mission Community
- Government, Business & Cultural Center of the Central Coast
  - Cal Poly
  - Tourism
  - State and Region-Wide Governmental Services

- 38,000 residents
- Central Los Angeles County
- General Fund: $10 million
- 90% of residents Hispanic
- One of poorest cities in Los Angeles County
  - Almost one in six residents lives below the poverty line
  - Unemployment: 16%
Purpose of the City’s Budget

Like most cities, SLO has a bunch of long-term policies and plans:
- General Plan (and all its elements)
- Water and Wastewater Master Plans
- Pavement Management Plan
- Access and Parking Management Plan
- Short-Range Transit Plan
- Bicycle Plan
- Public Art Policy
- Downtown Plan
- IT Strategic Plan

The budget is the key tool for programming the implementation of these plans by allocating the resources needed to do so.
- Over the next two-years, which of all these goals – many of which compete for the same resources – will get done.
- And which ones won’t.
Because . . . .

- Your agency can do anything.
- It’s everything it can’t do.
Linking Goals and Resources

This requires a process that:

- Clearly identifies the “highest priority, most important” things for the City to do during the next two years at the beginning of the process.
  
  - *Goal-setting should drive the budget process, not follow it.*

- Establishes reasonable timeframes and organizational responsibility for getting them done.

- Allocates required resources.
Five Step Goal-Setting Process

- Budget Workshops and Forums – Before Issuing the Preliminary Budget
  1. Setting the Table (November)
  2. Building the Foundation (December)
  3. Community Forum (January)
  4. Council Goal-Setting (January)
  5. Major City Goal Work Programs (April)
Don’t start this process with a blank slate, so what’s on the menu?

- What the status of General Plan implementation?
- What are long-term CIP needs through General Plan build-out?
- What’s the status of current major City goals and objectives?
- What’s the status of current CIP projects?
- What’s the general fiscal outlook?
Building the Foundation

- Finalize the goal-setting process
- Review (and modify as appropriate) budget and fiscal policies
- Review and discuss audited financial results for prior year (CAFR)
- General Fund five-year fiscal forecast
Community Forum

Extensive preparation for well-attended community forum

- Letters to over 200 community groups and interested individuals
- Display ads in media
- Web site
- “Community Budget Bulletin” inserts in utility bills
- Lot’s of thought and planning on what this should look like
Council Goal-Setting

All day workshop to answer the question:

*What are the most important, highest priority things for the City to accomplish over the next two years?*

Council members provide 5 to 7 goals before workshop, organized by staff by “themes;” distributed before workshop.

With help of professional facilitator and use of previously-agreed ranking process, organized into three priorities:

- Major City Goals
- Other Council Objectives
- Address as Resources Permit
Major City Goal Work Programs

We need to:
- Clearly define and scope the work
- Ensure clear understanding of how to accomplish the goal
- Convert the goal into specific action steps so we can measure progress in achieving it.
- And assure that we link the “action steps” with required resources

Detailed Work Programs
- Objective
- Discussion: key issues, background, challenges
- Action Plan: Key steps and schedule
- Responsible Department
- Required Resources
- Outcome: Final Work Product
Goal-Setting and the Budget Process

Goal-Setting Input
July to January

Advisory Bodies
Community Surveys
Community Forum
Letters from Community Groups
Letters from Individuals
Fiscal Forecast **
Long-Term Plans, Goals & Policies *

Council Goal Setting Workshop
January

* November “Setting the Table” Workshop
** December “Budget Foundation” Workshop

Major City Goal Work Programs and “Strategic Budget Direction:” April
Preliminary Budget: May
Budget Workshops: June
Adopted Budget: By June 30
What are the most important, highest priority things for the City to do over the next two years?

- Architectural Review Commission
- Bicycle Committee
- Cultural Heritage Committee
- Downtown Association
- Housing Authority
- Human Relations Commission
- Jack House Committee
- Joint Recreational Use Committee
- Mass Transportation Committee
- Parks and Recreation Commission
- Planning Commission
- Promotional Coordinating Committee
- Tree Committee
Advisory Bodies

- Briefing with Chairs/Mayor at Quarterly Meeting
- Briefing with support staff
- Presentations at meetings
- Results shared with all advisory bodies

city of san luis obispo

ADVISORY BODIES, GOAL-SETTING & THE BUDGET PROCESS

PURPOSE OF THE CITY'S BUDGET


The financial plan is the key tool for programming implementation of these goals, plans, policies and programs, by aligning the financial resources necessary to do so.

This requires a budget process that:
- Clearly sets major City goals and other important objectives.
- Allocates sufficient resources and organizational responsibility for achieving them.
- Allocates resources for programs and projects.

FINANCIAL PLAN FEATURES

- Debt/Debt Service
- Fixed/Deposits
- Additional
- Appropriations
- Hts. - Appropriations
- Appropriations

COUNCIL GOAL-SETTING

Start Guide to the Budget Process. Linking goals with necessary resources is a budget process that includes key objectives at the very beginning of the process. Setting goals and priorities should drive the budget processes, not vice versa.

FIVE-STEP PROCESS FOR 2009-11

1. Setting the Table: November 19, 2008. Review the terms of the General Plan, Economic Plan, Major City Goals, Long-term Capital Improvement Plan, etc., among other level objectives and the City’s annual budget projections and outlooks. This year, the Council will also consider the results of the last year's annual study, which fiscal foundation for the next year will be.

2. Budget Foundation: December 18, 2008. Based on plans for the goal-setting process, this plan will be reviewed and revised in February 2009 to avoid any budget deficits.

3. Community Forum: January 1, Council candidates public forums and discussion.


ADVISORY BODY MEETING


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ADVISORY BODY ROLE

By providing the Council with their recommendations, advisory bodies play a part in the budget process. For the Council goal-setting process, this role is encouraged in this manner:

- Provide the Council with goals that derive from their visions and are consistent with the Council goals. Council candidates are hereby directed to consider the following recommendations for 2009:

- High-priority, low-cost initiatives.

- Major City Goals:

- Economic Development:

- Major City Goals:

2009-11 Financial Plan

Council Advisory Body

RECOMMENDED GOALS

January 2009
Community Groups

Over 200 community groups and interested individuals invited to participate in the process.
Community Budget Bulletin

14,000 inserted into City utility bills
What are the most important things for the City to accomplish over the next two years?
Community Budget Bulletin Results

- Over 400 responses
- 15 “Top Themes”
  - Street repair/neighborhood paving
  - Open space preservation
  - Traffic congestion relief
  - Public safety
  - Creek & flood protection
- Senior services & facilities
- Neighborhood code enforcement
- Downtown protection/enhancement
- Spending reductions
- Bikeway improvements
- Binding arbitration repeal
- Parks & recreation
- Transit system
- Homeless concerns
- Affordable housing
city of san luis obispo

2009-11 Goal-Setting and Budget Process

What are the most important things for the City to accomplish over the next two years?

The Council wants your help in answering this question.

And with the very tough fiscal outlook facing the City, which would be much worse without Measure Y revenues, it's an especially important question this budget season.

The City is starting to prepare our next two-year budget: the 2009-11 Financial Plan. Its purpose is to link the most important, highest priority things for the City to achieve over the next two years with the resources needed to do so.

In setting goals for 2009-11 as part of the budget process, and in considering priorities for the use of revenues from Measure Y (the ¼-cent City sales tax approved by voters in November 2006), the Council wants to know what you think are important community priorities for the next two years.

Please join us at the Community Forum on the evening of January 15, 2009, where participants will have a meaningful opportunity to share with the Council (and each other) what they believe are the most important priorities for the City over the next two years. The comments and suggestions received at this forum will play an important role in shaping the City’s spending priorities.

Want more information? Please call us at 781-7125 or visit the City’s web site at www.slocity.org for more information about the Community Forum or the City’s goal-setting and budget process.

The City of San Luis Obispo is committed to including community members with disabilities in all of its services, programs, and activities. Telecommunications Device for the Deaf (TDD) 781-7410. Please speak to the City Clerk prior to the meeting if you require a hearing amplification device or other assistance.
Community Forum

- 275 participants
- Great learning opportunity – for community, Council and staff

**Agenda**

- Welcome
- Introduction: City’s budget process; status of current goals; general fiscal outlook; Forum purpose and approach
- Public Comments
- Post-its”
  - Green: Resource Suggestions
  - Pink: Questions or Concerns
- “Voting with Dots”
- Feedback Survey
Community Forum Feedback

Thank you for participating in the Community Forum for the City of San Luis Obispo’s 2009-11 goal-setting process. Please take a few minutes to share your community priorities with us.

How would you suggest prioritizing the City’s activities? For each budget community priority below, please indicate what level of attention would be desirable for it compared to the current situation, any suggestions about specific changes or potential goals and ideas about possible ways to achieve them.

<table>
<thead>
<tr>
<th>Community Priorities</th>
<th>Level of Attention (Compared to Current)</th>
<th>Suggested Changes or Potential Goals</th>
<th>Possible Ways to Accomplish Them</th>
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<tr>
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<td>Less</td>
<td>Same</td>
<td>More</td>
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<td>Public Safety (Police, Fire &amp; Paramedic Services)</td>
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<td>Street Maintenance/Paving</td>
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<td>Traffic Congestion Relief</td>
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<td>Creek &amp; Flood Protection</td>
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<td>Senior Services &amp; Facilities</td>
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<td>Neighborhood Code Enforcement</td>
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<td>Open Space Preservation</td>
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<td>Downtown Protection/Improvements</td>
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<tr>
<td>Other Services</td>
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</tbody>
</table>


Possible Actions to Achieve Goals & Balance the Budget

Potential Revenue Enhancements for Further Consideration. Please check or list any revenue enhancement opportunities that you would like the Council to consider in balancing the budget for 2009-11. (Please note that tax or assessment measures require voter approval).

Fees and Assessments
- Development Permit Applications
- Recreation Programs
- Paramedic Services *
- Fire Business Inspections *
- Creek & Flood Protection Fees *
- Street Lighting Assessment *
- Landscape Maintenance Assessment *

Taxes
- Parcel Tax (Flat amount per property) *
- Sales Tax
- Property Transfer Tax
- Transient Occupancy Tax
- Business Tax
- Utility Users Tax

* Note: The City does not have these in place today; these would be new revenue sources. The other measures would be an increase in current fees or taxes.

Other Revenue Enhancement Ideas

Potential General Fund Cost or Service Reductions for Further Consideration. Please check or list any service areas that you would like the Council to consider for reduction in balancing the budget for 2009-11.

Public Safety
- Neighborhood Services/Crime Prevention
- Police Investigations
- Police Traffic Safety
- Police Patrol
- Fire Emergency Response/Paramedic Services
- Fire Hazard Prevention
- Disaster Preparedness

Transportation
- Traffic Safety/Neighborhood Traffic Management
- Pavement Maintenance
- Sidewalks
- Traffic Signals & Signs
- Street Lights
- Creek & Flood Protection

Leisure, Cultural & Social Services
- Recreation Programs
- Park & Tree Maintenance
- Swim Center
- Cultural Services
- Social Services

Community Development
- Planning: Development Review
- Planning: Long-Range Planning
- Building & Safety
- Engineering: Development Review
- Engineering: Capital Projects
- Natural Resource Protection
- Tourism Promotion
- Economic Development

General Government
- Human Resources/Risk Management
- Financial Management
- Information Technology
- Building Maintenance
- Fleet Maintenance

Other Services

- 
- 
- 
- 
- 
Community Forum Outcome

- Great sense of community
- “Voices heard”
- Opportunity for dialog
- Great feedback

Deliverables
- 275 participants
- 68 speakers: “what & why”
- “Voting with dots” on priorities
- Survey results
  - “Level of attention” on services (less, same, more)
  - Potential revenue enhancements
  - Potential service reductions
  - Ways to achieve goals
Web Site

What’s New in SLO

City Adopts 2009-11 Financial Plan
On June 16, 2009, the Council approved a two-year budget for 2009-11. In San Luis Obispo, this is much more than a "numbers" document: the budget determines the City’s priorities and sets our course for the next two years. For this reason, the central question facing us in both good times and bad is: What are the most important things for the City to accomplish over the next two years? And with the very tough fiscal outlook facing the City, which would be much worse without Measure Y revenues, it’s an especially important question this budget season.

Click here for more information about the goal-setting and budget process, including the Preliminary 2009-11 Financial Plan, results of the Council’s strategic budget direction, Council Goals for 2009-11, detailed background information about the Community Forum that was held on January 15, 2009, the Council Goal Setting Workshop on January 31, 2009 and the Five Year General Fund Fiscal Forecast.
And after goal-setting

Some more notice!
Budget-In-Brief

2009-11 Financial Plan

Another very tough budget that would be much worse without Measure Y

The purpose of this "budget-in-brief" is to summarize the City's 2009-11 Financial Plan and 2009-10 Budget by highlighting the City's budget process, key budget features, major City goals and basic "budget facts." It also highlights how added resources available because of Measure Y will be used over the next two years. If you have any questions about the City's budget or would like a complete copy of the Financial Plan, please call us at 781-7125 or visit our web site at www.slocity.org

Purpose of the City's Two-Year Financial Plan

The fundamental purpose of the City's Financial Plan is to link what we want to accomplish for the community with the resources necessary to do so. Our two-year Financial Plan process does this by: clearly setting major City goals and other important objectives; establishing reasonable timeframes and organizational responsibility for achieving them; and then allocating the resources required for implementation.

While appropriations are still made annually under this two-year process, the Financial Plan is the foundation for preparing the budget in the second year.

Major City Goals

Linking important objectives with necessary resources requires a process that identifies key goals at the very beginning of budget preparation. Setting goals and priorities should drive the budget process, not follow it.

For this reason, the City began the 2005-07 Financial Plan process with a series of in-depth workshops where Council members considered candidate goals presented by community groups, Council advisory bodies and interested individuals; reviewed the City's fiscal outlook for the next five years and the status of current goals; presented their individual goals to fellow Council members; and then set and prioritized goals for the next two years.

City staff then prepared the Preliminary Financial Plan based on this policy guidance from the Council. A number of budget workshops and hearings followed, resulting in final Council adoption of the 2005-07 Financial Plan on June 21, 2005.

Financial Plan Policies

Formally articulated budget and fiscal policies provide the fundamental foundation for preparing and implementing the Financial Plan. Included in the Financial Plan itself, these policies cover a broad range of areas such as: operating cost recovery; goal setting; rate setting; debt management; minimum fund balance; and reserve levels; human resource management; productivity and contracting for services.

www.slocity.org/finance/budget.asp

- Budget-in-Brief
- Mailed to all residents and businesses
- On City web site (along with other budget information and financial reports)
Process relies on one simple question

- What are the most important, highest priority things for the City to accomplish over the next two years?
No.

- While they may appear to be, goal-setting and tough fiscal times are not conflicting concepts.
- In fact, the need to set goals for the most important, highest priority things for us to do is even more important when resources are tight.
- And creating meaningful opportunities for community involvement provides the best possible “campfire” for telling your fiscal story.
Of all the things we want to do in making our community an even better place to live, work and play, what are the most important?

- *In tough fiscal times, this may mean that preserving existing essential services is the highest priority.*

And making difficult resource trade-offs to do them is what the budget process is all about.
City of Bell

- Similar process, but unique challenges
  - Large Spanish-speaking population
  - Deep distrust in the aftermath of well-publicized scandals
A better story for this year

Este año el proceso es mucho mejor

- The Council publicly established the schedule and process very early
- Public involvement is underway – over six months before budget adoption
- Multiple opportunities for public participation throughout

El Concejo Municipal definió el calendario y el proceso públicamente y con mucha anticipación

El público ya está participando, más de seis meses antes de que se apruebe el presupuesto

Existen múltiples oportunidades para la participación del público durante todo el proceso
Small Groups

- English or Spanish speaking table
- Randomly assigned
- Two-facilitators per table
  - Volunteer/staff
  - Training beforehand
- Brief presentation on process and fiscal challenges facing the City
- Same table topic for all groups
Today’s Big Question
La Gran Pregunta de Hoy

- What are the most important things to accomplish next fiscal year (2012-13)?
- Keeping in mind …
  - We can’t do it all
  - Achieving many of the goals will take more than 1 year
  - Council must weigh many ideas and financial constraints

- ¿Cuáles son las metas más importantes para el próximo año fiscal (2012 -2013)?
- Tengan presente…
  - No podemos hacer todo lo que quisiéramos
  - Alcanzar estas metas podría requerir mas de un año
  - El Concejo tendrá que analizar muchas ideas y nuestra limitaciones fiscales
Engaged Process

- Facilitated discussion by each group
- Reporting out on top priorities
- Ranking priorities (“voting with dots”)
- Wrap-up/Next steps

www.ca-ilg.org/BellBudgetForum
Final Thoughts: Not a Panacea

- Meaningful community engagement is essential for community trust in stewardship of public resources and legitimacy of budget outcomes.

- But tough decisions by staff and elected officials are still necessary.
  - *Meaningful consideration of public input necessary, but one factor among many that need to be weighed by governing bodies.*
Recent IBM Report

Managing Budgets During Fiscal Stress: Lessons For Local Government Officials

- **Finding:** “Community engagement and budget transparency are important and do help, but will not supplant the need to make difficult decisions that involve costs or burdens to residents and community stakeholders.”

- **Recommendation:** “Foster citizen engagement to encourage widespread dissemination of fiscal information in order to enhance the legitimacy of public policy choices.”

Primary Goal: Strategic Plan priorities and work programs guide budget decisions, including preparation of upcoming 2013-15 Budget

What are the most important things for the City to focus on over the next five years?

Plan Monrovia Process

City’s fiscal condition

Community feedback & priorities

Current programs & services

Council Study Session: Jan. 29, 2013
City Council Chambers, 6p.m. open to the public

Feb. 9, 2013
Council Goal-Setting Workshop

Strategic Plan
April 16, 2013

March 26, 2013
City Council Work Plan Workshop

All workshops and study sessions are open to the public! We welcome you to get involved in the whole process.

Log on to www.PlanMonrovia.org for dates and times of future workshops and budget study sessions.

APPROVE 2013-2015 City Budget, June 2013
The Plan Monrovia Marketing and Outreach was designed to reach the greatest number of Monrovians, so that as Council developed a final plan, you would see a greater community snapshot.
Traditional / Low Tech Marketing

- Trifold Brochure
- Flyers
- Posters
- Postcards
- Banners
- Community Roadshow presentations
- Email / Phone
Out of the Box / High Tech Marketing

- City of Monrovia website
- Twitter, @MonroviaCA, #PlanMonrovia
- Facebook, City of Monrovia
- Textizen
- MindMixer (web)
Community Outreach Efforts

Over 60,000 potential stakeholders were reached through various mediums such as:

- Road Show Outreach- 6,118 people directly reached
- Written Surveys- Over 10,000 surveys were distributed with over 200 responses
- Community/Public Workshops- 160 participated
- PlanMonrovia.org- 164 participated
- Press and marketing – Approx 45,000 received information on PlanMonrovia
Outreach and Council Setting Results
Major Goals and Priorities

**ECONOMIC DEVELOPMENT**  Strengthen Monrovia’s economy and tax base through economic development efforts that include proactively retaining and attracting businesses, streamlining permit and plan check processes, and enhancing customer service and a business-friendly reputation.

**ENVIRONMENTAL STEWARDSHIP**  Maintain our commitment to environmental stewardship by improving our energy efficiency, water and air quality, parks and open space, and our urban-wildland interface.

**HISTORIC PRESERVATION**  Maintain our commitment to historical stewardship by preserving historic homes, structures, sites, and districts with sensitivity to neighborhood context.
Major Goals and Priorities Continued

INFRASTRUCTURE & FACILITY MAINTENANCE  Catch up to the extent feasible on the deferred maintenance of City facilities and infrastructure, and develop a program for long-term, ongoing maintenance that includes a system for establishing priorities among projects and maintenance services.

LONG-TERM FISCAL RESPONSIBILITY  Continue to demonstrate long-term fiscal responsibility by balancing the budget through revenue generation, wise use of available funds, building adequate resources and leveraging volunteer support; ensuring expenses are carefully considered and kept in line with revenues.

PUBLIC SAFETY  Provide a high level of public safety services through adequate staffing, high-quality personnel, up-to-date technology, and planning in both fire and police departments to assure resources are strategically invested in the highest priority areas.
Work Plans
MAJOR CITY GOAL WORK PROGRAM

ECONOMIC DEVELOPMENT: Strengthen Monrovia’s economy and tax base through economic development efforts that include proactively retaining and attracting businesses (especially focusing on Old Town, Gold Line and Huntington Drive Tech Corridor), streamlining permit and plan check processes where possible, and enhancing our customer service and business friendly reputation.

DISCUSSION

Work Scope Summary

Existing Situation

Retention and Growth
In the Business Retention and Growth aspect of the City’s efforts, our approach has been to retain businesses by providing them the tools they need to continue to grow and succeed in Monrovia. Specific ways we do this has been through outreach and support. Some of these include: special events (i.e CEO roundtables, broker receptions), marketing, maintaining the My Monrovia Business blog, continuing with the Business Visitation Program and focusing on maintaining the great quality of our existing shopping centers.

Relationships
Strengthening and maintaining relationships with local businesses, brokers, economic development organizations, property managers, elected officials and internal City Staff are key to developing and acquiring resources that will assist in the attraction, retention and growth efforts of economic development.

Job Development and Employee Development
The promotion of job development, employee development, and employee training within our community is an important aspect of Economic Development. It is the City’s position that a trained and qualified work force will help satisfy the employment needs of the local business community. Efforts towards achieving this objective are ongoing. One program that the City currently offers, through the Library Job and Career Center, is an ongoing outreach program that provides career-enhancing skills and education to members of the community.

Business Services Support
Efficient permit processing, appropriate land use regulations and adequate enforcement play a vital role in the attractiveness of the community to businesses and developers and have direct correlation to the effectiveness of any economic development efforts. The Development Services function is
Plan Monrovia
Strategic Plan
Plan Monrovia Strategic Plan

Plan consists of:
- Executive Summary
- Work Plans
- List of Council’s Goals set on 2/9/13
- Community Outreach report

The Plan and Progress reports can be viewed on the City site: [www.cityofmonrovia.org](http://www.cityofmonrovia.org)

Just Click on Plan Monrovia
Economic Development

GOAL: Strengthen Monrovia’s economic and tax base through economic development efforts that include proactively and attracting businesses (especially focusing on Old Town, Gold Line, and Huntington Drive Tech Corridor), streamlining permit and plan check processes where possible, and enhancing our customer service base and friendly reputation.

Through economic development efforts, we will be able to attract new businesses, keep and grow the ones we have, and prepare our community for the existing new changes in the future, such as the Gold Line.

THEME 1: RETENTION & GROWTH

Retain and grow the existing business base, with particular emphasis on our top employers, top revenue generators, and Old Town Businesses.

Keep Our Businesses and Help Them Grow by continuing to move forward with our business visit program. Make it a priority to visit 50 businesses each year, and explore ways to expand and improve that program by developing a business visit request process and a follow-up strategy.

Maintain Old Town as a viable and thriving district by continuing to develop the effectiveness of the Merchant Old Town Advisory Board. With more than 200 businesses in Old Town Monrovia, it will be important to continue to cultivate ways to ensure the success of all these merchants.

Please check back for more information on how we are making progress with Retention and Growth.

THEME 2: ATTRACTION

Attract businesses to Monrovia.
Incorporating Plan Monrovia into the Budget
The Plan & Budget

• Took the Plan and incorporated into the 2013-2015 Budget process

• Identified both funded and unfunded items

• Adopted a budget that was developed using the Plan
Takeaways
Strategic Planning
Do’s to Keep in Mind

• Promote community engagement
• Hire third-party consulting firm
• Form an employee group, such as MIT9, to plan, develop and promote community engagement events
• Consider how an election year might impact the outcome.
Strategic Planning
Do’s to Keep in Mind…Con’t

• Consider how the venue for the community workshop might change the focus of priorities

• Consider how much information the community may need to assist with developing priorities. Perhaps, explaining the current budget and whether there is a surplus or a shortfall

• Need an effective method for getting Council to agree on goals in a timely way
Questions?

Thank You!

The webinar recording and PowerPoint slides will be available on ILG’s website shortly

http://www.ca-ilg.org/webinar/how-ensure-your-budget-meets-your-communitys-needs

If you have additional questions please contact Melissa Kuehne: 916 658-8202