Honorable Mayor and City Council Members:

In the years between 2013 and 2016, the City failed to engage the public in the widespread rezoning that was part of the General Plan Update. That failure spurred considerable public backlash.

Now in 2025, you are faced with either repeating the same mistake made by a prior City Council, or you can truly engage the public. Unfortunately, there are some statements in the consultant's proposal that tell us that the City is looking at this as an adversarial process. For example, on page 10: "After the finalization of the plan, Kearns & West will host and facilitate a training session with staff and consultant team to review the plan, provide an overview of all public-interfacing activities, and **lay out strategies for successful conflict resolution and de-escalation in anticipation of potentially challenging community discussions and dynamics**. [Emphasis added]

In order to avoid the same backlash against the City as in 2016, I request that you form an advisory committee with respect to the rezoning required by the Housing Element and as a result of Measure K, so that the public can fully and meaningfully participate in the rezoning process. This will also avoid the adversarial attitude towards the public.

The contract with the consultant, Dudek, is for three years, with two one-year extensions. That is adequate time for the City Council to form an advisory committee. Advisory committees have timely and accurately performed tasks for the City in the past. The Active Transportation Committee, with the help of City staff, but only a little help from a consultant, wrote goals, policies, and procedures for the update of the Circulation Element of the General Plan. That was work was later the basis for the Active Transportation Plan, the backbone for a network of pedestrian and cycling routes.

Santa Ana used an advisory committee for the update and rezoning of its General Plan. Their group consisted of 17 members of the public, planning commissioners, business owners, and residents. There were 14 meetings over 10 months. The committee reviewed the goals and policies and identified areas suitable for future development. It also assisted with four vision statements, five core values and three land use maps.

Changes to General Plans don't show up on the agenda for public hearings fully formed. In most cities, the process begins with two steps:

- The creation of an advisory task force, often known as the "general plan advisory committee," and

- The selection of an outside general plan consultant.

Some cities precede creation of the task force with a visioning process, in which the city and community leaders gather public input and attempt to reach a consensus about what sorts of things they want for the city. Sometimes the advisory task force undertakes the visioning process. See attached "Using Visioning in a Comprehensives Planning Process" by Anna Haines of the University of Wisconsin Stevens Point (https://www3.uwsp.edu/cnr-ap/clue/documents/publicprocesses/using_visioning_in_comprehensive_planning_process.pdf).

An advisory committee is usually made up of 15 to 30 citizens who represent various neighborhoods, industries, and other interest groups in the city. It is typical to have advocates from affordable housing, veteran, senior, and youth groups along with representatives from development and building companies be part of the committee. A consultant or lead staff person will work with the committee to put together a draft of the general plan revisions. In most instances, the professional general plan team will provide the committee with technical background and make recommendations, while the committee will make the initial policy choices.

During the process of putting Measure K on the ballot, four of you, along with then City Councilmember Harlan, promised that the ordinance would bring affordable housing. It is critical that an advisory committee include affordable housing advocates to ensure that the zoning includes affordability requirements that will help the City satisfy its RHNA.

In addition, the public was promised there would be a visioning process for the rezoning. In fact, Measure K states "All city-sponsored land use plans adopted or amended for any part of the defined areas eligible for this exemption shall include a **public community visioning process** (e.g., workshops, design charrettes, community surveys) prior to adoption or amendment by the City Council at any required public hearing." [Emphasis added] By the way, community visioning is not just workshops, design charrettes and community surveys, which are typically part of public outreach. As you will see from reading Ms. Haine's article, visioning is so much more.

And I'm not the only one who believes visioning that involves an advisory committee is important. The State of California for one. See https://lci.ca.gov/docs/OPR_C3_final.pdf (and attached) which is a chapter from the guidelines that the State has written for cities updating their General Plans. Also, William Fulton, who wrote the "Guide to California Planning," a textbook that is widely used in California college classes in urban planning.

I am also attaching a slide deck from October 2022 which I used during a public comment at a City Council meeting. The information was gathered from the Fulton book and the State guidelines.

Again, I urge you to form an advisory committee before any work with the consultant begins.

Cynthia McDonald

3

Community Engagement and Outreach

Designing Healthy, Equitable, Resilient, and Economically Vibrant Places

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"Cities (and counties) have the capability of providing something for everybody, only because, and only when, they are created by everybody."

—Jane Jacobs

Introduction

Robust and inclusive community engagement is a vital component of drafting and updating a general plan. State law requires the local planning agency to provide opportunities for the involvement of the community. Such involvement should include public agencies, public utility companies, community groups, and others through hearings or other appropriate methods (Gov. Code § 65351). The law also requires that a jurisdiction make a diligent effort to include all economic groups when drafting, adopting and implementing its housing element (Gov. Code § 65583(c)(8)). For the purposes of this chapter, the term "update" will refer to adoption of new general plans as well as amendments to existing plans.

By law, cities and counties must hold at least two public hearings before adopting a general plan: one by the planning commission and another by the legislative body (either the city council or the board of supervisors) (Gov. Code §65353(a), §65355). Government Code section 65351 requires that during the preparation or amendment of a general plan, the planning agency must provide opportunities for community input through public hearings and any other means the planning agency deems appropriate. Specifically, Government Code section 65351 requires that the planning agency shall "provide opportunities for the involvement of citizens, California Native American tribes, public agencies, public utility companies, and civic, education, and other community groups." Government Code section 65357 requires that copies of the documents adopting or amending a general plan, including the diagrams and text, shall be made available to the public. The courts have found a general plan amendment invalid when it was not made available to the public (*City of Poway v. City of San Diego* (1991) 229 Cal. App. 3d 847, 861). Most planning departments, however, conduct more than the minimal number of hearings. Many jurisdictions undertake extensive outreach that exceeds the minimum statutory requirements. The spectrum of community engagement ranges from informing and consulting the public to involving, collaborating, and ultimately empowering local communities.

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A general plan update affects every aspect and member of the community. Broad participation – particularly direct or representative participation of local residents – will help achieve desired outcomes.

Many entities have recognized the ability of strong community engagement to improve local conditions, inform policy, enhance equity, and create better program outcomes. Community engagement as a process can also help strengthen community bonds. Creating the opportunity for community dialogue throughout the general plan update – while sometimes challenging – can result in a more informed plan with more public support.

As stated in Chapter 2, a general plan should start with a community's vision, but community engagement should continue throughout the process, from visioning to adoption and implementation, depending on the scope and extent of the project. A thorough update for an average-sized city typically requires at least one full year or more. The nature of the outreach process and its intended outcomes will differ in each stage of the update:
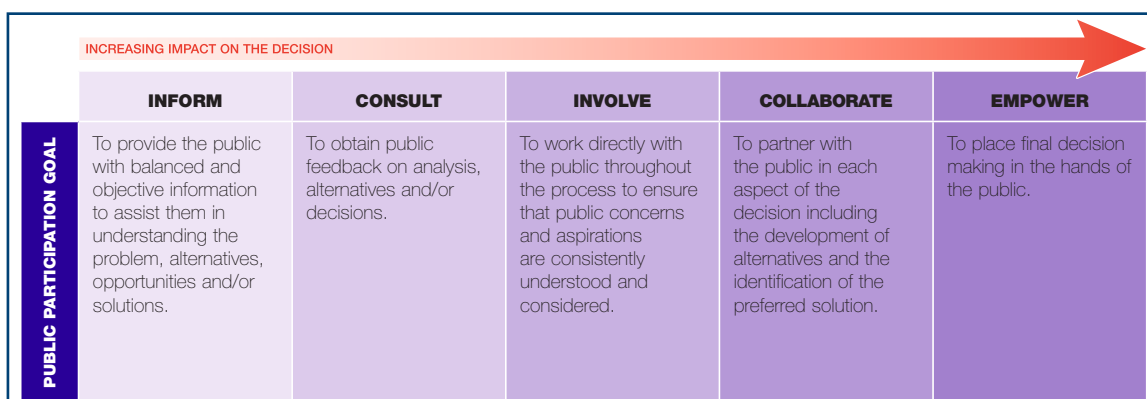
1. **Exploration**: The initial stages of outreach allow stakeholders to identify community strengths, assets, priorities for future development, and areas for improvement and, thus, to start the process of formulating a vision for the future. In addition, the exploration phase presents an opportunity to educate residents about land use planning principles prior to more extensive outreach.

2. **Collaborative Action**: After establishing a general baseline for community goals, planners should engage collaboratively with partners, considering different options for reaching the set goals and aligning policy priorities to attain the vision.

3. **Decision Making**: Exploration and collaboration should identify various policy priorities necessary for achieving the general plan vision. These priorities should then inform a framework to help identify policy options, choose among them, and assemble a draft plan.

4. **Monitoring and Evaluation**: Community engagement should continue after the plan is drafted. Updates on successful policy implementation and implementation challenges can be an opportunity to elicit feedback and help evaluate progress toward community goals.

Web-based engagement

Propel Vallejo developed a concise electronically available web document to highlight various planning options based on community input. By synthesizing all of the available information, the city created scenarios to elicit more input and inform the decision-making stage.

This chapter discusses various issues planning departments may consider when designing a public engagement process. It also provides tools and lists resources to inform the outreach process and ensure community involvement, input, and support for the general plan. As illustrated by Figure 7 below, statutory requirements only require limited meetings and fall into the "inform" area on the engagement spectrum. However, many jurisdictions recognize the benefits of a more involved process, and offer more extensive engagement and collaborative opportunities. Some communities have even conducted such an extensive engagement process that it moves towards "empower" in the engagement spectrum. The scenario land use planning and data informed process in the Fresno and the Vallejo plans are examples.

Figure 7: Public Engagement Spectrum

INCREASING IMPACT ON THE DECISION

PUBLIC PARTICIPATION GOAL	INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
	To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.	To obtain public feedback on analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.

http://c.ymcdn.com/sites/www.iap2.org/resource/resmgr/foundations_course/IAP2_P2_Spectrum_FINAL.pdf

Process Design

Designing the outreach process before starting a general plan update helps ensure adequate input from various stakeholders. Unexpected events can occur during an update, including changes in elected leadership, funding, and staff. Having an outreach plan in place will help keep the process on track. In addition to any organized participation activities, the Brown Act requires that meetings of appointed advisory committees, planning commissions, and local legislative bodies be public. This section provides guidance for developing an outreach plan.

Establish an Outreach Strategy

Establishing a road map to plan public engagement efforts may help guide outreach throughout the process. Local jurisdictions vary tremendously throughout California, and engagement strategies will also vary based on local circumstances. Local communities should help define the outreach strategy most relevant to their needs. There are some issues to consider across planning for all areas, however. These include:

• Funding available for engagement activities, including translation services as needed

• Timeline for activities

• Expectation setting for stakeholders

- Staff time, knowledge, and other expertise necessary to conduct outreach and education

- Communication tools available

- Process to ensure efforts are transparent, accessible, and fun

- Methods available to capture and record dialogue at outreach events

- Variety of meeting spaces

- Methods to continue engagement after the initial process has been completed

Some helpful tools in outreach include:

Oversight Responsibility

Assigning a staff member to oversee and be responsible for the engagement and outreach process will ensure dedicated attention to this important procedural step.

Advisory Committee or Board

Establishing a diverse advisory board or committee comprised of experts and community members can be helpful throughout the general plan update process. An advisory body can provide insight as to how to reach multiple populations, address potentially controversial issues, understand sensitive community needs, and represent a greater portion of the community. Establishment of the advisory body early in the process allows the board to inform the general outreach strategy from the beginning. An advisory board can also establish what community engagement will include for its own jurisdiction, and how community and stakeholder input is handled and communicated back to the public. Additionally, an advisory body can help build community capacity on issues such as data use and evaluation, as well as the historical context of land use planning. A manageably sized advisory body – around 10 people with an effective facilitator – should include multiple voices from the community and represent its diversity. General plan advisory board members should be drawn from the broad range of communities that exist within a jurisdiction to represent the varied interests that the public engagement process hopes to capture and to inclusively inform and enhance the general outreach strategy.

The following categories of advisory body members should be considered:

- Business leaders and/or representatives from chambers of commerce

- Representatives from the technology sector

- Local agency leaders, including water agencies, fire departments, law enforcement, parks and recreation, health officers, public works leads, and others

- Community development leaders

- Health leaders

- Representatives and advocates from various income groups, special needs populations, and neighborhoods in the jurisdiction

- Multi-lingual representatives

- State and/or federal agency leaders, if the jurisdiction has a high proportion of public lands

- School representatives

- Faith-based community representatives

- Agriculture and food system representatives

- Environmental justice representatives

- Academics

- Local philanthropic organizations

- Individual community leaders

Survey of Overlapping Efforts

Multiple public engagement processes may be in progress simultaneously. For instance, outreach to solicit input on an application for grant funding may occur at the same time as outreach for an update of the general plan. Concurrent outreach processes can confuse participants; and this confusion poses a potential challenge for recruitment and involvement. Additionally, other public or private agencies – for example, departments of parks and recreation, hospitals, departments of public health, or non-governmental organizations – may be conducting outreach simultaneously. Increased awareness of ongoing efforts to gain input can help avoid overlapping or conflicting outreach efforts and might even allow outreach sessions to be combined.

Scale

Outreach for a county's general plan is a much larger undertaking than for a city's due to the broader catchment area. Stakeholders may also have less of a perceived stake in the process because county general planning is further removed from their local jurisdiction. Sharing how information will be incorporated into the planning process can relate the importance of participation and increase community input.

Partnership

All affected stakeholders should be represented in any public participation process. In a general plan process, this is the entire community. Partnership with various stakeholders also provides the opportunity to establish paid or unpaid volunteers to work within the community during the outreach process. Stakeholder groups in the general plan process may include:

- Community and neighborhood groups

- School districts, charter schools, and county offices of education

- County transportation commissions

- Utilities and public service providers of:

  » Energy

» Water, including water supply and wastewater. These entities involve flood/stormwater districts, regional water management groups, (groundwater sustainability agencies (GSAs), reclamation districts, etc.

» Telecommunications

» Waste

- Regional groups that can identify synergies with other regional efforts

- Affordable housing and special needs population representatives and advocates

- Non-profit and for-profit builders

- State and federal partners, as appropriate

- Educational institutions

- Industry and business

- Civic and community service organizations

- Non-governmental organizations

- Religious communities

- Existing boards and commissions, such as planning boards, departments of parks and recreation, etc.

- Other public agencies

- Topical experts:

    » Groups working on climate change

    » County health departments

    » Environmental justice groups

    Tribal leaders

    Innovation or technology officers

    Local food groups

    Agricultural community members

Engaging more members of the community helps ensure a general plan that serves the needs of all residents

Source: http://www.futour.it/english/?p=48

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Tribal Consultation

When adopting or amending a General Plan, or designating open space, local governments must consult with California Native American tribes traditionally affiliated with the general plan area for the purpose of preserving or mitigating impacts to places, features, and objects described in Sections 5097.9 and 5097.993 of the Public Resources Code that are located within the city's or county's jurisdiction (Gov. Code § 65352.3, 65562.5). For more information about this consultation requirement, see the Governor's Office of Planning and Research's Supplement to the General Plan Guidelines, the Tribal Consultation Guidelines.

Cultural Considerations

Cultural differences may be present between and among professional groups as well as between and among community members. Reaching out to different professional groups and organizations not traditionally involved in planning may present additional challenges and opportunities. Understanding different interaction norms, priorities, levels of comfort with professional terminology, and expectations for project completion is essential to a productive process.

It is important to consider cultural diversity throughout the design of the community engagement process, including both overt differences, such as literacy level, socioeconomic status, and language, and more nuanced differences such as local history and cultural norms. Designing a process that is sensitive to all these considerations may help encourage broader, more equitable, and more informed participation.

To ensure equitable outreach, the following factors should be considered:

Literacy Level: It may be more difficult to reach out to Limited English Proficient (LEP) individuals, immigrant communities, or people with lower educational attainment. Planning agencies should design outreach materials and events to accommodate different literacy levels and provide background information when referring to complex concepts. Avoid the use of acronyms where possible.

Socioeconomic Status: Groups with lower socioeconomic status are often disproportionately affected by environmental hazards while facing greater barriers to participation in efforts to remediate them. These barriers may be addressed by considering factors such as location and timing of outreach, accessibility by public transportation, availability of childcare, and availability of food. Reviewing demographic information, such as the data available in the American Community Survey (ACS), can help identify the potential needs of each community.

Language: All communication should be done in the major languages spoken in the community. This includes any advertising and written background materials as well as live interpretation at key public events. Some documents, such as the draft general plan or the draft environmental impact report, may be infeasible to translate in their entirety. In such cases, the planning agency should consider translating an executive summary into the major languages spoken in the community. Interpreters should be available at meetings when it is clear that non-English speaking members of the community will be present. Many local non-profit organizations can provide minimal or low cost services for public benefit.

Age: Aging populations have specific needs that should be addressed to capture their input in the process. Considering time of day and location of events, as well as Americans with Disabilities Act (ADA) access to events and services available at the locations, will help include more elderly residents. The needs of young residents must also be considered, including outreach

methods that benefit multiple groups such as social media and online platforms, location access and amenities, and innovative tools for discussion at events.

Local History: Certain communities may have participated in previous outreach efforts that did not result in change. Over time, either not being included or participating and/or not feeling utilized may affect future participation. Understanding the local context is helpful prior to beginning outreach. Fostering dialogue around racial inequities that have existed in the land use context can be challenging. Jurisdictions have started to engage with skilled facilitators to have conversations that advance participation and engagement opportunities. In particular, specific outreach to tribal governments should be considered.

Cultural Norms: California is rich in diversity. Each city and county across the state is comprised of different ethnic groups from around the world. From 1980-2010, the percentage of people of color, for example, increased from 33.4 percent to 59.8 percent, and is expected to increase to 73.3 percent by 2040. Some community members may not be as familiar with the democratic form of government and the ability to openly share opinions; others may be accustomed to different gender roles, or may be fearful to have conversations and dialogue recorded. It is hard to learn all of the cultural nuances for each group in the community, but working in partnership with local non-profits or other groups skilled at working across cultures can help ensure all groups are able to participate in a meaningful outreach process.

Outreach Structure

Community members and other stakeholders have many competing interests and limited time. Allowing different levels and types of involvement in the process can help foster participation. For example, going to places where people already gather—a community health center, a street fair, a cultural event, a public event at a local religious or community center, or a community event at a local school—may allow attendees to give input without a large time commitment. This is an especially helpful mode of outreach when looking for feedback on specific topics, such as health, equity, and environmental justice. Meeting stakeholders in locations they are familiar and comfortable with can also help to bridge cultural and trust gaps. Other more time-intensive activities, such as focus groups, charrettes, and workshops, can be made available for stakeholders who are interested in providing more in-depth input. The structure of outreach is also important for transparency and continuing communication throughout the process of a plan update. Ongoing information sharing can help maintain community relationships and build trust in the process, especially if culturally appropriate communication methods are used. Web-based communications, for example, may exclude stakeholder groups without regular access to the Internet, and should be supplemented by other methods for greater reach across groups.

Data

Data and data visualizations can be powerful tools to catalyze community engagement. Some local jurisdictions have used maps with geospatial data and charts to examine transit routes, map community assets and risks, or share health outcome information to allow community members to understand planning in a tangible way. Data presentations should be tailored to their specific audience. For instance, some members might want specific details, including how the data are generated and collected. Other stakeholder groups may only be interested in general associations and how the data fit into the process. Missing data should be considered alongside existing data. Including funds in the budget to collect data as the general plan process proceeds will help address identified gaps in data availability.

There are also methods to allow community members to collect local data themselves. Tools such as walk audits, surveys of building types, and community photos help communities envision improvement while increasing potential participation. Considering how these data are valued – versus other data sets and sources such as traditional data, including how much weight they will carry in the process and how public contributors will be incorporated – is important to help ensure improved community data and input.

On the Horizon

As technology has advanced in the private sector, people have become accustomed to using the Internet and their personal cell phones to locate services, buy products, fund projects through crowdsourcing, and share their lives on social media. This constant and immediate interaction is changing the cultural norms for level of involvement with business, other community members, and, ultimately, with government agencies. Groups such as Code for America build open source technology to improve access to government services. Some places are starting to allow citizens to use personal cell phones to do surveys of local conditions, tweet responses to proposed policy options, or even provide their commentary online for local city council meetings rather than participate in person. As more local jurisdictions create positions for innovation officers and facilitate new ways of interacting with local government, planning departments will likely

Technology continues to create new methods of engaging the community in analysis and decision making

Source: https://www.pexels.com/search/analytics/

have new opportunities for engagement. However, jurisdictions should not ignore age and cultural differences in the rate of adoption of new technology as potential methods of engagement increase. As with any strategy, balancing alternative methods and using various tools to engage diverse perspectives will help increase input and prevent unintentional exclusion of community members.

Partnering for increased engagement in Salinas

In fall 2013, the City of Salinas initiated an Economic Development Element (EDE) planning process. The City's initial goal was to position Salinas for outside investment to become the agricultural technology capital. However, when the City asked local community based organizations (CBOs) about their economic development priorities, multiple new topics emerged including training for transitioning agricultural workers; reducing poverty; support for local entrepreneurs and small businesses; more childcare facilities; education and youth development; and tracking the city's economic indicators by neighborhood, race/ethnicity, and income group.

The CBOs also wanted improved community engagement for the EDE process. Early activities required a technical understanding which intimidated numerous residents (and CBOs) into not participating. While 75% of Salinas residents identify as Latino and 66% of residents speak Spanish at home, the workshop presentations and materials were all in English with limited Spanish interpretation assistance. The collaborative Building Healthy Communities

– East Salinas (BHC), identified this need and entered an MOU with the City to provide additional engagement opportunities tailored to the Latino residents in East Salinas (93% Latino).

This supplemental effort consisted of a pop-up workshop, a community workshop, and house meetings to learn about East Salinas residents' challenges with employment, education, shopping, and businesses. Additionally, BHC convened bi-weekly meetings with coalition members so they could collaboratively provide support and feedback to the City on engagement and policy proposals.

The BHC-led pop-up workshop's materials and hosts were bilingual and activities included a vision photo booth, goal prioritization dot exercise, and posters that asked people for ideas about "Small Businesses, Entrepreneurship and Innovation" and "Youth Development." The activities did not require any prior knowledge of the planning process or of economic development policy. A few months later, BHC and the Monterey County Health Department co-hosted a community workshop in East Salinas, held in Spanish with English translation. Activities framed EDE topics at an individual or household level making the discussion accessible to all attendees. Community leaders also organized, facilitated, and summarized small house meetings in Spanish to hear from many undocumented and mono-lingual Spanish-speaking families. From these activities, the resident's and business owners and workers articulated their dreams for their families and Salinas youth.

BHC's involvement in the process shifted the EDE's framework, promoted inclusion of policies with a health and equity framework, and created an entire quality of life section in the element. Evaluation metrics were modified to show breakdowns by race and ethnicity and include health and quality of life indicators. This process demonstrated that East Salinas residents have valuable contributions when culturally-appropriate community engagement opportunities are available. The City now sees BHC and other local CBOs as partners and allies. City of Salinas Planning RFPs now include requirements for processes to include fully bi-lingual and collaborative planning processes.

Source: Beth Altshuler, Raimi + Associates; Building Healthy Communities — East Salinas; and City of Salinas

Engagement Tools

There are a wide variety of engagement tools that can be used to inform and engage the community in a public participation process. Tools should be chosen based on the needs, strengths, and resources of the community. Using multiple techniques can help to reach a wider range of community residents. Community members who help develop the general plan may become champions throughout the process, helping carry the plan through adoption and implementation. Below are examples of different tools that may be employed.

Meetings, Workshops, and Events

Well-timed meetings help solicit input and keep participants informed. Ensuring that meetings and outreach activities are held at a variety of times and locations—after work hours, on weekends, or at facilities that are easily accessible via public transit—helps increase potential participation. Meeting types can vary depending on a variety of factors, including the meeting's purpose or its participants. In addition to regular meeting structures, project leads can use innovative methods such as story telling, games, or

white board activities to capture input. Meeting types include, but are not limited to:

- Public hearings

- Town hall meetings

- Open houses

- Events in non-traditional places, such as farmers' markets, churches, health fairs, school events, and community fairs

- Panel discussions

- Neighborhood meetings

- Meetings of civic organizations, such as chambers of commerce

- Focus groups

- Small in-home meetings

Activities

Activities are a helpful tool to expand thinking and demonstrate new opportunities and possibilities. For example, conducting a "walk audit," where local residents physically walk around as a group and collect standardized information about the condition of the built environment, could highlight infrastructure and safety needs. Activities can also provide group-learning opportunities and build relationships between community members and planning and consulting staff.

Tours

Tours to other cities and counties can show decision-makers and participants examples from other communities and help them visualize ideas for their own community. Tours within an agency's own jurisdiction are also a good way to experience parts of the city or district with which participants may be less familiar. Organized tours of recent or proposed projects within the community may also provide a good basis of discussion for decision makers and participants.

Open Houses

Open houses can allow community members to view plan proposals, data, and maps in a casual environment that allows people to come and go as their schedules allow. Open houses can be held at a church, school, community center, local business, or other location easily accessible to the public. Planners and visitors should be able to talk informally about the planning process, with translators present as necessary. Open houses can be combined with other tools, such as written or visual surveys.

Community Image Surveys and Photo Voice

Photos can be a powerful engagement tool to change the built environment. Various methods have been used with photos. Community Image Surveys are a visual preference method that are scored and used to assess preferences. Photovoice is a participatory method where users can capture elements about the environment and use them as a starting point for a discussion about their community.

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Design Charrettes

Design charrettes are interactive, visual, and time-intensive events where the public can participate with interdisciplinary teams of planners, architects, engineers, and artists, as well as each other. While charrettes are often used for specific plans and individual projects, they can also help community members visualize what they want their community to look like. These preferences can then be translated into general plan goals and specifications.

Web Based Meeting and Engagement Tools

Webinars, online conferences, and Internet collaboration tools allow for easy, convenient engagement with the public. People with busy schedules, families, or limited mobility may find participation simpler via web-based tools where they can enter questions or comments based on their own availability. Web-based tools range from simple online webinars or meetings to open forums, documents with commenting capability, and collaborative images for visioning. While some community members may not have access or interest in using online tools, including them in an engagement strategy may increase participation.

Mailings – email and regular mail

Mailings can be used to advertise process, request input, or share information. Per Government Code sections 65091 and 65092, some notices must be mailed in prescribed ways, but in all other situations the types of mailing used should be based on the desired input goals. Mass surveys or opinion mailings work well to broaden the range of participants in the process and can also share information about process scope, timelines, website links, data availability and other issues. Newsletters work to keep the public updated on the process as well. Some communities utilize existing mailing services, such as utility bills, to reduce costs.

Surveys

Surveys are most often used in the beginning of a general plan process to help identify community issues and concerns and to identify residents' opinions about the strengths and weaknesses of their community. A survey can help identify issues to be addressed by the general plan and areas where residents would like more information. A good survey includes the public early in the process, broadens the range of participants by including residents who do not come to meetings, and publicizes the general plan process. A statistically valid survey of local opinion, while more difficult to conduct, can be persuasive to decision makers and the public. Including demographic questions in a survey will help identify any inequities in response rates and detect important differences in opinions among groups.

There are a number of methods available to improve access and equity in surveys. Pilot testing the survey instrument with an advisory group or with a diverse group of pilot subjects may improve the form. The survey should be piloted in every language in which it will be offered to ensure that translations are conveying the intended information. While this will add time to the process, it may ultimately yield more accurate results and improve public perception of the data. Door-to-door surveys may also be an effective outreach method and can yield a higher response rate than traditional mail surveys.

Additionally, soliciting feedback on data interpretation may be useful before finalizing analyses. Because different interests may interpret the same data in multiple ways, providing an opportunity for discussion, feedback, and suggestions on how to analyze results may provide a stronger sense of transparency and trust in the process.

Beyond outreach

Conducting outreach with communities before and during the general plan update is key to having a more informed plan. Capturing input along the way is important for presentations back to city councils and county boards of supervisors to show how the plan is informed by community input. Beyond initial outreach, it is also important to have a mechanism in place to communicate with stakeholders who were involved during the update process, so they are aware of how their input was incorporated into the plan. Mechanisms to keep track of progress after the plan has been adopted have been well received in communities.

Jurisdictions have used different mechanisms to do this work. Some jurisdictions have assigned the various components of the general plan to different departments, allowing stakeholders to follow progress based on goals that align with the adpoted goals of existing agencies.

Using Visioning in a Comprehensive Planning Process

Anna Haines

Communities are increasingly using visioning as a public participation technique. Its purpose is to build consensus regarding a community's common future. Visioning is a useful and accepted part of the comprehensive planning process.

> **"A vision is like a light-house, which illuminates rather than limits, giving direction rather than destination."**
> —James J. Mapes, Foresight First

What is visioning?

Visioning is a process by which a community defines the future it wants. Through public involvement, communities identify their purpose, core values and vision of the future.
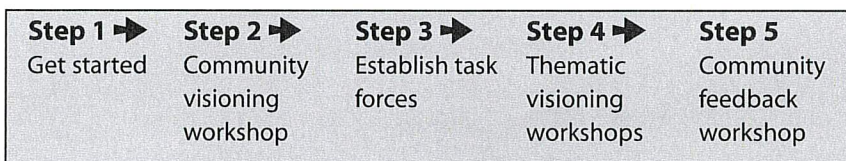
Visioning:

- Emphasizes community assets rather than needs.

- Assesses community options and opportunities on the basis of shared purposes and values.

- Stresses early and continuous public involvement in the process.

- Acts as a stand-alone process or part of a comprehensive planning process.

TYPES OF PARTICIPANTS

- Economic sectors: agriculture, manufacturing, services, tourism, others.

- Organizations: art and culture, unions, churches, environmental, youth, others.

- Local government: elected officials, police, transportation, housing, others.

- Personal characteristics: age, ethnicity/race, sex, income level, homeowners/renters, others.

- Political views: conservative/liberal/moderate and pro- and anti-growth

A consensus-building technique

Within a comprehensive planning process, visioning can be used as a consensus-building technique. Visioning facilitates the development of an effective comprehensive plan by focusing attention, "on how to organize collective thought and action within an inter-organizational network in which no one person, group, organization or institution is fully in charge".

Multi-jurisdictional initiatives, for example, may benefit by using visioning to build consensus on core values and to help people realize that despite differences they share many of the same long-term goals.

Figure 1. Steps in a visioning process

Step 1 ➡	Step 2 ➡	Step 3 ➡	Step 4 ➡	Step 5
Get started	Community visioning workshop	Establish task forces	Thematic visioning workshops	Community feedback workshop

A visioning exercise can bring a community together as people recognize their shared values and purposes, and articulate a shared vision of their community. The vision serves to lay out what the community should look like physically, socially and environmentally in 5, 10 or 20 years. A visioning exercise creates a sense of ownership in community residents to the extent that they want to see their vision come to fruition over a period of years.

INGREDIENTS OF A VISION STATEMENT

- Positive, present-tense language
- Qualities that provide the reader with a feeling for the region's uniqueness
- Inclusiveness of the region's diverse population
- A depiction of the highest standards of excellence and achievement
- A focus on people and quality of life
- A stated a time period

Source: The National Civic League Press

Many communities suffer from divisive perspectives involving past issues and policies. It is difficult for a local government to spearhead a comprehensive planning process when a community is divided into factions. Visioning can be a way to establish consensus on general beliefs and values. However, if there is too much distrust (for example, to the point where community leaders and others avoid talking to each other), a different technique, such as community mediation, will be needed to bring people together.
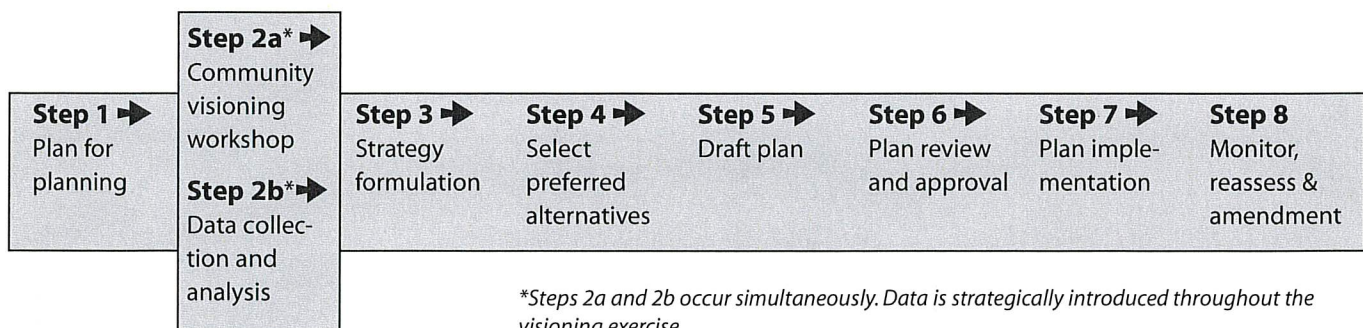
What are the results of visioning?

The results of visioning can include:

- An overall community vision statement

- Thematic vision statements that can address all the elements of the comprehensive planning law ("Smart Growth"), such as housing, transportation and natural resources. (A visioning process must remain focused on visioning and not drift towards too much detail or specific solutions.)

- Better communication lines developed within the community.

- Context for consideration and adoption of long-range functional goals and related policies.

- A "sounding board" during inventory and analysis of data. Asking how trends and other data fit into your community's vision can spur a more useful discussion about it.

- Grounded discussions and decisions when devising land use criteria and resulting policies.

- "Human glue" when naysayers challenge the adoption of your community's comprehensive plan.

How can visioning be incorporated into a comprehensive planning process?

There are at least two approaches that can be used to bring visioning into the planning process. Many communities develop a vision at the beginning of the planning process that acts as a guide for the rest. Conducting visioning at the beginning of the process builds a foundation upon which to build and evaluate the rest of the process. Ciitizens feel they are in control and that their input is meaningful when visioning is conducted early on. This implies, however, that planners, politicians and others must give up control of the results and trust that citizens will develop a vision (and goals and objectives) that are both useful and appropriate for that community.

Figure 2. Visioning parallels comprehensive planning process

| Step 1 → Plan for planning | Step 2a* → Community visioning workshop / Step 2b* → Data collection and analysis | Step 3 → Strategy formulation | Step 4 → Select preferred alternatives | Step 5 → Draft plan | Step 6 → Plan review and approval | Step 7 → Plan implementation | Step 8 Monitor, reassess & amendment |

Steps 2a and 2b occur simultaneously. Data is strategically introduced throughout the visioning exercise.

Adapted from Mark Hilliker, Citizen Participation In-Service, March 2000

In contrast, some places develop a vision after the issues step in the planning process. This type of vision acts more like a mission statement, but nevertheless can guide the rest of the process. In this model the planners and politicians are maintaining some control over the process. The risk is that citizens will not trust the results of the plan and more effort will be needed by planners to ensure trust and ownership of the resulting plan.

Visioning efforts try to maximize the number of people participating in them by establishing effective participation strategies such as press releases, advertisements and invitations to a broad set of community stakeholders. No one is excluded from visioning sessions and everyone has an equal voice. Representation from all parts of a community is necessary. In essence, visioning acts as the "human glue" to the planning process by getting a broad spectrum of people from a community involved and excited about their community's future.
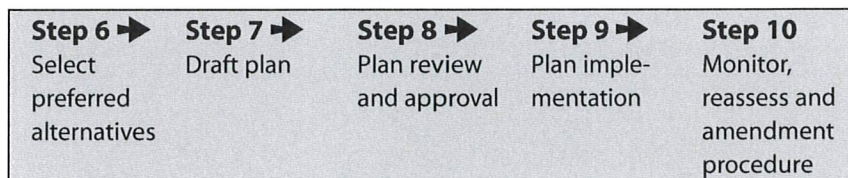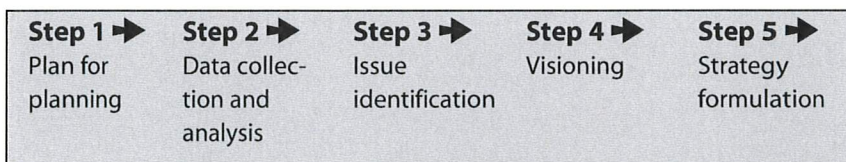

Preparing for the visioning process

Before adopting visioning, your community should ask a few questions:

- **Why should our community use visioning?** If your community already has a good sense of where it is going, you don't need to go through a visioning process. However, if you hear lots of grumbling and disagreements about growth and change, perhaps a vision can help look at these issues carefully.

- **Do we need visioning for all aspects of our community?** If your community feels it has a good sense of where it is headed except for one area, a visioning exercise is possible for only that one area. For example, many communities continue to experience problems with declining downtowns. After trying different methods for revitalization, people aren't satisfied with the results. Visioning can be used to define a focused plan for downtown.

- **Should we always use visioning in a comprehensive planning process?** There are situations when visioning is not a useful tool. Visioning does not make sense if a community is absorbed in a narrowly defined crisis, or if stakeholders have no faith in the value of public dialogue. In addition, if your community has a well-developed sense of itself, and land use issues are not overly contentious, a visioning process may not be useful.

Figure 3. Visioning as a step with comprehensive planning process

Step 1 ➡	Step 2 ➡	Step 3 ➡	Step 4 ➡	Step 5 ➡
Plan for planning	Data collection and analysis	Issue identification	Visioning	Strategy formulation

	Step 6 ➡	Step 7 ➡	Step 8 ➡	Step 9 ➡	Step 10
	Select preferred alternatives	Draft plan	Plan review and approval	Plan implementation	Monitor, reassess and amendment procedure

Adapted from Mark Hilliker, Citizen Participation In-Service, March 2000

Advantages and disadvantages of visioning

There are several **advantages** to using visioning in your comprehensive planning process.

Visioning:

- Serves as a catalyst. It can bring community residents together to talk about their community in new ways. After visioning, community residents often are motivated to get more involved in their community.

- Creates excitement in community residents about the planning process. People like to know that they can be a part of their community in meaningful ways.

- Keeps the process on track. Because a vision statement(s) have been created, community residents can make sure that the rest of the planning process addresses the issues raised from the visioning exercise and addresses how to achieve the vision.

- Keeps implementation moving forward. Again, because of the excitement created around the visioning process and the outcomes of visioning, community residents are motivated to keep track of the actions proposed to achieve the vision they helped to create.

There are also a few **disadvantages** to visioning.

Visioning can:

- Add to the cost of the planning process. Because visioning is an intensive public participation process, it can involve much organization. However, many planning or land use committees are willing to work on organizing visioning workshops because they recognize their importance in the overall planning process.

- Create expectations. While the advantage of visioning is that it generates excitement and serves as a catalyst for the rest of the process, it can also create expectations that the local government cannot fulfill. It is important to create short-term goals and objectives so that people can begin to see results fairly quickly .

- Depend on a facilitator. It is difficult to conduct visioning without a group of facilitators to make the process a successful one. However, many communities have trained a local planning or land use committee to facilitate visioning workshops. This has proved not only to be successful, but the committee walks away feeling its members have learned a new skill and have accomplished something meaningful.

Summary

Visioning is a useful tool in comprehensive planning. It can easily be included in the comprehensive planning process and can occur parallel to data collection and analysis. Vision statements provide a framework or hook upon which to hang ideas and information. Without an overall vision, gathering data and creating goals and objectives are often unconnected to anything meaningful. Thus, visioning provides a rationale and the framework for more meaningful questions. Finally, visioning can assist a community in identifying important and current issues, whether the debate centers on cell towers, gravel pits, or urban sprawl and farmland preservation.

References

For more detailed information on visioning, you can get copies of **Building Our Future: A Guide to Community Visioning** (G3708) by Gary Green, Anna Haines and Stephen Halebsky from Cooperative Extension Publications at the address on the back page. If you would like assistance on community visioning, please contact either Gary Green at 608-262-9532 or Anna Haines at 715-346-2386.

Green, Gary Paul, Timothy O. Borich, Robert D. Cole, David L. Darling, Connie Hancock, Stuart H. Huntington, Mary Simon Leuci, Bill McMaster, David B. Patton, Frederick Schmidt, Anne Heinz Silvis, Roger Steinberg, Dewey Teel, Jerry Wade, Norman Walzer, and Julie Stewart. 2001. *Vision to Action: Take Charge Two*. Ames, IA: North Central Regional Center for Rural Development (Report No. RRD 182). This manual provides materials for conducting a community visioning project and developing action plans. The project synthesized the "best practices" from several Midwestern states. The manual is available from the North Central Regional Center for Rural Development.

Moore, Carl M., Gianni Longo and Patsy Palmer. 1999. Visioning. pp. 557–589 in *The Consensus Building Handbook*, edited by Lawrence Susskind.

Oregon Visions Project. 1998. *A Guide to Community Visioning: Hands-On Information for Local Communities*. This guide provides a comprehensive approach to visioning; suggestions for designing and implementing an effective visioning process; ideas and examples for using graphics in visioning; and contacts and resources for finding additional information. Information on the manual can be obtained from Steven Ames, Chair APA Oregon Visions Project, 325 SE 14th Avenue, Portland, Oregon 97214 (503-235-3000) (scames@aol.com).

Okubo, Derek. National Civic League. 1997. *The Community Visioning and Strategic Planning Handbook*. Denver Colorado. This publication is used widely in helping communities design, develop and facilitate community-wide planning projects. It is especially useful on drawing a broad group of participants into the process. The publication is available from the National Civic League, 1445 Market Street, Suite 300, Denver, Colorado. (303-571-4343) www.ncl.org/ncl ncl@ncl.org.

Peterson, Mark. *Harnessing the Power of Vision: Ten Steps to Creating a Strategic Vision and Action Plan for Your Community*. Little Rock, Arkansas: University of Arkansas Cooperative Extension Service. This widely used manual outlines a ten-step process to developing a strategic vision and action plan in a community. It also provides wonderful overheads and references. It is available form the Economic and Community Development Section, University of Arkansas Cooperative Extension Service, PO Box 391, Little Rock, AR 72203 (501-671-2072).

The Center for Rural Pennsylvania. *Planning for the Future: A Handbook on Community Visioning*. Harrisburg, PA. This manual provides a process for community visioning, detailed instructions for each session, workshop agenda, resources, references and other information that communities can use to design a visioning process. Available from The Center for Rural Pennsylvania, 212 Locust Street, Suite 604, Harrisburg, PA 17101 (717-787-9555) www.ruralpa.org info@ruralpa.org.

Example vision statement from City of Lodi

Vision for Our Community: Lodi 2025

In 2025, Lodi is a community that links the future with the past by recognizing the importance of history in growth and development. The center of our small town is a pedestrian-friendly main street that celebrates historical architecture, while our waterways and surrounding vistas nourish the health and beauty of the valley.

Land Use and Growth Management

Our community is committed to planning and community involvement in directing its future growth to meet the needs of our residents. Our community encompasses a mix of distinct neighborhoods and districts, and by encouraging compatible land uses within those districts, we are maintaining our unique small-town character, protecting natural resources, and promoting sustainable development and growth.

Downtown Revitalization

Our revitalized downtown promotes a pedestrian-friendly retail and government center that maintains and enhances our city's historic and architectural integrity.

Business Retention and Expansion

Our community fosters business development and recognizes the importance of a balanced business district with retail shops, services, facilities, and light industries.

Housing and Historic Preservation

Our exemplary community is committed to historic preservation, conservation of neighborhood character, beautification of residential settings, and provision of housing that meets the needs of diversified social and economic groups. Our historic homes provide a bridge from the past to the future and enhance the beauty and warmth of the community. There is widespread public awareness of historic preservation programs and ongoing restoration of Lodi's historic homes, businesses, parks and transportation systems. Every home in the historic districts has been restored to its original condition.

New residential development is carefully designed with the preservation of natural settings and resources — woods, creeks and wetlands. Neighborhoods are picturesque with period lighting, fencing and walkways. Our long-range planning has thwarted sprawl by providing development that is sympathetic to, and respectful of, the topography, the environment and changing societal demographics. Ample housing is available to meet the needs of different economic groups and the desires and requirements of residents across the life span.

Community Services and Public Works

Our community services and facilities maintain their functionality, address the needs of our diverse population, and adapt and change as the community grows. Services include programs that promote a neighborly atmosphere that reflects the concerns of individuals and families in our community.

Natural Resources

Our community is situated in scenic Lodi valley surrounded by tree-covered bluffs and bisected by the pristine, trout-filled Spring Creek, which travels through Lodi Marsh, known across the state as home to abundant wildlife. An enlightened community advocates for watershed and shoreline preservation, maintenance and improvement of its existing vistas, parks, trees and green spaces, and managed growth in areas suitable for development. Much of the above can be attributed to fact that the Lodi school system is a national model for environmental education in the tradition of Aldo Leopold's concept of community and John Muir's principles of living in harmony with the environment.

Parks and Recreation

Our citizens and government are committed to Lodi's natural heritage. We cooperate to enhance and maintain our beautiful parks and other natural green spaces while providing quality recreational activities and equipment for the benefit of the entire community. A green corridor connects Lodi, both bonding the community together and linking it with the surrounding natural environment.

You can obtain copies of this publication from your Wisconsin county Extension office or from Cooperative Extension Publications, 45 N. Charter Street, Madison, WI 53715, 608-262-3346. Outside Madison, call toll free: 1-877-WIS-PUBS (947-7827). Before publicizing, please check on this publication's availability.

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FIRST VISIONING, THEN PLANNING

Cynthia McDonald

EXCERPTS FROM GUIDE TO CALIFORNIA PLANNING
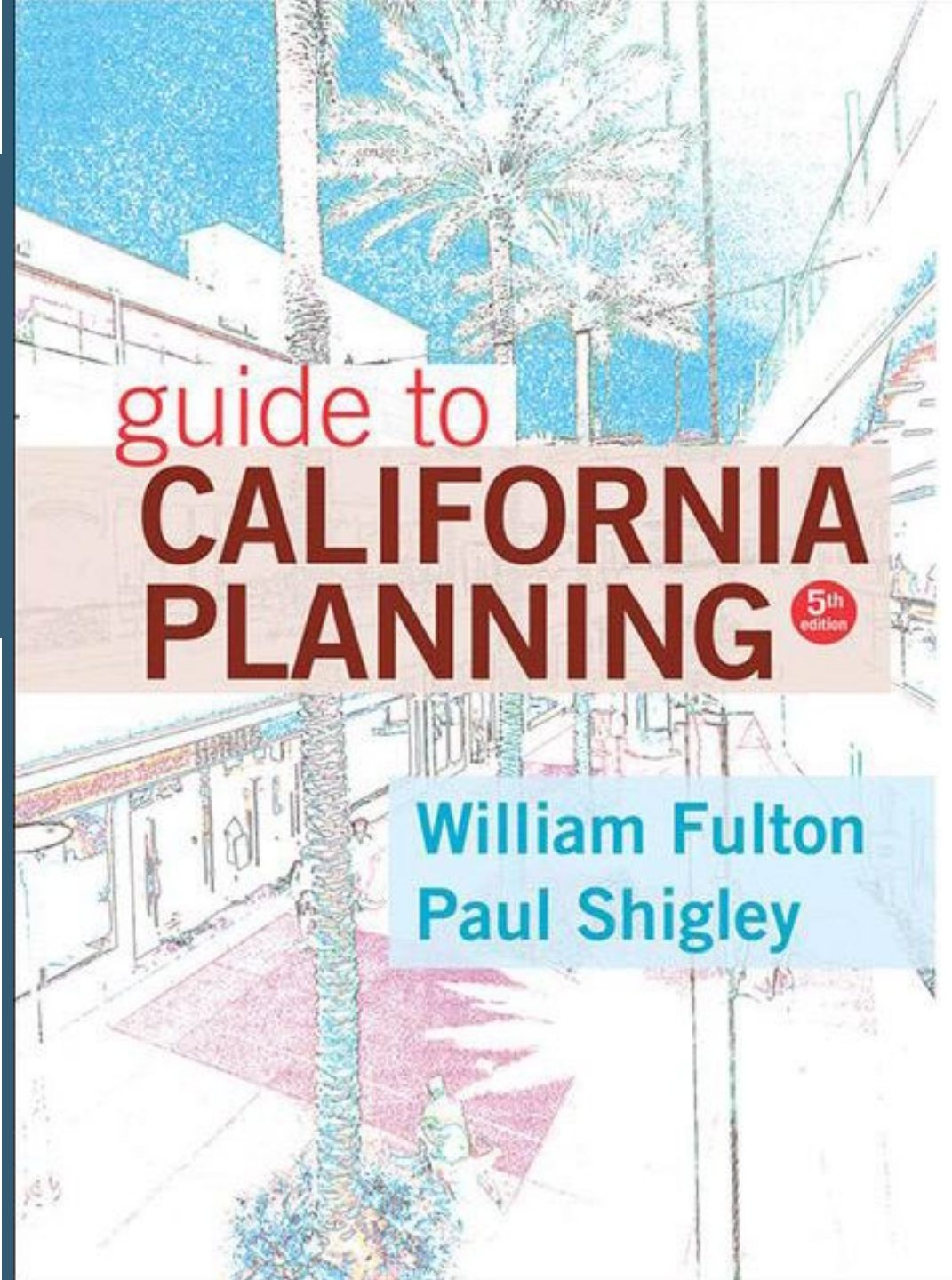
The Process: Participation and Politics

A proposed general plan (or general plan revision) usually doesn't leap forward into public hearings fully formed. In most cities, the process begins with two steps: the creation of an advisory task force, often known as the "general plan advisory committee," and the selection of an outside general plan consultant. . . .

Some cities precede creation of the task force with a "visioning" process, in which the city and community leaders gather public input and attempt to reach a consensus about what sorts of things they want for the city . . . Sometimes the advisory task force undertakes the visioning process.

The Process: Participation and Politics (continued)

An advisory committee is usually made up of 15 to 30 citizens who represent various neighborhoods, industries, and other interest groups in the city. . . . Over a period of months or even a few years, the consultant or lead staff person will work with the citizens committee to put together a draft of the general plan.

In most instances, the professional general plan team will provide the committee with technical background and make recommendations, while the committee will make the initial policy choices. . .

The rise of citizen power has changed the general plan process considerably, making it longer, more expensive, in some ways more cumbersome, in other ways more democratic.

The Process: Participation and Politics (continued)

In many cities, city managers and council members resist broad public participation. They believe that an elite group of decisionmakers will make the most informed choices and prevent the process from getting bogged down. These city managers and council members say visioning and consensus-building is unrealistic.

Leaders in many other cities recognize that organized citizen groups cannot be ignored and welcome their participation. The state's General Plan Guidelines contain a chapter emphasizing the importance of public participation. To help avoid future conflicts, the guidelines strongly recommend early, frequent and broad public participation . . ..[1]

[1] Fulton, William; Shigley, Paul. Guide to California Planning, 5th edition (pp. 121-122). Solano Press Books. Kindle Edition.

WHAT ARE THE STATE GUIDELINES?

[A] general plan should start with a community's vision, but community engagement should continue throughout the process, from visioning to adoption and implementation, depending on the scope and extent of the project. . . The nature of the outreach process and its intended outcomes will differ in each stage of the update:

Exploration: The initial stages of outreach allow stakeholders to identify community strengths, assets, priorities for future development, and areas for improvement and, thus, to start the process of formulating a vision for the future. In addition, the exploration phase presents an opportunity to educate residents about land use planning principles prior to more extensive outreach.

Collaborative Action: After establishing a general baseline for community goals, planners should engage collaboratively with partners, considering different options for reaching the set goals and aligning policy priorities to attain the vision.

WHAT ARE THE STATE GUIDELINES?

Decision Making: Exploration and collaboration should identify various policy priorities necessary for achieving the general plan vision. These priorities should then inform a framework to help identify policy options, choose among them, and assemble a draft plan.

Monitoring and Evaluation: Community engagement should continue after the plan is drafted. Updates on successful policy implementation and implementation challenges can be an opportunity to elicit feedback and help evaluate progress toward community goals.[1]

[1] Governors Office of Planning Research. State of California General Plan Guidelines 2017 (p. 27).
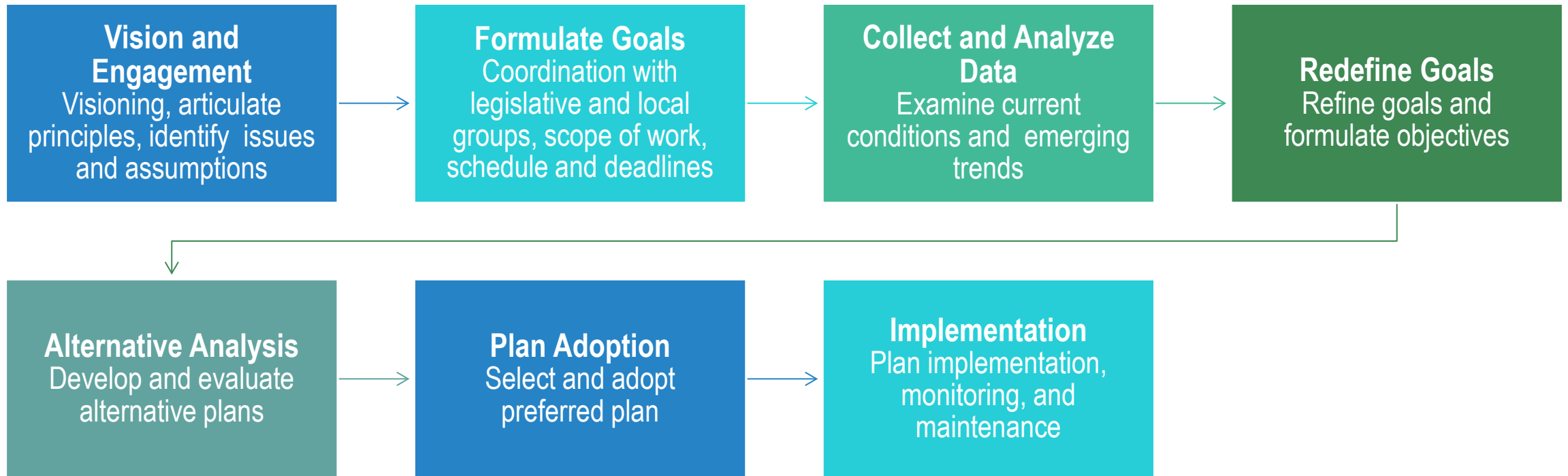
STATE GUIDELINE PROCESS

THANK YOU

Cynthia McDonald

CostaMesa1st@gmail.com

www.CostaMesa1st.com

City Council,

I sent these comments to Staff and requested they be shared with the FiPac Committee last week

Staff did not share these comments with the FiPac Committee, nor respond to my email

We also need to reconstruct the FiPac Committee, with a change of resident participants and provide the forum for meaningful input to City Council

We also need a formal Policy for Staff Customer Service improvements making it no longer optional if Staff responds or does not.

48 Hours to respond seems reasonable

Cheers,

Jim Fitzpatrick
Solutioneer
G.O.A.T.

G.O.A.T.
<u>G</u>overnment <u>O</u>penness <u>A</u>nd <u>T</u>ransparency
DOGE for Costa Mesa
Riffs on **Goat Hill** &
Greatest **O**f **A**ll **T**ime.

FiPac, we have a problem

Below are my comments and observations.

I ask you to seek answers from Staff

Each year, John Moorlach reviews Orange County Cities Annual Comprehensive Financial Reports (ACFR). The cities are ranked by their unrestricted net position (found in their annual comprehensive financial reports, or ACFRs) divided by the population, providing a useful tool for demonstrating a city's fiscal health.

	RANK	PER CAPITA	CHG	UNP
2017	34	-$1,419		
2018	34	-$1,949	0	
2019	34	-$2,085	0	
2020	34	-$2,190	0	
2021	34	-$2,163	0	
2022	34	-$2,026	0	$226,702,393
2023	33	-$1,494	1	$166,151,695
2024	33	-$1,537	0	$168,244,238

Observations:

- Comparing 2024 to 2023:
    - The population declined from 111,183 to 109,423
    - However, the Unrestricted Net Deficit grew
        - from ($166,151,695) to ($168,224,238).
- With a reduced population and an increased UND
    - the per capita grew from ($1,494) to ($1,537).
- Santa Ana's UND grew to ($1,764)
    - so Costa Mesa will not be in last place.
- However, Anaheim's UND reduced to ($1,235)
    - so Costa Mesa will not be moving up a position either.
- LIABILITY:
    - Each Resident has a potential liability of ($1,494)
    - Married = ($2,988) / Family of 4? = ($5,976)

2024 Research in Process

Table for 2023 vs 2022

It is a Homeowner's asset when positive

It is a Resident's liability when negative

ORANGE COUNTY CITY RANKINGS

Rank 2023	City	Population 2023	UNP 2023	Per Capita 2023	Population 2022	UNP 2022	Per Capita 2022	Rank 2022	Change
1	Laguna Beach	22,445	$71,135,527	$3,169	22,706	$59,445,633	$2,618	1	0
2	Tustin	79,558	$188,209,049	$2,366	79,535	$177,884,930	$2,237	2	0
3	Cypress	49,818	$109,409,928	$2,196	49,810	$95,488,606	$1,917	3	0
4	Irvine	303,051	$563,130,000	$1,858	310,250	$568,355,000	$1,832	4	0
5	Dana Point	33,882	$45,888,649	$1,354	33,765	$40,786,001	$1,208	5	0
6	Lake Forest	87,127	$111,333,965	$1,278	86,775	$104,627,188	$1,206	6	0
7	San Juan Capistrano	35,383	$41,318,582	$1,168	34,798	$24,677,648	$709	9	2
8	La Palma	15,332	$17,188,372	$1,121	15,332	$16,896,171	$1,102	7	-1
9	Stanton	39,084	$39,965,239	$1,023	39,275	$31,132,064	$793	8	-1
10	Laguna Niguel	64,702	$45,831,379	$708	64,316	$39,034,613	$607	11	1
11	Aliso Viejo	50,766	$33,277,156	$656	50,782	$29,924,478	$589	12	1
12	Laguna Woods	17,450	$11,159,858	$640	17,514	$11,329,413	$647	10	-2
13	Rancho Santa Margarita	47,066	$28,034,586	$596	47,279	$25,745,815	$545	13	0
14	Laguna Hills	30,525	$17,861,468	$585	30,750	$8,226,453	$268	16	2
15	Villa Park	5,850	$3,275,214	$560	5,900	$1,913,620	$324	15	0
16	San Clemente	63,237	$35,085,461	$555	63,380	$31,746,402	$501	14	-2
17	Newport Beach	83,411	$20,117,377	$241	83,727	($8,183,288)	($98)	19	2
18	Mission Viejo	91,846	$20,076,441	$219	92,515	$11,929,682	$129	17	-1
19	Yorba Linda	67,068	$6,537,745	$97	67,233	$3,052,522	$45	18	-1
20	Seal Beach	24,647	$864,319	$35	24,683	($10,011,404)	($406)	23	3
21	Garden Grove	171,183	($17,842,977)	($104)	170,526	($34,672,540)	($203)	20	-1
22	Los Alamitos	11,901	($1,899,211)	($160)	11,780	($4,758,845)	($404)	22	0
23	Fountain Valley	56,987	($17,081,942)	($300)	56,495	($28,855,352)	($511)	26	3
24	Brea	48,184	($16,320,573)	($339)	46,872	($23,291,146)	($497)	25	1
25	Buena Park	83,517	($37,846,745)	($453)	83,430	($28,554,255)	($342)	21	-4
26	Placentia	52,507	($43,543,074)	($829)	51,204	($23,395,810)	($457)	24	-2
27	Westminster	90,498	($78,659,154)	($869)	90,393	($96,417,176)	($1,067)	28	1
28	Huntington Beach	198,373	($173,034,000)	($872)	197,437	($223,438,000)	($1,132)	30	2
29	La Habra	61,835	($61,304,857)	($991)	61,792	($57,893,558)	($937)	27	-2
30	Fullerton	142,873	($149,971,139)	($1,050)	142,732	($156,104,563)	($1,094)	29	-1
31	Orange	139,063	($195,625,958)	($1,407)	137,676	($174,372,427)	($1,267)	31	0
32	Anaheim	328,580	($462,719,000)	($1,408)	341,245	($553,852,000)	($1,623)	33	1
33	Costa Mesa	111,183	($166,151,695)	($1,494)	111,394	($225,702,393)	($2,026)	34	1
34	Santa Ana	299,630	($498,310,802)	($1,663)	308,459	($468,389,299)	($1,518)	32	-2

Source: Public Financial Statements

SOURCE:

MOORLACH UPDATE — Orange County Cities 2023 Per Capita — July 8, 2024

PAGE #19 – Statement of Activities

CITY OF COSTA MESA, CALIFORNIA
Statement of Activities
Year ended June 30, 2024
(With Comparative Data for Prior Year)

| Functions/programs | Expenses | Program Revenue | | | Net (Expense) Revenue and Changes in Net Position | |
		Charges for Services	Operating Contributions and Grants	Capital Contributions and Grants	2024	2023
Governmental activities:						
General government	$ 46,273,963	$ -	$ 243,921	$ -	$ (46,030,042)	$ (34,674,078)
Protection of persons and property	112,351,024	9,792,484	10,122,137	-	(92,436,403)	(54,951,980)
Community programs	29,965,511	6,118,182	6,650,102	-	(17,197,227)	(11,959,708)
Public services	22,489,960	7,080,894	6,643,640	4,395,853	(4,369,573)	4,932,640
Interest on long-term debt	1,033,694	-	-	-	(1,033,694)	(962,189)
Total governmental activities	$ 212,114,152	$ 22,991,560	$ 23,659,800	$ 4,395,853	(161,066,939)	(97,615,315)
General revenues:						
Taxes:						
Property taxes					56,411,786	53,806,587
Sales and use taxes					76,400,160	79,851,289
Transient occupancy tax					10,150,696	9,830,790
Franchise taxes					6,542,802	6,094,232
Business/cannabis tax					3,902,514	1,907,551
Other intergovernmental, unrestricted					138,951	275,292
Investment income (loss)					7,200,904	1,821,815
Miscellaneous					2,579,220	3,345,452
Total general revenues					163,327,033	156,933,008
Change in net position					2,260,094	59,317,693
Net position - beginning of year					110,944,791	51,627,098
Net position - end of year					$ 113,204,885	$ 110,944,791

Questions:

- Why does the June 30, 2024 ACFR show **$63,451,624** more in spending than in 2023? We need specifics
    a. **$37m expense increase for Protection of Persons and Property?** What specifically drove increase?
    b. **$11.3m expense increase for General Government?** What was that spent on?
    c. **Why decrease in Sales and Use taxes?** Is forecast continued decline? What strategies and tactics to address?
    d. **Cannabis Tax is $5.8**, ½ percent for 1st Time Home Buyers & Arts is over **$400k each. How much spent?**

POLICY NECESSITIES:

- City Council MUST prioritized funding the Defined Benefits Pension Plans
    a. Cannabis budget was $2.5m vs Actual $4m
    b. Allocate the $1.5m surplus to decrease Unfunded Pension Liability
- Can model after City Council Actions in Newport Beach
- Explain significant Expense Increase of $63 million
- Why hasn't Staff developed a Cannabis Tax ½ Percent Tax allocation program, as directed by City Council?
    a. Both First Time Home Buyers and Arts are over $400,000
- Is the reduction in Sales Tax a one time decline or a trend?
- What is being done to mitigate the decline?
- **NOTE**: City Population decreased YOY

The Kennedy
COMMISSION

www.kennedycommission.org
17701 Cowan Ave., Suite 200
Irvine, CA 92614
949 250 0909

February 18, 2025

Mayor John Stephens
Costa Mesa City Council
77 Fair Drive
Costa Mesa, CA 92626

RE: Item 1 New Business - Ensuring Community Engagement in the Housing Element Rezoning Process

Honorable Mayor Stephens and Costa Mesa City Council Members,

The Kennedy Commission (the Commission) is a broad-based coalition of residents and community organizations advocating for the production of homes affordable for families earning less than $30,000 annually in Orange County. Since 2001, we have successfully partnered with jurisdictions across the county to create housing and land-use policies that increase affordable housing opportunities for lower-income working families.
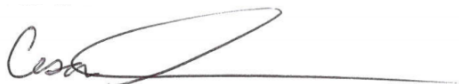
As the City moves forward with its Rezoning Program and Environmental Impact Report commitments as part of the implementation for its 2021-29 Housing Element, it is critical to ensure that the community has meaningful opportunities to engage in this process. Given that this rezoning effort stems from both the Housing Element update and Measure K to address affordable housing needs, we urge the City Council to establish an advisory committee for the Housing Element Rezoning Project. Cities create such committees to help create key strategies, project goals and priorities in collaboration with community stakeholders.

Such a committee would provide a structured space for affordable housing advocates, residents, and stakeholders to contribute to the rezoning discussions, ensuring transparency and fostering a collaborative approach to meeting Costa Mesa's housing goals.

Costa Mesa has an opportunity to lead with an inclusive process that prioritizes affordability and community-driven planning. The formation of an advisory committee will help ensure that the rezoning process results in equitable and sustainable housing solutions for all residents, particularly lower-income families who are most in need of stable and affordable housing. We recommend that the city include the formation of an advisory committee as part of the consultant's scope of work in the proposed project being considered for the Housing Element Rezoning Program.

We look forward to working with the City of Costa Mesa to promote an inclusive and transparent rezoning process that supports the development of much-needed affordable housing.. If you have any questions, please feel free to contact me at (949) 250-0909 or cesarc@kennedycommission.org.

Sincerely,

Cesar Covarrubias
Executive Director

1