

## STRATEGIC VISION



Mayor Dale Ross and the Georgetown City Council

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## STRATEGIC VISIONING IN GEORGETOWN

### COMMUNITY VISION AND COMPREHENSIVE PLAN

Section 213.002 of the Texas Local Government Code grants municipalities the authority to “adopt a comprehensive plan for the long-range development of the municipality.” Georgetown has a long and successful history of community involvement in the development of a comprehensive plan to guide growth within the community. As early as 1964, the citizens of Georgetown realized the importance of such a plan in shaping the long-term growth of the City. In 1986, voters approved a City Charter amendment requiring a comprehensive plan. This amendment committed the City to plan as a “continuous and ongoing governmental function,” with the common goal of maintaining and enhancing a high quality of life for the City’s residents. The Charter establishes that the comprehensive plan must contain the “Council’s policies for growth, development, and beautification of the land within the corporate limits and the extraterritorial jurisdiction of the City, or for geographic portions thereof including neighborhood, community or area-wide plans.” The City adopted its first comprehensive plan in 1988 and updated it in 2006.

The first component of the process is the strategic thinking and visioning by the City Council, typically through a visioning and priority-setting workshop. This Council workshop serves an integral role in linking the long-term vision and plans to the ongoing and current needs of the community. Using Council’s priorities, biennial citizen survey feedback and growth assumptions, five-year comprehensive Capital Improvement Plan and business plans are prepared. These plans are reviewed and adjusted by staff and Council, and serve as the basis for the annual budget preparation.



### GEORGETOWN 2030 PLAN

The comprehensive plan for the City is the Georgetown 2030 Plan. The process to update the City’s comprehensive plan began in 2006 and used a broad cross-section of citizens that provided input and ideas throughout the process. Meetings were held that allowed citizens and stakeholders the opportunity to voice their ideas and concerns about community growth over the next 20 years. The Georgetown 2030 Comprehensive Plan is the product of a careful design process that incrementally built consensus on the desired future of the City and the means to achieve that future. The 2030 Plan was adopted by City Council in 2008. City Staff will work with the Council and Community to update the 2030 plan in FY2018.

The 2030 Comprehensive Plan builds on the foundation created by the 1988 Plan and advances the planning for the City’s future by establishing a Vision Statement that reflects the shared values and aspirations of citizens.

### **2030 Vision Statement**

*In 2030, Georgetown is a growing city, recognized throughout the region and the nation as a premier community of choice by virtue of its exceptional livability; proud historic heritage; welcoming, engaging people; safe neighborhoods; variety of well-paying jobs; excellent public schools; vibrant arts and cultural offerings; and well-planned infrastructure, transportation, and public facilities.*

*We have taken advantage of our strategic location by embracing sound, managed growth, and harnessing and guiding it to deliberately shape Georgetown as we choose it to be. In embracing sound growth and encouraging a variety of densities and architectural styles, we have promoted sustainable development patterns that are compatible with our natural resources and historic character. We have encouraged innovation in development practices, raised quality standards for new development, re-invested in downtown and historic neighborhoods, and revitalized areas in transition. We have achieved greater economic autonomy by attracting quality employment and an array of local retail and commercial services to grow our tax base, safeguard our fiscal health and retain our talented youth. All of our neighborhoods are safe and thriving, and offer quality, affordable housing to households of all ages, lifestyles and economic means.*

*We have achieved our Vision by exercising leadership and by mobilizing citizens, civic, and neighborhood organizations, local businesses and institutions to work together in partnership with the City of Georgetown, its elected and appointed leaders and staff.*

*We have crafted our Vision to articulate community values and aspirations, structured into the following four major themes:*

### **STRATEGIC GOALS**

To meet the challenges set forth by the 2030 Plan, the City adopted a new process in preparation for the FY2013 annual budget. With guidance from Council, staff developed a framework for a strategic guidance from the Council that directs a more detailed business planning process at the staff level. At the Council level, the focus is strategic thinking and visioning that sets policies and direction for the City Manager and staff.

The 2030 Comprehensive Plan has four major themes listed below that frame the budget process.

- **QUALITY OF LIFE:** Focuses on Community Character, the People, Educational and Cultural Opportunities, and Public Safety.
- **SUSTAINABLE DEVELOPMENT:** Attract a desired balanced development, support homegrown businesses, promote development compatible with safe and efficient traffic movement, prevent incompatible development, and deliver utility services to meet the needs of the community.
- **BALANCED TRANSPORTATION:** Progress towards functional, well-integrated, multi-modal transportation system that implements improvements to the local road and traffic controls and enhance traffic flow and safety.
- **EFFECTIVE GOVERNANCE:** Maintain our City government's reputation for providing a high level of responsiveness to citizens and exercise visionary leadership in planning and investing for the future.

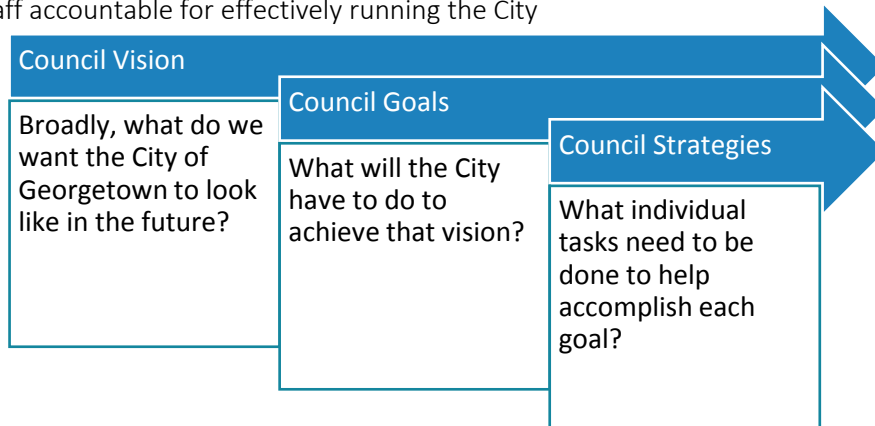
## CITY COUNCIL STRATEGIES

In the fall of 2015, the City Council went through a series of visioning exercises to clarify their role. Council developed a vision statement for the City, created a list of goals to help drive policy decisions, and developed a list of strategies to achieve those goals. The Council's vision for the City helps shape policy and provides clear and concise direction to staff, who have been working to develop and execute implementation plans around each of these strategies. Below are the City Council developed vision, goals, and strategies for the City to accomplish in the coming years.

### Role of Council

As a representative democracy, we provide a voice for each district so the Council can make decisions that serve the best interests of the City of Georgetown as a whole. To establish a vision and common goals that will protect the past and innovate for the future of our City, we are committed to the following:

- Keep the City physically safe and fiscally sound
- Establish appropriate policies
- Approve effective budgets
- Exercise fiduciary and financial responsibility
- Provide guidance, support, and oversight to the Council's direct reports
- Hold key staff accountable for effectively running the City



### Vision

- Georgetown is a safe, healthy, happy, connected, and truly diverse community where people can live, learn, work, retire, and play in an environment where we have ready access, throughout our lives, to arts, culture, essential services, and the natural environment.
- Our educated and skilled population, fiscally responsible governance, excellent infrastructure, and the beauty of our natural and man-made environments, attract new residents and businesses and enable us to create balanced and diverse employment centers and economic levels. Our strong sense of community connects us regardless of our cultural, age, ethnic, or economic differences.

### City Council Goals

#### Culture

Georgetown is a truly diverse, vibrant, inclusive, and socially dynamic City where everyone has the opportunity to participate in, and benefit from, our economic, political, and social activities.

#### Employees

Our outstanding and innovative City Employees work diligently to bring the Vision of Council to life and deliver exceptional services to our customers while exemplifying our Core Values.

### Internal Processes

Our policies and procedures are easy to understand, and consistently and professionally applied. Our internal processes are effective, efficient, fair, inventive, transparent, and make us a desired destination for residents and businesses.

### Customer

Anyone interacting with the City will have such a positive experience that they will tell everyone about it.

### Financial

To maintain a fiscal environment conducive to attaining the goals of the City.

### Council Strategies

- Attract, hire, develop, and retain the best people, and compensate them for the value they create
- Create a customer service mindset
- Implement the special event and destination strategy
- Build and maintain an entertainment platform/venues
- Expand and diversify the tax base (increase commercial percentage)
- Accumulate funds to account for unfunded and unanticipated liabilities
- Create a strategy to increase mobility
- Attain and maintain superior public safety and the enhance the perception of safety
- Attract younger workers/young professionals
- Improve communications and advertising
- Create and maintain outstanding aesthetics, and a welcoming appearance and spirit
- Create an asset maintenance and revitalization plan
- Create an annexation strategy
- Monitor, promote, and communicate a long-term water and utilities plan and strategy

City staff has been working to develop and execute implementation plans for each of these 14 strategies. Staff has regular check-ins with the City Manager to provide progress updates. The City Manager provides updates to the City Council to confirm the strategy execution is aligned with the Council's goals and vision. Council's next strategies workshop will be held in November 2017.



## MASTER PLANS

While the City of Georgetown 2030 Comprehensive Plan is a policy document, the goals and actions identified in it will only become a reality by concerted and consistent implementation efforts. This requires that the City administration, departments, and City Council actively uses the 2030 Comprehensive Plan as a key reference for all decisions and actions. The 2030 Plan identifies elements, or master plans, needed to frame the strategic planning and multi-year budgeting process. These master plans serve as a platform to secure input and consensus regarding strategies to achieve the goals outlined in the 2030 Plan.

The intent is to update master plans decennially, pending Council funding and direction, to provide a sustainable and manageable business planning process. Detailed Master Plans drive capital infrastructure programs and Departmental strategic plans. Brief descriptions of each of the City's Master Plans are below. Copies of these master plans are available on the City's website (<https://files.georgetown.org/category/master-plans/>).

1. **Airport Master Plan:** Provides a long-range plan to guide current and future activity at the Airport.
2. **Arts and Culture Strategic Plan:** Helps guide the City's planning for the cultural district for the next three to five years.
3. **Citizen Participation Plan:** Seeks to establish and coordinate procedures for the City to effectively and efficiently communicate relevant information and its effects to the public. Additionally, this plan seeks to proactively solicit feedback, improve community outreach, and provide opportunities for public participation in the City's decision-making process.
4. **Downtown Master Plan:** Sets the vision for Downtown and guides strategic decisions about future developments and enhancements.
5. **Future Land Use Plan:** Lays out land use throughout the City and ETJ. This plan is intended to convey the direction that the City is seeking in terms of its impact on established growth patterns, transportation, and open space.
6. **Housing Plan:** Guides the City in the development of affordable housing.
7. **Information Technology Master Plan:** Utilized by the IT Steering Committee (ITSC), this plan identifies software projects that may be needed over a five-year horizon. The intent of the plan is to ensure that resources expended on software are invested wisely and that the risks presented by those projects are minimized.
8. **Land Use Plan:** Provides an outline for new and ongoing elements pertaining to growth and development in the City.
9. **Library Strategic Plan:** Helps guide the City's planning for the Library for the next 3 to 5 years.
10. **Parks and Recreation Master Plan:** Provides an assessment of the current system, to allow the citizens the opportunity to voice their desires and concerns, and to provide recommended priorities that will guide staff and elected officials on how to plan for future parks and recreation needs.
11. **Public Safety Plan:** Acts as an outline for four long-term strategic priorities: enhancing public safety, organizing development, advancing teamwork and partnerships, and emergency management.
12. **Sidewalk Master Plan:** Inventories existing pedestrian infrastructure, identifies design deficiencies, evaluates future sidewalk requirements, and develops an implementation plan.
13. **Trails Master Plan:** Identifies key trail corridors and guides the creation of a citywide trail network.
14. **Transportation Master Plan:** Guides future roadway improvements, construction of new facilities, and outlines the City's transportation goals.
15. **Utility Master Plan:** Oversees the City in planning for long-term expansion and development of the water, wastewater, and electric utilities.

## **FY2018 ANNUAL BUDGET PROCESS**

The Budget process is an essential element of the financial planning, control, and evaluation process of municipal government. The annual budget includes all of the operating departments of the general fund, proprietary funds, debt service funds, special revenue funds, as well as the City's five-year capital improvement plan.

### **COMPREHENSIVE PLAN**

The Georgetown 2030 Plan is the City's comprehensive plan as required by the City of Georgetown Charter (Section 1.08). The plan seeks "to preserve, promote, and protect public health and general welfare, prevent overcrowding, ensure adequate transportation, availability of necessary utilities and services, and conserve and protect the City's natural resources." The City's Annual Budget is designed to further implement the 2030 Plan.

### **CITY CHARTER REQUIREMENTS**

The Charter (Section 6.02) requires "a proposed budget prepared by the City Manager and submitted to the City Council at least thirty days prior to the end of the fiscal year. The budget shall be adopted not later than the twenty-seventh day of the last month of the fiscal year. No budget will be adopted or appropriations made unless the total estimated revenues, income and funds available shall be equal to or in excess of such budget or appropriations, except otherwise provided."

### **PREPARATION**

The City's budget process begins each year with the Capital Improvements Program (CIP) planning process during January and February. CIP budgets are prepared on five-year planning horizons and use different variables relating to population trends, development patterns, and projected growth. Revenue estimates for utility operations, as well as development impact fees, are also prepared to forecast the ability of the rate base to fund needed capital maintenance, upgrades, and expansions. Five-year pro-forma models for each utility are prepared, as well as a five-year General Fund and property tax model, which is prepared to determine the impact of general infrastructure and facilities improvements on future property tax rates.

During the budget process, the City Manager and the Management Team hold budget review meetings to evaluate the one-year annual operating budget needs against the priorities and available resources. The biannual citizen survey results are reviewed. The budget is reviewed in public workshops with the City Council in June and July. The City Manager prepares the Proposed Budget, allocating resources to best meet the goals needed to execute the priority areas to further the implementation of the 2030 Plan.

### **PUBLIC PARTICIPATION**

The budget review process includes City Council participation in the development of each segment, while allowing for sufficient time to address policy and fiscal issues. The City Council holds public hearings to allow the public to provide comment and feedback on the City Manager's Proposed Budget. A copy of the City Manager's Proposed Budget is filed with the City Secretary and budget information is also posted to the City's website. The City also produces a budget highlight video which is posted on our social media outlets, website, and City YouTube channel.

### **ADOPTION**

Once budget appropriations are finalized, Council will adopt by Ordinance the final proposed budget as amended. The budget will be effective for the fiscal year beginning October 1st.

### **APPROPRIATIONS**

Budget control is at the division level for all funds. The budget is adopted by personnel, operations and capital (POC) totals within departments. Total appropriations are presented by Funds/by Divisions and by Funds/by POC. POC detail by department is included on each department summary page. The Charter (Section 6.030.) provides that any transfer of appropriation between funds must be approved by the City Council. The City Manager may transfer, without City Council approval, appropriations between departments within the same operational



division and fund. The City Manager may also authorize transfer of salary adjustment monies between funds that are budgeted in a citywide account.

#### **BUDGET AMENDMENTS**

The Charter (Section 6.04) provides a method for budget amendments and emergency appropriations. The City Council may authorize with a majority plus one vote, an emergency expenditure as an amendment to the original budget. This may be done in cases of grave public necessity or to meet an unusual and unforeseen condition that was not known at the time the budget was adopted. In practice, this has been interpreted to include revenue-related expenses within the enterprise funds and timing differences on capital improvement projects.

#### **UPDATED PERFORMANCE MANAGEMENT PROGRAM**

In FY2017, the City Manager's office launched a renewed effort at enabling data-driven decisions. The program includes the development of mission statements, goals and key performance measures. During the past year, a few departments participated in a pilot program. In FY2018, all remaining departments will begin participating in the program. The City looks forward to including more performance measures in future budget documents.

## FY2018 ANNUAL BUDGET CALENDAR OF EVENTS

### JANUARY - FEBRUARY

- Budget process schedule set.
- Capital Improvement Program (CIP) internal department meetings to discuss proposed projects, including 5-year model update.
- City Council reviews Five Focus Areas and recommends priorities for FY2018.
- Internal Service Funds (ISF) meet with each division for FY2018 needs.

### MARCH - APRIL

- FTE counts and initial personnel projections.
- ISF allocations are prepared.
- Preliminary revenue projections: sales tax, utilities, fees for service charges, and development fees.
- FY2018 Base Budgets, Service Level Improvements and new Program Requests are completed.

### MAY

- Five-year General Fund financial model is developed.
- Annual review and update of Fiscal and Budgetary Policy.
- Base Budgets are reviewed in detail by Finance.
- Service Level Improvements and Program Requests are reviewed by the Executive Team.
- Preliminary assessed value and property tax revenue projected.

### JUNE

- FY2018 CIP presentation to Council and Boards.
- Budget Team assembles a workbook that includes all Service Level Improvement and Program requests for City Manager review. These requests are all linked to long-term goals from the City's comprehensive plan.
- Revenue and expenditure projections are monitored and updated.

### JULY

- Five-year CIP presented to Council.
- City Manager's Preliminary Budget is presented to Council.
- Tax roll finalized.
- Property tax rate and revenue projections finalized.

### AUGUST - SEPTEMBER

- Departmental narratives and performance measures are submitted.
- Finalize FY2018 New Programs.
- Finalize FY2018 proposed tax rate.
- Final recommendations and Budget Summary distributed to Council and public.
- Public hearings on proposed budget and tax rate are held.
- Budget and tax rate ordinances presented to and adopted by Council.

### OCTOBER

- Implement FY2018 Annual Budget.

### BUDGET AMENDMENTS

Budget amendments may be made during the year in accordance with state law and City Charter. See detailed requirement in the Budget and Fiscal Policies included in the Reference Section. Typically, budget amendments are proposed to Council as part of the Mid-Year Annual Budget Review in May of each year.