

A Case Study for Consideration for the 2013 Transforming Local Government Conference

A COMMUNITY CONNECTED



2012-2014 BUDGET STORY  CITY OF WALNUT CREEK, CALIFORNIA

Case Study

“A Community Connected: The 2012-14 Budget Story

Category: Community Building
Jurisdiction: City of Walnut Creek
City Manager: Ken Nordhoff

Would we like the application to be considered for an innovation award? Yes

Would you like the application to be considered for our Rapid Fire Session? No

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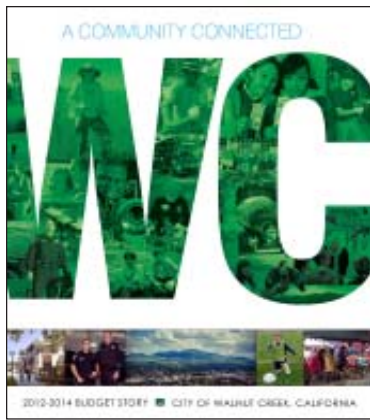
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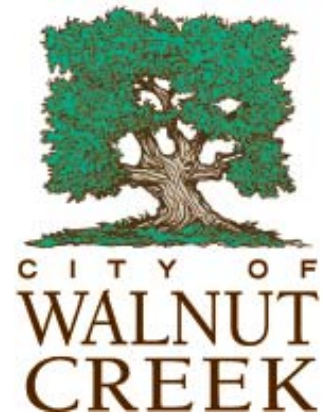
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A Community Connected: The 2012-14 Budget Story

Case Study Synopsis



INTENT OF PROJECT

“Budget Balanced: Fiscal problems still looming” proclaimed the headline in the City’s own newsletter.

Despite trumpeting this message for the past few years, most citizens remain unaware or unconvinced that the City truly faces significant shortfalls. Many seem to assume we will soon be back to the pre-recession world where there was plenty of money to pay for everyone’s favorite projects while still tending to infrastructure and other needs.

The City of Walnut Creek is fortunate because we were able to pass a balanced 2012-14 Budget. Still, there are financial challenges just around the corner. Capital needs alone will cost \$95 million over the next 10 years, but only \$35 million has been identified. Federal and State mandates add additional burdens.

Before the community can work in partnership with the city to develop a joint economic plan, residents and businesses need to fully comprehend what is at stake. And, they need to understand how government funding works: where the money comes from and where it goes, how special funds work, and the impacts of Federal and State mandates.

Recognizing that traditional budget documents did not tell the story in a way that the public could easily understand and that media coverage only tapped into the ‘conflict of the day’ without delving into potential solutions, we decided to do something dramatically different to catch the community’s attention.

INNOVATIVE CHARACTERISTICS:

1. The Solution
2. The Team
3. The Message
4. Delivering the Message in Multiple Ways

The Solution

The City Council decided to forgo the traditional 3-inch budget binder loaded with numbers and charts in favor of creating a budget communication piece that was compelling and accessible.

And, it needed to be ... dare we say it? ... **fun**.

Yet at the same time, it needed to have enough substance to:

- ◆ Clearly define what the City is in business to do;
- ◆ Build confidence in how the City makes decisions on behalf of the community, and;
- ◆ Inspire the community to get involved in setting a new course for the future.

It needed to strike a balance between celebrating the many positive projects, programs and services the City delivers, while cautioning the public that the high quality of life they expect is at risk.

AND it needed to offer information in a variety of formats to appeal to different audiences and learning styles – text, graphics and photos for the initial printed publication, and embedded video and web links for the online and tablet applications.

And so *“A Community Connected: The 2012-14 Budget Story”* was born.

The Team

Assistant City Manager Lorie Tinfow assembled a Budget Communications Team, led by Communications & Outreach Manager Gayle Vassar. Finance Manager Cindy Mosser added financial savvy, and Karen Majors, a member of the City’s community task force on fiscal health and a retired public administrator, was brought on board to help with research and writing.

Two new players were added to the mix: visual journalist Chuck Todd and multi-media producer Liz Payne.

Chuck is the presentation editor for the Bay Area Newspaper Group (<http://info.bayareanewsgroup.com/>), and has more than a decade of experience in taking complicated stories and turning them into easily understood informational graphics. He agreed to work with the City on a contract basis to develop an overall design as well as infographics. In addition to his technical expertise, Chuck brought a fresh, non-governmental perspective to the team.

Liz works for the City’s government access channel and has expertise in creating video that can be leveraged across a variety of traditional and new media platforms. She spearheads the City’s social media programs, and has extensive experience as a photographer and visual storyteller.

The Message

The team created a 20-page publication called *“A Community Connected: The 2012-14 Budget Story,”* framed around the Priority Based Budgeting (PBB) process Walnut Creek has used since 2009.

PBB is based on identifying community goals, scoring city programs against those goals, and then allocating funding to the programs most likely to achieve the goals so the City can demonstrate how well resources are matched to community priorities.

To demystify how Priority Based Budgeting works, Chuck made a colorful, easy-to-follow infographic that clearly illustrates the unique role of the Council, the community and the staff play.

Each of the seven goals has its own 1 or 2-page ‘chapter’ with a mix of short ‘snapshot’ articles, graphics, and photos of staff and community members. For every goal, there is at least one “Consider This” box outlining a future challenge.

Budget information is presented in a 2-page spread. In addition to the traditional “revenues and expenses” pie charts, etc., illustrations demonstrate how just a fraction of property and sales tax revenues actually stay in Walnut Creek.

Photos of community members, coupled with their quotes on specific topics, are showcased throughout

the pages. Using “real people” resonates with readers who can identify with their fellow Walnut Creekers, and further validates *The Budget Story*’s message.

Delivering the Message in Multiple Ways

The City has the perfect mechanism to get the Budget Story into people’s homes: the city newsletter, which is read by 87-percent of the population according to the 2012 National Citizen Survey.

The City pays for the newsletter to be mailed to every address in Walnut Creek once a quarter. By keeping the Budget Story to 20 pages, it could easily be inserted into the city newsletter without incurring additional postage costs.

The budget pages include a QR code as well as a web address for those who wanted more information about the City’s budget. Web links and QR codes are used in several other chapters to allow readers quick access to full reports or other information.

Taking technology a step further, the team is converting the Budget Story into an I-Pad and Android tablet app complete with short, produced video vignettes bringing various programs and goals to life. (Walnut Creek produces video for its government access TV channel and YouTube, so this is a way to “repurpose” that video content and leverage resources.)

In addition to appealing to a younger demographic, and being accessible to anyone at anytime who has an I-Pad or Android tablet, the multi-media version can be easily demonstrated during public meetings and presentations, or set up for hands-on learning at special events.

OBSTACLES:

The key obstacle was settling on a cohesive message. Overall, life in Walnut Creek is great and the results from the 2012 National Citizen Survey confirm that. Still, there are serious unmet needs looming ahead.

Lorie and Gayle worked with City Manager Ken Nordhoff to hone and refine three key messages:

- ◆ The City manages resources on behalf of the community in a thoughtful and prudent way;
- ◆ Walnut Creek has an outstanding quality of life thanks to long-standing partnerships between elected leaders, City staff and the community; and
- ◆ Economic challenges require new community-supported solutions if our quality of life is to continue, or tough choices will have to be made regarding programs and service levels.

Throughout the creation of *The Budget Story*, the team kept returning to those key messages and tested each page to make sure it stayed true to those messages.

OUTCOMES:

We expect to have outcomes available for TLG 2013. As well, we will have both printed copies and the multimedia version of the “visual budget” for attendees if Walnut Creek’s case study presentation is selected.

COSTS:

The City Council appreciated the new approach to the visual budget document and allocated \$20,000 dollars to create, print, distribute the Budget Story, as well as to convert it into a multimedia format that could be pushed out via the City’s social media outlets.

SAVINGS:

While some savings were realized by not creating and printing the traditional 3-inch budget binder, those savings were certainly less than the cost of producing the new Budget Story.

However, short-term savings was not Council’s goal. Staff was directed to develop a budget document that:

- ◆ Clearly defined what the City is in business to do;
- ◆ Built confidence in how the City makes decisions on behalf of the community, and;
- ◆ Inspired the community to get involved in setting a new course for the future.

PRESENTATION STYLE

The presentation team will use a variety of presentation tools and resources, such as:

- ◆ Copies of the visual budget
- ◆ Demonstration of the iPad multimedia version
- ◆ Video showing people using the multimedia version during various “roadshow demonstrations”

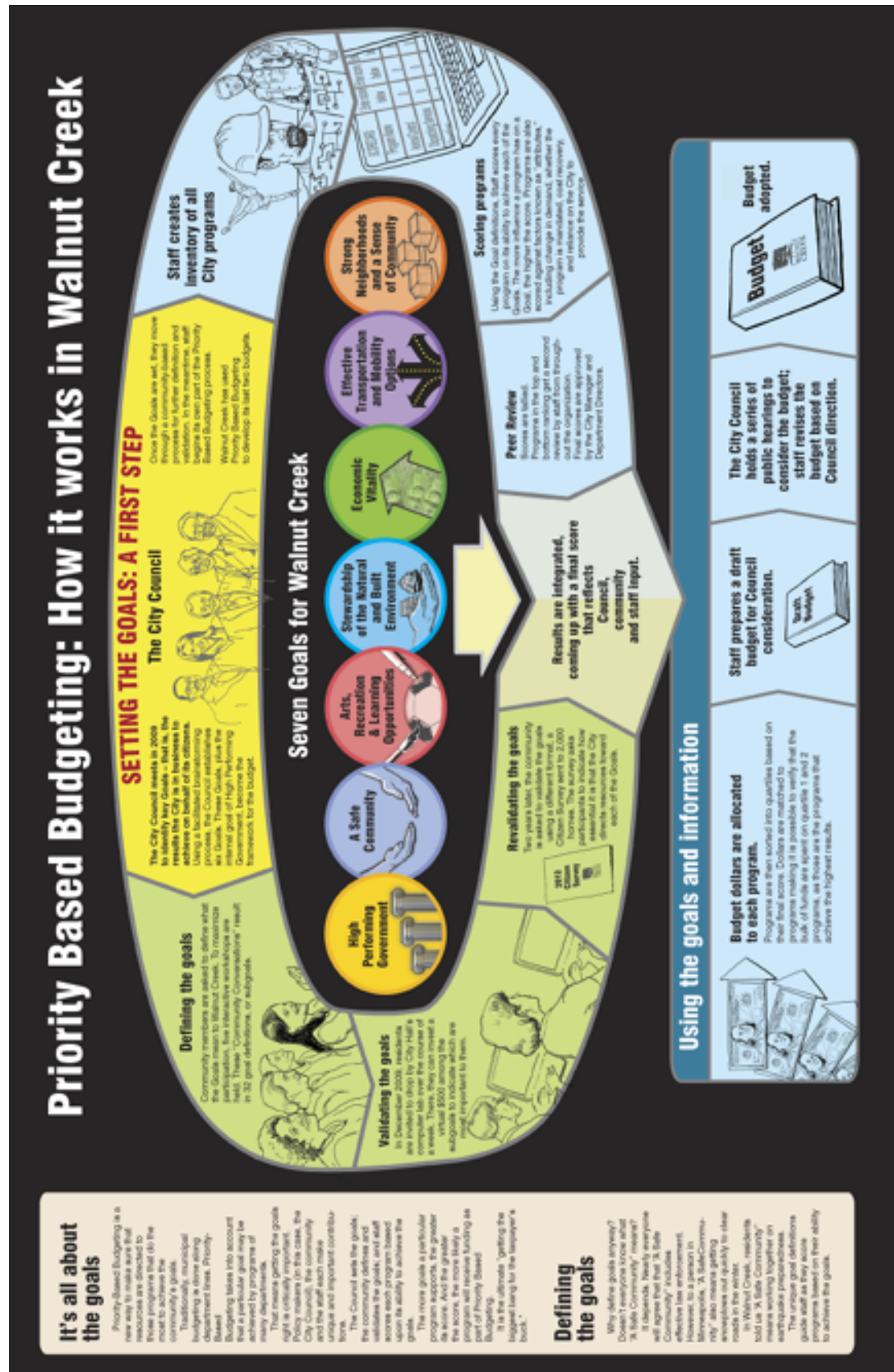
WAS A CONSULTANT USED:

While the City developed the vision for the new Budget Story and managed the process of creating the document in print and multi-media forms, visual Journalist Chuck Todd was the design consultant who developed an overall look and feel for the pages as well as the infographics. Chuck is the presentation editor for the Bay Area Newspaper Group (<http://info.bayareanewsgroup.com/>) and also has extensive experience as a freelance artist and a visual journalism instructor. A draft version of the infographic created to explain the Priority Based Budgeting process, and as well as a sample page (also draft) are included as attachments 1 & 2.

Attachments:

- 1 -- DRAFT Graphic - Priority Based Budgeting: How it works in Walnut Creek
- 2 -- DRAFT Page - “A Safe Community” goal (the page is included as a sample but is not finalized)

DRAFT -- Page is still in final production and may not be complete. Included for example only



DRAFT -- Page is still in final production and is not complete. Included for example only

Strong Neighborhoods and a Sense of Community

Collaborate and communicate with citizens

Promote physically attractive, safe neighborhoods

Support ways to connect neighborhoods and the downtown

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Volunteers of all ages teamed up to make Walnut Creek a better place at the first Community Service Day on October 1, 2011. Here, volunteers build a bridge at the Howe Homestead park. The 2012 Community Service Day will be Saturday, Oct. 6.

VOLUNTEERING MAKES THE DIFFERENCE

In today's challenging economic times volunteerism makes an evengreater difference, stretching limited local financial resources.

In 2011 alone, **2,300 volunteers** contributed **119,000 hours** to City programs,

from volunteering at the Police information counter to patrolling Open Space trails on bicycles. Total market value of these donated hours? \$1.4 million! Local non-profits also benefit from the contributions of volunteers.

This strong sense of community commitment was clearly evident during the City's first ever Community Service Day, held in October 2011. More than 1,000 people spent a half day working on everything from painting the Meals on Wheels parking lot to building a bridge at the Howe Homestead park.

The 2012 Community Service Day will be Saturday, Oct. 6. More than 50 projects are waiting for eager volunteers to lend a hand. Look for registration information in the Nutshell newsletter and the City's website.

Getting to know your city

Ever wonder how Walnut Creek really works? The Walnut Creek Citizens Institute is a great place to start. Through interactive exercises, tours of city facilities, presentations by the City Council members and city staff, and group discussions on the challenges facing communities like ours, participants learn the inner workings of city government.

The Institute is open to anyone who lives or works in Walnut Creek. Since its first class in May 2000, 489 people have taken part in this community-building program.

Institute graduates stay involved – more than half of the current Commission members got their start by taking the Citizens Institute, and Institute alumni regularly volunteer for everything from special events like the Library grand opening to being an usher at the Leshner Center for the Arts.

The Institute is offered once a year. To be put on the Interest List for notification of upcoming sessions, email community@walnut-creek.org.



A great community begins with good planning

Imagine what Walnut Creek would be like if the Sunvalley Mall was located in the Ygnacio Valley.

Developers in the early 1960s wanted to do exactly that, but city leaders turned the proposal down because it would devastate the traditional downtown and overburden the neighborhoods taking shape in the Ygnacio Valley.

That's just one example of the kind of long-range vision Walnut Creek residents and their elected leaders have used to create a sustainable community.

Thriving cities and attractive neighborhoods don't just happen. It takes careful planning before the first shovel of dirt is turned to insure that a construction project is not just a building but an integrated part of the community.

In 1956, the voters approved the "Little Master Plan" to improve streets and circulation in downtown Walnut Creek, and Walnut Creek hired its first City Manager, Ira Gunn.

In 1971 Walnut Creek adopted its first citywide General Plan which has been updated regularly ever since, and encourages the com-

munity to think long term about its future.

City leaders use specific plans to "think big" about a specific area of town to insure that new developments and subdivisions connect to make thriving neighborhoods, attractive business parks or commercial areas that meet residents' needs. The City's Design Guidelines, adopted in 1996, provide developers and property owners with a clear delineation of the community's architectural and aesthetic expectations for new developments and remodels.

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