

Beaverton Sister Cities Program

Strategic Plan: 2014-19

Prepared by:

Beaverton Sister Cities Advisory Board
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October 8, 2014



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Letter from the Chair

On behalf of the Beaverton Sister Cities Advisory Board, it is my pleasure to present this final report which represents the board's work in developing the Beaverton Sister Cities Program Strategic Plan 2014-19.

The initial and current mission of the Sister Cities Program (SCP) was reaffirmed during our first strategic planning session, and we believe it continues to eloquently state the overarching purpose and vision for the program and its work in supporting the City of Beaverton:

- To encourage cross-cultural understanding and to promote educational and economic exchange between the City of Beaverton and our sister cities around the world.

To ensure that the Sister Cities Program continues to support this mission through relevant, intentional and effective programs and activities the board endeavored to establish a strategic plan to guide its efforts for the next five years.

With guidance from Portland State University's Center for Public Service, the board participated in a strategic planning effort involving the review of stakeholder feedback, full board discussions and small group work sessions, resulting in a five-year strategic plan as reflected in this final report.

In summary, this plan reflects the board's thoughts and evaluation about contributions the SCP can make in supporting the City of Beaverton through clear goals, strategies and actions that support our mission. We are excited about the possibilities that this strategic path offers our board and the city.

Sincerely,
Janine Kanable
Chair, Beaverton Sister Cities Advisory Board

Introduction

The Beaverton Sister Cities Program's (SCP) five-year strategic plan provides a direction and common ground for future program activities and initiatives. It serves as a guide for the Sister Cities Advisory Board, associated city staff, and other interested parties as the program's future endeavors are planned and implemented. It also offers other stakeholders and community members a clear understanding of the program's goals, strategies and actions.

Purpose

While the SCP has made great progress toward establishing and building ongoing relationships with its international municipal partners over the years, the board recognized the need to bring a strategic focus to the program. With limited financial resources and a desire to maximize volunteer and staff time, the board believed a strategic plan would help external audiences better understand the opportunities and benefits derived from these international connections.

Program Overview

The Beaverton Sister Cities' Foundation began in 1987 with the establishment of the Gotemba, Japan sister city relationship. The program was led by local volunteers until 2008, when the City of Beaverton took over operation of what is now the Beaverton Sister Cities Program. Since its inception, the purpose of the program has been to encourage cross-cultural understanding and promote educational and economic exchange between the City of Beaverton and its sister cities. Over the past 28 years, the program has expanded to include formal relationships with five additional municipalities and has been a catalyst for numerous cultural exchanges between Beaverton and its sister cities, listed as follows:



Gotemba, Japan

Beaverton's first sister city, Gotemba, signed an agreement with the city in 1987. The city is located 60 miles southwest of Tokyo, Japan, and is known as the eastern entrance to Mt. Fuji. Located at the center of Izu-Hakone-Fuji National Park, recreation facilities exist for golfing, skating, hiking, climbing, and camping.

Similarities between our two cities include the location of our cities at the base of two well-known mountains, many high-tech industries, and the fact that both cities are considered the horseradish capitals of their respective regions. The population of Gotemba is 80,000, and the city covers an area of 77 square miles.

Hsinchu, Taiwan

The second signed city, Hsinchu in 1988, is located in the northwestern part of Taiwan. The city is on the vital North-South freeway with rail services, good public roads and a harbor for shipping. Similarities are the existence of the Hsinchu Industrial Park, which has been dubbed "Asian Silicon Valley," where a huge amount of scientific and technological progress has been made since its founding. Electronics, agriculture, food processing, glass production and fishing are the main industries. The population is 300,000 and the city occupies 40.6 square miles.



Cheonan, Korea

designated as the high tech headquarters for Korea. Cheonan City has a population of around 600,000 and occupies the entire county of Cheonan.

Cheonan, signed as the third sister city in 1989, is located about 50 miles south of Seoul. Due to its rolling hills and four distinct seasons, it is called the "Garden City". There are many scenic attractions in the immediate area. Similarities include the primary concern of education, which is evidenced by the large number of educational facilities in Cheonan. It has been

Birobidjan, Russia

The fourth sister city, Birobidjan, is located in the southern portion of the Russian Far East and signed in 1990. It is 200 km. west of Khabarovsk, Portland's Sister City. A quarter of the region is mountainous with incredibly diverse wild life, including northern jungle terrain that is home to bears, boars and the Siberian tiger. Similarities are the existence of light industry, including apparel, furniture, agricultural packaging, lumber, marble and brucite, and an aluminum ore. There are plans for developing high technology and tourism industries in the future. The population is 80,000. Birobidjan is the capital of the Jewish Autonomous Region.





Trossingen, Germany

Located about 100 km. southwest of Stuttgart, just off of the Autobahn, Trossingen, became the fifth signed sister city in 1993. It lies between the Black Forest and Swabian Alps mountain ranges and is situated on a plateau named The Baar. The landscape, rolling hills and vegetation are similar to Beaverton's, although the climate is drier and colder, with more snow. It is the home of the [Hohner Music Company](#), which is the manufacturer of the famous Hohner mouth organs. Population is 16,000. Trossingen has existed as a city for 1200 years.

Cluses, France

Beaverton's most recent Sister City, Cluses, signed in 1999, is located in the southeastern region of France near Mt. Blanc in the French Alps. It enjoys year-round recreation activities such as hiking, mountain climbing, swimming, boating, parasailing, golfing, skiing and ice-skating. Similarities include its history, with farmers establishing a city that is now involved with manufacturing precision parts for electronic, automobile and medical industries.

Cluses lies in the L'Arve Valley on the L'Arve River. On the river is a museum housing an old water wheel used for power generation. This building is close to an ancient bridge that is said to have been ordered repaired by Napoleon. Cluses has a population of 18,000.



Sister Cities Advisory Board Overview

The Beaverton Sister Cities Advisory Board, appointed by the Mayor and comprised of community representatives, guides and supports the development and activities of the program. The board, which serves in an advisory role to the Mayor and City Council, assists in various capacities to facilitate activities which build and strengthen sister city relationships.

During the life of the program, the board has helped to initiate and/or support a variety of cross-cultural activities including:

- 80 cultural and student exchanges with the sister cities
- International summits, including one focused on sustainability in 2011
- International business roundtable
- Participation and promotion at local events
- Providing homestay and internship opportunities to visiting students

The board recognizes the city's rich and growing cultural diversity. It seeks to explore ways for SCP to align with these demographic changes and consider future opportunities for the program. In recent years the board has seen the need for a more focused and strategic approach to the activities it conducts. To this end, the City of Beaverton retained Portland State University's Center for Public Service to assist the board in developing a strategic plan. This report provides a comprehensive description of the development process and outcomes from the board's work over three months.

Methodology

The strategic planning process for the Beaverton Sister Cities Program (SCP) was designed to be inclusive, informative, and build consensus about the program's direction and priorities. To this end, the objectives of the development process included:

- To develop a five-year strategic plan for the SCP that delineates the mission, goals, strategies and specific actions.
- To identify and incorporate the perspectives of key stakeholders in the development process.
- To build consensus among the board members regarding the strategic plan elements.
- To produce a final plan that accurately reflects the board's decisions, conveys a common direction, and sets priorities.

The process was divided into three phases: environmental scan, strategic plan development, and report preparation. These phases are described below:

Phase 1: Environmental Scan

In order for the board to have an informed discussion about the future of the program, it was important to understand what is presently working well, challenges it is facing, and opportunities for enhancement. The first step was to gain a better understanding of the current SCP from the perspectives of people who were knowledgeable about it. To obtain this information, the consultant team interviewed 20 stakeholders including the City of Beaverton Mayor and City Council members, board officers, local education representatives, business leaders, and key city staff. A complete list of interviewees is provided in Appendix A. The interviews were confidential and all but one were conducted in-person. Each interview ranged in time from 30 minutes to an hour.

Phase 2: Strategic Plan Development

Upon completion of the stakeholder interviews, the board met in a series of four meetings spanning the period from May 19, 2014 to July 14, 2014 to develop the strategic plan. This was achieved through facilitated dialogue, small group discussions and brainstorming exercises. During the intervals between several meetings, the board members worked in small groups to develop draft products for discussion with the larger group. The outcome of these sessions included four key products agreed upon by the members present: mission, goals, strategies, and actions that are delineated in the following sections of this report.



Seated from left to right: Mark Fagin, City Councilor/Sister Cities Liaison; Advisory Board Members: Stephanie Somanchi, Carolyn McCormick, and Penny Hanson.

During each meeting, the consultant team led the strategic planning process through presentations, facilitation, and brainstorming activities. Each meeting's agenda was designed to focus on one or two key products in the strategic plan. Interactive discussion and member participation was highly encouraged. Board members engaged actively and demonstrated their genuine interest and commitment through their work during each session. The ultimate products from these meetings were derived entirely from the participating board members. Consultants and staff served as resources to the process.

Phase 3: Report Preparation

After completion of the board's four strategic planning sessions, the consultant team prepared a draft of this report and sent it to the entire board for review and comment. In addition, four board members volunteered to serve as a sub-committee to review the edits and comments, to work with the consultant team to finalize the report, and approve the final draft prior to printing.

Environmental Scan Summary

The consultant team interviewed 20 stakeholders who have an interest and/or experience with the SCP. These individuals included the Mayor, City Councilors, Board officers and former members, business representatives and educators. A complete list of the interviewees is included in Appendix A.

The interviews covered the SCP's strengths, successes, challenges and opportunities for enhancement. The interviews were confidential so no statement in this section is attributable to any one individual. The following summary provides an overview of the findings.

Strengths

The majority of the interviewees felt the SCP has definitely generated positive impacts for the city and sectors of the community in the past 28 years. The most cited positive impacts were the multitude of exchanges with students, business representatives, elected officials, cultural groups, and board members. In total, there have been 80 exchanges between the City of Beaverton and its six sister cities since the program's inception.

The greatest success for the program, cited by a range of interview participants, is the 2011 International Sustainability Leadership (ISL) Project which brought 25 students and six mayors from all the sister cities to Beaverton. This event is hailed as the most recent major event that resulted in student studies and findings on how to work together toward global sustainability.



Mayors' Discussion at the 2011 ISL Project

Other specific positive impacts listed by one or more of the interviewees included:

- a business partnership between a City of Beaverton business and a company in a sister city,
- ISing Choir trips to sister cities,
- global cooking demonstrations at the City of Beaverton Downtown Association's First Friday events,
- program representation at local community events such as the City of Beaverton International Celebration,
- displays of gifts from sister cities in the Mayor's reception area,
- on-going planning for a Korean garden,
- an engraved recognition of each of the sister cities at the featured sculpture, which is placed near The Beaverton Building at The Round and transit hub.

Increased individual level cultural understanding was cited by many as a general positive outcome of the program.

It should be noted when many interviewees were talking about the program's strengths and attributes, the dedication, passion, and commitment of city staff was frequently mentioned. Many saw the staff as the glue that held the program together.

Challenges

The program's challenges, shared by those interviewed, were substantial but not insurmountable. Many of those interviewed said the development of the strategic plan and subsequent implementation had the potential to address many of these challenges.

By and large, the most frequent issue raised by interviewees was the lack of a strategic direction or a clear understanding of the program's priorities and objectives. Many described the approach to program activities as reactive rather than proactive. While there was little question of the program's opportunity for continued and enhanced value to the community, many felt there was a need for an inward focus first to establish a unified course and priorities.

From the perspective of those interviewed, while there was a need for a longer term and focused plan for the program, there were a number of issues to be addressed as part of the development process to maximize success. Most notable is the ability of the program to demonstrate clear objectives and produce tangible results. To this end, the three most cited areas of importance for any long-term plan were: (1) role definition; (2) communication and marketing; and (3) resources.

Role Definition: As part of developing a strategic direction, priorities and objectives, some interviewees discussed the challenge of defining the role of the SCP in relation to other city functions. First, in relation to economic development, where the program has had a supportive role in the past, many felt there is a lack of understanding regarding SCP's role and some cautioned against any lead role or expectation. Second, a few interviewed raised a question about how the program fits with other city initiatives, specifically the Diversity Advisory Board and the City of Beaverton's Community Vision.

Marketing and Communication: Many interviewees noted the challenge of being able to market and communicate effectively with all SCP audiences, including the sister cities, City of Beaverton community, and city elected officials and staff. Communication with sister cities has varied over time, and lacked consistency and expectation. A significant number of those interviewed expressed the need for greater community awareness and involvement in the SCP. Several interviewees mentioned that part of this challenge includes increasing the program's links to cultures already in the City of Beaverton.

Resources: Many interviewed, who are close to the SCP's activities, cited limited resources as a challenge to maintaining and enhancing the program. They noted recent city budget cuts to the program combined with a lack of full-time staff may constrain the ability to implement any future plans including adding more sister cities. In addition, several interviewees noted the recent high turnover in board membership has left a void of institutional memory.

Opportunities

When asked about the opportunities to enhance the program going forward, survey participants, not surprisingly, recommended the Beaverton Sister Cities Advisory Board address many of the issues cited above. Many felt the strategic planning process was timed well and offered the chance to better define, focus, prioritize and build a foundation for fostering greater tangible outcomes for City of Beaverton. More specifically, the participants suggested opportunities in marketing and communication, cultural and educational

enhancement, local cultural linkages, economic development, and additional sister cities. These ideas included:

Marketing and Communication

- Develop a marketing and communications strategy
- Establish regular contact with sister cities
- Increase community awareness/involvement with SCP

Cultural and Educational Enhancement

- Maintain and expand cultural and educational exchanges with sister cities, possibly adding student and business exchanges
- Continue hosting summit events possibly for other topic areas (e.g., agriculture, business)
- Consider expanding exchange programs to include a range of professionals

Local Cultural Linkages

- Link the program to local cultural communities to increase awareness and participation in the program

Economic Development

- Work with the City of Beaverton's economic development team to understand and, when appropriate, support their international business initiatives

Additional Sister Cities

- Consider adding new sister cities, particularly those having strong connections to local Beaverton communities and cultural relevancy to City of Beaverton citizens

Strategic Plan

Strategic Plan Overview

The five-year strategic plan described in this section is intended to provide the Beaverton Sister Cities Advisory Board, city officials, staff, and other interested parties with a mutual understanding of the program's mission, direction and expectations over the next five years. The plan offers the opportunity to guide the board's activities, future planning, and allocation of resources.

The Beaverton Sister Cities Advisory Board developed the plan during the course of four special sessions between May and July 2014. In addition, they spent time between meetings preparing draft ideas and language for discussion by the larger group.

The environmental scan provided a foundation for the board's discussions and final strategic plan. There were key objectives that emerged through the members' discussions, which they hoped would be addressed by the strategic plan including:

- Developing a plan that brings clarity and strategic focus to the program's activities through its mission, goals and action plan.
- Striving to maintain and enhance the program's value to the City of Beaverton community through tangible outcomes.

- Building a marketing and communications plan for outreach to multiple audiences including sister cities, City of Beaverton community, and other interested parties.
- Strengthening program ties to the City of Beaverton’s multi-cultural population to build awareness, linkages and involvement.
- Maintaining and enhancing financial and other resources available to the program.
- Defining the program’s role with other City of Beaverton initiatives, particularly with economic development.

The following components constitute the SCP’s strategic plan:

- Mission:** A statement of the program’s purpose.
- Goals:** Two statements regarding the key directions that the program should move towards to achieve the desired outcome.
- Strategies:** The first part of the action plan (see Appendix B). There are nine strategies that offer a means for accomplishing the two goals.
- Actions:** The second part of the action plan (see Appendix B). Actions are the specific tasks, projects, or programs that implement a strategy. This strategic plan has a total of 20 actions. Each action delineates a lead member of the board to facilitate its implementation, potential partners to involve in the action, estimated timing, and a measurement of success.

All of the strategic plan components are integrated, with each supporting the mission at some level.

The strategic plan elements, as agreed by the board, are provided on the following pages.

Mission Statement

To encourage cross-cultural understanding and to promote educational and economic exchange between City of Beaverton and our sister cities around the world.

Goals

1. Create and support ongoing sister cities programs with tangible outcomes that excite, engage and add value to City of Beaverton.
2. Cultivate the exchange of ideas, skills and experiences between City of Beaverton and international communities across professions and interests.

Action Plan

The action plan identifies 20 actions that support the nine strategies established by the board to fulfill the two identified goals. The actions are listed below to provide a brief summary. The full table provided as Appendix B, includes the goal that each strategy is linked, the name of the board member who will serve as the lead and take responsibility for the action’s completion, the timeframe for completion, the measurement for compliance,

and any partnering entity that would likely align with the effort. All plans and products that implement the actions are to be periodically reviewed and approved by the board.

Strategies and Actions

- A. Evaluate the status and viability of current sister cities for continued relationship building.
 - 1. Conduct an analysis of the strengths, weaknesses, opportunities and threats (SWOT) for each sister city relationship.
 - 2. Develop criteria to determine the viability of the sister cities.
 - 3. Evaluate past communication activity with existing sister cities.
- B. Strengthen on-going communications with current sister cities.
 - 1. Develop a plan to maintain or enhance outreach to existing sister cities.
 - 2. Establish a communication framework/plan with each sister cities to include social media efforts, web services and public information utilizing email, letters, phone, fax, visits, etc.
- C. Examine existing the Sister Cities Program activities for consistency with strategic plan.
 - 1. Conduct an assessment of existing the Sister Cities Program activities and adjust if necessary to align with the strategic plan. Do this assessment on a yearly basis.
- D. Develop a marketing approach to increase the Sister Cities Program visibility and importance to the City of Beaverton community.
 - 1. Develop a consistent message for the Sister Cities Program (elevator speech).
 - 2. Develop and implement a comprehensive marketing plan to include consistent branding about the Sister Cities Program for all audiences.
- E. Enhance and encourage community participation in the Sister Cities Program.
 - 1. Identify key community interests and develop a plan to engage in international information-sharing and relationship-building including but not limited to; healthcare, sports, education, technology, environmental, leadership and youth.
 - 2. Establish a flagship program that garners community awareness, support and has most value-added from/to the community.
 - 3. Establish and prioritize recurring events (e.g. Sustainability Summit, cooking events) which foster outreach and community participation.
- F. Maintain and enhance the Sister Cities Program knowledge and experience.
 - 1. Review and amend the Sister Cities Program's by-laws to ensure balanced rotation of board seats.
 - 2. Create an orientation program for Sister Cities Advisory Board members.
 - 3. Host an annual alumni event.
 - 4. Encourage past members to attend Beaverton Sister Cities Advisory Board meetings.
- G. Evaluate and document the selection process and criteria for adding new sister cities.
 - 1. Evaluate and establish the selection process for future sister cities to include economic development potential.

H. Maintain sustainable funding for the Sister Cities Program.

1. Review and participate in the annual city budget process which includes preparing a proposed annual budget incorporating targeted projects.
2. Identify and pursue grants, other funding opportunities and local sponsorships.

I. Clarify the role for the Sister Cities Program in regard to the City of Beaverton's economic development interests.

1. Prepare for and meet with the City of Beaverton's Economic Development office and the Beaverton Area Chamber of Commerce to understand their needs and address the value of the Sister Cities Advisory Board.
2. Following the meetings with the City of Beaverton's Economic Development office and Beaverton Area Chamber of Commerce (identified above in #I1), establish the Sister Cities Program role and develop next steps.

Summary and Acknowledgements

The Sister Cities Advisory Board developed the strategic plan under the direction and facilitation of the consulting team. The board's commitment and hands-on work during the four sessions resulted in the examination and confirmation of the initial SCP mission statement, and the creation of the key strategic plan elements of goals, strategies and actions to support that mission.

The final report and appendix materials were compiled by the Center for Public Service in the Hatfield School of Government, Portland State University in collaboration with Jensen Strategies. The Center for Public Services provides research, education, and consulting services to public and nonprofit organizations to improve governance, civic capacity, and public management.

Contributors include:

The Sister Cities Advisory Board members:

Janine Kanable, Chair 2014
Wambui Machua, Vice Chair 2014
Penny Hanson, Secretary 2014
Carolyn McCormick
Dave Vernier
Holly Frohlick
Julie Scholz
Karen Schouten
Karen Yeong
Kazuhito Osawa
Natalie Verdi
Neil Simon
Stephanie Somanchi
Thomas Zingalis
Tricia Melnik

Office of the Mayor staff:

Cynthia Lee Rozanc, Staff Liaison to Sister Cities Advisory Board
Jayne Scott, Senior Program Manager, Arts, Culture & Events

Consulting team:

Erik Jensen, Principal, Jensen Strategies, LLC in Partnership with CPS
Catherine LaTourette, Faculty, Center for Public Service, Portland State University
Lulu Pang, Graduate Student, Portland State University

Beaverton Sister Cities Program

Strategic Planning Project

STAKEHOLDER INTERVIEW LIST

1. MayorDenny Doyle
2. Council President / Board Liaison.....Mark Fagin
3. Beaverton Chief Administrative Officer.....Randy Ealy
4. Sister Advisory Board Chair.....Janine Kanable
5. Sister Advisory Board Vice-Chair.....Wambui Machua
6. Sister Advisory Board Secretary.....Penny Hanson
7. Arts and Cultural Events Senior Program Manager.....Jayne Scott
8. Staff Liaison to Sister Cities Advisory Board..... Cynthia Lee Rozanc
9. City Councilor.....Cate Arnold
10. City Councilor..... Betty Bode
11. City Councilor..... Ian King
12. City Councilor..... Marc SanSoucie
13. Business Development Liaison, Economic Development
Division.....Steve Thompson
14. Strategic Initiatives & Communications Manager.....Holly Thompson
15. Director, Beaverton Area Chamber of Commerce..... Lorraine Clarno
16. Past Board Member..... Ted Chung
17. Founder, Sister Cities Foundation.....Charles Allcock
18. Director, The German-American School of Portland.....Blake Peters
19. Public Communication Officer, Beaverton School District... Maureen Wheeler
20. Director, Washington County Visitors Association and
Sister Cities Advisory Board Member..... Carolyn McCormick

**City of Beaverton Sister Cities Advisory Board
ACTION PLAN
Strategies and Actions**

| | Action | Lead | Timing | | | Compliance Measurement | Partners |
|---|--|-----------------------------------|--------|---|--|---|---|
| A - Evaluate the status and viability of current sister cities for continued relationship building. [Goals: 1,2] | | | | | | | |
| A1 | Conduct an analysis of the strengths, weaknesses, opportunities, and threats for each sister city relationship. | Carolyn McCormick, Neil Simon | S | | | Completion by 6/2015. | |
| A2 | Develop criteria to determine the viability of the sister cities relationship. | Carolyn McCormick | S | | | Completion by 6/2015. | Sister Cities International |
| A3 | Evaluate past communications activity with existing sister cities. | Penny Hanson, Janine Kanable | S | | | To occur once during the first year of the strategic plan, from 7/2014 to 6/2015. | |
| B - Strengthen on-going communications with current sister cities. [Goals: 1,2] | | | | | | | |
| B1 | Develop a plan to maintain or enhance outreach to existing sister cities. | Natalie Verdi | S | | | Completion by 6/2015. | |
| B2 | Establish a communication framework/plan with each sister city to include social media efforts, web services and public information utilizing email, letters, phone, fax, visits, etc. | Penny Hanson | | M | | Communications during FY 2015/2016 and FY 2016/2017. | City of Beaverton Web Services and Public Information Departments |
| C - Examine existing Sister Cities Program activities for consistency with strategic plan. [Goals: 1, 2] | | | | | | | |
| C1 | Conduct an assessment of existing Sister Cities Program and adjust if necessary to align with the strategic plan. Do this assessment on a yearly basis. | Tricia Melnik and Board President | S | | | To occur once during the first year of the strategic plan from 7/2014 to 6/2015, and annually thereafter. | |
| D - Develop a marketing approach to increase the Sister Cities Program visibility and importance to the Beaverton community. [Goal: 1] | | | | | | | |
| D1 | Develop a consistent message for the Beaverton Sister Cities Program (elevator speech). | Stephanie Somanchi | S | | | To occur once during the first year of the strategic plan from 7/2014 to 11/2014. | City of Beaverton Public Information Department |

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| D2 | Develop and implement a comprehensive marketing plan to include consistent branding about the Beaverton Sister Cities Program for all audiences. | Stephanie Somanchi | | M | | Fully planned by 2/2015. | |
| E - Enhance and encourage community participation in the Sister Cities Program. [Goal: 2] | | | | | | | |
| E1 | Identify key community interests and develop a plan to engage in international information-sharing and relationship-building including but not limited to; healthcare, sports, education, technology, environmental, leadership and youth. | Karen Yeong, Natalie Verdi | S | | | Completion by 7/2015. | |
| E2 | Establish a flagship program that garners community awareness, support and has most value-added from/to the community. | Julie Scholz, Tricia Melnik | | M | | To occur at least bi-annually beginning in FY 2015/2016 that progressively builds participation levels. | |
| E3 | Establish and prioritize recurring events (e.g. Sustainability Summit, cooking events) which foster outreach and community participation. | Neil Simon, Wambui Machua, Natalie Verdi | S | M | | To occur in FY 2015/2016. | |
| F - Maintain and enhance Sister Cities Program knowledge and experience. | | | | | | | |
| F1 | Review and amend the Sister Cities Program by-laws to ensure balanced rotation of board seats. | Kazuhito Osawa, Carolyn McCormick | S | | | Completion by 6/2015. | |
| F2 | Create an orientation program for Sister Cities Advisory Board members. | Natalie Verdi | | M | | To occur in FY 2015/2016. | |
| F3 | Host an annual alumni event. | Dave Vernier, Wambui Machua | | M | | Completion by 6/2017. | |
| F4 | Encourage past members to attend Beaverton Sister Cities Advisory Board meetings. | Board President | S | * | * | Begin FY 2014/2015. | |
| G - Evaluate and document the selection process and criteria for adding new sister cities. [Goals: 1,2] | | | | | | | |
| G1 | Evaluate and establish the selection process for future sister cities to include economic development potential. | Board President, Tricia Melnik | | M | * | Beginning FY 2015/2016: set aside one to two meetings for this purpose annually. Add this information to the Sister Cities Advisory Board information materials. | Economic Development, Beaverton Chamber, leading area |

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| H - Maintain sustainable funding for the Sister Cities Program [Goals: 1, 2] | | | | | | | |
| H1 | Review and participate in the annual city budget process which includes preparing a proposed annual budget incorporating targeted projects. | Cynthia Rozanc | S | * | * | Beginning FY 2014/2015. | |
| H2 | Identify and pursue grants, other funding opportunities and local sponsorships. | Tricia Melnik | | M | * | Beginning FY 2014/2015. | Beaverton Arts Commission, Beaverton Arts and Culture Foundation, Beaverton Area Chamber of Commerce, Beaverton School District |
| I - Clarify the role for the Sister Cities Program in regard to the City of Beaverton's economic development interests. [Goal: 1,2] | | | | | | | |
| I1 | Prepare for and meet with the City of Beaverton's Economic Development office and the Beaverton Area Chamber of Commerce to understand their needs and address the value of the Sister Cities Advisory Board. | Economic Development Sub-Committee (Neil Simon, Dave Vernier, Karen Yeong) | S | | | End of 3/2015 | City of Beaverton Economic Development Department, Chamber of Commerce |
| I2 | Following the meetings with the City of Beaverton's Economic Development office and the Beaverton Area Chamber of Commerce (identified above in I1), establish the Sister Cities Program role and develop next steps. | Economic Development Sub-Committee (Neil Simon, Dave Vernier, Karen Yeong) | S | | | Completion 6/2015 | City of Beaverton Economic Development Department, Beaverton Area Chamber of Commerce |

Note: Timing projections are measured in short (S), medium (M), and long (L) term.

Beaverton Sister Cities Advisory Board Strategic Planning Session #1 May 19, 2014 - Meeting Summary

Board Members/Alternates Present: Janine Kanable (Chair), Holly Frohlick, Penny Hanson, Wambui Machua, Kazuhito Osawa, Julie Scholz, Neil Simon, Stephanie Somanchi, Natalie Verdi.

Staff and Consultants: Cynthia Lee Rozanc, Catherine LaTourette, Erik Jensen, Lu Pang (graduate assistant)

1. Introductory Remarks

Board Chair Janine Kanable opened the meeting and introduced the strategic planning consultant team from Portland State University's Center for Public Service including Catherine (Cathy) LaTourette, Erik Jensen and Lu Pang. She stated that the consultant team will be leading the board through a strategic planning process during the next three meetings on May 19, June 9 and June 23, 2014. Cathy and Erik introduced themselves.

2. Ice Breaker: Who is Your Neighbor?

Cathy led the board through an ice breaker exercise asking each board member to introduce another member by sharing information about them including reasons for involvement in the Sister Cities Program (SCP), overseas experience, languages spoken, and something interesting about themselves.

Some of the reasons members chose to be involved with the program:

- Previous cultural experience has fostered desire to get more involved civically
- Getting to know more people and exchange ideas
- Wanting exposure to multiple cultures and environments
- Always being active on the board since being a volunteer of SCP
- Living abroad experience raised interest in connecting with other cultures
- Master's degree thesis topic was a study on sister cities
- The mission and the love of cultures
- The seeds for international involvement have been planted since teenager years
- Passion for educational and economic exchanges

Many of the board members had traveled and lived overseas including: Japan, India, African countries, Russia (particularly Moscow), Scandinavian countries, Kenya, France, Belgium, and South Korea.

Collectively, the board members spoke varying levels of multiple languages including: Russian, Spanish, Turkish, German, Japanese, French, Swahili, Latin, and Armenian.

The board members seek cultural diversity in their lives by:

- Travelling to multiple countries around the world
- Welcoming international guests to visit the US, and hosting people from different cultures
- Living and travelling between the US and their own and/or their spouses' native countries
- Moving around within the United States, as the US culture is diverse as well

After the ice breaker, the board agreed to utilize the following norms for active participation in the session discussions:

- Come prepared for active engagement
- Be open to others' point of view and listen deeply for new and different frameworks

- Follow Vegas rules – don't attribute comments outside of group
- Leave behind outside concerns during each session – switch electronic devices to vibrate mode, etc.
- Start on time, end on time; exceptions with permission.

3. Strategic Planning Overview

Erik presented an overview of the process the board will use to develop the strategic plan. He initially asked board members about previous experiences with similar planning processes. A few board members have been introduced to strategic planning before. They understood the implication of using the strategic planning process as an opportunity to discuss problems, share ideas, chart a direction and implement plans. The challenges of using a strategic planning process include the lack of participation on the part of individual group members, the possibility of decreasing participant commitment and engagement during the process, and the risk of poor follow-through in implementing the agreed upon actions.

An overview of strategic planning elements was presented and included the following key points:

- Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it.
- Key steps of the development process include:
Mission→Objectives/Goals (we are here now) →Strategies→Actions→Implementation
- The process works by developing the big picture and working toward the detailed project level.
Big picture→Strategic Level→Plan Level
- An environmental scan is used to understand where things are now. In the case of this process, the consultants interviewed key stakeholders (including city council members, community representatives, etc. detailed information on handout)
- A mission statement (short and inspiring) answers: Who are we? What is our purpose? In the case of the Sister Cities Advisory Board the mission statement has already been developed and includes:
 - To encourage cross-cultural understanding
 - To promote educational exchange
 - To promote economic exchange
- Goals (a path of travel) answer the questions: What do we want to achieve? How do we put our mission into action?
- Strategies address: how the goals are accomplished? How to achieve what we want?
- Actions bring the implementation detail to the plan by addressing the specific steps to implement the strategies. They also identify what entity will be responsible for making each step happen.

The SCP strategic planning process will address these strategic planning elements over the course of three meetings (see PowerPoint handout). The intent is to have the strategic plan completed in time for a presentation to the City Council in July, 2014.

It was agreed that the June 9 meeting would be extended to three hours (6:00pm – 9:00pm) and members can eat dinner before or bring it to the meeting. Dessert will be provided.

4. Program Insights from Stakeholder Interviews (See handout)

Cathy and Erik provided a summary of feedback from 20 SCP stakeholders including board officers, City Council members, former board members, city staff, and community leaders. Key points included:

1) Current program

- They expressed a lack of clarity about the purpose and direction of SCP in the areas of economic development and ROI to the City. They recognized that cultural exchanges are positive, but there are questions about who participates, for what purpose, and with what result. There is limited awareness about the work of the SCP and about the community benefits/public good that it brings to the City of Beaverton.
- A board member pointed out that all the feedback received from stakeholders present typical obstacles for sister cities programs

2) Looking forward

- Stakeholders expressed extreme variations of opinion regarding the economic development benefits to the SCP. One opinion is that ROI is limited and should not be included in its mission. The other extreme opinion is to tie 100% of the SCP efforts to economic development.
- The City of Beaverton is the most culturally diverse city in Oregon: opportunities exist to tie the program to cultures already in the community
- Exchange programs becoming more proactive rather than opportunistic
- Exchange of professionals and businesses: more visible to the public compared with student exchanges

5. Sister Cities Advisory Board Mission:

Cathy led the Sister Cities Advisory Board in a review their mission statement. The board was divided into small groups where they discussed the SCP mission statement, the implications of mission statement, aspects of the mission that they relate to, and how it translates from statement to action. Subsequently the small groups reported back to the all the present board members with the following points:

1) What does the mission statement mean to the board?

- Bring different cultures to the City of Beaverton community; we are the bridge/ambassadors
- Educational exchange could be formal (e.g. student exchange) or informal (e.g. how to prepare a native Kenyan recipe), international or within the Beaverton community
- Mutually beneficial to all the sister cities and the City of Beaverton
- Recognizing that not all activities have a direct economic result for the city

2) What aspects of the mission does the board relate to?

- Accountability
- Cross-cultural education
- International acceptance
- More presence: vocalize accomplishments, advertise presence
- Interactions: between the board and community, between sister cities and Beaverton

3) How does it translate into the actions of the board?

- More people, more involvement, more commitment
- Community outreach/development: by language, faith, community groups, etc.
- Non-sister cities (a global city's culture may be similar to current sister cities): to be facilitators and communicators of the cultural connections; use our opportunities wisely to reach out to inter-cultural communities in the City of Beaverton

- Identify cultural representatives or groups, especially the ones in the City of Beaverton who come from sister cities
- Marketing campaign: creating a welcoming image of the City of Beaverton, like “the faces of Beaverton”. The emotional ROI may bring future economic benefits
- Work needs to be intentional and communicated: use diverse communication channels to share messages with the public and report the feedbacks to city council
- Building community partners: diversity advisors, international celebration, sustainability exchange, etc. in order to be aware of potential opportunities
- Connect with the cultural competency plan/mission plan of the City of Beaverton.

At the end of the session the board agreed the current mission is still relevant and will be used moving forward.

6. Strategic Plan Goals: Special Assignment

Erik reviewed the next step for the board’s strategic planning process: goal setting. He gave a brief overview of key elements of goal development and provided some examples. He noted the importance of brevity and identified a preferred outcome that links back to the mission statement.

Board members were randomly divided into three working groups that include absent members and identified a lead person (see below). The assignment, to be completed during the interim period between strategic planning sessions, is as follows:

- Develop 1-3 proposed goals statement for discussion at the June 9, 2014 meeting
- Use these resources
 - Online sister cities program research
 - input from stakeholder interviews
- Any strategy/action ideas - put on a parking lot list
- Designated work group leader* to email ideas to consultants by June 2, 2014.

Board Members Work Groups

| Group 1 | Group 2 | Group 3 |
|-------------------|--------------------|-----------------|
| Wambui Machua* | Julie Scholz* | Janine Kanable* |
| Penny Hanson | Stephanie Somanchi | Holly Frohlick |
| Neil Simon | Natalie Verdi | Kazuhiro Osawa |
| Carolyn McCormick | Dave Vernier | Karen Schouten |
| Thomas Zingalis | Tricia Melnik | Karen Yeong |

Beaverton Sister Cities Advisory Board Strategic Planning Program Session #2 June 9, 2014 - Meeting Summary

Board Members/Alternates Present: Janine Kanable (Chair), Penny Hanson, Carolyn McCormick, Tricia Melnik, Kazuhito Osawa, Julie Scholz, Karen Schouten, Neil Simon, Stephanie Somanchi, Natalie Verdi, Karen Yeong.

Staff and Consultants: Cynthia Lee Rozanc, Catherine LaTourette, Erik Jensen, and Lu Pang (graduate assistant).

1. Introductory Remarks

The strategic planning consultant team from Portland State University's Center for Public Service, Catherine (Cathy) LaTourette, Erik Jensen and Lu Pang welcomed the board and reviewed the agenda and workbook. The focus for this second session was to develop the goals and strategies to support the board's mission.

2. Ice Breaker Revisited

Cathy invited the board members who were not able to join the first session to briefly share their international travel, language and cultural experiences. These board members added to the rich collection of cultural diversity and shared interests to serve on the Sister Cities Advisory Board. Specifically, the group speaks varying levels of 13 languages and they have travelled to, or lived in, 27 countries and regions around the world.

3. City of Beaverton Program Presentation

Cathy introduced the panel of the City of Beaverton leaders, Ms. Holly Thompson and Jayne Scott. The panel shared their functional responsibilities for cultural and community programs. Specifically, they highlighted the programs and events that offer the greatest opportunities for collaboration with the Sister Cities Program (SCP).

- Holly Thompson, Program Manager, Mayor's Office
 - **Beaverton Community Vision (BCV):** BCV began as an outreach effort by the City of Beaverton to involve their community members in planning the City of Beaverton's future. More than 120 meetings and events occurred, and more than 5,000 people have shared their ideas for the City of Beaverton.

BCV's 20-year action plans were adopted in 2010. SCP serves as a partner with BCV on several of the 61 approved actions. BCV is developing a five-year update by going into the communities and asking people about their concerns and needs. "What's next, Beaverton?" BCV will continue asking this question in its surveys from June to October, 2014, as well as in the future. The collaborative opportunity for the Sister Cities Advisory Board is to provide questions for the public; BCV is willing to involve these culture-related questions in the survey and provide feedback.

- **Diversity Advisory Board (DAB):** The City of Beaverton believes it is important to have a permanent diversity advisory board in order to develop and maintain a Diversity, Equity and Inclusion Plan for the City of Beaverton. DAB is a newly created advisory board to the Mayor and City Council that began officially meeting in January, 2014. DAB is working to define basic principles and generate recommendations. The goal is to meet with the City Council by Fall 2014 with recommendations and to then reach out to the public for further discussion.

Eight core areas defined by the DAB connect well with the SCP mission. Some examples include the shared interest in creating a city environment that is welcoming and inclusive to its diverse community, reaching out to greater numbers and new arrivals within the diverse communities, and building bridges that encourage people to get involved. DAB looks forward to having a closer partnership with the SCP in the near future.

- Jayne Scott, Senior Program Manager for Arts, Culture and Events
Ms. Scott explained that her unit currently partners with the Beaverton Art Commission and the SCP, and participates in numerous city events. She offered many suggestions about future collaborations with SCP, as listed below:
 - International Celebration - In the past five years the international celebration has become a very popular event and a priority for the city. This event provides an ideal opportunity for collaboration with the SCP that may include
 - Inviting sister cities to send representatives to perform
 - Hosting a parade akin to the Rose Parade, which is hosted by the City of Portland and is a vehicle for displaying sister city relationship. The Beaverton SCP could use the Beaverton Celebration Parade as its vehicle as well.
 - Providing various educational programs focusing on the cultural diversity of Beaverton
 - Utilizing Beaverton's Art Cultural Center and future facilities to bring citizens together to experience the arts and share cultural traditions.
 - Beaverton Arts and Culture Foundation is the fundraising arm of the Beaverton Arts Commission and could be a potential fundraising arm for SCP as well. Having SCP representation in the foundation might be useful for SCP, in terms of finding new fiscal resources and collaborative fund-raising opportunities.
 - Considering SCP participation in other advisory boards in Beaverton, as there are many international development activities occurring in Beaverton.
- Alma Flores, Economic Development Manager, and Steve Thompson, Business Development Liaison, were not available to participate in the panel discussion. However, they prepared a statement that could be read to the group and summarized as follows:
 - The economic development work in the city is driven by market and industry needs which may or may not be in alignment with Beaverton sister cities' geographic locations.
 - It takes a considerable amount of focus and time to accomplish a business relationship and agreement, often taking from six months to many years to establish.
 - Building economic relationships with other sister cities is complex in terms of negotiations and tax laws.
 - SCP has the opportunity to support economic development opportunities, but is not identified as a driver of economic development programs.
 - SCP could become a resource for the groups who are working or travelling abroad by providing cultural training (e.g. cultural norms, etc.)

Erik reviewed the extreme opinions about the roles that SCP needs to play: 100% economic development or 100% educational exchanges. The vast majority of the interviewees

believed that the right role was somewhere in the middle. They saw the SCP as a complement to the city's economic development function, although they were uncertain as to the best ways to interface and provide support.

4. Recap of the first Strategic Planning Session

In discussing the SCP mission, board members discussed the role they play in the city's economic development effort. Do city officials and citizens expect SCP to be an economic driver? Some members expressed their concern that the budget of SCP is tight and the Mayor's Office may hesitate to commit funding if SCP doesn't bring economic benefits. Erik reminded the board that the interview findings demonstrated that stakeholders want to see tangible outcomes, such as goals, strategies and actions that can be measured.

Erik summarized that the Sister Cities Advisory Board finished the first step of the strategic planning process by confirming its mission.

5. Goal Development Work Session

Erik explained that the purpose of the second session was to develop goals and strategies to support the mission.

Erik defined a "goal" as answering the question, "What do we want to achieve? How do we put our mission and core values into action?" The members were split into three work groups to carefully consider the goals provided by the board work groups as homework. They could accept the goal if it sufficiently captured the group's intent; they could modify the goals or add a new goal. The number of total goals should be between three and six. The workgroups used the workbooks (p. 7) to guide their discussion and they recorded their notes on the flip charts.

After the discussion, Erik and Cathy led the board to share the goals with Lu editing simultaneously on the screen. The board members discussed actively, merged ideas and modified text, and eventually approved the following goals:

Goal 3 required further discussion and a sub-committee was established to work during the interval prior to the next session and report back.

- ✚ Goal 1: Create and support ongoing SCP activities with tangible outcomes that excite, engage and add value to the City of Beaverton.**
- ✚ Goal 2: Cultivate the exchange of ideas, skills and experiences between Beaverton and international communities across professions and interests.**
- ✚ Goal 3 (Under discussion): Maintain support from the City of Beaverton city government for the SCP.**

6. Strategies Development Work Session

To set the stage, Erik clarified the importance of strategies because they offer the means for accomplishing the identified goals. In this work session Erik and Cathy guided the groups in using the strategy development worksheet (p. 9) in the workbook.

The board continued to work in small groups and created the following initial strategies:

| Beaverton Sister Cities Program Strategic Planning Session 2 Strategy List | |
|--|-------------------------|
| Group1 | Applicable Goals |
| 1. Identify community stakeholders | 1, 2, 3 |
| 2. Key performance indicators | 1, 2, 3 |
| 3. Strengthen communications with sister cities | 1, 2 |
| 4. Evaluate current sister cities | 1, 2 |
| 5. Examine current SCP activities | 1, 2 |
| Group2 | Applicable Goals |
| 1. Establish flagship program | 1 |
| 2. Develop marketing plans that communicates value | 1 |
| 3. Develop a communication process among sister cities | 2 |
| 4. Identify key partnerships for the SCP | 1, 2, 3 |
| Group3 | Applicable Goals |
| 1. Continue and enhance youth involvement with the SCP | 1, 2 |
| 2. Develop a sustainable plan to maintain open communication between sister cities and board members | 2 |
| 3. Develop a program that enhances community participation | 2 |

7. Assignment

Erik wrapped up the discussion and indicated that further work was needed to vet and approve the strategies. Erik also assigned homework, due before the next session:

- Continue thinking about the strategies and submit new strategies before June 17, 2014, or no later than the next meeting.
- Start thinking about the actions.
- At the end of the meeting, Cathy and Erik expressed appreciation for the board's commitment to the program and their very effective team work.

Work Groups of the Sister Cities Advisory Board Members – Session 2**

| Group1 | Group2 | Group3 |
|-------------------|---------------|-----------------|
| Penny Hanson * | Julia Scholz* | Janine Kanable* |
| Wambi Machua | Natalie Verdi | Holly Frohlick |
| Neil Simon | Tricia Melnik | Kazuhiro Osawa |
| Carolyn McCormick | Karen Yeong | Karen Schouten |
| Thomas Zingalis | | |

*Group leaders

**The group composition changed slightly each session given shifts in actual attendance.

**Beaverton Sister Cities Advisory Board
Strategic Planning Program Session #3
June 23, 2014 - Meeting Summary**

Board Members/Alternates Present: Janine Kanable (Chair), Penny Hanson, Neil Simon, Carolyn McCormick, Julie Scholz, Tricia Melnik, Kazuhito Osawa, Karen Schouten, Karen Yeong, Councilor Mark Fagin

Staff and Consultants: Cynthia Lee Rozanc, Catherine LaTourette, Erik Jensen, Lu Pang (graduate assistant)

1. Introductory Remarks

Janine Kanable, Chair, opened the meeting and gave the floor to consultants Erik Jensen and Cathy LaTourette.

2. Goal Development

Erik reminded the group that Carolyn McCormick had lead a subcommittee to review and recommend goal language related to program funding.

Councilor Mark Fagin shared his insights of budget processes noting the City Council has final approval of the budget as recommended by the Budget Committee. However, the budget goes through numerous levels of review and discussion before reaching the City Council.

Carolyn and Janine recapped their group's discussion of the draft Goal 3, developed and debated at the end of the last meeting. Their group agreed that the language of Goal 3 was more indicative of a strategy than a goal. They also believed that Goals 1 and 2 address the board's concerns and interests. Goals 1 and 2 are:

Goal 1: Create and support ongoing SCP activities with tangible outcomes that excite, engage and add value to The City of Beaverton.

Goal 2: Cultivate the exchange of ideas, skills and experience between The City of Beaverton and international communities across professions and interests.

3. Strategy Development Work Session

Erik briefly reviewed the proposed strategies developed at the last meeting and from the interim work groups. He noted the CPS consultant team had developed a new set of strategies by consolidating and integrating the original strategies prepared by the board members. He also highlighted the Strategies Development Idea Bank, which contains other strategy ideas that emerged earlier in the strategic planning process.

Erik noted none of the proposed strategies addressed SCP's role in economic development, which had been raised in earlier discussions as an important component. He suggested that the board consider how to address this issue.

The board formed in small groups, reviewed the proposed strategies and, in some cases, added new ones. Subsequently, Erik and Cathy led the board in a discussion about all the proposed edits to the strategies and additions. The results of the discussion, which included a "dot voting exercise," were the following strategies:

- A. Evaluate status and viability of current sister cities for continued relationship building. [Goals: 1, 2]
- B. Strengthen on-going communications with current sister cities. [Goals: 1, 2]
- C. Examine existing SCP activities for consistency with strategic plan. [Goals: 1, 2]

- D. Develop marketing approach to increase SCP visibility and importance to the City of Beaverton community. [Goal: 1]
- E. Enhance and encourage community participation in the SCP. [Goal: 2]
- F. Maintain and enhance the SCP knowledge and experience. [Goals: 1, 2]
- G. Evaluate and document the selection process and criteria for adding new sister cities. [Goals: 1,2]
- H. Maintain sustainable funding for the SCP[Goals: 1, 2]
- I. Clarify the role for of SCP in terms of economic development. [Goals: 1, 2]

These nine strategies were accepted and approved by the Sister Cities Program Advisory Board for the strategic plan.

4. Action Plan Work Session

Following the strategy discussion, the board began discussing actions. Actions carry out the strategies by providing the on-the-ground programs, projects, and activities for implementation; there is a direct correlation between strategies and actions. The board was asked to consider two questions before developing an action statement:

- 1) What specific steps will we take to implement this strategy?
- 2) What entity will be responsible for making each step happen?

Erik also highlighted the guidelines for writing each action. The work groups were asked to develop at least one action statement per strategy. The groups were also encouraged to draw from the Action Development Idea Bank. After the actions were developed, each group wrote an action on an index card and gauged its relative priority by establishing whether it was a short term (1-2 years), mid-term (3-4 years), or long term (5+ years) action.

Each group then presented the actions to the board and placed each on a flip chart matrix according to the relevant strategy and priority. The groups were asked to identify a lead board member, who will be responsible for facilitating implementation of each action, and any potential partner organizations that might be involved. Following group discussions, board members shared their thoughts on action statements and point persons. Twenty actions were proposed, including: community awareness and involvement, events, exchange programs, funding, performance indicators, communication and networks.

After the reports were completed, Erik and Cathy noted that there was more work to be done to synthesize all of the actions and finalize the strategic plan. As it was time for the meeting to end, it was suggested that the board meet again to complete the action and strategic planning. The group agreed and a new meeting time would be identified (later determined to be July 14, 2014).

Cathy recapped the three strategic planning sessions and illustrated the next steps that the board will need to take in order to accomplish the objectives: establishing accountability and the measurements.

The City of Beaverton Sister Cities Advisory Board Strategic Planning Program Session #4 July 14, 2014 - Meeting Summary

Board Members/Alternates Present: Janine Kanable (Chair), Penny Hanson, Wambui Machua, Carolyn McCormick, Tricia Melnik, Julie Scholz, Karen Schouten, Neil Simon, Natalie Verdi, Karen Yeong.

Staff and Consultants: Cynthia Lee Rozanc, Catherine LaTourette, Erik Jensen, Lu Pang (graduate assistant).

1. Welcome and Introductory Remarks

Janine Kanable, Chair, welcomed the board to this final session and explained that the evening's work was to develop and agree upon the actions—the tasks, projects or programs to support the strategies that were approved at the previous session. She turned the facilitation over to the consulting team.

2. Action Plan Development

Erik and Cathy designed a workbook and materials to guide the board members through the process of developing the action plan. The workbook provided definitions about what constitutes effective and implementable actions. The consultants provided a first draft of the initial actions suggested by the board members during the third session. Working in their small groups, the consultants directed the board members to review each action and determine whether the actions captured the intent of the approved nine strategy statements. An action statement should answer the questions:

- What specific steps will we take to implement this strategy?
- What entity will be responsible for making each step happen?

After active discussion, every group contributed to the action plan by modifying statements, exchanging ideas, and eventually voting to accept 20 specific actions. The final action plan included the nine strategies, the actions supporting each strategy, the names of the board members who will take responsibility for completing each action, the timeframe for the completion, the measurement for compliance and any partners who would have interest and/or resources to support the action.

4. Final Report

To ensure that the final report accurately represents the recommendations of the City of Beaverton Sister Cities Advisory Board, the CPS consulting team will review the report draft with all board members to seek input and comments. In addition, an Advisory Board sub-committee was established to review the edits and comments received from the group, and serve as a final review in concluding the report.

The advisory sub-committee is comprised of the following board members: Janine Kanable, Karen Yeoun, Neil Simon and Julie Scholtz.

Wrap Up

The consultant team concluded the final session with an opportunity to reflect on the process and the lasting takeaways. Board members shared some of what they learned about the program, the insights they gained about one another's rich, diverse and

international backgrounds and experiences, their dedication to the SCP mission and their ability to work together as a relatively new board. They expressed a confidence and hopefulness about their more intentional and strategic direction going forward and their shared commitment to achieve the objectives of SCP.

The CPS consulting team, Erik Jensen, Cathy LaTourette and Lu Pang, appreciated the opportunity to work with the Advisory Board and the City of Beaverton.

**The City of Beaverton Sister Cities Advisory Board
Strategic Planning Process**

Session #1

May 19, 2014

AGENDA

- | | |
|---|---------------------|
| 1. Introductory Remarks | Kanable |
| 2. Icebreaker: Who is Your Neighbor? | LaTourette/Board |
| 3. Strategic Planning Overview | Jensen |
| 4. Program Insights from Stakeholder Interviews | LaTourette / Jensen |
| 5. Sister Cities Advisory Board Mission: What Does It Mean? | LaTourette/Board |
| 6. Strategic Plan Goals: Special Assignment | Jensen |

Strategic Planning for Programs

A Guide to Plan Elements

Strategic plans have key elements that are integrally linked to each other. The following is a description of the elements, their level of detail, and association to the other components of the plan.

Mission Statement

A mission statement is a concise statement clarifying the program's purpose. The statement highlights broad themes and is intended to be reflective of the organization's culture. Language is activist in tone and inspirational in nature.

Goals

A goal is a statement of general direction leading toward a desired outcome. It is a path of travel. A goal should answer the questions: (1) What do we want to achieve? and (2) How do we put our mission and core values into action? Goals are consistent with the mission statement. The language is active and the statement is short (one sentence or less).

Strategies

Strategies offer a means for accomplishing the goals. They explain how each goal will be accomplished. Each strategy directly supports at least one goal. Usually, a strategy does not identify a specific project or program, but rather a general direction for future policy and operational decision-making.

Actions

Actions support and implement one or more aspects of a strategy. An action is a specific task, project or program to implement a strategy. For each one, a lead entity (e.g., a department, position, or committee) is identified and has responsibility for facilitating completion of that item. Language should be positive, neutral, succinct, and broad enough to allowing the implementing entity flexibility to achieve the intent.

Beaverton Sister Cities Advisory Board

Strategic Planning-Session 2 Workbook





Agenda

1. Welcome and Introductory Remarks.....Kanable
2. Icebreaker Revisited.....LaTourette
3. City of Beaverton Program Presentations.....LaTourette
 - a. Beaverton Vision.....Thompson
 - b. Diversity Committee.....Thompson
 - c. Intercultural Celebration.....Scott
4. Strategic Planning Recap.....Jensen
5. Goal Development Work Session.....Jensen/LaTourette
6. BREAK.....All
7. Strategies Development Work Session.....Jensen/LaTourette
8. Action Plan Development: Special Assignment.....Jensen

Work Groups: Proposed Goals

GROUP 1

1. Ensure there is community support for existing and new sister city relationships.
2. Give more citizens more opportunities to be exposed to global ideas and relationships on topics and regions that matter most to them.
3. Provide events and forums that broaden the City of Beaverton residents' horizons culturally, educationally and economically.
4. Create forums of exchange in education, sister city interaction, and commerce for the citizens of the City of Beaverton.
5. Enhance communication of program vision and common cultural interests in the community.

GROUP 2

6. Develop programs and international relationships that are relevant and provide measurements of their value to Beaverton's municipal representatives, students and educators, multicultural communities, and business stakeholders.
 - Study the City of Beaverton's demographics and act accordingly, such as adding sister cities that reflect the City of Beaverton's diverse population.
 - Create engaging, interactive programming where people share cultural traditions and history with each other.
 - Establish parameters to measure the Return On Investments (ROI) of funding and time: emotional or economic; benchmarks such as number of program events, participants.
7. Enhance communication and relationships between Beaverton's local and international communities.

GROUP 3

8. Create an environment that cultivates the sharing of ideas and skills in the following areas, but not limited to: culture, medicine, sport, education, technology, environment, leadership and youth. Work with our Sister cities on common goals, business and professional exchanges.
 - Rationale: Let's share more than just city officials, high tech and

students (not that they aren't important). Let's show people that girls can play soccer, send a delegation of nurses to share how things are done here and learn how things are done there, let teachers learn what is unique so they aren't quoting a book but showing pictures they took (or swap teachers for a week or two).

- Example: grass root activists, NPO groups hosting a cultural exchange, and/or interchange program, business delegation exchange program, company visit program, student exchange program
 - Example: sending leaflet, pamphlet, and schedule of event calendar of City of Beaverton to fellow cities, etc.
9. Create programs that are sustainable and excite the local community about the SCP. This would include an anchor program such as the Sustainability Summit. These programs should increase board involvement and volunteer participation, and be supported through fundraisers that give back to the community, as well as to our sister cities.
- Rationale: We currently do not do anything that is a legacy. We could fundraise and present a scholarship to a Beaverton youth who is studying languages or international business. We could provide financial support for a family in one of our sister cities. Now this could insult someone so other options are to rotate and give a gift annually to one of the cities or to also offer a scholarship to a student in one of our sister cities who is studying international business, languages or wants to study in the US. This was a merger of several ideas when considering the Sustainability Summit as an anchor program.
10. Form collaborative partnerships with committees that increases the visibility of sister cities, such as working with the Beaverton Library Board during International Language week, assisting the Art's commission with activities, ensuring a presence at civic activities, etc.
11. Creating collaborating projects: finding certain project that allow your city to work with other cities to achieve a common goal.
12. Cross-Cultural Exchange Program: By introducing and offering information of Beaverton periodically to the fellow cities, feedback from them will be expected.

CPS Draft Goals

1. Initiate and support SCP activities with tangible outcomes and value to the Beaverton community.
2. Maintain and enhance communication and relationships between Beaverton's local and international communities.
3. Cultivate the sharing of ideas and skills among the Beaverton community and its sister cities across a wide array of professions and interests.
4. Create and foster sustainable programs that promote, excite, and engage the local community about the SCP.

Goal Development Work Session

Definition:

A goal is a statement of general direction leading toward a desired outcome. It is a path of travel. A goal should answer the questions:

- What do we want to achieve?
- How do we put our mission and core values into action?

Goals are consistent with the mission statement, and the language is active and the statement is short (sentence or less).

Instructions:

- In your small group, re-visit your workgroup's proposed goals and determine if the consultants' four CPS draft goals capture the intent of what you initially proposed, and the other goals presented by other workgroups.
- Specifically, determine what action you want to take for each of the four draft goal statements. Your choices are:
 1. ACCEPT that the goal sufficiently captures your group's intent and accept it as written.
 2. MODIFY with word(s) or phrases to reflect your group's preferences in stating the goal.
 3. ADD a new goal or two. (No more than two, please.)
- Use the worksheet on the next page to guide your discussion and provide a space for your individual notes.
- Assign one group member to record the group's notes on the flip chart and be prepared to report out to the larger group within 20 minutes.

Goal Development Work Sheet

| # | CPS Draft Goals & Proposed New Goals | Accept | Modify |
|----|---|------------|--------|
| 1. | Initiate and support SCP activities with tangible outcomes and value to the Beaverton community. | | |
| 2. | Maintain and enhance communication and relationships between the City of Beaverton's local and international communities. | | |
| 3. | Cultivate the sharing of ideas and skills among the City of Beaverton community and its sister cities across a wide array of professions and interests. | | |
| 4. | Create and foster sustainable programs that promote, excite, and engage the local community about the SCP. | | |
| 5. | | Add | |
| 6. | | Add | |

Strategies Development Work Session

Definition:

Strategies offer a means for accomplishing the goals. They explain how each goal will be accomplished. For each strategy there is a direct relationship to supporting at least one goal, although it can support more than one. A strategy statement should answer the question:

- How will we achieve what we want?

Usually, it does not identify a specific project or program but rather a general direction for future policy and operational decision-making.

Instructions:

- Within your small group develop 3 or more strategies that meet the definition above and support at least one goal, although each strategy can support more than one goal.
- Use the worksheet on the next page to guide your discussion and provide a space for your individual notes.
- Assign one group member to record the group's notes on the flip chart and be prepared to report out to the larger group.

Resources:

In developing your strategies, consider the following guidelines. Strategies must...

Set a clear direction for implementing one or more of the goals.

Be based on one or more of the goals.

Have at least one or more action items to help implement it.

Not identify a specific project or program—only a strategic direction

Also, you are encouraged to consult the ideas generated from the consultants' interviews and work groups. These ideas are listed in the Strategies Development - Idea Bank on page 10 of the workbook.

| Strategies Development Worksheet | | | |
|---|---|-------------------------|--|
| | Strategy | Applicable goals | Action Ideas |
| | Example: Assess existing workforce and identify current and future staffing and skill needs | Goal 1, Goal 2, Goal 4 | Update current org chart and compare to list of department needs |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

Strategies Development Idea Bank

These strategy planning ideas are generated from the consultants' stakeholder interviews and other work sessions with staff. These ideas are provided for your reference:

1. Build a role for the SCP with economic development activities.
2. Continue and enhance student involvement with the SCP.
3. Strengthen and build on-going connections between the SCP and the current cultures in the City of Beaverton.
4. Develop a sustainable plan to maintain regular contact/communication with the City of Beaverton's sister cities.
5. Develop and implement activities to increase community awareness of the SCP.
6. Establish an updated approach and criteria for adding new sister cities.
7. Establish new approaches for enhancing community participation in the SCP.
8. Create engaging, interactive programming where people share cultural traditions and history with each other.

Strategies Selection

Once the small groups have presented their strategies and posted their flip charts, the large group will reconvene to review and edit for redundancy and clarity. In other words, this will be an opportunity to clean up the wording, condense and hone the text into the best slate of strategy statements for voting.

Instructions:

- Each group member will receive 6 numbered “dots” that will represent 6 votes.
- Each individual should review the flip charts and determine their choice for the top 6 strategies and order them from 1 to 6.
- When ready, each person will place their “dot” votes on the flip chart according to their priority order.
- One “dot” per strategy, please.

This voting process will establish the final 6 to 9 strategies as agreed upon by the group for inclusion in the strategic plan.

Action Plan Development

Definition:

Actions are the specific tasks, projects or programs that implement a strategy. An action statement should answer the question:

- What specific steps will we take to implement this strategy?
- What entity will be responsible for making each step happen?

Instructions for Homework Assignment:

- Develop 3-6 proposed action statements for discussion at the June 23, 2014 meeting.
- Work with your group to discuss and collect the action statements.
- Designated work group leader to email action statements to facilitators by June 17, 2014 to:
 - Erik Jensen erik@jensen-stretegies.com
 - Cathy LaTourette latourec@pdx.edu
- If you have any questions, call Erik at 503-307-8020

Resources:

Consider the following guidelines for preparing each action. Actions must...

- Support and implement one or more aspects of a strategy.
- Identify an outcome such as a project, program or specific activity.
- Have a proposed lead entity.
- Be with the capability and potential resources of the board or city.
- Have language that should:
 - Be broad enough to allow a lead entity flexibility to implement
 - Be neutral—avoid subjective terminology
 - Be succinct and limit to one or two sentences
 - Be positive in nature

Also, you are encouraged to consult the ideas generated from the consultant's interviews and work groups. These ideas are listed in the "Action Plan Development - Idea Bank" on page 14 of the workbook.

Action Plan Development Worksheet

| Action Title | Action Description (1-2 sentences) | Lead Board Member | Potential Partners (Organization/Dept/ Person) | Priority (H/M/L) |
|---------------------|--|-----------------------------|--|----------------------------|
| Ex: Backyard BBQ | Hold a backyard bonanza themed BBQ for block party | Ben | Hoss, Adam, Little Joe, Neighbors: Susan, Mary, City Planning, Police, BBQ's R Us catering, Cowboy's Lament Band | H |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Action Plan Development - Idea Bank

These action planning ideas are generated from the consultants' stakeholder interviews and other work sessions with staff. These ideas are provided for your reference:

1. Establish a plan and schedule for maintaining communication with sister cities.
2. Establish an exchange program purpose, criteria, and schedule.
3. Explore opportunities to establish new sister cities in Mexico, India, Turkey, SE Asia, South America, and China.
4. Plan and implement another all-sister-cities summit focusing on agriculture interests.
5. Establish a student business exchange program.
6. Complete plans to build a Korean garden.
7. Work with the City of Beaverton to establish the SCP's role in the International Celebration.
8. Identify and incorporate a broad range of professionals in exchange program planning.
9. Study the City of Beaverton's demographics to assist in strengthening the SCP's connection to the City of Beaverton's diverse community.
10. Establish parameters to measure the Return on Investments (ROI) of public funds. Consider cultural benefits and economic outcomes. Suggested benchmarks include: number of program events and number of participants.
11. Identify key community interests to engage in international information sharing and relationship building including, but not limited to, healthcare, sports, education, technology, environmental, leadership and youth.
12. Establish an "anchor event," which is scheduled every (two?) years for the SCP, such as an all-sister-cities summit.
13. Establish a fundraising program to raise additional funds for the SCP.
14. Form on-going partnerships with other city-related committees, such as the

Library Board or the Arts Commission, to increase the program's visibility and foster linkages with other city initiatives.

Reflections on Today's Session

What were some of the takeaways for you?

What was something that you like, or that worked well about the session?

What was something that you would like us to do differently?

Next Session:

Monday, June 23, 2014

3rd floor conference room

5:30 – 7:30

Beaverton Sister Cities Advisory Board

Strategic Planning-Session 3 Workbook





Agenda

June 23, 2014

- 10. Welcome and Introductory Remarks.....Kanable
- 11. Goal Development.....Jensen/LaTourette
 - a. McCormick Special Group Report
 - b. Final Goal Discussion / Decision
- 12. Strategy Development Work Session.....Jensen/LaTourette
- 13. BREAK.....All
- 14. Action Plan Work Session.....Jensen/LaTourette
- 15. Final Report.....Jensen/LaTourette
 - a. Small Group Advisory Committee
 - b. Report to City Council
- 16. Reflections.....Jensen/LaTourette
- 17. Wrap Up & Thank You.....Jensen/LaTourette

Board Accepted Goals

1. Create and support ongoing SCP activities with tangible outcomes that excite, engage and add value to Beaverton.
2. Cultivate the exchange of ideas, skills and experiences between the City of Beaverton and international communities across professions and interests.

Goal under Consideration

The following goal was being discussed at the end of Session #2. The McCormick subcommittee will be offering an alternative at Session #3.

Maintain support from Beaverton city government for Beaverton Sister Cities Program.

Instructions:

1. Presentation of the McCormick Special Group Report
2. Large group discussion to consider Special Group Report recommendation and seek agreement about the final Sister City Advisory Board goals
3. Finalize and number goals.

Proposed Strategies

The following draft strategies were developed by three groups of the Sister Cities Advisory Board during the June 9, 2014 meeting and as assigned for homework. These strategies provided a tremendous foundation and are provided below as follows:

Group 1

1. Identify community stakeholders [Goals: 1, 2]**
2. Key performance indicators [Goals: 1, 2]**
3. Strengthen communications with sister cities [Goals: 1, 2]*
4. Evaluate current sister cities [Goals: 1, 2]**
5. Examine current SCP activities [Goals: 1, 2]**

Group 2

1. Establish flagship program [Goal: 1]*
2. Develop marketing plans that communicates value [Goal: 1]*
3. Develop a communication process among sister cities [Goal: 2]*
4. Identify key partnerships for Beaverton sister cities program [Goals: 1, 2]*
5. Evaluate addition of new sister cities through SWOT analysis to determine capacity (self) and criteria of potential sister city.***
6. Increase visibility of SCP through targeted marketing and partnerships.***
7. Establish flagship program that garners most buy in and has most value-add from/to the community. (e.g. International Sustainability Project)***
8. Explore national grants/funding programs and develop local sponsorships.***
9. Secure long-term budget from City Council with clear and projected expense (budget) for annual programs.***
10. Transfer of knowledge through continuity, tapping into an alumni network (of SCP past members and volunteers).***

Group 3

1. Continue and enhance youth involvement with SCP [Goals: 1, 2]*
2. Develop a sustainable plan to maintain open communication between sister cities and board members [Goal:2]*
3. Develop a program that enhances community participation [Goal: 2]*

* Proposed at the June 9th meeting

** Proposed at the June 9th meeting and confirmed during the interim group discussion(s)

*** Developed during the interim group discussion

Strategies Development – Idea Bank

Other suggestions from the strategies development process, interviews, work groups and planning sessions.

9. Maintain a commitment from city council for ongoing funding of SCP activities, staffing, and budget.
10. Build a role for the SCP with economic development activities.
11. Continue and enhance student involvement with the SCP.
12. Strengthen and build on-going connections between the SCP and the current cultures in the City of Beaverton.
13. Develop a sustainable plan to maintain regular contact/communication with the City of Beaverton sister cities.
14. Develop and implement activities to increase community awareness of the SCP.
15. Establish an updated approach and criteria for adding new sister cities.
16. Establish new approaches for enhancing community participation in the SCP.
17. Create engaging, interactive programming where people share cultural traditions and history with each other.
18. Build strategy/role with economic development.
19. Continued/increased student involvement.
20. Stronger and more consistent ties with local cultures in the City of Beaverton.
21. Strategy for continued contact/communication with sister cities.
22. Increase community awareness.
23. New sister city criteria/strategy.
24. Increase community participation.

CPS Consolidated Strategies

- J. Strengthen on-going communications with current sister cities. [Goals: 1, 2]
- K. Evaluate status and viability of current sister cities for continued relationship building. [Goals: 1, 2]
- L. Examine existing SCP activities for consistency with strategic plan. [Goals: 1, 2]
- M. Develop marketing approach to increase the SCP visibility and value to the Beaverton community. [Goal: 1]
- N. Enhance and encourage community participation in the SCP. [Goal: 2]
- O. Maintain and enhance SCP knowledge and experience through an ongoing network of past board members and other interested parties. [Goal 2]
- P. Continue and enhance youth involvement with the SCP [Goals: 1, 2]
- Q. Evaluate the selection process and criteria for adding new sister cities. [Goals: 1,2]
- R. Continue to seek and attain sustainable funding for SCP [Goals: 1, 2]

Strategies Development Work Session

Definition:

Strategies offer a means for accomplishing the goals. They explain how each goal will be accomplished. For each strategy there is a direct relationship to supporting at least one goal, although it can support more than one. A strategy statement should answer the question:

- How will we achieve what we want?

Usually, a strategy does not identify a specific project or program, but rather a general direction for future policy and operational decision-making.

Instructions:

- Within your small group review the consolidated (draft) strategies and determine if they capture the intent of the strategies your group and the other work groups proposed.
- Specifically, determine what action you want to take for each of the draft strategy statements. Your choices are:
 4. ACCEPT that the strategy sufficiently captures your group's intent and accept it as written.
 5. MODIFY with word(s) or phrases to reflect your group's preferences in stating the strategy.
 6. ADD a new strategy or two. (No more than two, please.)
- Use the worksheet on the next page to guide your discussion and provide a space for your individual notes.
- Assign one group member to record the group's notes on the flip chart and be prepared to report out to the larger group within 20 minutes.

Strategy Development Work Sheet

| # | Draft Strategies & Proposed New Strategies (Note the goal each strategy supports.) | Accept | Modify |
|----|---|------------|--------|
| A. | Strengthen on-going communications with current sister cities. [Goals: 1, 2] | | |
| B. | Evaluate status and viability of current sister cities for continued relationship building. [Goals: 1, 2] | | |
| C. | Examine existing SCP activities for consistency with strategic plan. [Goals: 1, 2] | | |
| D. | Develop marketing approach to increase the SCP visibility and value to the Beaverton community. [Goal: 1] | | |
| E. | Enhance and encourage community participation in SCP. [Goal: 2] | | |
| F. | Maintain and enhance SCP knowledge and experience through an ongoing network of past board members and other interested parties. [Goal 2] | | |
| G. | Continue and enhance youth involvement with SCP [Goals: 1, 2] | | |
| H. | Evaluate the selection process and criteria for adding new sister cities. [Goals: 1,2] | | |
| I. | Continue to seek and attain sustainable funding for the SCP [Goals: 1, 2] | | |
| | | Add | |
| J. | | | |
| K. | | | |
| L. | | | |

Strategies Selection

After the workgroups have presented their strategies and posted their flip charts, the large group will reconvene to review and edit them for redundancy and clarity. In other words, this will be an opportunity to clean up the wording, condense and hone the text into the best slate of strategy statements for voting.

Instructions:

- Each group member will receive 6 numbered “dots” that will represent 6 votes.
- Each individual should review the flip charts and determine their choice for the top 6 strategies and order them from 1 to 6.
- When ready, each person will place their “dot” votes on the flip chart according to their priority order.
- One “dot” per strategy, please.

This voting process will establish the final 6 to 9 strategies as agreed upon by the group for inclusion in the strategic plan.

Action Plan Development

Definition:

Actions are the specific tasks, projects or programs that implement a strategy. An action statement should answer the question:

- What specific steps will we take to implement this strategy?
- What entity will be responsible for making each step happen?

Consider the following guidelines for preparing each action. Actions must...

- Support and implement one or more aspects of a strategy.
- Identify an outcome such as a project, program or specific activity.
- Have a proposed lead entity.
- Be with the capability and potential resources of the board or city.
- Have language that should:
 - Be broad enough to allow a lead entity flexibility to implement
 - Be neutral—avoid subjective terminology
 - Be succinct and limit to one or two sentences
 - Be positive in nature

Instructions:

- As a group, develop at least one action statement per strategy.
- Refer to the Action Plan Development – Idea Bank as a resource in considering actions that have previously been suggested during the stakeholder interviews and by others in the course of this project.
- Once your group has agreed upon the action statements, write them separately on the index cards provided.
- Assess and identify them for priority levels as follows:
 - “S” – short term: to be achieved in the first year
 - “M” – mid range: to be achieved in the next 2 – 3 years
 - “L” – long term: to be achieved in the next 5+ years
- Each group representative will then explain each action and place it on the flip chart matrix according to the relevant strategy and priority level.

Action Plan Development - Idea Bank

These action planning ideas are generated from the consultants' stakeholder interviews, goal and strategy development processes, and other work sessions. These ideas are provided for your reference and have been categorized for your convenience:

Community Awareness and Involvement

15. Identify community stakeholders to engage in the SCP.
16. Study the City of Beaverton's demographics to assist in strengthening the SCP connection to Beaverton's diverse community.

Community Partnerships

17. Form strategic partnerships with cultural/diversity leaders, educational institutions and industry partners to increase visibility and awareness on sister cities. In short, branding and marketing sister cities as enablers to the above-mentioned three major sectors of Arts, Youths and Businesses/Corporations.
18. Foster closer ties with Advisory Boards with similar or interlinked objectives such as Diversity Advisory, Arts Commission and Library Board, to determine roles, identify similar targeted groups and synergize activities.
19. Identify key community partnerships for the SCP.
20. Identify key community interests to engage in international information sharing and relationship building including, but not limited to, healthcare, sports, education, technology, environmental, leadership and youth.
21. Form on-going partnerships with other city-related committees, such as the Library Board or the Arts Commission, to increase the program's visibility and foster linkages with other city initiatives.

Events

22. Introduce a sporting element to create camaraderie among diverse culture. This can also lead to having sporting exchanges between sister cities.
23. Establish flagship program that garners community awareness, support and has most value-add from/to the community. (e.g. International Sustainability

Project

24. Plan and implement another all-sister-cities summit focusing on agriculture interests.
25. Work with the City of Beaverton to establish the SCP's role with the International Celebration.
26. Establish an anchor event, which is scheduled every two years for the SCP, such as an all-sister-cities summit.

Exchange Programs

27. Establish an exchange program purpose, criteria, and schedule.
28. Establish a student business exchange program.
29. Identify and incorporate a broad range of professionals in exchange program planning.

Funding

30. Formulate a clear and projected annual budget to propose to the City Council targeted annual projects. (rather than sit and wait for budget to be given to us.)
31. Align budget period to term period (of Advisory Board) to accurately formulate (or plan for) the SCP.
32. Explore national grants/funding programs and develop local sponsorships.
33. Secure long-term budget from City Council with clear and projected expense (budget) for annual programs.
34. Establish a fundraising program for the SCP.

New Sister Cities

35. Conduct a SWOT analysis to determine capacity and criteria to add new sister cities.
36. Explore opportunities to establish new sister cities in Mexico, India, Turkey, SE Asia, South America, and China.

Performance Indicators

37. Establish key performance indicators to evaluate the strategic plan's success.

38. Establish performance measurements to evaluate the Return on Investments of public funds. Consider cultural benefits and economic outcomes. Suggested benchmarks include: number of program events and number of participants.

Project(s)

39. Complete plans and build a Korean garden.

Sister Cities Communications

40. Establish a plan and schedule for maintaining communication with sister cities.

Sister Cities Program Network

41. Create a 'membership club' or alumni to give advice and/or continuity to projects. This network also serve as an avenue to tap into for funding, support and volunteers - much like the Lions Club or Rotary Club and allows for transfer of (sister cities) knowledge for continuity.
42. Develop a plan to strengthen the SCP alumni (board, volunteers, etc.) network to assist in supporting, volunteering, and advising the program.

| Action Plan Development Worksheet | | |
|--|--------------------------------|--|
| Action Description (1-2 sentences) | Lead Board Member | Potential Partners (Organization/Dept./ Person) |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Final Report Advisory Committee

We invite 3-4 board members to volunteer over the next two weeks to serve on a very short-term committee that will be available to review the first draft of the final report and provide input for accuracy and detail. This will entail working individually (at home), and possibly one in-person session that will enable discussion.

Reflections on the Strategic Planning Process

What were some of the takeaways for you? What will you remember 6 months from now?

What has touched your mind and/or your heart?

Thank you...

We have appreciated getting to know you and for your hard work and commitment to the SCP and the strategic planning process.

Best wishes,

Erik Jensen erik@jensen-strategies.com

Cathy LaTourette latourec@pdx.edu

Strategic Planning-Session 4
Workbook



Agenda

July 14, 2014

1. Welcome and Introductory Remarks.....Kanable
2. Action Plan Development.....Jensen/LaTourette
3. BREAK.....All
4. Final Report.....Jensen/LaTourette
 - a. Small Group Advisory Committee
 - b. Report to City Council
5. Reflections.....Jensen/LaTourette
6. Wrap Up & Thank You.....Jensen/LaTourette

Advisory Board Accepted Goals

1. Create and support ongoing SCP activities with tangible outcomes that excite, engage and add value to Beaverton.
2. Cultivate the exchange of ideas, skills and experiences between the City of Beaverton and international communities across professions and interests.

Advisory Board Accepted Strategies

- A. Evaluate status and viability of current sister cities for continued relationship building. [Goals: 1, 2]
- B. Strengthen on-going communications with current sister cities. [Goals: 1, 2]
- C. Examine existing SCP activities for consistency with strategic plan. [Goals: 1, 2]
- D. Develop marketing approach to increase the SCP visibility and importance to the Beaverton community. [Goal: 1]
- E. Enhance and encourage community participation in the SCP. [Goal: 2]
- F. Maintain and enhance SCP knowledge and experience.
- G. Evaluate and document the selection process and criteria for adding new sister cities. [Goals: 1,2]
- H. Maintain sustainable funding for the SCP [Goals: 1, 2]
- I. Clarify the role for SCP in terms of economic development. [Goals: 1,2]

Action Plan Development Work Session

Definition and guidelines revisited:

Actions are the specific tasks, projects or programs that implement a strategy. An action statement should answer the question:

- What specific steps will we take to implement this strategy?
- What entity will be responsible for making each step happen?

Consider the following guidelines when reviewing each action. Actions must...

- Identify an outcome such as a project, program or specific activity.
- Support and implement one or more aspects of a strategy.
- Have a proposed lead entity.
- Be with the capability and potential resources of the board or city.
- Have language that should:
 - Be broad enough to allow a lead entity flexibility to implement
 - Be neutral—avoid subjective terminology
 - Be succinct, limited to one or two sentences
 - Be positive in nature
- Assess and identify them for priority levels as follows:
 - "S" – short term: to be achieved in the first year
 - "M" – mid range: to be achieved in the next 2 – 3 years
 - "L" – long term: to be achieved in the next 5+ years

Instructions:

- Within your small group review the consolidated (draft) actions for the first strategy (Strategy A). Determine if each action (A1, A2, and A3) captures the intent of the strategy statements that your group and the other work groups proposed during Session 3.
- Specifically, determine what follow-up steps your group wants to take for each of the draft action statements. Your choices are:
 7. ACCEPT that the action sufficiently captures your group's intent and accept it as written.

8. MODIFY with word(s) or phrases to reflect your group's preferences in stating the action.
 9. CONSOLIDATE two actions that can be combined.
 - 10.ADD a new action or two.
 - 11.DELETE an action.
-
- Use the "Action Plan Development Worksheet" (provided as a separate handout) to guide your discussion.
 - Complete the far left column for each action by adding a "partner" who may be an individual, group, city department, non-profit agency, etc. who may be a relevant partner in participating in the action.
 - Work in your small groups for approximately 10 minutes. Let the consultants know when your group is finished with the actions for Strategy A.
 - Be prepared to review each action under Strategy A with the large group in an effort to create and approve final actions. The text for each action will be accepted, modified, added, deleted, etc. and scribed in real time during the session.
 - Once the Actions under Strategy A are accepted, we will follow the same procedure for the actions under Strategy B through Strategy H.
 - The group will need to create and accept actions under Strategy I.

Final Report Advisory Sub-Committee

In order to ensure the final report accurately reflects the intent and recommendations of the Sister Cities Advisory Board, we need a small group of representatives who can officially approve the report on behalf of the board before it is finalized. While all board members will have an opportunity to comment on our draft report, these individuals will work with us to develop the final version over the coming weeks.

We are pleased the following Sister Cities Advisory Board members have agreed to serve on a very short-duration sub-committee over the next three weeks: Janine, Karen Y, Neil, and Julie. Specifically, they will review the first draft of the final report, as well as any comments received from the full board, and provide input for accuracy and detail. This effort will entail working individually (remotely) and possibly participate in one on-site session that will enable discussion.

All Sister Cities Advisory Board members will have the opportunity to review and comment on our first draft. We will email it to you with a requested reply date. Your comments will be forwarded to the subcommittee members as well. We welcome all and any participation in reviewing and commenting on the report to ensure it accurately reflects the full board's agreed upon strategic plan.

Reflections on the Strategic Planning Process

What were some of the takeaways for you? What will you remember 6 months from now? What has touched your mind and/or your heart?

The consultant will facilitate a final large group activity to reflect on the past 4 sessions. This will serve to share important learning about the group's experience in working together on this project.

Thank you...

We have appreciated getting to know you, and thank you for your hard work and commitment to SCP and the strategic planning process. On behalf of the Hatfield School of Government's Center for Public Service, we thank you for the opportunity to work with the Sister Cities Advisory Board and the City of Beaverton.

Best wishes,

Cathy LaTourette latourec@pdx.edu

Erik Jensen erik@jensen-strategies.com

Sister Cities Program

Summary of Stakeholder Interviews

Current Program

- Going Well / Successes
 - Sustainability Summit (greatest accomplishment)
 - Exchanges
 - Relationships with Sister Cities
 - New board members
 - Cultural understanding on an individual level

- Challenges
 - Lack of funding
 - Lack of available staff time (although available staff is great)
 - Lack of focus / big picture / strategic plan
 - Lack of board member participation
 - Reactive not proactive
 - High turnover in board membership
 - Seen as “cultural or social club”
 - Questions of value to community
 - Conflicting views of economic mission/benefits
 - Role with diversity committee and vision
 - Lack of community awareness
 - Perception of cost/benefit for overseas trips

- Value to Community
 - Potential value but not evident

Looking Forward

- Potential Objectives
 - Increase accountability and tangible outcomes
 - Increase value to Beaverton community
 - Tie activities into mission

- Potential Strategies
 - Build strategy/role with economic development
 - Continued/increased student involvement
 - Stronger and more consistent ties with local cultures in Beaverton
 - Strategy for continued contact/communication with sister cities

- Increase community awareness
 - New sister city criteria / strategy
 - Increase community participation
- Potential Actions / Activities
 - Regular communication with existing sister cities
 - Establish exchange program schedule/criteria
 - New sister cities – Mexico, India, Turkey, SE Asia, South America, China
 - New summit – economic, agricultural
 - Student business exchange program
 - Move forward with Korean Garden
 - Build stronger role and involvement with International Celebration
 - Expand exchange program to include different types of professionals

Interviewees

| | |
|---|--------------------|
| 18. Mayor | Denny Doyle |
| 19. City Council President / Board Liaison | Mark Fagin |
| 20. Beaverton Chief Administrative Officer | Randy Ealy |
| 21. Sister Cities Board Chair | Janine Kanable |
| 22. Sister Cities Board Vice-Chair | Wambui Machua |
| 23. Sister Cities Board Secretary | Penny Hanson |
| 24. Beaverton ACE Senior Program Manager | Jayne Scott |
| 25. Board Lead Staff | Cynthia Lee Rozanc |
| 26. City Council | Cate Arnold |
| 27. City Council | Betty Bode |
| 28. City Council | Ian King |
| 29. City Council | Marc SanSoucie |
| 30. Beaverton Business Development Liaison | Steve Thompson |
| 31. Beaverton Strategic Initiatives & Communications Mgr. | Holly Thompson |
| 32. Beaverton Director, Beaverton Chamber | Loraine Clarno |
| 33. Past Sister Cities Board Member | Ted Chung |
| 34. Founder, Sister Cities Foundation | Charles Alcock |
| 35. Director, German-American School | Blake Peters |
| 36. Public Communications Officer, Beaverton School Dist. | Maureen Wheeler |
| 37. Director, WCVA / Sister Cities Board Member | Caroline McCormick |