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Implementation Process

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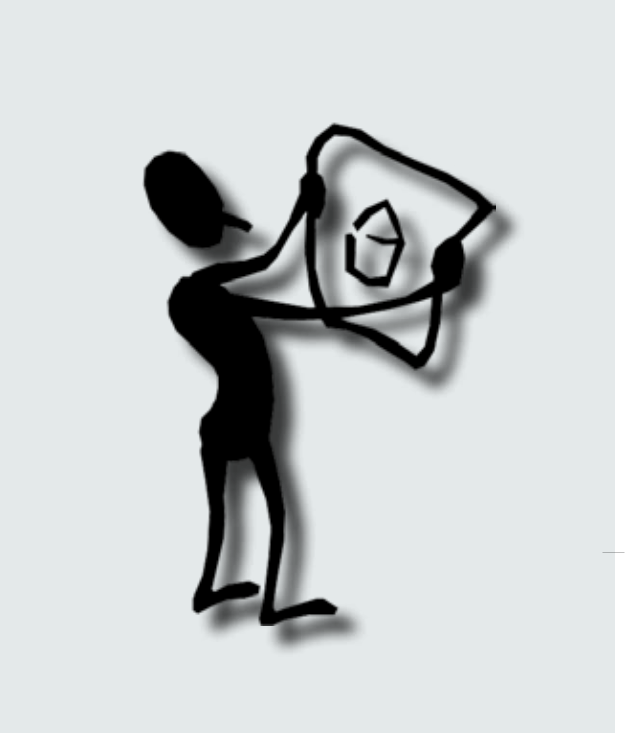
XENIA

Vivid History, Vibrant Future.



Overview

Xenia's leaders, as well as all involved in the X-Plan process, want more than just a set of policies. They want actionable steps to effect positive change in Xenia. This is the purpose of the Implementation element of X-Plan.

The Implementation Process chapter provides suggested procedures for incorporating X-Plan policies into City management and decision-making. The separate Action Plan chapter provides an annually updated three-year action plan for implementing X-Plan strategies.

Implementing Comprehensive Plans can be difficult and Xenia will likely find that X-Plan is no different. This chapter uses a blend of existing City management processes and new steps to integrate X-Plan into City management and decision-making.

In general, in order to be successful in moving X-Plan forward, City leaders must:

- Make a deliberate effort to implement X-Plan goals.
- Integrate X-Plan goals in annual budgets and department work programs.
- Clearly set project priorities, timelines and expectations each year.
- Receive comprehensive plan updates and communications on a regular basis and provide support and problem solving resources when needed.

X-Plan Adoption

- **Planning and Zoning Commission.** The Planning and Zoning Commission will play a critical role in implementing X-Plan policies through its decisions on development proposals and Zoning Code/Map revisions. Formal review and adoption by the Commission is therefore necessary before X-Plan implementation can move forward. The Planning and Zoning Commission voted to endorse approval of X-Plan to City Council on May 16, 2013.
- **City Council Adoption.** X-Plan must have the formal support of the City's elected leaders if implementation is to be successful. City Council establishes the policies that guide the efforts of City staff, boards and commissions. X-Plan is intended to help City Council by assembling many of these policies in one document that was developed with community input and support.

  City Council formally supported X-Plan by passing Resolution 13-P on June 13, 2013 (a copy of this resolution is provided between the inside cover and acknowledgements page of this document).

Action Plan

Although X-Plan contains many policies aimed at guiding decisions, many X-Plan strategies require proactive action by the City to implement. These items are referred to as "action items." Action items often reflect a task or in some cases multiple tasks that must be achieved to

implement an X-Plan objective.

The Action Plan tables, provided in the following chapter, provide a tool to help monitor X-Plan implementation progress. The tables outline X-Plan-related action items that the City should undertake within the next three years in order to implement the highest X-Plan priorities.

Action items included in the three-year Action Plans reflect the highest-priority recommendations as indicated by citizens during the X-Plan process. Prioritization was necessary since not all X-Plan recommendations can be accomplished within a three-year timeframe.

Each action item includes a description and how it relates to X-Plan objectives and strategies. Additionally, each action item indicates the type of action item, timeframe for completion, desired outcome, responsible entity and support entities.

The Action Plan is intended to be updated on an annual basis. This will allow the City to be flexible and respond to changing conditions, priorities, and funding situations; as well as note completion of Action items.

Even the initial three-year Action Plan may seem daunting. However, with strategic focus, persistence and creative use of available tools, the City can achieve a great deal of success. Being strategic also requires choosing the right mix of partners, phasing projects in an appropriate order, and assigning the right resources for each task.

If funding is extremely tight, it might be necessary to reduce the scope of some Action items in order to move X-Plan forward. Small wins are better than no action at all.

A significant amount of X-Plan action items require partner participation and alternative funding sources. The City cannot implement X-Plan alone.

X-Plan Updates

X-Plan is a living document designed with built-in flexibility to evolve with changing local circumstances and needs. This statement does not support blatant disregard for adopted public policy. Deviations from current X-Plan policy are supported when new findings are made that were not present during X-Plan's creation and adoption. Below are several procedures that will balance flexibility with adherence to X-Plan:

- **Annual Report.** The Planning and Zoning Department, in coordination with the City Manager's Office, will prepare an X-Plan Annual Report each year highlighting the status of X-Plan action items. This report will be presented to the Planning and Zoning Commission and City Council and will inform the annual Action Plan review process.
- **Annual Action Plan Review.** Prior to annual budget planning and departmental performance plans, City department heads should annually hold a retreat to review progress on completing Action Plan tasks, and develop recommendations to City Council for updating priorities, timeframes, outcomes and responsibilities. Included in this process should be an assessment of available grants and other non-City funding sources for action items. This process will conclude with a list of specific budget items and performance plan tasks.
- **Public Involvement.** Many residents expressed interest in their continued involvement after X-Plan's adoption. Involving citizens in the annual Action Plan review, prior to the City staff retreat, would be an excellent way of increasing transparency in City decisionmaking, and encourage a two-way communication process on priority-setting. Public meeting(s), surveys and/or social media could be utilized to maintain a dialogue with the public.
- **Land Use/Thoroughfare Plan Amendment Requests.** Although the X-Plan is highly comprehensive, it is possible that the City

may encounter unanticipated situations where a deviation from the X-Plan Land Use and Thoroughfare Plans may be necessary or beneficial. A procedure for X-Plan amendment requests would allow individual applicants or the City to initiate amendments to portions of the Land Use Plan or Thoroughfare Plan.

Such a procedure should require a presentation of findings to the Planning and Zoning Commission and City Council, demonstrating why it would be in the community's best long-term interests to revise the plan. Such a request should not be taken lightly and should be viewed in the context of X-Plan goals and objectives. Approval of such a revision request should occur prior to approval of legislation or other City Council decisions that would deviate from these plans.

- **Five-Year Update.** A minor update should occur no less than five years from X-Plan's adoption to reassess strategies against community socioeconomic and political changes, as well as progress in implementing X-Plan. Such an update should involve an inventory and analysis of community characteristics, opportunities and constraints that were not present at the time of X-Plan's adoption. The process should also be driven by public input, like the original X-Plan.
- **10-Year Update.** While the five-year update assumes that the goals and most objectives will remain intact, the 10-year update will be a comprehensive rewrite of the plan. It may chart an entirely new direction for the community, since conditions and public sentiment may change considerably over this period of time. It is also hoped that the majority of X-Plan strategies will be implemented in 10 years, and a new set of strategies will be needed.

Budget Planning Process

City expenditures and public improvement projects are planned annually through the City's capital and operating budget planning process. The process entails a subset of City Council known as the Finance Sub-Committee. Department heads annually review needs against available resources and submit recommendations for budget allocations.

This budget planning process is an excellent opportunity to incorporate X-Plan policies and action recommendations into City management. The following steps show how Xenia can integrate X-Plan into Xenia's annual budgeting decision-making:

- **Step 1 - Tax Budget preparation.** Starting every spring, the City's annual planning process for next year's budget begins with the Tax Budget (i.e. draft budget). The City Manager's Office (CMO) annually submits budget guidelines to department heads. The CMO then reviews department requests and submits the complete Tax Budget to the Council Finance Sub-Committee.

  The CMO can integrate X-Plan into this process by (1) including budget items from the annually reviewed Action Plan in the Tax Budget guidelines sent to department heads, and (2) presenting the updated Action Plan to the Council Finance Sub-Committee, and eventually the full City Council, during the Tax Budget deliberation process.

  As an option, the City may consider accepting volunteer citizens to serve as advisors to the subcommittee, as an extension of the public input that would have already occurred during the annual Action Plan review.
- **Step 2 - Tax Budget Adoption.** Once deliberation is complete, City Council holds a public hearing and makes a motion to approve the Tax Budget. The City could improve the transparency of this process

through enhanced publicity and outreach, and by demonstrating the linkage to citizen priorities via the X-Plan Action Plan budget items. Through this process, the general public would have an opportunity to comment and learn about how the City is responding to citizen needs.

- **Step 3 - Final budget preparation/adoption.** Preparation of the final budget begins in late summer and concludes with a public hearing and appropriation ordinance at the end of the year. The process is similar to the Tax Budget, although it focuses on refining the Tax Budget figures based upon improved revenue and cost projection data. As with the Tax Budget process, the City can improve the transparency and public support of this process through improved outreach and demonstrations of how the Final Budget furthers X-Plan strategies.

Department Performance Plans

Department Performance Plans are used by City management to manage workload and improve accountability. A Performance Plan is a strategic work plan that identifies a department's goals and work tasks for the upcoming year.

Like the budget planning process, the Departmental Performance Plans are an excellent opportunity to integrate X-Plan policies into City operations and management. The CMO can use the annually updated X-Plan Action Plan to identify which departments are responsible for individual X-Plan projects and initiatives, and then incorporate this information into annual Performance Plan guidelines sent to department heads. This process will give department heads clear direction on their X-Plan-related responsibilities each year.

Ongoing Communication/Monitoring

Based on the nature of City government, there will be numerous funding requests, legislative items and policy decisions that will not be directly related to X-Plan initiatives. In these cases, the City must take a reactive stance and view the funding request, legislation or policy through the lens of X-Plan goals and objectives.

- **Staff reports.** Staff can assist this process by indicating connections with X-Plan goals and objectives in staff reports to City Council. Planning and Zoning staff must also indicate this connection in staff reports sent to Planning and Zoning Commission, in response to development proposals and zoning map/text amendments.
- **X-Plan log.** Keeping a log of decisions and actions that reference X-Plan will help staff in preparing a more informative X-Plan annual report, and communicating to City leaders and the public how X-Plan is being used. The Planning and Zoning Department would maintain this log.