



CITY OF KIRKLAND
City Manager's Office
123 Fifth Avenue, Kirkland, WA 98033 425.587.3001
www.ci.kirkland.wa.us

MEMORANDUM

To: Dave Ramsay, City Manager

From: Marilynne Beard, Assistant City Manager

Date: August 18, 2006

Subject: ANNEXATION UPDATE

RECOMMENDATION:

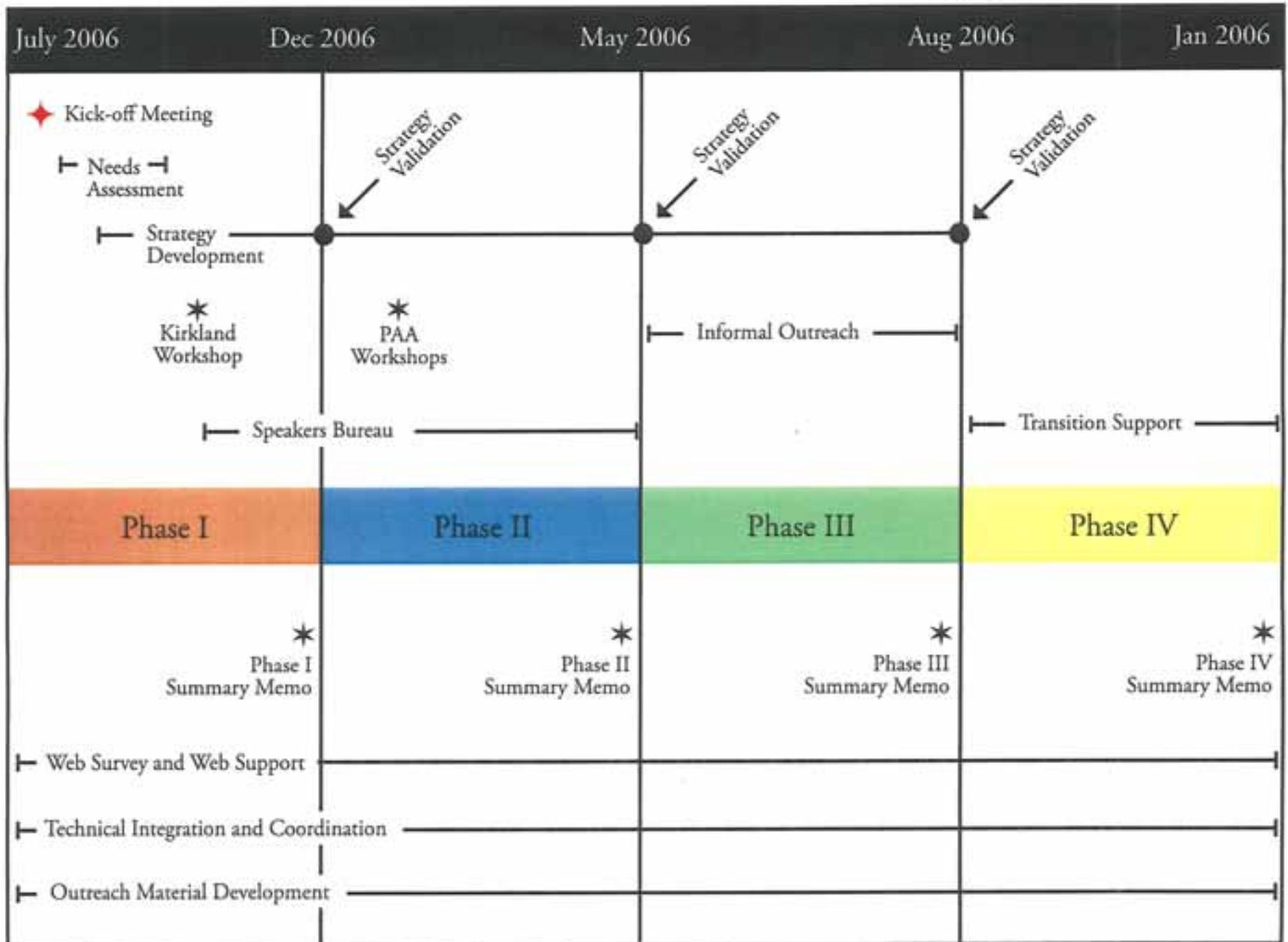
Council receive a report from Envirolssues, the City's communications consultants, regarding the proposed annexation communications strategy.

BACKGROUND DISCUSSION:

The City has engaged the services of Penny Mabie and Sarah Brandt of Envirolssues to develop a communications strategy concerning the potential annexation of Finn Hill, Juanita and Kingsgate. Council authorized staff to proceed with phase one of an overall communications strategy. Phase one focuses on communications and outreach to the existing Kirkland community. As a first step, the consultants are meeting with each City Council member to get input on the strategy. These meetings are currently taking place with the final meeting scheduled for September 1st. Given the timing of the meetings and the need to begin implementing a strategy, the consultant will provide a verbal report summarizing the Council's input and presenting a proposed communications strategy for phase one at the September 5th Council meeting. A written report will also be provided but could not be available for the regular Council packet.

Attached is an excerpt from Envirolssue's proposal that outlines their general approach to community outreach and Kirkland's potential annexation. The consultants are focusing on phase one only at this time. If the Council decides to proceed with further study and planning for the annexation, additional phases will be implemented.

Customized Outreach and Communications Strategy by Phase*



DEVELOPING A COMMUNITY OUTREACH AND COMMUNICATIONS STRATEGY

Phase I - Needs Assessment, Strategy Development, and Kirkland Outreach

During Phase I, EnviroIssues will conduct a comprehensive internal and external needs assessment to provide a baseline for developing defensible communication strategies to support the City's annexation decision-making process. After assessing the full range of factors that will influence project outcomes and identifying the appropriate tools and activities to include in a outreach and communication strategy, EnviroIssues will be ready to help implement Phase I activities in partnership with City staff.

We suggest basing the needs assessment and resulting outreach and communications strategy on several tasks, including a team kick-off meeting, stakeholder interviews, surveys (primarily web-based), a tools assessment, an implementation focus group, and informal outreach activities. Each is described in more detail to the right.

KICK-OFF MEETING WITH THE PROJECT MANAGER AND KEY STAFF

Objectives

- Confirm the project work plan, schedule, and list of deliverables.
- Present a draft needs assessment survey for City review
- Compile and prioritize a preliminary list of internal staff and external stakeholders,

Approach

First and foremost, the kick-off meeting will provide an opportunity for City and EnviroIssues staff to meet and discuss roles and responsibilities linked to the emerging scope, budget, and anticipated schedule. Once a clear path forward has been confirmed, the group can begin the substantive work of developing and implementing successful communication strategies.

Prior to the kick-off meeting, EnviroIssues will draft and email a needs assessment survey to the project manager to allow time for review and comment. The assessment will be an expanded checklist-style tool that will guide stakeholder interviews and help collect and consolidate relevant data to inform development of the outreach and communications strategy.

EnviroIssues will suggest a preliminary list of stakeholders, including City and King County government, local civic organizations, businesses, and private residents. With City staff input, EnviroIssues will confirm which key stakeholders



should be interviewed as part of the needs assessment. For example, we would expect to interview people from the Kirkland Planning Department, Kirkland Chamber of Commerce and/or Downtown Association, neighborhood association leaders, Fire District #41, utility providers, King County Parks and the Kirkland Parks Board.

As the project continues, EnviroIssues will develop a database to track potential stakeholders, key contact information, and other helpful information. EnviroIssues will continue to review and enhance the database during each phase and will include it as an appendix to the strategy.

Expected Outcomes

- Confirmed work plan and schedule
- Polished needs assessment template
- Prioritized stakeholder list

CONDUCT NEEDS ASSESSMENT

Objective

The needs assessment will serve as the basis for the community outreach and communications strategy, and incorporates stakeholder interviews and an assessment of tools, resources, and current activities upon which to base an overall annexation outreach and communications strategy:

Approach

The needs assessment include the following components:

- **TOOLS, RESOURCES, AND CURRENT OUTREACH WORK:**

EnviroIssues staff will meet with the City's project manager to identify existing community outreach resources and outreach efforts to date with the aim of defining a list of existing tools and current knowledge (to avoid duplicating efforts). Excellent points of departure include the City's existing annexation webpage, as well as the report titled



Public Opinion About Potential Annexation to Kirkland conducted by Elway Research, Inc., in February 2005.

Relevant key project example: Brightwater Conveyance Pre-Design Project



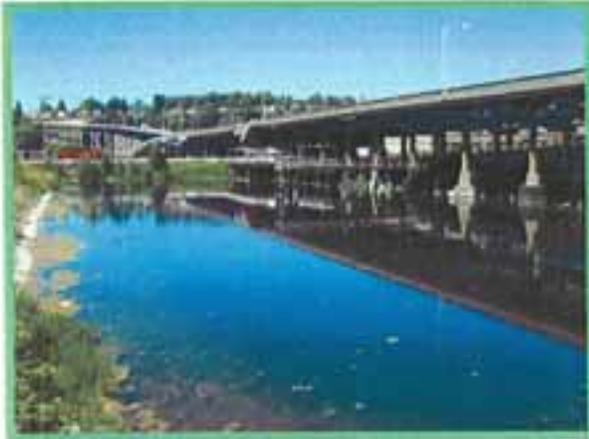
- **STAKEHOLDER INTERVIEWS:**

EnviroIssues will interview a subset of key internal and external stakeholders, identified through consultation with the City. EnviroIssues will base these interviews on the needs assessment template described above, and will conduct them in person or by telephone, depending on stakeholder location and availability. EnviroIssues will schedule, coordinate, and perform up to twelve interviews – including at least two representatives from each PAA – and will invite City staff as requested by the project manager. PAA representatives are included in this sampling to help inform the City's decision (i.e., if strong opposition in any of the PAAs were revealed through early research, Kirkland may be discouraged from pursuing Phase II). EnviroIssues will capture the key points from each interview using the survey template, and share survey results with the project team.

Relevant key project example: Magnolia Bridge Replacement Project

- **WEB-BASED SURVEY:**

EnviroIssues will create a web-based survey that is educational, user-friendly, and gauges community opinions and concerns about annexation. This quick and convenient method of collecting feedback about residents' perceptions, questions, preferred communication methods, and levels of knowledge will help the project team craft key messages and correct misinformation through outreach tools identified in the strategy. In addition, the web survey will be easy to modify throughout the process, if needed, with components tailored to each phase and neighborhood (Kirkland and the three PAA communities).



Web survey content will be designed in collaboration with City staff, finalized and posted to the City's existing annexation webpage, and advertised in tandem with other outreach efforts. For example, the survey web address can be printed on all outreach materials, disseminated on information cards at community locations and gatherings, and emphasized on the website.

Relevant key project example: Magnolia Bridge Replacement Project

- **INFORMAL OUTREACH:**

In combination with – and to confirm the results of – the web-based survey, EnviroIssues proposes to “go to where the people are” to receive input about shaping the annexation outreach and communications strategy. By tabling and handing out surveys or fliers at existing community events and gathering places, we will engage in person those who may not choose to go to the City's website, but who live, work, and play in the communities. For example, tabling at local malls (e.g., Totem Lake Mall, Inglewood Village, Kirkland Park Place, Carillon Point, etc.), libraries (Kirkland or Kingsgate Public Libraries) or handing out fliers at transit stations will allow us to invite hundreds of citizens to participate in ongoing discussions about annexation.

Informal outreach at local fairs and festivals such as Kirkland's Summer Festival, Farmers Market, and other community events and locations will accentuate outreach at any phase, and will likely be considered an important tool within the strategy.

Relevant key project example: Sound Transit Phase 2

- **IMPLEMENTATION FOCUS GROUP:**

Kirkland department staff, King County staff, and external service providers will also require ongoing updates about this process and their roles and responsibilities. Depending on the extent to which these stakeholders have been engaged in discussions



about annexation, we suggest convening a focus group to discuss these special communication needs. This forum will help the project team determine appropriate communication protocols and identify tools to convey important updates (e.g., email notifications, regular meetings, etc.).

- **NEEDS ASSESSMENT MEMO:**

Based on the results of the tools assessment, stakeholder interviews, and informal outreach, EnviroIssues will draft a memo summarizing the results and key findings of the needs assessment. EnviroIssues will submit this memo to the project manager for review and finalize it based on client input.

Relevant key project example: Brightwater Conveyance Pre-Design Project

Expected Outcomes

- A better understanding of key community issues and concerns based on 15 stakeholder interviews, web survey responses, and informal outreach efforts.
- A needs assessment memo identifying existing resources, gaps, and suggested tools and activities to include in a robust outreach and communications strategy.



DEVELOP COMMUNITY OUTREACH AND COMMUNICATIONS STRATEGY

Objective

EnviroIssues will compile the best methodologies, resources, tools, activities, and schedule for outreach and communications activities synchronized with the annexation decision-making process. The needs assessment will provide the raw material needed to develop credible, effective, and efficient strategies.

Approach

EnviroIssues will formalize the work done to this point in a draft public outreach and communications strategy. The strategy will include a stand-alone executive

summary to use when briefing the Kirkland City Council and other committees or groups interested in public outreach. The strategy will also provide a communications roadmap, as well as communications protocols, to ensure that the project team speaks with one voice and is responsive to community input, requests, and needs.



The strategy will include the following components:

1. Executive summary
2. Background
3. Objectives and outcomes
4. Key messages
5. Internal and external communication protocols
6. Technical coordination and integration
7. Public outreach strategies and schedules linked to key milestones
8. Event plans: workshops, briefings, hearings, etc.
9. Tools: materials, media, web and electronic tools, etc.

Recommended strategies, events, and tools will be included for each potential phase to provide a cohesive, forward-thinking plan, recognizing that later phases will be contingent upon the results of earlier steps. Therefore, Phase 1 communication approaches will be more fully detailed than later phases, which will be revisited and enhanced as the City initiates each subsequent phase. In this way, the strategy will be a living document, available for review and revision as new information emerges or circumstances change.

Expected Outcome

A communications roadmap for City and EnviroIssues staff to effectively educate and engage the community in exploring whether annexation is an appropriate option to pursue.

Relevant key project examples: Juanita Bay Pump Station Project, Alaskan Way Viaduct and Seawall Replacement Project



VALIDATE OUTREACH AND COMMUNICATIONS STRATEGY

Objective

Revisiting the strategy at the beginning of Phases II, III, and IV will confirm recommended approaches, tools, and activities and ensure that ongoing outreach efforts are on-target, effective, and efficient.

Approach

Although the initial strategy will address each of the four annexation phases described in the RFP, it will touch more lightly on the later three phases. The strategies, recommendations, and tools recommended for each later phase will in large part depend on the results of the preceding phase(s), requiring validation or shifts in direction and approach as needed to meet community needs revealed through ongoing outreach. At the conclusion of each phase, EnviroIssues will assess with City staff the effectiveness of all strategies, activities, and tools, identify course corrections, and revise the strategy to reflect these realignments.

Expected Outcome

A more efficient, cost effective strategy that evolves and responds to community needs and reflects lessons learned over the life of the project.

IMPLEMENT OUTREACH AND COMMUNICATIONS STRATEGY

For a long time, Kirkland has done an excellent job engaging its citizens and neighborhoods in key civic decisions. Good public process means a lot to Kirkland, and at EnviroIssues we consider ourselves to be unbiased guardians of the public process. When implementing any outreach and communications strategy, we recognize that our job is not to advocate for a particular outcome, but to share accurate and timely information with the public so that they may make informed decisions and participate fully in the process. The staff we propose are well versed in the technical and policy issues that your local jurisdiction faces. Our firm has built our reputation on providing facilitators and communication specialists who understand the importance of remaining neutral, and who are skilled at translating complex information into materials that help the public understand and engage in efforts that shape their communities.

If requested by the City, EnviroIssues will be prepared to efficiently implement the blend of tools and activities ultimately described in the outreach and communications strategy. In addition, if more formal polling of Kirkland and PAA residents were desired, we often partner with Evans/McDonough, a local firm, and can facilitate this partnership.

The general approach to each phase is briefly described below. As later phases are initiated, EnviroIssues will be prepared to support ongoing communications activities in alignment with the evolving strategy.

PHASE I

During Phase I, we will emphasize educating and gauging Kirkland residents' concerns and preferences about annexation (and to a lesser extent, the opinions of residents in the PAAs). Results of this outreach will inform the City Council's decision to pursue Phase II of annexation. We propose convening one community workshop for Kirkland residents, as well as providing a briefing to each of Kirkland's neighborhood associations (a "speakers bureau").

As with all stages, EnviroIssues will be prepared to provide updated content for the annexation website and to develop outreach materials that support selected activities. For each stage, we have also built into our budget a task called "technical coordination," which captures efforts to communicate with various service providers in the City, County, and PAA, and integrate relevant public information into the outreach process and materials. At the conclusion of this and every phase, we will provide a brief memo for the Kirkland City Council that describes outreach efforts to date, summarizes public input and key themes, and results to consider as the City moves forward.

PHASE II

During Phase II, attention and messaging will shift to focus on communicating with PAA communities. In addition to ongoing web support, materials development, and community group briefings, we propose focusing energy on three PAA workshops, one each in Juanita, Kingsgate, and Finn Hill. Our efforts will be designed to help the Kirkland City

Council solidify their decision about whether to pursue annexation based on how the idea is received by PAA residents.

PHASE III

During Phase III, we will apply our extensive experience in the political arena to the task of helping the City prepare for an election. Working in tandem with a campaign committee, we will use information collected in Phases I and II to hone key messages, tailor communications to the needs of voters, and engage in diverse activities – from face-to-face informal outreach to enhancing the project website. As neutral guardians of the process, we will not advocate for a position during the outreach (that will be left to people involved in the campaign), but will strive to share accurate information with as many residents as possible.

PHASE IV

Finally, if the PAA areas approve annexation and the City agrees to complete this process, we anticipate that residents' attention will turn to how their services and experiences will change (or not). Our outreach materials will therefore focus on making service transitions a transparent process, clearly identifying timelines, roles and responsibilities, and expected changes that will affect local residents and businesses. Additional tools may also be appropriate, such as establishing an annexation hotline to answer questions and provide updates.

While specific tools and activities in the outreach and communications strategy will be identified based upon findings during the needs assessment, useful tools that would likely contribute to effective outreach to City of Kirkland and PAA residents include:

- Convening and facilitating community workshops in Kirkland, Juanita, Kingsgate, and Finn Hill

- Providing content for Kirkland's annexation website and web survey
- Developing outreach materials
- Conducting informal outreach
- Supporting media relations

Each is described in more detail below. Please also see the additional project examples that testify to our experience and success implementing similar communications and outreach activities on countless other projects.

CONVENE COMMUNITY WORKSHOPS

Objective

To educate the Kirkland community about the annexation process and the related pros and cons of this option. Through facilitated breakout groups and other methods at the meeting, the project team will solicit feedback and reveal public concerns that will help inform the Kirkland City Council's decision making about this issue.

Approach

Engage a large group of Kirkland citizens and stakeholders to learn about the ramifications of annexation, and engage directly with the project team to provide feedback and raise questions and concerns. One option would be to convene a facilitated focus group prior to each workshop to ensure a diverse cross-section of community representatives and feedback, followed by an open public meeting. EnviroIssues has skilled staff available to:

- Draft and design informational displays focusing on why Kirkland is considering annexation, what the advantages and disadvantages of this choice would be, and how residents and businesses in Kirkland would be affected. Staff members will be available to discuss key issues related to annexation.
- Facilitate large and small group discussions with meeting attendees. A workshop format or facilitated breakout groups could be used to

engage community members in deeper dialogues about the implications of annexation.

- Develop tools to solicit community input. Feedback will be solicited verbally through discussions with City of Kirkland staff and other members of the project team, hard copy comment forms, and via laptops set up to allow meeting attendees to complete the web-based survey (described in more detail below).
- Synchronize meeting advertisements with other outreach activities, supported by newspaper display ads, postcards, fliers, posters, and other tools, as appropriate.

The City of Kirkland will provide refreshments, help define the focus of the meeting, help advertise the meetings, and provide direction on the feedback sought at the open house.

Expected Outcomes

- Approximately 300 participants total at area workshops
- Increased public understanding of how annexation affects communities

Relevant key project examples: City of Kirkland Lake and Central Site Project, Ada County Solid Waste Project, Sound Transit Phase 2

ESTABLISH SPEAKERS BUREAU

Objective

To provide annexation briefings to community groups during their regular meeting times.

Approach

Rather than asking community members to come to us, a speakers bureau allows us to meet with groups who are potentially interested in the annexation process during their customary meeting times. During Phase I, we suggest meeting with any active Kirkland neighborhood associations, and expanding our reach to other local government and civic groups (Chamber, Parent/Teacher Associations, etc.) in

Kirkland and the PAA during Phase II. EnviroIssues will contact targeted groups to offer briefings, maintain a schedule of engagements and project team presenters, and help prepare appropriate informational materials to share with each group requesting a briefing.

Expected Outcomes

- Increased understanding of the annexation process and ramifications among actively engaged community members.

Relevant key project example: Magnolia Bridge Replacement Project, Ada County Solid Waste Project

PROVIDE WEB CONTENT AND SUPPORT

Objective

To maintain up-to-date information and provide community members with opportunities to learn and provide feedback about the annexation process.

Approach

Please see the web-based survey description earlier in this proposal, a tool that could be modified throughout the life of the project to solicit public input. Questions could be changed with the initiation of each phase to test public knowledge, assess public concerns, and inform future outreach strategies and project decisions. The website should also serve as a repository or clearinghouse for all project information.

Expected Outcomes

- Easily accessible project information provided at a wide range of technical detail, available to any member of the public at their convenience.

Relevant key project example: Magnolia Bridge Replacement Project

DEVELOP OUTREACH MATERIALS

Objective

To provide consistent messaging and information in

a variety of outreach tools, including postcards, fliers, presentations, etc.

Approach

We will work with the City to develop diverse outreach materials specific to each phase describing the annexation process, opportunities and challenges, and avenues of communication between Kirkland residents and project staff. The materials we develop will depend on the tools identified in the needs assessment and subsequent outreach and communications strategy.

Expected Outcomes

- Equip the project team with the right outreach materials, in the appropriate format, for each outreach activity
- Provide the appropriate level of detail to meet the needs of targeted community sectors

Relevant key project examples: Juanita Bay Pump Station Project, Magnolia Bridge Replacement Project, Ada County Solid Waste Project

CONDUCT INFORMAL OUTREACH

Objective

To provide an avenue of direct public engagement with "everyday" residents who may not choose to attend a meeting or visit the project website.

Approach

Please see the description provided under "Developing an Outreach and Communications Strategy." Informal outreach has proven to be a very effective outreach tool, as project staff go to locations and events where residents are already gathering (rather than expecting people to attend a separate project event). Whether soliciting feedback on how to develop effective outreach strategies (as described earlier), or attempting to share information about an upcoming election, informal outreach can accentuate any communications plan.

Expected Outcomes

- Interact with many people who would not otherwise engage in activities implemented from the outreach and communications strategy
- Provide information to 30 people per hour of each outreach activity

Relevant key project example: Sound Transit Phase 2

SUPPORT MEDIA RELATIONS

Objective

To leverage existing avenues of communication, including newspapers, television, and radio, to share information about the annexation process.

Approach

EnviroIssues staff are prepared to help the City of Kirkland identify and leverage a variety of media outreach opportunities, and have experience with the following activities:

- Drafting and distributing press releases
- Drafting and placing display ads with local newspapers, including the King County Journal, the Kirkland Courier, and the Kirkland News
- Producing project information videos and coordinating their airing on local access television channels
- Coordinating and supporting media events, including press conferences, editorial board meetings, and reporter interviews

Expected Outcomes

- Garnering additional public attention and informing more residents about the annexation process

Relevant key project examples: City of Kirkland Lake and Central Site Project, EPA Brownfields Project, Ada County Solid Waste Project, Alaskan Way Viaduct and Seawall Replacement Project