



**CITY OF KIRKLAND**  
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## **MEMORANDUM**

**To:** Dave Ramsay, City Manager

**From:** Marilynne Beard, Assistant City Manager  
Tracey Dunlap, Director of Finance and Administration  
Marie Stake, Communications Program Manager

**Date:** July 14, 2008

**Subject:** UPDATE ON BUDGET COMMUNICATIONS PLAN

The purpose of this memo is to provide an update on 2009-2010 Budget process and the status of the associated communications plan.

### **Activities to Date**

The following is a recap of meeting highlights relative to the 2009-2010 Budget and the proposed communications plan.

**March 28/29 – City Council Retreat** – Finance presented a financial status including a projected deficit for the 2009-2010 on-going budget of roughly \$6 million. City Manager's Office staff presented general communications plan options, key messages and an overview of public involvement strategies. Council discussed proposed key messages and indicated a preference for a public involvement effort focusing first on "inform" (education public about City finances and current challenges) and "consult" (soliciting feedback from citizens about a proposed strategy). Council asked for a series of special study sessions to be scheduled during the spring to discuss the budget.

**May 7 – Special Study Session** – CMO staff presented refined key messages based on Council's feedback (summarized on page 3 of this memo) and a general proposed timeline of activities:

Excerpt from May 7<sup>th</sup> Memo – a copy of the May 7<sup>th</sup> public outreach memo is included as Attachment G:

*“A work plan is shown below that suggests a proposed sequence of activities. Major tasks and milestones include:*

<b>“Inform”</b>	May 7	Budget Study Session – Key Messages Identified
	May-June	Prepare City Update Special Edition and Web Page Initiate Stakeholder Contacts for Public Involvement Phase
	May 29	Second Budget Study Session
	June 5	Mid-Year Budget Meeting – General Policy Guidance Provided by Council Media Contacts (press release and/or guest editorial)
	Mid-June	Print and Mail City Update and Publish Web Page
	Early July	Communications Training
	July 15	Budget Balancing Strategies Finalized <b>(Note: this meeting was initially cancelled as it was deemed not necessary by the City Council when establishing the study session topic for the July 15<sup>th</sup> meeting).</b>
	Mid-July	Currently Kirkland Feature Story
<b>“Consult”</b>	July – Mid-Sep	Community Meetings
	Sep 16	Report Back to Council and Community on Input
	Sep - Oct	City Manager prepares Budget Recommendation
	Oct 21	Budget Transmitted to City Council Media Contacts (press release and/or guest editorial)
	Nov – Dec	Budget Study Sessions and Adoption
	Dec	Second Issue of City Update regarding Budget Outcomes (including how public input was used)“

Council approved the communications strategy and asked that focus groups be added to test key messages. Funding for communications activities based on unobligated annexation funding was endorsed by Council (including \$11,000 for focus groups). The Finance presentation focused on expenditure tools including a draft expenditure matrix. Council requested that an updated tax burden study be completed.

**May 29 – Special Study Session** – Finance presentation focused on reserves, revenue options and policy tools. Refined key messages and an updated expenditure matrices reflecting on-going and one-time services (see Attachments E and F) were included in packet, as well as an excerpt from past tax burden study. Council directed staff to include one-time funded service packages, NORCOM cost impacts, and fire overtime amounts to be added to the projected deficit amount. Council expressed general preferences for revenue tools to be employed along with the use of expenditure reductions and reserves. Staff was directed to return with a general strategy for preparation of the 2009-2010 Budget.

**June 5 – Special Study Session/Mid-Year Budget Review** – An overall budget balancing strategy was presented to City Council (see Attachment A) reflecting a revised budget shortfall of \$13.8 million, including on-going and one-time services. The strategy also included an estimate of sales tax risk if revenues decline from forecast assumptions (an additional \$3 million). Council requested issue papers on firefighter overtime, future jail costs and Council salaries. No further special study sessions were requested at that time.

**June 17 – Regular Council Meeting** – Council approved mid-year budget adjustment providing funding for budget communications activities.

### **Communications Plan – Current Status**

Following is a status report on each component of the communications strategy.

**Key Messages** – Key messages were not changed following the May 29<sup>th</sup> special study session, although a request was made at the June 5<sup>th</sup> meeting to assure that citizens knew that the budget issue was longer term and could not be “fixed” in one budget year. Key messages presented in the May 7<sup>th</sup> packet were as follows (updated for revised deficit):

#### ***Projected Budget Gap: Key Messages***

*Kirkland faces a serious budget shortfall.*

- *Based upon financial forecasts, Kirkland is facing a \$13.8 million projected gap between its expenses and revenues in 2009-2010.*

*Kirkland’s revenues have struggled to keep pace with expenses.*

- *Revenue has been negatively impacted by
  - *Voter approved tax limiting initiatives*
  - *Current economic conditions**
- *Expenses have been negatively impacted by
  - *Increasing employee wage and health care costs**

*Kirkland can no longer continue to provide the current level of services with existing revenue.*

- *The City must adopt a balanced budget*

*To balance the budget, Kirkland will need to reduce services and raise revenue.*

## **Focus Groups**

Staff requested proposals from three consultants for focus groups to be held in June. Timing was based on the anticipated availability of an overall strategy and draft written materials. The firm of Envirolssues was engaged to conduct the focus groups which were held on June 30<sup>th</sup> at GMA research in Bellevue. The groups were facilitated by Penny Mabie. A copy of the consultant's report is included as Attachment B.

The groups were provided a brief overview of the City budget (including the projected shortfall) and then asked to review and comment on a draft of a City Update article outlining the proposed budget strategy. Based on the focus group comments, materials were revised to reflect additional information and clarification. The consultant will be available at the July 15<sup>th</sup> study session to discuss the focus group report.

## **City Update**

One element of the communications strategy recommended to Council was a change in the format and distribution of City Update from the current one-page ad in the Kirkland Reporter to a quarterly publication mailed to all Kirkland addresses. The first issue of the new City Update would be devoted to the budget. Staff from the City Manager's Office, Finance and Multimedia services has been working on developing content and graphics for City Update. Draft articles were also reviewed by several communications consultants for feedback. The publication has an introductory message from the City Council, an overview of the City Budget, excerpts from the community survey about citizen priorities, an overview of the proposed budget balancing strategy, an article on property taxes and a page of "frequently asked questions." A copy of the draft publication is included as Attachment C.

(Note: At the communications training session held on July 10<sup>th</sup>, staff mentioned the amount of the average monthly impact of the proposed tax increases on homeowner in Kirkland. Attachment D provides background about how the calculation was made to derive an average monthly impact of \$9.65).

## **Currently Kirkland**

A feature story for the July episode of Currently Kirkland was filmed the week of June 16<sup>th</sup> including interviews with the Mayor, City Manager and Finance Director. The episode is tentatively scheduled to air following the July 15<sup>th</sup> Council meeting.

## **Communications Training**

Michael Buschmohle presented a training on effective communications techniques on July 10<sup>th</sup> to the Council and key staff that would be making budget presentations. Mr. Buschmohle was selected after interviews and proposals were held with two different consultants based on cost and availability.

## **Community Meetings**

Two dates will be selected for community meetings to be held at City Hall and the Peter Kirk Community Center during the month of September. Exact dates have not been selected yet. Staff is beginning to contact neighborhood associations to schedule presentations and identifying and contacting other

community groups and an announcement will be sent out on the neighborhood listserv. All handout materials and City Update will include a contact number for requesting a meeting. The exact format for each meeting will vary depending on the amount of time allotted by the group for this topic. Copies of City Update will be distributed.

### **Business Community Meetings**

Staff from the City Manager's Office (including Economic Development) and Finance met to discuss outreach to the business community. In particular, the proposed business license tax restructure would be discussed including input on rules and implementation. Ellen Miller-Wolfe will contact the City's largest employers to schedule individual meetings and work with the Chamber of Commerce and the Kirkland Downtown Association to capture additional businesses. A presentation on the City's budget challenge and strategy was provided at the Business Roundtable held on July 9<sup>th</sup>.

### **Web Page**

Staff is developing a web page devoted to the 2009-2010 budget including links to key pages for details ([www.ci.kirkland.wa.us/budget](http://www.ci.kirkland.wa.us/budget) – this site is not posted yet). An email address [09-10Budget@ci.kirkland.wa.us](mailto:09-10Budget@ci.kirkland.wa.us) was established as a central place to receive comments and questions from the public.

Council will receive updates as products become finalized and dates are set for community meeting

### **2009-2010 Budget Development – Current Status**

The draft results of the update to the Tax Burden Study will be presented to the City Council on August 5. The required Public Hearing on Proposed Revenue Sources is scheduled on September 16.

Departments are in the process of preparing their base budgets for 2009-2010, in addition to identifying expenditure reductions. Preliminary budgets with candidate service reductions are due in early August, followed by more detailed service level reductions/service packages in late August. The drafts will be reviewed by the City Manager in September and preliminary recommended service level reductions will be identified at that time. Staff anticipates another communications effort will begin based on those recommendations so that the public can be made aware of and comment on possible reductions contained in the City Manager's Preliminary Budget. The preliminary budget document will be presented to the City Council in mid-October with the following budget deliberations schedule:

- Council Budget Work Session #1 – Thursday, October 30 (3-9 pm),
- Council Budget Study Session #2 – Thursday, November 5 (6 pm),
- Council Budget Study Session #3 – Monday, November 10 (6 pm) – if needed,
- Public Hearing on Proposed Budget (w/Adoption of Prelim. Property Tax Levy) – November 18,
- Budget Adoption – December (date to be determined).

**2009-10 Budget Strategy**  
7-15-08

**ATTACHMENT A**

	2009	2010	2009-10
<b>Forecasted Ongoing Deficit (as of 6/5/08)<sup>1</sup></b>	(2,954)	(4,432)	(7,386)
<b>Basic Budget Items</b>			
Telecom Utility Tax Revenue	500	500	1,000
<b>Strategy</b>			
<b>Expenditure Reductions</b>			
0% Growth in Non-Labor Costs	250	250	500
Service Level/Expenditure Cuts	450	450	900
Fleet Replacement Charge Reduction	240	220	460
<b>Revenue Increases</b>			
Property Tax Banked Capacity	145	146	291
City Utility Tax Increase (3%)	690	700	1,390
Business Head Tax	700	700	1,400
Voted Private Utility Tax Inc. (1.5%) <sup>2</sup>	-	1,800	1,800
<b>Reserves</b>	-	-	-
<b>Ongoing (Deficit)/Surplus</b>	<b>21</b>	<b>334</b>	<b>355</b>
<b>One-time Funded Positions/Programs<sup>3</sup></b>	(3,415)	(3,009)	(6,424)
Reallocated from CIP	282	282	564
One-time Resources	350	350	700
Reserves	500	500	1,000
Service Level/Expenditure Cuts	2,283	1,877	4,160
<b>One-time (Deficit)/Surplus</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total (Deficit)/Surplus</b>	<b>21</b>	<b>334</b>	<b>355</b>

<b>Summary</b>	2009	2010	2009-10
<b>Total Deficit</b>	<b>(6,369)</b>	<b>(7,441)</b>	<b>(13,810)</b>
Telecom Utility Tax Revenue (Basic Budget)	500	500	1,000
<b>Revised Deficit</b>	<b>(5,869)</b>	<b>(6,941)</b>	<b>(12,810)</b>
Revenue Increases	1,535	3,346	4,881
Service Level/Expenditure Cuts	3,223	2,797	6,020
Policy Changes/Reserves/One-time Resources	1,132	1,132	2,264
<b>Net (Deficit)/Surplus</b>	<b>21</b>	<b>334</b>	<b>355</b>

<b>NOTES</b>	2009	2010	2009-10
<b>Sales Tax Risk</b>	(1,382)	(2,019)	(3,401)
Assumptions:			
6.8% decrease in 2008 over 2007 actuals (vs. 0%), 0% growth for 2009 (vs. 2%), and 2% growth for 2010 (vs. 6%)			

<sup>1</sup> Forecasted deficit includes estimate for ongoing NORCOM costs and additional ongoing funding for firefighter overtime.

<sup>2</sup> If the ballot measure failed, address the \$1.8 million shortfall half from reserves and half from additional service level/expenditure cuts.

<sup>3</sup> Includes NORCOM one-time costs.

**ATTACHMENT B**

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**CITY OF KIRKLAND  
BUDGET & FINANCE FOCUS GROUPS  
DRAFT REPORT**

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**June 2008**

Prepared by

  
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## Executive Summary

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The City of Kirkland conducted two focus groups of Kirkland citizens in June 2008 to assist the City in developing key messages and communication strategies about the City's budget shortfall. Twenty-one Kirkland citizens, reflecting Kirkland's age demographics, participated in the focus groups. Participants were provided with background information about Kirkland's budget and finance process, as well as reading a draft newsletter article about the budget shortfall and strategies to address that shortfall. The City will use data from the focus groups to improve future communications with City citizens about budget issues and options for addressing the budget shortfall.

Most focus group participants were unaware of the budget shortfall and were interested in the impact the shortfall could have on City services. Many participants wanted additional information about service reductions and how their community could be affected. Participants were also quick to note the likely cost increase to citizens of \$9.65 per month as presented in the draft newsletter article. The majority of participants considered this a manageable increase and some were surprised it was not larger. A few participants felt the City should not need to increase costs, and could instead reduce inefficiencies in spending. Participants said the tax increase and service reductions were the most important information about the budget and suggested the City communicate with citizens about these issues. They suggested the City advertise opportunities for the public to learn more and provide their input to the City. They also suggested the City clearly communicate how proposed changes will affect Kirkland citizens.

As the City develops key messages and communications strategies, the results of the focus groups support engaging the public in budget issues, and providing examples that illustrate the impact of budget decisions on the lives and finances of citizens. A list of key findings and recommendations from the focus groups begins on page 10 of this report.

# Introduction

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## **Background**

The City of Kirkland is developing key messages they will use to communicate with citizens about City finances. The City budget supports essential and highly-valued programs and services and the current economic downturn and limited methods of raising revenue have caused a budget gap that the City Council must address. The City wants citizens to understand the City's budget options and goals and wants citizens' ideas and priorities incorporated into the budget and revenue decisions. Focus groups with Kirkland citizens were designed to help the City clarify its key messages and gain insight into how citizens understand and view City finances.

The City conducted two focus groups with Kirkland citizens June 30, 2009. EnviroIssues moderated two 90-minute sessions at 6:00 p.m. and 8:00 p.m. The sessions were held at the following location:

GMA Research Corporation  
325 118th Ave SE, Suite #104  
Bellevue, WA 98005

This report summarizes the results of both focus groups and combines the responses of both groups for the purpose of capturing key comments and issues.

## **Objectives**

The purpose of the focus groups was to help the City identify which key messages resonate and appeal to the general public and which do not, as well as to identify public understanding about ideas and priorities for City finances. The data derived from the focus groups will allow the City to communicate clearly with their citizens about budget and revenue decisions and reflect how they are consistent with the general citizen's attitudes and values.

Focus groups are valuable because, unlike a survey or other individually-oriented method, a focus group allows participants to play off each other's ideas. This approach often generates additional ideas and conclusions that would not be generated by individuals.

The specific goals of this focus group research were to:

1. Determine awareness about Kirkland's budget shortfall
2. Understand how well citizens understand Kirkland's budget and budgeting process, including how property and other taxes are allocated
3. Determine how well citizens understand the potential approach to solving Kirkland's budget shortfall
4. Test key messages to be used to communicate with citizens about Kirkland's budget problems and proposed strategy to address the problems

## Who participated?

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### ***Participant Demographics***

Focus group participants were recruited randomly from citizens of the City of Kirkland. Participants were selected to match the demographics of the City of Kirkland in terms of age and gender. Participants were also selected to include as many homeowners in the City of Kirkland as possible.

Most of the participants were homeowners in the City of Kirkland, while 2 participants were renters in the City. A total of 21 people participated in the two focus groups—10 men and 11 women. Their ages ranged from 20 years old to more than 65 years old, with a mix approximating the demographics of the City.

### ***Selection Criteria***

All participants met the following selection criteria:

- Resident of the City of Kirkland
- Not employed by the City of Kirkland
- Does not have a relative employed by the City of Kirkland
- Has not participated in a focus group in the last year

## What did we ask?

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### ***Background***

Participants were given minimal information about the topic of the focus group before arriving at their session. At the beginning of each session, the moderator introduced herself and shared the purpose of the focus groups with participants. They were informed that the City of Kirkland was sponsoring the focus groups and that the purpose was to learn more about how Kirkland citizens understand the City's budget and how to communicate more effectively with citizens about budget and finance issues. After introducing the topic and explaining the logistics of the focus group, including that the sessions were being recorded and could be viewed by City staff, the moderator began guiding the group through discussion questions.

### ***Questions and Discussion Tools***

The moderator guided the group through the following discussion format, beginning with a general question to be answered by each participant. The moderator recorded participant responses on flip charts throughout the discussion, a recorder was present in the observation room taking notes, and the focus groups were recorded on DVDs. (For complete flip chart notes, see Appendix D). The first question was as follows:

1. How knowledgeable do you feel about the City of Kirkland's budget?

After this opening question, the moderator read aloud an overview of Kirkland's budget and how it works. She then asked if participants had any questions about the information. (For the

complete background piece, see Appendix A). Participants were then asked to respond to the following questions.

2. How closely do you pay attention to Kirkland's budgeting process? How do you get your information if you do pay close attention?
3. Do you understand your part in the budget? Where your taxes go? What is included in Kirkland's revenue and expenses?

Next, participants read a draft City of Kirkland newsletter article about current budget issues and were asked to respond to the following questions. (For the complete draft newsletter article, see Appendix B).

4. Were you aware of the budget shortfall facing Kirkland? If so, how did you hear about it?
5. What is your reaction to this?
6. What are the top three things you noticed in the story?
7. What questions does it bring to mind for you?
8. What other information would you need to know?

Finally, the participants' copies of the draft article were collected and the moderator asked a few final questions.

9. What advice do you have for the City Council as they consider how to talk about this issue with the community?
10. As you leave this focus group and talk about these issues with your family, friends and neighbors, what are the key things you will tell them?

The moderator concluded by explaining that a summary of both focus groups will be provided to the City, to assist their current budget process for the next biennium. There will soon be a dedicated City of Kirkland web page about the budget, and an informational video will be out on "Currently Kirkland" in mid-July. A *City Update* newsletter will be mailed to the entire city sometime in July.

Finally, the moderator asked any participants associated with a neighborhood group or other organization that may want a presentation on the budget to contact City staff to schedule a speaker. City staff also came into the focus group room to thank the participants for their time and ideas.

## What did they say?

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### ***Background Knowledge***

Most participants said they knew little or nothing about the City's budget process and planning at the start of the focus group. A few participants had some information and one participant had been in a budget workshop through the City. After hearing the background statement about the City's budget, participants did not need additional clarification about the statement, and most participated significantly in the discussions.

## **General Perspectives**

Below is an overview of responses from the two focus group sessions. Please note that the statements added below are not verbatim, but are paraphrased to help present a general idea of the input from the participants. The bullets below highlight common themes that emerged as the groups discussed budget and finance issues and how the City could communicate with citizens about these topics.

- **Most participants did not know much about the City of Kirkland’s budget before attending the focus group.** Many participants said they knew “nothing” about the City’s budget and a few said they knew “a little” about these issues. Only one participant said they knew more about the budget, due to participating in a workshop about budget issues.

*I’m not as knowledgeable as I should be.*

*I know they have a budget problem.*

- **Several participants learned about the budget from the *Kirkland Reporter*.** Of the participants that knew some information about the City’s budget, most said they learned about these issues from the *Kirkland Reporter*. Other sources of information included the local Kirkland television station, emails from the City, and neighborhood associations.

*I read the Courier [now the Kirkland Reporter] and I know the City may need to make budget cuts.*

*I get emails from the City.*

- **Participants generally knew their taxes fund the City budget.** Most participants understood that their taxes contributed to the City budget. They had questions about how revenue was collected and spent.

*Sales tax and property tax are used and I’d like to know more about how they spend it.*

*The descriptions are too broad – what are “capital improvements?”*

- **Some participants asked for easily located information about how the City allocates the available funding.** Several participants asked for clarification about how funding decisions are made, how much funding goes to different services, and other budget details. Other participants expressed their trust in the City to make budgeting decisions and did not need additional information.

*I want more information, but I don’t want to read all the contracts.*

*The descriptions are vague because it would be too much information – I’m sure they’re doing fine.*

- **Before reading the draft newsletter article, several participants were already aware of the budget shortfall facing the City.** In the first group, three of the eleven participants said they already knew about the budget issues. In the second group, five of the ten participants said they already knew. Most of these participants had learned about the budget shortfall from articles in the *Kirkland Reporter*.
- **Participants’ reactions to the newsletter article included surprise, concern, and questions about the seriousness of the budget gap and possible service reductions.** Most participants understood the budget gap and the possible approaches of reducing costs and increasing revenue. Many participants had questions about the specific approaches, such as which services would be reduced or how tax increases would be implemented. Some participants were skeptical about the need for service reductions or tax increases.

*They would reduce expenses by reducing services – what exactly will that mean?*

*How does the banked property tax work?*

*Can we combine services with other cities to reduce our costs?*

- **When asked for their top three notable items in the newsletter article, most participants noted the following key points:**
  - 1) **The \$9.65 per month increase is “not that bad”**
  - 2) **The City will be cutting back on staff and services**
  - 3) **\$13 million is a large budget gap**

Participants had a variety of “top three” items, and these also included concerns about how the City will find revenue sources, suggestions to encourage business development, questions about how the figures and facts in the article were calculated, and suggestions for services that should be cut from the budget. (For a list of key phrases in the newsletter article as identified by the participants, see Appendix C).

*I’d be willing to pay a little more for our services.*

*I’m alarmed at the traditional approach to cut services.*

*What’s on the docket for raising revenue and attracting businesses?*

*What about the City’s responsibility to cover the lean years?*

- **Several participants had questions about which services will be cut, whether there will be a vote about the utility tax, and how this shortfall fits with past and future budget decisions.** There were also questions about what will happen to the budget in the future, and whether new developments in Kirkland are increasing revenue.

*What are the specific service cuts? Will there be cuts of basic services?*

*Does the part about utilities mean they'd increase it with a City vote?*

*Is this just a stop gap? How will we resolve this in the future?*

- **Participants advised the City to inform the public about these issues by meeting people where it's convenient for them and advertising opportunities for public input.** Many participants suggested ideas for capturing public interest in budget issues, including advertising public meetings, providing information on the local cable channel, and meeting the public at neighborhood associations or other events.

*Have meetings at different neighborhood associations.*

*Go where people live rather than making people go to you.*

*Say "this decision will cost you \$X" as a way of catching people's attention.*

- **Participants advised the City to provide clear, understandable information and engage the public in back-and-forth conversations.** Participants suggested asking the public for substantive input, communicating clearly and avoiding acronyms and technical terminology.

*Get rid of acronyms and confusing terms – use clear language.*

*Have two-way conversations, not just one-way public comments.*

- **Participants advised the City to provide additional budget details, particularly about service reductions.** Participants in both groups were concerned about possible service cuts and had questions about which services would be reduced and how significantly. They suggested that more information about these details would be helpful to the public.

*Be specific about what will be cut and by how much.*

*Include more specifics about how services will be reduced (i.e. we will cut X number of policemen).*

- **Participants in the first group said they would tell others about the budget shortfall, service reductions, and possible vote on the utility tax.** This group said they would emphasize the significance of the budget gap and their concerns about service reductions.

*I would tell people about the budget shortfall.*

*Taxes will be going up and services will be going down.*

*I'd tell them to expect a vote on utility taxes and that services will probably suffer.*

- **Participants in the second group said they would tell others the increase in cost to each homeowner is “only \$10 each month” and alert others to service reductions.** This group said they would emphasize the minimal impact of the cost increase and prepare their friends and neighbors for future reductions in City services.

*They’re looking at an increase of \$10 each month and service cuts.*

*We may have service reductions and pay a little more.*

*I’ll tell them about the service cuts and personnel reductions.*

## **Key Findings & Recommendations**

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Results from the Kirkland focus groups will help the City refine key messages and communication strategies as the budget process moves forward. Participants’ responses and suggestions will help guide the City’s communications approach and the content of future City materials, to ensure they answer the public’s questions and concerns as thoroughly as possible.

### **Key Findings**

The following key findings summarize the main ideas heard from focus group participants:

- A few participants were previously aware of budget and finance issues, while most participants said they do not regularly pay attention to these issues.
- Of the participants that did know about budget issues, most had learned about the budget from the *Kirkland Reporter*.
- Most participants were concerned about the service reductions as described by the draft newsletter article. Participants also requested further details about the types of service reductions the City is considering.
- Many participants said the \$9.65 increase in monthly costs was “not that bad” and participants saw this number as key information for themselves and their fellow citizens.
- Most participants considered the \$13 million budget shortfall a serious issue and thought other citizens should know about it. A few participants thought the shortfall could be resolved by the City using revenue more efficiently or cutting unnecessary services.
- Participants suggested the City communicate clearly with the public about the budget issues, call attention to the issue so citizens can provide their input, and provide opportunities for citizens to meet with City staff.

### **Recommendations**

Future communication with Kirkland citizens about the budget shortfall will need to address citizens’ concerns about service reductions, future revenue sources, and cost increases. The following strategies are recommended:

- Continue communicating budget information in terms of impact on the average homeowner, including cost increases and service reductions. Participants engaged more effectively with budget information when it was expressed in terms of the impact on them.
- Aim for clear and non-technical communications about budget issues, avoiding acronyms and terminology that might be confusing to a public audience.

- Explore opportunities for public education and input at convenient locations for the public, such as neighborhood associations and other public events.
- When possible, provide opportunities for Kirkland citizens to give the City substantive input on their budget priorities, before budget decisions or plans are completed.

# Appendix A – Background Information

## City of Kirkland’s Budget Process

The City of Kirkland uses to a two-year budget called a biennial budget. It is developed through a 6-month process before the start of each biennium and adopted by the City Council as an ordinance.

### Kirkland’s Biennial Budget 2008 (shown to participants on flip chart)

June	July	August	September	October	November	December
*Council mid-year budget review	*Dept. Directors develop budget request  *F & A prepares revenue estimates	F & A reviews dept. budget requests	*Dept.’s submit “service package” requests  *City manager reviews budgets  *Public hearing on revenue sources	*F & A prepares prelim. budget document for next biennium	*Council work sessions on budget  *Public hearing on prelim. budget	*Council adopts final property tax levy for coming year and final budget for biennium
2009 – 2010 Budget						

## Revenues and Expenses – The City’s Budget

Like a household budget, the City’s budget has income and expenses. Here is how the parts of the City’s budget compare to your household budget:

- You have living expenses – the City has an operating budget. This pays for things like utilities, gas for your car, supplies for your household, etc. The City’s operating budget pays for police, fire, emergency medical, parks, road maintenance services and other services. Sixty percent of the tax-supported budget goes to public safety (police, fire, emergency medical, and courts)
- You have debt and so does the city. This would be for things like your mortgage or the City’s buildings and major improvements.
- You try to save for a rainy day and unexpected emergencies – so does the city. The City calls this “reserves.”
- And you spend money on home improvements and the City invests in repairs and improvements to its infrastructure, called capital projects.

Your primary source of income is probably family wages. The City receives income (revenue) from a variety of sources including property, sales and utility taxes.

Sales tax is the City's primary source of funding for general City services. It is the single largest revenue source in the General Fund. In addition, sales tax is a funding source for transportation-related capital projects, technology capital projects and neighborhood capital improvement projects.

The general sales tax rate within the City of Kirkland is 9 percent. Of the 9 percent, less than one percent is returned to the City of Kirkland (0.15 percent goes to King County), and the remainder is distributed to the State and other public agencies.

Although property taxes represent a major source of funding for City services, the portion of each property owner's total tax bill allocated to the City is relatively small. In 2008, the total property tax rate in Kirkland was \$8.34 per \$1,000 of assessed valuation, of which the City received \$1.26.

## Appendix B – Draft Newsletter Article

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### *Bridging the Budget Gap: A Blueprint for Sound City Finances*

(DRAFT)

Just as a bridge needs to be designed to be structurally sound, so do the City's finances. In very basic terms, bridge design involves professional engineers who must first know the distance to be spanned and the type of material the bridge must have in order to withstand all forces of nature. The construction plan, or blueprint, for a bridge must detail how the structure will survive those forces without buckling or snapping.

There are several forces that are causing strain on the City's current and future financial condition. The general state of the economy, higher prices for basic goods (such as fuel) and services and slower growth in jobs and income are pressures being felt by the City; just as they are being felt by you. For the City, there is less revenue available to sustain current levels of services for Kirkland citizens and operational costs of the City are rising.

There is a \$13 million projected "gap" between City expenses and revenue for the upcoming two years. This amount is more than 12% of the total General Fund budget. The General Fund supports functions such as police, fire, emergency medical (about 60% of the General Fund), transportation and park services. About 70% of General Fund expenses pay for wages and benefits of City employees who provide these services. Employee costs are on the rise despite changes to less expensive benefit plans for most employees.

At the same time that costs are rising, the City's most important source of revenue – sales tax is declining. Generally, personal spending is down which means lower sales tax revenue for all public agencies. For Kirkland, several additional factors are expected to negatively impact sales tax revenue. The completion of the Evergreen Healthcare and Medical Center expansion and the I-405 expansion projects and an overall slowdown in new construction in the City, has resulted in less construction-related sales tax revenue in 2008. Halfway through the year, sales tax revenue is already down 12% from the same period in 2007 – a little over \$1 million from last year. Looking ahead, the City expects less sales tax to be generated from the Kirkland Costco due to the opening of new stores in the surrounding area. Another loss expected will be from the relocation of the sales operation of a major auto dealership. These events will mean a loss of about \$1.6 million over the next two years. Property tax – the City's next largest source of revenue – is limited to a 1% increase per year which is far less than the rate of inflation.

With these forces at work, the City Council is developing a blueprint to bridge the budget gap that will result in a balanced 2009-2010 Budget.

### **A Blueprint to Bridging the Gap**

Cities have a limited number of tools they can use to balance the budget: reduce costs, raise revenue and use reserves. The City Council recognizes that no one tool alone will close the \$13 million gap and they are considering several strategies that take a balanced approach.

Almost half of the budget gap will be closed by reducing expenses which will result in noticeable changes in services to Kirkland citizens. A recent citizen opinion survey reflected an “above average” level of customer satisfaction with city services. The survey also asked about which services citizens care most about. The priorities identified by citizens in the survey include police, fire/emergency medical and garbage collection and will be an important consideration when the City Council determines which services can be reduced.

Making use of reserves (“savings accounts”) that were set aside as a “rainy day fund” and using savings from unfilled positions will be the second approach to closing the gap. In addition to \$1 million from the Rainy Day Fund, there is an anticipated \$700,000 in year-end savings from position vacancies. Also, some revenue now dedicated to the Capital Improvement Program will be reallocated to the General Fund for the 2009-2010 Budget.

The third part of the budget balancing strategy will involve increasing revenue. The City Council plans to use a balance of residential and business taxes that will generate additional revenue:

- *Banked Property Tax* – A small amount of unused property tax (about \$145,000 per year or \$291,000 for the two years) is remaining from years when the City Council could have increased taxes but chose not to. The estimated impact to a home with a value of \$500,000 is about 50¢ per month.
- *Tax Increase on City Utilities*– A three percent increase in utility taxes on water, sewer and garbage services is proposed that will raise about \$1.4 million over the two-year period. The increase will cost the average homeowner about \$3.25 per month.

### **Budget Blueprint: Bridging the Gap**

1. Service Level Reductions and Expenditure Cuts (\$6 million)
  - *Almost half of the gap will be closed by reducing expenses.*
  - *Levels of service will be reduced.*
2. Reserves and One-time Resources (\$2.3 million)
  - *Rainy Day Fund reserves and salary/wage savings will be used.*
3. Revenue Increases (\$4.8 million)
  - *Unused banked property tax is available from previous years when the City Council chose not to raise taxes.*
  - *A 3% increase to residential and commercial utility tax (water, sewer & garbage service) is being proposed/will be implemented.*
  - *The current business tax program will be restructured to reflect the number of workers in a business.*
  - *A 1.5% increase in the utility tax on private utilities will be presented to voters within the next year.*

- *Business Tax Restructure* – A restructuring of the City's business tax from the current license fee and surcharge to a “head tax” based on number of workers (“FTE's”) is expected to generate an additional \$1.4 million for the two years. The City will be working with representatives from the local business community to develop the revised tax structure.
- *Private Utility Tax Increase* – A 1.5% tax increase on private utilities (electric, gas, telephone and cable service) will be presented to Kirkland voters in 2009. The current tax rate for private utilities is set at 6% – the maximum rate allowed under state law without a vote of the people. If approved by voters, the increase will provide an additional \$1.8 million per year. The average cost per household is estimated at \$5.90 per month. If the measure is not passed by voters, further service cuts will be necessary.

When added together, the total estimated monthly cost for the average homeowner would be \$9.65.

The term “force,” as it relates to bridge design, is defined as “any action that tends to maintain or alter the position of a structure.” Economic forces have eroded the structure of the City's budget and it is out of balance. Bridging the gap in the City budget requires a well-engineered blueprint – one that helps restore the structural integrity of the City's finances for the long term.

(END)

## Appendix C – Key Phrases in Draft Newsletter Article

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Participants were provided with highlighting markers and encouraged to mark important points in the draft newsletter article. Most participants did mark their copies of the newsletter article, and the following is a list of commonly marked phrases, including how many of the 21 participants marked each phrase. In addition to these phrases, the majority of participants marked the italicized phrases at the beginning of the bulleted text, such as “banked property tax.”

### Text Commonly Highlighted by Participants

<i>Section of text that was frequently marked by participants</i>	<i>Number of participants who marked this phrase</i>
“\$13 million projected ‘gap’”	13 of 21 participants
“Cost for the average homeowner would be \$9.65”	12 of 21 participants
“Sales tax is declining”	9 of 21 participants
“Less revenue available to sustain current levels of service”	7 of 21 participants
“Priorities identified by citizens included police, fire/emergency medical and garbage collection”	6 of 21 participants

## Appendix D – Flip Chart Notes

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### What is your reaction to this [draft newsletter article about the budget]?

#### Group 1

- If it's only \$9.65, I'd be willing to pay that.
- Think that's an optimistic estimate.
- Fairly predictable how much of our utilities we use - estimate should be close.
- The proposed increase seems low.
- Suggest higher property tax & lower utility tax so it doesn't impact renters.
- What was fiduciary responsibly of the city to put more away during the good years?
- I'm not sure it's realistic for the City to put away enough money in the good years to support the bad years.
- Business tax restructuring. What about the major new complex (Google): what "deal" did they get?
- Seems like a lot of attention and an overstatement to say that Costco will lower revenue that much.

#### Group 2

- Alarmed at "traditional approach" to cut benefits to employees and cut services. Be more creative.
- Glad there is a 1% cap on property tax increases – they should look at other things such as pushing city parks to the county or instituting user fees.
- If they cut benefits for some employees, be transparent and include information about the Mayor's benefits, etc.
- Would reducing expenses result in noticeable reductions in services? What are the specific service cuts?
- It's a three-step proposal and the biggest part is service cuts but it doesn't say what they are.
- \$9.65 increase is not going to "break the bank."
- Any time we're dealing with the budget it's possible to reduce costs and increase income. What is the City's plan to increase income? To entice other businesses to come to Kirkland? The Totem Lake Mall is underutilized.
- Would like to know how many people shop in Kirkland. It's important to shop here to support our local businesses and increase our sales tax. Would be good to educate people about how that makes a difference.
- Contract out services – is it possible to do a group contract with other cities to gain economies of scale?
- Idea of discontinuing 4th of July or other things like that is backwards thinking – don't cut things if they bring in revenue.
- City is overstaffed. If there's no more building going on, they should adjust the rules to allow more density to bring in more residents.
- Have pride in Kirkland because it's well run.
- I don't see this as a crisis, more of a belt-tightening. This plan looks like it's on the right track.
- Sounds like this article says garbage services will be cut.

### What are the top three things you noticed in the story?

### *Group 1*

- Times are tough
- City expenses are higher
- Your crisis isn't my problem (i.e. highway costs)
- City services are being cut
- How long did it take to come up with these figures? Did they spend more time on that than trying to solve the problem?
- Major automobile dealers are relocating
- Private utility tax increase
- Staff cuts – what are they?
- What are the noticeable changes we'll see?
- What happens when the Rainy Day fund is gone?
- Look at efficiencies before cutting.
- There has to be waste that can be eliminated.
- It didn't mention permit costs

### *Group 2*

- It's not that bad – not a crisis.
- Less than \$10 a month
- There's a \$13 million dollar gap (*3 participants*)
- Level of services will be reduced
- Estimated monthly cost will be \$9.65 (*2 participants*)
- Defeatist attitude about businesses in the area
- I like the "Budget Blueprint" box in the article
- Looks like my water bill is going to go up
- None of this is the slightest interest to me – I'm upper income
- Kirkland is as it was when I was a kid – I love it. We want to keep it the same and not have massive changes.
- \$13 million is a lot to me. Not just that it's going to cost homeowners \$9.65 – but I'm concerned with reduced services.
- Article doesn't give any perspective as to the relationship to prior years and prior budget problems.

## **What questions does it bring to mind for you?**

### *Group 1*

- How are other cities dealing with this?
- Are we going to see cuts of basic services?
- What's unused banked property tax?
- How will we resolve the declining sales tax in the future, over the long-term?
- Is this solution the result of public input?
- How are they going to deliver this information and ensure we're going to read it?
- What's the communication plan?
- Why does it have to be a biennium budget?

### *Group 2*

- What are the details of service cuts?
- What are the costs for businesses?

- Perspective in history -- how serious this is?
- What are some services that aren't as valuable?
- What makes you think other car dealers won't move out as well?
- Business tax restructure – is that going to make businesses not want to be in Kirkland?
- Is any of this going to be tied into the Park Place proposal? Would Park Place keep the shortfall from happening again down the road?
- So much building is going on – isn't that bringing in revenue?
- Has Kirkland looked at these developments – why isn't Kirkland making developers do road improvements associated with the growth?

**What other information would you need to know?**

*Group 1*

- Website you can drill down through – direct line to dig as deep as you want to go. Be transparent. Dedicate a portal that has all the info readily available.
- Use common language.
- Headline the main message – there's going to be a vote on utility tax.
- More specifics on services that will suffer.
- Are we going to let anybody go, or not make any new hires?
- Get info to neighborhood associations to disseminate it further.
- Talk about successes they have had – here is what we've done so far with your dollars.
- Compare to other cities' gaps, problems, & proposed solutions.
- Are there ways for neighbors or residents to volunteer labor to fill gaps?
- What could Kirkland do to get in more retail (i.e. malls)
- Kirkland is not merchant-friendly. How can we improve continuity of businesses?
- How is the City encouraging or not encouraging commercial development?

*Group 2*

- What's being done to “romance” other businesses to town?
- Why can't businesses contribute more to “charm” of Kirkland?
- How much Section 8 housing is there in Kirkland? No revenue from that type of residential housing.

**What advice do you have for the City Council as they consider how to talk about this issue with the community?**

*Group 1*

- Publicize the public meetings better
- Come to the neighborhood association meetings and do town halls.
- Be more open (i.e. will they be at the 4th of July celebration?) and come to us where we are.
- Use plain English when speaking to us.
- Have two-way conversations with members of public.
- Consider demographics, especially impacts on elderly.
- Encourage shopping in Kirkland.

*Group 2*

- Provide more details.
- Focus on suppliers more than end users.

- Tell us how many heads will roll. City staff cuts are needed.
- What revenue generating ideas are they considering?
- Do they anticipate this happening again?
- Talk about the long-term plan as well as the biennium.
- Talk about past management of the budget.
- Put the information in the utility bill, not a flyer.
- Use other mediums (i.e. TV, internet, local channels). Advertise on big channels where to get City news.
- Catch people's attention – let them know you're making a decision that will cost them \$X.

# KIRKLAND CITY UPDATE

**Special  
Budget  
Edition**

The Official Newsletter of the City of Kirkland, Washington | Summer '08

## In This Issue:

A Message from the  
Kirkland Council

City Services: A Good  
Value for Your  
Tax Dollar

Bridging the Budget Gap

City Budget is Like Your  
Budget: A Balancing Act

City Property Tax Rate:  
Pain at the Pump,  
Fuel for Thought

Budget Questions &  
Answers



Printed on Recycled Paper

[www.ci.kirkland.wa.us/budget](http://www.ci.kirkland.wa.us/budget)



## A Message from the Kirkland City Council

What do you value most about living in Kirkland? A recent opinion survey revealed that our citizens value three things most about Kirkland: its location, physical setting and quality of life. Your City Council recognizes and appreciates these same values, especially our quality of life. These values influence the decisions we make on behalf of the City. Today, the biggest decision we face is how to create a balanced budget for 2009-2010 that maintains the quality of life we all value.

One of the most important and challenging responsibilities of the City Council is to balance the City budget. Every year, the cost of maintaining services increases but our revenues do not grow at the same rate. When an economic downturn hits, as it has this year, we are faced with a grim financial forecast. Kirkland is no different than many other cities and businesses in Washington that are struggling to keep pace with inflation and the cost of employee wages and benefits. Unlike a business, the choices we have to keep the City's finances in good order are more limited. The City Council must balance the budget and is faced with having to reduce services, raise revenue and use reserves to close the gap between expenses and revenue.

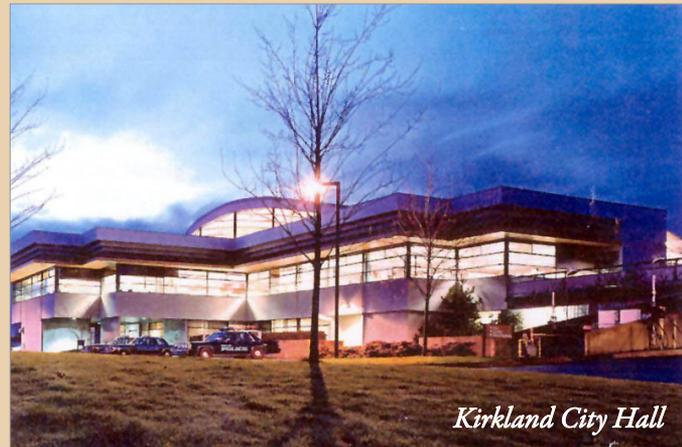
The City's two most important revenue sources – property tax and sales tax – are not growing at the same pace as our costs. Voter-approved property tax initiatives limit the growth in existing property tax revenues to one percent per year. With inflation growing at three to five percent per year, property tax revenue just can't keep pace. Sales tax is the City's

largest source of revenue. When the economy is good, sales tax revenue grows. When the economy stalls, sales tax revenue declines. Development of our local retail areas, such as the Totem Lake Mall redevelopment – taking longer than expected.

We believe that the Kirkland community receives quality services at a reasonable cost. We further believe that the services we provide make Kirkland a unique, special place to live, work and visit. We take our financial responsibility seriously and we expect to make very difficult budget decisions in the coming months that will most likely affect all Kirkland residents and businesses.

We believe that our budget can be balanced if we work together to align revenues with expenses. This is our challenge. It will require thoughtful discussion and carefully-weighted decisions. We hope that you stay engaged in our discussions as we work toward a budget solution.

*--The Kirkland City Council*



*Kirkland City Hall*

## City Services: A Good Value for Your Tax Dollar



If you were asked to name five services provided by the City of Kirkland, you'd probably quickly list police, fire/emergency medical, and garbage collection.\* If you were further asked to name the services most important to you and your household, your answer might be the same. If it is the same, your opinion reflects those of more than 420 Kirkland residents who participated in the City's opinion survey conducted in February, 2008.

The opinion survey asked participants to rate the importance of certain services and then to rate the City's performance of those services. Fire, police and garbage collection\* were rated as the "most important" services and received the highest performance ratings. Participants identified traffic flow, downtown parking and zoning/land use as areas for the City to improve.

As you may know, the City provides many more services than the 18 identified in the survey. Generally speaking, services and programs fall into six categories:

- **Public safety** (police, fire, medical emergency response, disaster preparedness, Municipal Court)
- **Infrastructure** (streets, sidewalks, traffic control, transportation planning)
- **Utilities** (water, sewer, storm water management, garbage and recycling)
- **Community development** (development regulations, land use planning, building permitting, code enforcement, economic development)
- **Culture and recreation** (parks, arts, recreation classes and events)
- **Human services** (social service agency support, youth and senior services)

Utility services such as garbage collection are run like a business and are fully self-supported through utility rates. The remaining services are paid

for through taxes and fees. In particular, public safety and street maintenance services are almost completely tax supported. As the "Fuel for Thought" (page 6) property tax article reflects, what you pay to the City in property, sales and utility taxes funds most of the services listed above. That means that an average household pays about **\$156 per month** in exchange for police and fire protection, clean and safe streets, parks and City planning among other services.

The City Council allocates funding, including staff resources, for services identified by citizens as their priorities. The highest number of employees is dedicated public safety, infrastructure maintenance and development services.



The opinion survey also asked residents to rate the City's effectiveness (the ability to accomplish its goals), efficiency (providing valuable services at a reasonable cost), and accountability (taking responsibility for its actions). 69 percent of survey respondents think that their tax dollars are well-spent in Kirkland and 77 percent said that the City was effective in achieving its goals.

The City conducts an opinion survey every two years and the results are shared with the City Council so that it can prepare a work program and allocate resources to the most important services. To view the full results of the 2008 Citizen Survey, go to [www.ci.kirkland.wa.us](http://www.ci.kirkland.wa.us) and search "citizen survey."

### Key Findings, Citizen Opinion Survey

#### February 2008

- Kirkland is a great place to live.
- Residents value Kirkland's location, quality of life, size and physical setting.
- Residents feel safe.
- The City is focused on the "right things."
- Kirkland government is generally viewed as effective, efficient and accountable.
- The City does a good job keeping citizens informed.
- Fire, police and garbage collection are rated as the "most important" services and received highest performance ratings.
- The City needs to focus on managing traffic flow, downtown parking and zoning/land use.
- The majority of participants favor "the same level" of business activity.
- Participants expressed some interest in attracting new businesses, such as department and furniture/appliance stores and more family-oriented, small businesses.



# City's Budget is Like Your Budget: A Balancing Act

Just as you earn income, so does the City. Just as you spend your money for essential items and services, so does the City. We both have to live within our means and it's a constant balancing act. Let's take a look at how the City's budget is like your budget.

- You probably have a budget for living expenses that is similar to the City's operating budget (utilities, gas for your car, and supplies for your household).
- You also probably have debt such as a mortgage; the City has debt for its buildings and major improvements.
- You save some of your money for future or unexpected expenses. The City has reserves for similar reasons.
- You invest in home improvements just as the City invests in repairs and improvements to its roads, parks and utility systems.
- You manage your family's budget within your means; so does the City. And in today's slow economy, it's more challenging to keep our books in balance.

Although there are some similarities between the City's budget and your family budget, there are some distinct differences.

The City's budget document is over 375 pages and is comprised of 30 separate funds (like individual checking accounts). Our largest account is called the General Fund

## Budget Basics

2007-2008 Budget<sup>1</sup> by the numbers

- City total budget = \$318,347,331
- Operating budget = \$152,530,657
- Non-operating budget<sup>2</sup> = \$74,025,298
- Utilities budget = \$91,791,376

Budget Tidbits

- The City's budget is adopted for a two-year period (biennial budget).
- State law requires adoption of a balanced budget (expenses equal revenue).
- The budget is comprised of 30 separate funds that are independently balanced.

To view the 2007-2008 Biennial Budget, go to [www.ci.kirkland.wa.us](http://www.ci.kirkland.wa.us)

<sup>1</sup>As originally adopted

<sup>2</sup>Includes Capital Improvement Projects

which provides funding for basic services such as police, fire protection, emergency medical services and infrastructure (streets and parks) maintenance.

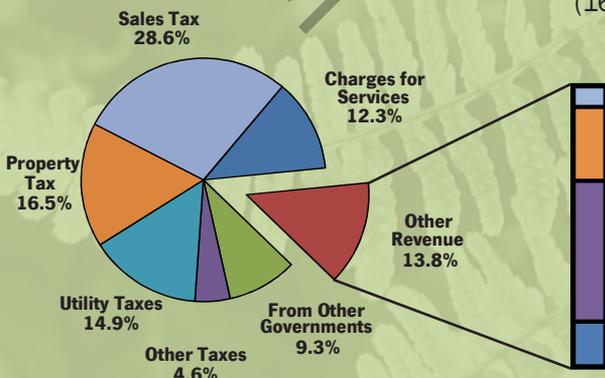
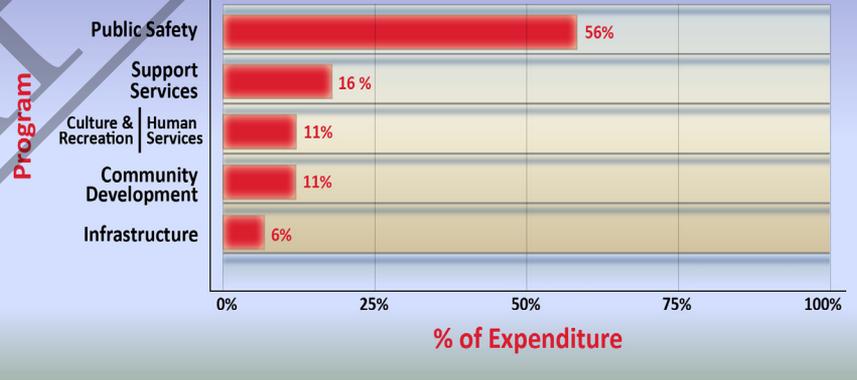
The primary source of income or "revenue" for your household most likely is your family's wages. As the pie graphic depicts (below left), the City receives revenue

from a variety of sources. However, the General Fund is mostly funded by taxes;

ment operating expenses with the majority of the expenditures dedicated to public safety - police, fire, emergency medical and municipal court services (see graph below right). Other General Government services - infrastructure maintenance, community development, culture and recreation and human services - account for the next greatest expenditure. All of these services are provided by City employees which is why the City's largest expense - nearly 70% - is devoted to wages and benefits.

The budget sets spending limits for the programs and services that reflect the priorities of Kirkland citizens and serves as a work plan and a financial plan. (See page 2, "Good Value for Your Tax Dollar"). The City Council has begun its deliberations on the 2009-2010 Biennial Budget. These deliberations include reviewing current and forecasted financial trends and prioritizing what services the City can afford to

## General Fund Expenditures by Program



such as sales tax (28.5%), property tax (16.5%), and utility taxes (14.9%). Fees pay for some services like building permits and are updated on a regular basis to keep pace with the City's costs.

The General Fund accounts for over 70% of the City's general govern-

provide, at what level, and at what cost to Kirkland citizens.

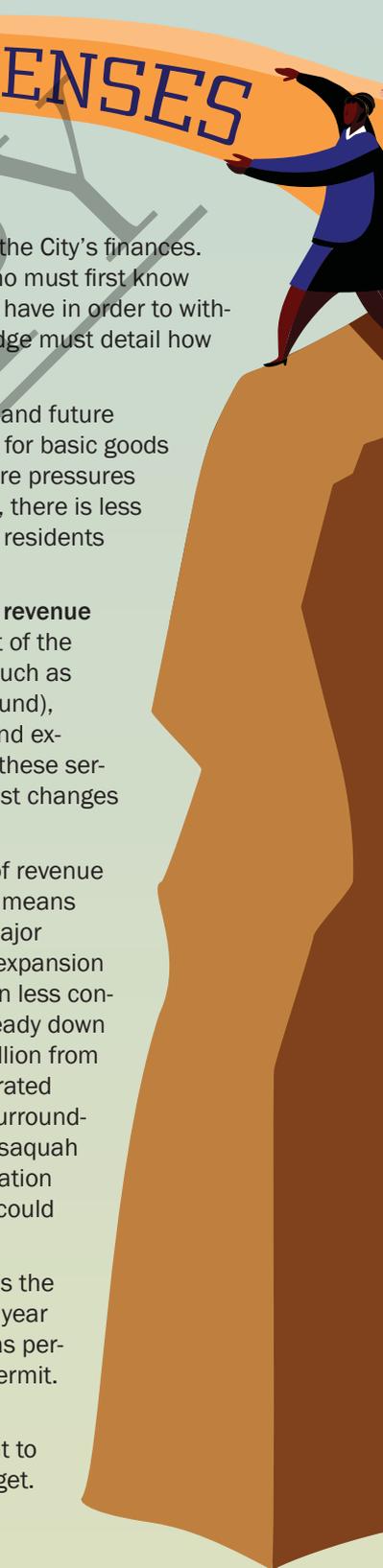
Just as you plan for your family's financial future, such as retirement and college, so does the City. Naturally it is easier to plan for what is known will happen and it becomes difficult when faced with unexpected circumstances. After careful consideration of the City's financial outlook, the City Council is pursuing a plan to address the budget shortfall.



## Bridging the Budget Gap: A Blueprint for Sound City Finances



REVENUES



EXPENSES



Just as a bridge needs to be designed to be structurally sound, so do the City's finances. In very basic terms, bridge design involves professional engineers who must first know the distance to be spanned and the type of material the bridge must have in order to withstand all forces of nature. The construction plan, or blueprint, for a bridge must detail how the structure will survive those forces without buckling or snapping.

There are several forces that are causing strain on the City's current and future financial condition. The general state of the economy, higher prices for basic goods (such as fuel) and services and slower growth in jobs and income are pressures being felt by the City; just as they are being felt by you. For the City, there is less revenue available to sustain current levels of services for Kirkland residents and operational costs of the City continue to rise.

**There is a \$13 million projected "gap" between City expenses and revenue for the upcoming two years.** This amount is more than 12 percent of the total General Fund budget. The General Fund supports functions such as police, fire, emergency medical (about 60 percent of the General Fund), transportation and park services. About 70 percent of General Fund expenses pay for wages and benefits of City employees who provide these services. Employee wage and benefit costs are on the rise, despite past changes to less expensive health care plans for most employees.

At the same time costs are rising, the City's most important source of revenue – sales tax, is declining. Generally, personal spending is down which means lower sales tax revenue for all public agencies. The completion of major construction projects in the City (Evergreen Medical Center and I-405 expansion projects) and an overall slowdown in new construction, have resulted in less construction-related sales tax revenue in 2008. Sales tax revenue is already down about 12 percent from the same period in 2007 – a little over \$1 million from last year. Looking ahead, the City expects less sales tax to be generated from the Kirkland Costco due to the opening of new stores in the surrounding area. A similar impact was felt by the City in 1995 when the Issaquah Costco store opened. Another expected loss will be from the relocation of the sales operation of a major auto dealership. These events could mean a loss of up to \$1.6 million over the next two years.

In addition to sales tax supporting the general fund, property tax is the next largest source of revenue and is limited to a 1% increase per year which is far less than the rate of inflation. Fees for services, such as permit fees, are updated regularly to reflect the cost of processing a permit. But fees only comprise about six percent of General Fund revenue.

With these forces at work, the City Council has developed a blueprint to bridge the budget gap that will result in a balanced 2009-2010 Budget.



Total estimated monthly increase: \$9.65 per month in 2009

## A Blueprint to Bridging the Gap

Cities have a limited number of tools they can use to balance the budget: reduce costs, raise revenue and use reserves. The City Council recognizes that no one tool alone will close the gap and is using combination of strategies that take a balanced approach.

The first strategy will be to reduce expenses which will result in noticeable changes in services to Kirkland residents. Specific reductions have not been identified yet, but will account for almost half of the amount needed to close the budget gap. The General Fund priorities identified by citizens in a recent opinion survey (police, fire/emergency medical services) will be an important consideration when the City Council determines which services can be reduced.

A second approach will be to use reserves ("savings accounts") that were set aside in a "Rainy Day Fund" for situations just like this and savings from currently vacant positions. In addition to \$1 million from the Rainy Day Fund, there is an anticipated \$700,000 in year-end savings from position vacancies. Also, some revenue and expenditures now dedicated to the Capital Improvement Program will be reallocated to the General Fund for the 2009-2010 Budget.

The third part of the budget balancing strategy will involve increasing revenue. The City Council plans to use a balance of residential and business taxes to generate additional revenue:

- **Banked Property Tax** – A small amount of unused property tax (about \$145,000 per year) is remaining from years when the City Council could have increased taxes but chose not to. The estimated impact to a home with a value of \$500,000 is about 50¢ per month.
- **Tax Increase on City Utilities** – A three percent increase in utility taxes on water, sewer and garbage services is proposed that will raise about \$1.4 million over the two-year period. The increase will cost the average homeowner about \$3.25 per month.
- **Business Tax Restructure** – A restructuring of the City's business tax from the current license fee and surcharge to a "head tax" based on number of workers (\$90 per full time equivalent) is expected to generate an additional \$1.4 million for the two years. The City will be working with representatives from the local business community to develop the revised tax structure.
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**If all of these approaches are approved and implemented, the total estimated cost for the average homeowner would be about \$9.65 per month.**

## Budget Blueprint:

### Bridging the Gap

- 1. Service Level Reductions and Expenditure Cuts (\$6.0 million)**
  - Almost half of the gap will be closed by reducing expenses.
  - Levels of service will be reduced.
- 2. Reserves and One-time Resources (\$2.3 million)**
  - Rainy Day Fund reserves and salary/wages savings will be used.
- 3. Revenue Increases (\$4.9 million)**
  - Unused banked property tax is available from previous years when the City Council chose not to raise taxes.
  - A 3% increase to residential and commercial utility tax (water, sewer & garbage service) is being proposed.
  - The current business tax program is proposed to be restructured to reflect the number of workers in a business.
  - A 1.5% increase in the utility tax on private utilities will be presented to voters in 2009.

The proposed strategy not only bridges the gap for the 2009-2010 budget but also creates a more solid foundation for the future. By diversifying our revenue base and reducing our dependence on sales tax, the City's financial future is stronger. The City's economic development efforts will continue to focus on business retention and recruitment that ultimately bring jobs and tax revenue.

Bridge design defines "force" as "any action that tends to maintain or alter the position of a structure." Economic forces have eroded the structure of the City's budget and it is out of balance. Bridging this gap in the City budget requires a well-engineered blueprint – one that helps restore the structural integrity of the City's finances for weathering the current economic downturn as well as the long term.

## City Property Taxes: Fuel for Thought

Talking about property taxes may not get your attention as much as discussing the rising cost of fuel. But what if the conversation could be about both? Here's some fuel for thought when it comes to understanding just how much the City receives from your property taxes.



Without overwhelming you with percentages and algebraic calculations, presume for purposes of this article that all the mathematics described are examples only and assume averages.

To start the conversation, we must begin with some basic vocabulary. The "levy" is the total amount of property tax revenue the City will collect in a year. The "value" is the assessed valuation (AV) of your property as determined by the King County Assessor. The "rate" is determined by taking the total levy and dividing it by the total property value in the City. The rate is then applied to every \$1,000 of your property's value which then determines the amount of taxes you will pay.

The math looks like this:

$$\frac{\text{LEVY}}{\text{TOTAL VALUE OF ALL PROPERTY IN KIRKLAND}} = \text{TAX RATE APPLIED TO EACH \$1,000 OF ASSESSED VALUE}$$

Let's look at that in 2008 real numbers:

$$\text{Step 1: } \frac{\$14,415,258 \text{ (LEVY)}}{\$11,407,260,325 \text{ (TOTAL AV)}/1,000} = \$1.26 \text{ (RATE)}$$

According to the King County Assessor's Office, the 2007 average assessed value of a home in the City of Kirkland is \$494,000. Let's assume an average assessed value of a \$500,000 home in Kirkland for this example:

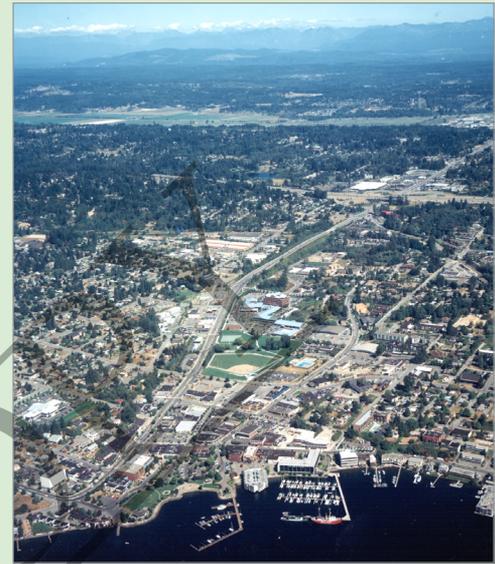
$$\text{Step 2: } \$1.26 \text{ (RATE)} \times \$500,000/\$1,000 = \$630$$

So the City's regular levy rate for 2008 is \$1.26 per \$1,000 of AV which means you pay approximately \$52.50 a month in property taxes to the City of Kirkland – which is about the amount you pay to fill up your car's gas tank.

Property tax is the second largest source of revenue (16.5%) for general fund services such as police, fire, emergency medical, and parks and street maintenance (See page 2 for "Value for Your Tax Dollar"). For purposes of this analogy, let's assume that you fill up your gas tank about once a week – about five tanks per month. So, property taxes represent about one out of five "fill ups" to support the current level of City services. The other four have to be paid from other revenue sources, such as sales tax which is the largest contributor to the City's general operating budget. With today's economic downturn, the City is receiving less sales tax revenue. Combine this reduction with the increased cost of doing business and



statutory limits on property taxes (the City can only increase its existing property tax levy by 1 percent each year), and the City is feeling the "pain at the pump."



## A Bit about Assessed Value and Property Taxes

- Your property's Assessed Value (AV) is determined by the King County Assessor's Office.
- Assessed value is based on the assessors appraisal of your real and personal property at 100 percent of its true and fair market value.
- There are eight (8) taxing districts on your property tax bill.
- Kirkland represents about **16%** of your total property tax bill.
- In 2008, the total property tax rate for the City is \$8.34 per \$1,000 AV, of which the City received \$1.26.
- Voter-approved property tax limitations restrict annual increases to existing property tax revenues to one percent.

For more information about assessed value, visit King County's Department of Assessment website at <http://www.metrokc.gov/Assessor/PropertyTaxes.htm>.

## Budget Questions & Answers

### **What service reductions have been identified? When will they become effective?**

City departments are preparing their budgets now. At this time, specific service reductions have not occurred or been identified. The City Manager will prepare a budget that has all of the recommended reductions (the "Preliminary Budget") which will be considered by the City Council in early fall. As these deliberations progress during the fall, updates on proposed reductions will be posted on the City's web page ([www.ci.kirkland.wa.us/budget](http://www.ci.kirkland.wa.us/budget)).

### **Is it possible to reduce expenses without reducing service levels?**

The City of Kirkland is a service-based organization. We continually improve internal delivery systems that result in more value for your tax dollar. We are active in many regional partnerships that offer cost sharing opportunities for participants and greater efficiencies. We also have an active "continuous improvement" program where departments identify better, more efficient ways of providing services during the year. While it is our intent to try to maintain service levels whenever we can, we expect that the amount of reductions needed to balance the budget (\$6 million) will result in noticeable service changes to the public.

### **Could the City have prevented this shortfall?**

For many years, the City has struggled to balance expenses and revenue. In part, this occurred due to voter initiatives that have eliminated or limited certain revenues that could not have been foreseen. This upcoming biennium is being negatively impacted by forces greater than those that have occurred in past years, many of which are beyond our control, including the economic downturn and business decisions by major retailers that are expected to negatively impact the City's baseline revenues. When balancing the budget in the

past, the City has implemented some of the same strategies it is proposing to use to balance the 2009-2010 Budget including making expenditure reductions and increasing revenue. These are "structural adjustments" that create a new base from which to plan future budgets. In addition to these structural changes, the City has also carefully maintained its reserves to help bridge the gap until a more permanent solution can be put in place and economic conditions improve.

### **What is the City doing to increase sales tax revenue?**

One of the purposes of our Economic Development Program is to attract and retain the kinds of businesses that help provide a strong financial foundation. One element of economic development relates to retail businesses and making sure we have the goods and services for not only our own community, but to attract those outside our community to shop in Kirkland. By "importing" sales tax from outside the City, the tax burden on Kirkland taxpayers can be lessened. Over-reliance on sales tax can be risky since it is subject to serious fluctuations in an economic downturn or the loss of a major retailer. This is why increasing sales tax revenue can be only one of the solutions to the City's budget challenges. You can help increase sales tax revenue by shopping at retail stores within City limits.

### **How does new development help or hurt the anticipated shortfall?**

Given the voter initiatives that have passed in recent years, the City has become increasingly dependent on revenues from new development to keep pace with cost growth. New development generates one-time sales tax revenue from goods and services during construction. In the year after final completion of a project, the increased assessed value from the new construction begins to generate additional property tax revenues. If the new development is retail-oriented, it will also (hopefully) generate additional on-going

sales tax revenues. It is important to keep in mind that there may be additional costs of providing services to new development that may need to be paid for from these additional revenues.

### **What will I be asked to vote on next year?**

As part of the multi-pronged approach to raising revenue, a ballot measure will be presented to Kirkland voters in 2009 for a 1.5 percent increase to private utility taxes on electric, gas, telephone and cable services. It is estimated that this increase would cost an average household \$5.90 per month. The election date has not been set. A voted private utility tax increase requires a simple majority vote (50% + 1).

### **What if the ballot measure to increase private utility taxes fails?**

If the ballot measure fails, further expenditure reductions will need to be made.



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## 2009-2010 Budget Adoption Timeline

Agenda and packet materials are available at [www.ci.kirkland.wa.us/budget](http://www.ci.kirkland.wa.us/budget)

### Public Hearing on Proposed Revenue Sources

**September 16, 2008**

### City Manager's Proposed Budget

**October 21**

### City Council Study Sessions

**November 5 & 10**

### Public Hearing on Proposed Budget & Preliminary 2009 Property Tax Levy

**September 16, 2008**

City Council meetings can be viewed live on KGOV Channel 21 and on the City's website on the first and third Tuesday of each month at 6 p.m.

Rebroadcasts are also available.

Go to [www.ci.kirkland.wa.us](http://www.ci.kirkland.wa.us) for programming schedules.

### **Kirkland City Hall**

123 5th Avenue, Kirkland, WA 98033

City offices are open Monday-Friday, 8 a.m. to 5 p.m. (excluding holidays)

- Please keep this special budget edition of City Update. You are encouraged to stay informed and get involved.
- Address the City Council at its regular meetings which are held the first and third Tuesday of each month at 7:30 p.m., City Hall, Council Chambers
- Send your email comments and concerns to [09-10budget@ci.kirkland.wa.us](mailto:09-10budget@ci.kirkland.wa.us)
- Visit the 2009-2010 Biennium Budget webpage at [www.ci.kirkland.wa.us/budget](http://www.ci.kirkland.wa.us/budget)
- Host an informational presentation by City officials. To schedule a meeting, please call the City Manager's Office at 425-587-3016.
- Subscribe to the City Council Agenda and Neighborhood email subscription services to receive information about upcoming public meetings and events.
- Stay tuned to our government access channels – Channel 21 (KGOV) and Channel 75 (KLIFE) – for budget updates, including public meetings and hearings.

**City Manager's Office**

**425-587-3001**

**Finance & Administration Department**

**425-587-3100**

## ATTACHMENT D

Calculation of impact of tax increases on average home:

### Property Tax

Banked Capacity Levy Amount	\$ 145,000
City Assessed Value	\$11,407,260,325
Rate per Thousand	0.012711203

Average Home Assessed Value	\$500,000	Average home value in Kirkland	\$492,000
Annual taxes	\$ 6.36		
Monthly impact	\$ 0.53		

### City Utility Tax

Average Monthly Bill (water/sewer/garbage)	\$108.00	Source: COK Utility Billing
New tax @ 3% (monthly impact)	\$ 3.24	

### Private Utility Tax

Cable	\$672.00	Basic at \$56 per month
Telephone	1,332.00	Assumes land line and 2 cell phones @ \$111 per month
Gas/Electric	<u>2,700.00</u>	Assumes \$225 per month average
	\$4,704.00	
Tax at 1.5%	\$70.56	
Monthly tax impact	\$ 5.88	

<b>Total monthly impact</b>	<b>\$ 9.65</b>
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**DRAFT**

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: Nondepartmental**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Employee Flex pass	21,630	x			
100% Revenue-Supported Services		Expenditures			FTE's	Notes
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>21,630</b>			-	

# DRAFT

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: City Council**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Community Survey	25,000	x			
	Focus Groups	10,000	x			
Discretionary Services			Revenue Offset?		FTE's	Notes
			None	Partial		
100% Revenue-Supported Services		Expenditures			FTE's	Notes
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>35,000</b>			<b>-</b>	

# DRAFT

**CITY OF KIRKLAND SERVICES MATRIX**  
**DEPARTMENT: City Managers Office**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Kirkland Downtown Association OT	42,000	x			
	Legislative Advocate - State	30,000	x			
	Legislative Advocate - Federal	20,000	x			
	Public Art	50,000	x			
	Celebrate Kirkland 4th of July Fireworks	30,000	x			
	Other Outside Agencies One-time	34,000	x			
	Admin Support	59,590	x		0.75	Communication Strategy on Finances
	ICMA Fellow	90,230	x		1.00	Communication Strategy on Finances
	Economic Development	114,200	x		-	Kirkland Chamber Professional Services, Marketing, Parmac Plan
100% Revenue-Supported Services		Expenditures			FTE's	Notes
	Kirkland Uncorked	15,000				Funded by LTAC
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>485,020</b>			<b>1.75</b>	

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: Human Resources One-Time Funded Position**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Human Resources Analyst	56,977.00	x		0.70	This position is essential to keep up with current service levels, addressing the difficult recruitment environment, special project assignments, employment law/ personnel policy (PPR) needs, while providing employee and management support to the City of Kirkland. This position has proven key to the day to day operation of the department. Departmental service demands will increase with anticipated labor relations, compensation and benefits challenges for the remainder of this year and the next biennium. The Human Resource Department is supporting 478 fulltime employees and approximately an additional 100 seasonal employees, with a lower HR/ employee ratio than the norm.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>56,977</b>			<b>0.70</b>	

**DRAFT**

**CITY OF KIRKLAND SERVICES MATRIX**  
**DEPARTMENT: PARKS & COMMUNITY SERVICES**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Human Services per capita	96,673	x		-	
	Environmental Stewardship Outreach	53,588	x		0.50	
	Rose Hill Meadows M&O	36,291	x		-	Originally scheduled for development in 2008. Construction postponed to '09 (renamed from "124th Ave Park-side M&O")
	Leash Law Enforcement	10,800	x		-	
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Kirkland Performance Center	50,000	x		-	
	Senior Council Support	9,500	x		-	
	EnhanceWellness Program for Older Adults	7,500	x		-	
	Operation School Bell	7,500	x		-	
	Waterfowl Management	7,306	x		-	(renamed from "Goose Patrol")
	All-City Youth Summit	4,000	x		-	Bi-annual event
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>283,158</b>			<b>0.50</b>	

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: Public Works**

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
GF-01	Commute Trip Reduction Plan	50,000	X			Kirkland has sites that have entered into TMP (Transportation Management Plans with the Cit as a part of their SEPA mitigation.  Traffic Counts are a key element in calibrating the forecast models  In Jan 05 Kirkland entered into an interlocal agreement w/ Bellevue & Redmond. Through the interlocal agreement Kirkland agreed to share in the ongoing costs for the model.
GF-02	Transportation Mgt Plan Support	10,000	X			
GF-03	Traffic Counts (every other year)	30,000	X			
GF-04	BKR Model Support	10,000	X			
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ST-01	Public Grounds Tech	81,956		X	0.40	Reallocate .10 FTE to Water, .50 FTE to Surface Water the additional .40 FTE to Street Operating Fund will be offset by seasonal dollars
ST-02	Field Arborist	53,789		X	0.50	Reallocate 1/2 (.25) FTE to Surface Water the additional .25 FTE will be funded by Street Operating Fund.
ST-03	Graffiti Specialist	82,791		X	1.00	Reallocate .10 FTE; .05 to Water, .05 to Sewer, the additional .90 of the FTE will be funded by Street Operating Fund
GF-05	NTCP Support	29,122		X	0.50	By reallocating the funding structure of current positions we have identified funding to cover this position. (75% of GIS FTE should be allocated to Utilities this = \$60,586)
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
F-01	Green Power	10,000	X			
<b>100% Revenue-Supported Services</b>		<b>Expenditures</b>			<b>FTE's</b>	<b>Notes</b>
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
<b>Total</b>		<b>257,658</b>			<b>2.40</b>	

**CITY OF KIRKLAND SERVICES MATRIX**  
**DEPARTMENT: Finance and Administration**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Firefighters Pension Actuarial Study	16,000	x			Required to be completed biennially to be in compliance with the pronouncements of the Governmental Accounting Standards Board (GASB). The actuarial report provides financial information and required disclosures for the Comprehensive Annual Financial Report.
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
	Business Analyst	87,840	x		1.00	Backfilled position is in Customer Accounts for Document Management Project
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
Administration		Expenditures	Revenue Offset?		FTE's	Notes
	<b>Total</b>	<b>103,840</b>			<b>1.00</b>	

**DRAFT**

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: Planning**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Development Review Subdivision	72,000	X			Funded for professional services to process subdivisions
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	ARCH	216,000	X			Housing Trust Fund annual contribution.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Urban Forester	24,295		X	0.25	Additional hours to existing .50 FTE. Reduction would require code amendments that would need short term staffing.
	Code Enforcement Officer	56,127	X		0.50	Continuation after end of Mercer Island contract
	Neighborhood Plans Update	20,000	X			
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>388,422</b>			<b>0.75</b>	

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: POLICE**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Annexation/Norcom Captain	128,524	X		1.00	Temporary position funded through May of 2008 for Annexation related responsibilities and from May 2008 through December 2008 for NORCOM related responsibilities
	Police Accreditation Expenses	25,480	X		-	Fees for Accreditation conferences, supplies, and annual fee
100% Revenue-Supported Services		Expenditures			FTE's	Notes
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	<b>Total</b>	<b>154,004</b>			<b>1.00</b>	

DRAFT

**CITY OF KIRKLAND SERVICES MATRIX**

**DEPARTMENT: Fire and Building**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
1	Emergency Prep Coordinator	103,566		X	1.00	.50 one-time service package funding, .50 one-time grant funding.
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
	Fire Training	50,000		X		
	Finn Hill Staffing OT	350,000		X		
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
	Think Again Program	4,488		X		
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
	Plans Examiner	45,452			0.50	
	Building Permit Technician	63,394			1.00	
	Electrical Inspector	<i>None</i>			<i>none</i>	Backfill for Evergreen Hospital temp assignment; project completed, position not filled after permanent employee left.
<b>Total</b>		<b>508,054</b>			<b>2.50</b>	

**CITY OF KIRKLAND SERVICES MATRIX**  
**DEPARTMENT: Information Technology**

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
IT-1	Support for Finance systems	86,498		x	0.82	This is the portion a one-time funded FTE's being used to provide support to Finance (and support to other related systems, which are shown). This position has been one-time funded for four years. We obtained Council direction to move this position into rates and reduce the CIP at the early May meeting.
IT-3	Network Analyst for Wireless for Fieldworkers	97,688		x	1.00	This position was one-time funded during the 2007-08 mid-biennial process. Subsequently the duties of this position have been re-allocated to a permanent position and the one-time funded duties consist of help desk support for Council meetings, desktop management, and training. Additionally, in light of budget issues, we chose to only fill the one-time portion at .5 FTE so .5 FTE remains unfunded. Not funding will result in a lower level of internal service to city staff regarding day to day help with their computers.
IT-4	GIS	86,804		x	1.00	This position has been funded from the CIP for the past two years and is doing ongoing work to help maintain the GIS data layers built over the past few years. The strategy for funding this position is to take it from the CIP to operating budget. Not funding it will result in fewer regular updates to GIS data, and a reduction in the quality of GIS data.
IT-5	Central server & network support	11,762		x	0.10	This is the portion of time that the one-time Finance Systems support position spends supporting the SQL databases used to keep the network data up to date. The funding strategy is the same as mentioned above, and failure to fund this would result in someone else spending time helping Network and Operations with this, and thus affect someone else's workload.
IT-8	Police Systems Support	94,929		x	1.00	Police CAD, RMS, mobility, field reporting, jail, evidence tracking, etc. Includes support for police technology systems for Medina and Mercer Island. Some of these costs will be shifted to NORCOM, but the timing is not yet set in stone, and may not be before the 2009/2010 biennium.

**DEPARTMENT: Information Technology**

**DRAFT**

	Lease of space in the Bellevue Data Center	33,300				We lease space in the Bellevue Data Center. Although originally funded for disaster recovery purposes, it looks like we will need some of this space for daily operations since we are outgrowing our server room. If we don't fund this we would have to buy rack space on the open market which would probably be less expensive but less secure.
	Copier Replacements	51,590				Average annual expense of \$50,000 per year on copier replacements
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
	Support for Document Management systems	8,637		x	0.08	Backup from the Finance Systems support position for this project. The strategy for funding this is movement from the CIP into operating as discussed above.
IT-14	Web system/Web production assistant	78,351		x	1.00	The 1.0 web assistant helps post information to the web for departments, does graphics for web communications, and provides some daily training and support. This is ongoing work that has been funded through one-time money for two and a half years. Our only funding strategy at this point for the web assistant is to request that departments allow us to build the position into rates.
AS-21	Other Video Services, including Currently Kirkland	51,296		x	0.50	Includes 0.5 of the videographer and an video intern position (hourly). Produces the Currently Kirkland News Magazine show, special videos such as the pedestrian safety video, the teen video, and the senior video, and manages extra demands that come up (such as taping training classes, etc.). The funding strategy is to build the intern into the MMS budget (finding offsetting cuts) and to use the ongoing funding for the vacant document support position to backfill this. There will still be a few thousand dollars gap, which we hope to fund by billing departments and/or outside agencies for video services.
	Downtown Wireless System	17,607		x		Includes the ongoing money necessary to keep the wireless program running. Does not include support (which is minor and has been absorbed by the Help Desk) or funding for capital replacement. Our strategy is to build this into our IT rates and look for offsetting cuts.
	Multimedia Support	10,000				On-call hourly support to address volatile workload.
<b>100% Revenue-Supported Services</b>						<b>Notes</b>
IT-17	We have no one-time funded revenue supported services	0			-	
<b>Administration</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
IT-18	We have no one-time funded administration support	0		x	-	
	<b>Total</b>	<b>628,462</b>			<b>5.50</b>	

**CITY OF KIRKLAND SERVICES MATRIX****FUND/DEPARTMENT: General Fund/Non-Departmental****DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ND-1	Puget Sound Clean Air Act	28,726	x			Mandatory per Washington State Clean Air Act RCW 70.94.093
ND-2	2% Liquor Excise Tax	10,512	x			2% based on yearly liquor sales
ND-3	LEOFF 1 Direct Medical Payments	35,000	x			Police and Fire LEOFF 1 Direct Medical Payments
ND-4	LEOFF 1 Medical Insurance	457,194	x			Police and Fire LEOFF 1 Insurance Premiums
ND-5	Mail Services - Postage	84,000	x			Citywide Postage
ND-6	Debt Service	620,070	x			Parking Garage and Teen Center
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ND-7	Repairs and Maintenance - Copier Maintenance	4,000	x			Routine maintenance and repairs on copy machines
ND-8	Printing, Envelopes, Letterhead, Forms	15,062	x			Stationary supplies, forms for all departments
ND-9	Operating Supplies - Office	31,350	x			Paper products, toner
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ND-10	Employee Transportation Program	30,000	x			Commuting incentive for city employees
ND-11	Credit Card Fees	50,000	x			Development Services Credit Card Fees
ND-12	Management Retreat	4,625	x			Yearly management retreat
ND-13	Office Furniture and Equipment - Breakage	12,500	x			Unforeseen breakage/loss of small office equipment
ND-14	Outside Agency Funding	61,000	x			Misc. - Ongoing amount for One-Time Agency Requests
ND-15	Misc Equipment & Supplies For Copy Room	3,100	x			Supplies Equipment
ND-16	Misc Repaires to Microfiche Reader/Printer	1,500	x			Microfiche Reader for Ord

**FUND/DEPARTMENT: General Fund/Non-Departmental****DRAFT**

<b>Discretionary Services continued</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
ND-17	Youth in Government	1,500	x			Youth in Government Day
ND-18	Professional Services	20,000	x			Miscellaneous professional services
<b>100% Revenue-Supported Services</b>		<b>Expenditures</b>			<b>FTE's</b>	<b>Notes</b>
<b>Administration</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
	MMS	298,288	x			MMS Charges
	Videographer	10,133	x			MMS Charges
	Insurance	3,386	x			Fidelity Bond
	Facility Charges	18,968	x			City Hall Annex
	<b>Total</b>	<b>1,800,914</b>			<b>-</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: General Fund/City Council

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CC-1	Mayor and Councilmembers	115,000	x		7.00	Salary and benefits
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CC-2	Puget Sound Regional Council Dues	22,500	x			
CC-3	Association of Washington Cities Dues	30,000	x			
CC-4	Suburban Cities Association Dues	25,000	x			
CC-5	Eastside Transportation Partnership Dues	500	x			
CC-6	Kirkland Chamber Dues	500	x			
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CC-7	All City Dinner	3,500	x			
CC-8	National League of Cities Dues	4,000	x			
CC-9	Sister City International Dues	500	x			
CC-10	City Council Meals	5,250	x			
CC-11	Neighborhood Council Meetings - printing and postage of notice to neighbors	6,200	x			
CC-12	City Council Travel and Training	16,600	x			\$4,600 in training and 12,000 for travel to national and state-wide conferences.
CC-13	Council Retreat	6,500	x			
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Telecom, Fax, IT Charges, Facilities Charges	77,650	x			
<b>Total</b>		<b>313,700</b>			<b>7.00</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: General Fund/City Manager's Office

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CM-1	City Manager	203,900	x		1.00	Salary and Benefits
CM-2	Judicial Services	900,000		x	9.74	Assumes all fines and forfeits assigned to Court
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CM-3	Council Support	78,000	x		1.00	Includes clerical support only, does not include policy-setting support services; .75 Exec. Asst. 1, .25 Exec. Asst. 2
CM-4	Court Security	40,000		x		Contracted
CM-5	Public Defender Screening	8,000		x	0.10	
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CM-6	City Update	18,000	x			Currently 1 full page, 12 times per year in Courier
CM-7	On-Going KDA Funding	10,000	x			Funds KDA activities
CM-8	Grant Administration	9,300	x		0.10	Staff administration of community and business grants
CM-9	Intergovernmental and Regional Services	108,000	x		0.90	Includes staff support for legislative and regional programs, performance measurement, and special projects
CM-10	Neighborhood Services	71,000	x		0.58	Includes staff support, mailings and support services to neighborhoods and to the Neighborhood Connection Program
CM-11	Neighborhood Matching Grants	31,000	x			Grants to 9 neighborhoods
CM-12	Neighborhood Signs	8,000	x			Annual budget for refurbishing neighborhood entry signs
CM-13	Volunteer Services	44,500	x		0.50	This program coordinates over 20,000 hours of volunteer time annually, for a value to the City of approximately \$340,000
CM-14	Volunteer Appreciation Event	4,500	x			
CM-15	Economic Development Services	156,000	x		1.00	Includes staff support for the Economic development program, \$12,000 in professional services for the program, and other support services
CM-16	Economic Development Intern	7,000	x			

**FUND/DEPARTMENT: General Fund/City Manager's Office****DRAFT**

Discretionary Services continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CM-17	Enterprise Seattle Dues	6,000	x			
CM-18	Alliance for Innovation Dues	3,500	x			
CM-19	Communications Services	102,250	x		1.00	Includes staff, mailings, and support services for communications program
CM-20	Cultural and Special Events Services	40,000	x		0.35	Includes staff support of Cultural Council and special event volunteers and \$5,000 for Cultural Council funding
100% Revenue-Supported Services		Expenditures			FTE's	Notes
CM-21	Probation	250,000			2.90	1.5 Probation Officer, 1 JSA II, .5 JSA I
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Asst. City Manager, Exec. Assts. 1 & 2	395,550	x		2.00	Includes salary; benefits; \$19,000 in professional services; supplies; printing; mailings; copies; dues, training and travel not associated with specific programs
	IT Charges	112,242				
	Facilities Charges	124,640				
	Insurance	20,133				
	<b>Total</b>	<b>2,751,515</b>			<b>21.17</b>	

**DRAFT**

**CITY OF KIRKLAND SERVICES MATRIX**  
**FUND/DEPARTMENT: General Fund/Human Resources**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
HR-1	Labor Relations	84,600	x		0.64	Dir.30 FTE - \$50,700 HR Analyst & HR Coordinator .34 FTE - \$30,950 Supplies \$500, Operating Supplies \$1,000, Labor Relations Travel \$1,000 , Labor relations Trng \$450 Includes: Contract negotiations, Labor management mtgs w/bargaining units stipulated by contract, contract interpretation, mediations & arbitrations.
HR-2	Recruitments	136,281	x		0.71	Supplies- \$250; Advertising \$32,000; Printing \$1,500; Prof Svcs testing services mandated by contract (i.e. police, fire, etc.) \$31,800; Courier Svcs \$650; Fed ex mailings \$1,000; Test Scoring \$450, Management Recruitment \$2,500, relocation 1 management \$1,500, staff time - \$64,631
HR-3	Background checks	7,692		x	0.02	HR Coor .02 FTE - 1676 Background checks for finalist and volunteer positions consistent with RCW 43.43. \$10.00 fee per individual implemented June 2006 and privacy laws requiring notifying individuals of results, \$3,500 fees
HR-4	Safety Program	39,602	x		0.28	WAC mandated expenses: DOT exams & CDL Exams - \$1,300; Hearing Tests - \$1,500; Bloodborne Pathogen Trng - \$4,000; Hep B shots - \$3,300; Hep C shots Fire - \$1,500 First Aid Kits - \$500; Staff time - \$27,502
HR-5	Risk Management	35,359	x		0.36	Documentation of Claims consistent with WCIA guidelines Claims management staff time: \$35,359
HR-6	Monetary recovery - Claims	21,798	x		0.26	Monetary recovery, collections and follow-up staff time: \$21,798
HR-7	LEOFF / Disability Board	7,193	x		0.06	Prof Svcs - \$1000; Ofc Supplies - \$200 , Operating Sup - \$100 Travel/Training - \$2,300; staff time - \$5,893
HR-8	Civil Service	8,493	x		0.06	Ofc Supplies - Travel/Training - \$1,300; staff time - \$5,893
HR-9	Leave Administration	6,875	x		0.07	State and Federal Laws staff time: \$6,875
HR-10	Policy Administration	42,127	x		0.36	staff time: \$42,127 (staff time includes Director, Analyst & Coordinator time)
HR-11	Organizational Training	14,744	x		0.14	staff time:\$12,744 required training some very two years, Sexual Harassment Trng-\$2,000;
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
HR-12	Industrial Psychologist	2,000	x			Evaluations for employees, Goodenough Company.
HR-13	HR Employee Services	13,344	x		0.14	HRIS, Web Maintenance, EO Updates, Kirknet, Printing (PAF's) - \$600; Staff time: \$12,744

**DRAFT****FUND/DEPARTMENT: General Fund/Human Resources**

<b>Essential Services continued</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
HR-14	HR Staff Training - new hire	5,869	x		0.07	staff time:\$5,869
HR-15	Orientation/Exit Interviews, ID Badges	25,488	x		0.28	Staff time: \$25,488 - supply costs to be determined
HR-16	Employee Relations and Communications	85,645	x		1.00	Employee Relations and communication documentation, verbal and written warnings, grievance, and employee confidential issues. Staff time: \$85,545.
HR-17	Re-Class/Reorg Salary Survey	62,172	x		0.54	Dir. .14 FTE -\$23,660 , HR Analyst & HR Coordinator .40 FTE - \$36,412, salary surveys internal and external, job description maintenance and certification, Salary survey publications \$2,100
HR-18	MEBT Retirement Plan Community Support	6,875	x		0.07	staff time: \$6,875
HR-19	Benefits Administration - Health & Retirement	41,154	x		0.46	staff time : \$41,154
HR-20	General Administration - Support	77,375	x		0.85	Budget Maintenance, PAF's, Personnel Files, AP/AR, IFAS, employee support, citizen inquiry staff time - \$77,375
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
HR-21	On-call / Pool Administration	5,869	x		0.07	HR On-call pool administration - staff time -\$5,869
HR-22	Diversity Program	9,546	x		0.03	Supplies - \$3,100; Speakers/Events - \$1,215; Trng - \$2,500; staff time - \$2,731
HR-23	Wellness Program	15,276	x		0.03	Supplies - \$4,600; Prof Svcs - \$1,500; Travel/Trng - \$845; Fitness Room - \$1,300; Flu Shots \$4,300 staff time - \$2,731
HR-24	Employee Assistance Program	6,000	x			The City has had 25% employee and family participation. This fee has doubled for 2008 this is running approximately \$18,000 for 2008
HR-25	Organizational Training	26,490	x			ECTC-\$4,500, Leadership Institute-\$2,400, Rocky Mountain-\$10,590, Cascade Mgmt (6 reg slots 1500) - \$9,000,
HR-26	Tuition Reimbursement	13,426	x		0.02	Reimbursement \$11,750 - Increased use over the past two years - staff time: \$1,676
HR-27	Special Projects for Director		x			Special projects for director, director support, council special requests, research committees
HR-28	Employee Recognition Program	14,676	x		0.02	Service Awards - \$13,000; staff time - \$1,676 this impacts 80 to 85 employees in 2008.
<b>100 % Revenue-Supported Services</b>		<b>Expenditures</b>			<b>FTE's</b>	<b>Notes</b>

**DRAFT****FUND/DEPARTMENT: General Fund/Human Resources**

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Director & Assistants	94,640	x		0.56	Director, strategic planning, meetings, budget approval
	IT and Facilities Charges	56,228	x			
	Insurance	6,286	x			
	<b>Total</b>	<b>973,123</b>			<b>7.10</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: General Fund/City Attorney's Office

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CA-1	Public Defender	130,000		x		
CA-2	Prosecution	183,000		x		
CA-3	Witness Fees	5,000				
CA-4	Ordinances, instruments, and civil duties	82,000	x		0.60	e.g., "civil duties" might include legal actions brought by or against City, conducting investigations, responding to Auditor, and preparing franchises.
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CA-5	Interpret statutes, Kirkland Municipal Code, rules, or contracts and review key documents	100,000	x		0.65	
CA-6	Code Enforcement	24,000		x	0.05	
CA-7	Legal process and recording fees	3,500	x			
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CA-8	Advise City Council, Boards and Commissions, City Manager, and departments. Draft and review documents.	80,000	x		0.60	e.g., prepare legal memoranda and other documents relating to City business.
CA-9	Attend City Council meetings and review agenda packets	20,000	x			
CA-10	Information for service providers and WCIA requirements	30,000	x			e.g., assist WCIA outside counsel in defense of City.
CA-11	Negotiation and drafting of contracts	40,000	x		0.10	
CA-12	Outside legal counsel	26,800	x			e.g., outside counsel retained to assist with selected matters. Does not include legal services charged to the Litigation Reserve.
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
CA-13	Utilities	24,000				e.g., prepare liens for non-payment, rate ordinances, and advise staff.

**FUND/DEPARTMENT: General Fund/City Attorney's Office*****DRAFT***

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Director and administrative staff	182,046	x		2.00	
	IT & Facilities charges and Insurance	37,779	x			
	<b>Total</b>	<b>968,125</b>			<b>4.00</b>	

**DRAFT**

**CITY OF KIRKLAND SERVICES MATRIX**  
**FUND/DEPARTMENT: General Fund/Parks and Community Services**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PK-1	Inspections / installations	95,000	x		1.00	Inspect play areas, docks, lighting, repair and document, ADA accessibility
PK-2	Comprehensive Plan - Park Element	4,000	x		0.03	State Mandate
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PK-3	Cemetery Operations	155,000		x	1.00	Cemetery labor, materials, and utilities
PK-4	Ballfield Maintenance	275,000		x	3.50	Ballfield prep, maintenance, scheduling, administration
PK-5	Park Mowing / turf maintenance	290,000	x		3.00	Mowing and turf maintenance, administration
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PK-6	Pool Operations	278,000		x	1.35	Maintenance & Operations of pool, utilities, supplies, labor, training (Note Cheryl this does not include Carries #'s)
PK-7	Landscape Maintenance - Parks	193,820	x		1.25	Maintenance of Landscape areas - Parks
PK-8	Garbage / litter collection /park closure	205,000	x		1.50	Removal of garbage & litter, close parks and lock gates
PK-9	Restroom operations	285,000	x		2.25	Maintenance, repairs, labor
PK-10	Irrigation	235,000	x		1.50	Maintenance & operation of irrigation systems, utilities, supplies, labor, training
PK-11	Long-Range Park Planning	104,748	x		1.00	Includes Natural Resources team, neighborhood connection program, GIS user group, special projects, grant administration
PK-12	Human Service grants ongoing	414,280	x			Per capita: \$8.36, Doesn't include one time of 96,673
PK-13	CDBG & H.S. grant management, H.S. Advisory Committee	66,770		x	0.65	CDBG planning \$\$ support staff salary ( additional .15 per Council authority )
PK-14	Youth Council Management	78,600	x		0.75	Doesn't include one time, Youth summit: \$4000
PK-15	Teen Center Support and Management	190,750	x		0.30	Includes contract with Friends of Youth for 160,000
PK-16	Beach Lifeguards	96,200	x		0.20	Supv. / Rec. Coordinator plus additional seasonal employees

**FUND/DEPARTMENT: General Fund/Parks and Community Services**

# DRAFT

Discretionary Services continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PK-17	Highland Center Specialized Recreation Program	10,000	x			Contract with Bellevue to provide specialized recreation
PK-18	NKCC Programs & Operations	186,000		x	1.65	Customer service, facilities management, program registration, supplies, drop-in programs, printing, advertising etc.. General fund operation of Community Services & Rec. Revolving fund
PK-19	Senior Center Operations	145,000	x		1.00	Includes health and social services, additional hourly employees
PK-20	Facility Rentals	36,000		x	0.30	FTE staff and additional hourly employees
PK-21	Community Service division administration	145,000		x	1.45	Customer service, facilities management, program registration, boat launch sales
PK-22	Senior Council Support	26,000	x		0.20	This includes \$4000 project money for Sr. Council
PK-23	Night and Weekend coverage	250,000		x	1.50	Staff for ballfield prep, garbage/litter, restroom maintenance after 5 pm Mon - Fri and all day Sat/Sun
PK-24	Art	17,000	x			Contracted cleaning service and staff maintenance/repairs
PK-25	Juanita bay Park Ranger Program	14,793	x		0.15	.15 FTE, supplies and training for volunteer park rangers
PK-26	Human Services: Regional Eastside Human Services Forum	38,000		x	0.20	This includes 12,500 for EHSF and other regional projects
PK-27	Youth Services: Assets, regional support, Teen mini grants, Teen traffic court, We've Got Issues	114,000	x		1.00	Misc. Grant funds support projects
PK-28	Summer Youth Outreach	33,500	x		0.15	Includes hourly employees
PK-29	Summer Concert Series	28,600		x	0.20	See Recreation Revolving Fund matrix
PK-30	Senior Center Van Service	32,000		x	0.70	See Recreation Revolving Fund matrix
PK-31	Senior Fitness, Lifelong learning, Enrichment programs	76,200		x	0.75	See Recreation Revolving Fund matrix
PK-32	Senior Community Evening Classes	35,000		x	0.25	See Recreation Revolving Fund matrix
PK-33	Senior Center Special Events	7,000		x		See Recreation Revolving Fund matrix
PK-34	Van Trips	4,000		x	0.05	See Recreation Revolving Fund matrix

## FUND/DEPARTMENT: General Fund/Parks and Community Services

**DRAFT**

Discretionary Services continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PK-35	Business Services	157,400		X	1.15	This is a new functional area based on a recent reorganization. The goals of this position are to create consistencies, and efficiencies in our business practices. This position is charged with business partnerships, soliciting sponsorships and donations, etc. Includes hourly dock master and moorage attendants. Revenues for this position include concessions, moorage, private partnership sponsorships, boat launch. Revenues budgeted for 2008 include: 120,000, year end estimates are 155,000.
PK-36	Special Events	85,877		x	1.00	Transferred from CM's office and Includes: Special event coordination with organizers, permitting & grant administration. Impacts would be liability exposure for the City with events that are not permitted or coordinated. Loss of income from permits for events, block parties, and banners. Reduce the tourism potential of the community. In addition .25 FTE was added to Coordinate Friday Market at Juanita Beach. Revenue to support .25FTE=\$22,000
100% Revenue-Supported Services		Expenditures			FTE's	Notes
PK-37	CIP Project management	50,863			0.50	.25 FTE Planning Coordinator / .25 FTE Manager
Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Department Administration	318,211	x		2.32	Department administration, supplies, and park board support, citizen information service, City website/Kirknet.
	Interfund charges - Technology, Fleet, Facilities	762,673	x			
	Insurance & Stormwater	102,757	x			Liability insurance and surface water fees
	Professional Services Intfnd	4,000	x			
<b>Total</b>		<b>5,647,042</b>			<b>33.80</b>	

**CITY OF KIRKLAND SERVICES MATRIX**  
**FUND/DEPARTMENT: General Fund/Public Works**

# DRAFT

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PW-1	Transportation Improvement Plan	\$ 6,690	x		0.05	5% Dave S.
PW-2	Utility Comprehensive Planning	\$ 7,791		x	0.05	5% Ray
PW-3	GMA Concurrency Planning	\$ 17,909	x		0.15	David
PW-4	Monitoring of Commute Trip Reduction (CTR) Employers	\$ 5,324	x		0.05	Thang
PW-5	Administer City's Trip Reduction Program	\$ 5,324	x		0.05	Thang
PW-6	SEPA Traffic Analysis	\$ 74,542		x	0.70	Thang
PW-7	Training (safety, pathogens, etc)	\$ -	x		0.00	Included in staff rates
Essential Services			Revenue Offset?			Notes
			None	Partial		
PW-8	Capital Improvement Program (CIP) Administration	\$ 126,944		x	0.85	60% Ray, 25% Dave S
PW-9	Public Works Mapping/GIS	\$ 101,466		x	1.05	Joe & 5% Ray
PW-10	PW Customer Service @ Front Counter	\$ 48,464	x		0.60	30% Amy, 20% Terri, 10% Katy
PW-11	Development Review Engineering	\$ 368,484		x	3.40	John, Phillip, Bill, 30% Terri, .10 Rob (should be development fee \$\$ per development services study)
PW-12	Development Surface Water Review	\$ -		x	0.00	Stacey Rush re: development services study
PW-12	Single Family Development Review	\$ -	x		0.00	
PW-13	Inspection for Development	\$ 288,690		x	3.00	3 inspectors
PW-14	Sidewalk clearance and sight distance	\$ 15,564	x		0.15	two neighborhood traffic
PW-15	PW Land Use Permit Review	\$ 42,794	x		0.30	30% Rob
PW-16	ROW Permit and ROW Vacations (non-user vacations) Administration	\$ 46,987		x	0.50	50% Katy
PW-17	Development Review Policy and Program Support/Administration	\$ 123,177	x		1.00	40% Katy, 60% Rob

**FUND/DEPARTMENT: General Fund/Public Works****DRAFT**

Essential Services continued			Revenue Offset?			Notes
			None	Partial		
PW-18	Performance/Maintenance Securities Processing	\$ 39,470	x		0.50	Terri
PW-19	Support for Parking Programs/PAB	\$ 27,144	x		0.20	Dave G, 5% Iris
PW-20	Traffic Accident Analysis & Records Management	\$ 10,728	x		0.10	10% Iris
PW-21	Engineering for Traffic Signing, Marking and Signals (including ITS)	\$ 91,837	x		0.75	45% Iris, 30% David
PW-22	Maintain BKR Traffic Model	\$ 5,324	x		0.05	5% Thang
PW-23	Transportation Engineering Support for CIP	\$ 10,728		x	0.10	10% Iris
PW-22	Traffic Counts	\$ -	x		0.00	now in discretionary
PW-23	Non-User Claim Processing	\$ -	x		0.00	
PW-24	Bike, Pedestrian, Transit issue coordination	\$ 29,040	x		0.20	Dave G
PW-25	PW Research & Analysis Support	\$ 5,364	x		0.05	Iris
PW-26	WSDOT Nickle coordination	\$ 27,382	x		0.25	25% Don A. (project engineer)
PW-27	Adjacent agency CIP project coordination	\$ 15,582	x		0.10	10% Ray
Discretionary Services			Revenue Offset?			Notes
			None	Partial		
PW-28	Traffic Counts	\$ 5,364	x		0.05	5% Iris
PW-29	Grant Writing and Accounting	\$ 11,182	x		0.13	Iris, Eileen
PW-27	General Development Review Engineering Support	\$ -	x		0.00	
PW-30	Kirkland Transportation Commission Support	\$ 14,520	x		0.10	10% David
PW-31	Neighborhood Traffic Control Program Coordination	\$ 93,559	x		0.90	85% Jim, 85% Noel
PW-32	PW Transportation Support for Neighborhood/Business District Planning	\$ 10,728	x		0.10	
PW-33	Regional Transportation Planning	\$ 14,520	x		0.10	10% David

**FUND/DEPARTMENT: General Fund/Public Works****DRAFT**

<b>Discretionary Services continued</b>			<b>Revenue Offset?</b>			<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
PW-34	Pedestrian Flag Program	\$ 7,260		x	0.05	
PW-35	Commute Trip Reduction Program	\$ 12,585	x		0.10	
<b>100% Revenue-Supported Services</b>						<b>Notes</b>
PW-36	Emergency Sewer Program Administration	\$ 6,787		x	0.09	33% Eileen
PW-37	Capital Project Management-Engineers	\$ 840,777		x	7.50	6.75 project engineers, 70% Dave S., 5% Ray – capital project \$
PW-38	CIP Accounting	\$ 6,787		x	0.09	33% Eileen
<b>Administration</b>			<b>Revenue Offset?</b>			<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
	Director, Admin Asst, Admin Mgr, Acct	\$ 448,776	x		3.55	Daryl, Lisa, Julie, 25% John M., 10% Mike, 15% Ray, 5% Teri
	DP, Fleet and Facilities Charges	\$ 325,018	x		0.00	IT, Fleet, Facilities, Insurance
	<b>Total</b>	<b>\$ 3,340,613</b>			<b>26.95</b>	

**CITY OF KIRKLAND SERVICES MATRIX****FUND/DEPARTMENT: General Fund/Finance & Administration****DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FA-1	Financial Reporting	132,756	x		1.37	.3 Angela, .5 Carol, .5 Teresa .07 Michael and Other Costs (Office Supplies, Travel, Training, Dues, Printing, Furniture and Misc)
FA-2	Accounts Payable	160,210	x		2.11	1.0 Lori, .95 Cheryl, .05 Teresa, .11 Michael and Other Costs
FA-3	Grant Accounting	21,455	x		0.21	Required as a condition of receiving grants .10 Angela, .10 Teresa, .10 Michael and Other Costs
FA-4	Payroll	204,699	x		2.64	1.0 Cheryl, 1.0 Doreen, .50 Diana K, .14 Michael and Other Costs (Office Supplies, Travel, Training, Dues)
FA-5	Tax Collections	49,048	x		0.53	.50 Angela, .03 Michael and Other Costs
FA-6	Debt Service and Cash Mgmt.	119,043	x		1.51	1.0 Diana Bruland, .08 Michael, .10 Sharon A, .33 Sharon S and Other Costs
FA-7	Budget Preparation	118,113	x		1.10	.2 Sandi, .3 Sri, .5 Neil
FA-8	Fixed Asset Management	27,061	x		0.32	.30 Carol, .02 Michael and Other Costs
FA-9	Annual Audit	106,282	x		0.58	Mandatory contract with State Auditor \$51,500 plus staff support .05 Cheryl, .2 Carol, .1 Angela, .2 Teresa, .08 Michael and Other Costs
FA-10	Records Management	163,454	x		1.00	Victoria 1.0 Professional Services related to Records Management \$85,000 Professional Services and Other Costs
FA-11	City Council Meetings & Support	128,141	x		1.45	Cheri 1.0 Kathi .45 and Other Costs
FA-12	Elections	111,300	x			Voter registration, primary and general election; voter pamphlet
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FA-13	Financial Analysis and Monitoring	53,428	x		0.50	.2 Sandi, .1 Sri, .2 Neil and Other Costs
FA-14	Contract Costing	32,925	x		0.30	.1 Sandi, .2 Sri and Other Costs
FA-15	Special Analysis	54,443	x		0.50	.2 Sandi, .2 Sri, .1 Neil and Other Costs
FA-16	Financial System Op/Maint/IC	17,468	x		0.16	Teresa .15, .01 Michael and Other Costs
FA-17	Centralized Purchasing	185,193	x		2.00	Buying and contract/bid management Barry 1.0 Sheila 1.0 and Other Costs
FA-18	Cemetery Administration	20,610	x		0.26	Gloria/Patti .25, .01 Michael and Other Costs
FA-19	Staff & Public Support - Records Services	52,401	x		0.45	Kathi .45 and Other Costs

**DRAFT****FUND/DEPARTMENT: General Fund/Finance & Administration**

Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FA-20	Park Smart Support	20,610		x	0.26	Sales of permits and registration of businesses Gloria/Patti .25, .01 Michael and Other Costs
FA-21	Business License Administration	91,541		x	1.16	Needed to continue revenue stream Gloria/Patti 1.00, Sharon .10, Michael .06 and Other Costs
FA-22	Passport	35,449		x	0.53	Amy .50, .03 Michael and Other Costs
FA-23	False Alarm Administration	40,872		x	0.53	Patti .50, .03 Michael and Other Costs
FA-24	Capital Improvement Program	66,239	x		0.60	.2 Sandi, .2 Sri, .2 Neil and Other Costs
FA-25	Mail Services	78,231	x		1.10	Tina - Mail Clerk 1.00 FTE and Kathi - Supervisor .10 and Other Costs
FA-26	Information Desk	35,449	x		0.53	Amy .50, .03 Michael and Other Costs
FA-27	On-call / Hourly Wages	10,623	x			Used to cover Mail Clerk
<b>100% Revenue-Supported Services</b>		<b>Expenditures</b>			<b>FTE's</b>	<b>Notes</b>
FA-28	Utility Billing	581,678			6.82	Supported by utility charges Sharon A .80 Sharon S .67, .35 Michael and Other Costs
<b>Administration</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
	Director and Admin Asst.	294,719	x		2.00	1.0 Tracey, 1.0 Karen, Other Costs
	Insurance	24,725	x			
	IT and Facilities Charges	274,332	x			
<b>Total</b>		<b>3,312,494</b>			<b>30.50</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: General Fund/Planning and Community Development

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PL-1	Building, mechanical & sign permits	315,242		x	3.50	Ongoing staff only including overtime.
PL-2	State mandated land use permits	261,295		x	2.50	Includes subdivisions, shoreline, SEPA, ROW vacations, some zoning. Ongoing staff = \$206,028. Ongoing prof. services = \$12,000.
PL-3	Comprehensive planning, regulations & shoreline management (State mandated)	255,423		x	2.00	Includes comprehensive plan & zoning code updates. Ongoing staff = \$236,423. Ongoing prof. services = \$19,000.
PL-4	State mandated natural resource plans & regulations.	51,952	x		0.50	Ongoing staff only.
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PL-5	Public regulatory information	192,033		x	2.50	Respond to counter and phone inquiries. Ongoing staff only.
PL-6	Code enforcement	212,664	x		2.00	Ongoing staff only including \$1,830 communications. (Note: Does not include additional one-time.5 FTE.)
PL-7	ARCH	55,000	x			Ongoing ARCH dues only (Note additional one time ARCH trust fund = \$216,000.)
PL-8	Comprehensive planning and regulations (non state mandated)	186,424	x		1.50	Includes some plan and code updates, affordable housing regs. Ongoing staff = \$170,434 Ongoing prof. services = \$4,000 for data & mapping & \$12,000 for code updates.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PL-9	Land use permits not mandated by State	189,005		x	2.00	Includes discretionary permits required by Zoning Code. Ongoing staff only. Reduction would require code amendments that would need short term staffing.
PL-10	Urban forestry services	42,538	x		0.50	Ongoing staff only (Note does not include additional one-time .25 FTE)
PL-11	Comprehensive planning and regulations (non state mandated)	207,806		x	2.00	Includes neighborhood plans; private amendment requests and optional plan/code amendments. Ongoing staff only.
PL-12	Natural Resource plans and regulations	51,952		x	0.50	Ongoing staff only.
PL-13	Planning Interns	32,958	x			Planning intern hourly wages (\$28,126) & benefits (\$4,832)
100% Revenue-Supported Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PL-14	Third Party Review Planner	70,577			1.00	Ongoing staff for expedited permit review. This position is currently unfilled; however the work is being accomplished through overtime by the Planning Information Specialists.

**FUND/DEPARTMENT: General Fund/Planning and Community Development****DRAFT**

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Salaries & benefits	314,784		x	3.06	Ongoing staff for budgeting; personnel; departmental management; interdepartmental coordination; coordination with councils, boards & commissions; training; records (Director, Office Supv., Receptionist) including Director travel/medical allowance (\$2,700).
	Administrative on-call hourly wages	40,463	x			Ongoing administrative assistance for heavy workload and ongoing assistance (\$34,669) and benefits (\$5,794)
	Professional Services Administrative	13,114	x			Ongoing recording secretary services for PC, HCC, HE, DRB
	Office Supplies, operating supplies, furniture	19,800	x			Department office supplies (\$14,500), operating supplies (\$3,200), furniture (2,100)
	Overhead expenses	236,991		x		Operating rentals (e.g. IT charges, fleet, telecom); insurance; repairs
	Travel, training & dues for staff, PC, HCC and DRB	28,400	x			Staff and Planning Commission, Houghton Community Council and Design Review Board support. Travel (\$7,700), Training (\$11,700), Dues (\$9,000)
	Software, repairs/maintenance	1,850	x			All software purchases (\$1,600) and maintenance agreements (\$250)
	Advertising	21,400	x			Advertising for projects and permits
	Printing/postage/miscellaneous	27,500	x			Department printing (\$24,200), postage (\$2,500) and meeting packet delivery (\$800)
	<b>Total</b>	<b>2,829,171</b>			<b>23.56</b>	

**CITY OF KIRKLAND SERVICES MATRIX**  
**FUND/DEPARTMENT: General Fund/Police**

# DRAFT

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PD-1	Responding to Calls for Service - Patrol Division	3,846,740	x		37.00	A total of 36 FTE's are allocated to the Patrol Division with oversight of the division provided by two 0.50 Management Staff personnel (Lieutenant). Uniform costs are \$1,611 per Patrol FTE, Training costs are \$737 per Patrol FTE, and Overtime costs are \$3,954 per Patrol FTE. Costs for Management Staff are \$140,473.
PD-2	Public Safety Answering Point/911 Calls - Communications Division	1,525,913		x	19.50	A total of 19 FTE's are allocated to the Communications Division with oversight provided by 0.50 Management Staff personnel (Lieutenant). 4 FTE's funded by contracts from outside agencies (Medina = 1, Mercer Island = 3) with a total 2007 Revenue of \$299,184. Additional revenues are available from King County E911 for call taking, training, and equipment. Training costs are \$629 per FTE. Uniforms and all other supplies are provided within the total expenditures for this division. Costs for Management Staff are \$70,478.
PD-3	Training		x			Training expenditures have been allocated to the position/division where the FTE(s) are budgeted.
PD-4	Jail	823,633		x	10.90	Expenditures include salaries, benefits, uniform costs, and all Kirkland inmate expenditures. Revenues from Point Cities for Housing & Transport, total 2007 revenue received \$28,205. Training costs are \$629 per FTE. Unit is managed by Corrections Lieutenant (0.90 FTE) for a cost of \$104,930.
PD-5	Outside Agency Incarceration Costs	521,505	x			
PD-6	Records Maintenance	331,943	x		4.65	A total of 4.5 FTE's are allocated to Records with oversight provided by 0.15 Management Staff (Lieutenant). Uniform costs are \$385 per FTE and Training costs are \$629 per FTE. Overtime costs for the division are \$1,958. Costs for Management Staff are \$21,143.
PD-7	Evidence	83,519	x		1.10	Uniform costs are \$385 for this position, Training costs are \$629, and Overtime costs are \$435. Oversight is provided by the Corrections Manager (0.10 FTE) for a cost of \$11,659.
PD-8	Accreditation	69,877	x		0.50	This position is filled by Management Staff (Lieutenant) personnel who serves as our Accreditation Manager in addition to other staff responsibilities.

**FUND/DEPARTMENT: General Fund/Police****DRAFT**

Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PD-9	Investigations Division	885,984	x		7.15	A total of 7.0 FTE's are allocated to the Investigations Division with oversight provided by 0.15 Management Staff (Lieutenant). Uniform costs are \$1,061 per FTE, Training costs are \$1,000 per FTE, and Overtime costs are \$4,444 per FTE. Costs for Management Staff are \$20,963
PD-10	Management Staff	551,687	x		3.40	Management staff consists of 6 FTE's made up of 2 Captains and 4 Lieutenants. Portions of the Lieutenants' costs are allocated to provide oversight to other divisions within the department. Uniform costs are \$1,840 per FTE and Training costs are \$1,000 per FTE.
PD-11	Traffic Division	459,893		x	4.15	A total of 4.0 FTE's are allocated to the Traffic Division with oversight provided by 0.15 Management Staff (Lieutenant). The Traffic Division performs many mandated services such as investigation of fatal or serious injury traffic collisions. Revenues are available from the Traffic Safety Commission for reimbursement of costs associated with special emphasis and/or equipment. Uniform and Overtime costs are included in the total expenditures for the division, and Training costs are \$1,000 per FTE. Costs for Management Staff are \$20,832.
PD-12	Marine Patrol	39,000	x			Contract service with King County Sheriff's Office to provide for the routine patrol of waters to enforce laws and ordinances May through October of each year. Additionally, they may be called out to respond to serious emergency complaints or situations with a corresponding call out fee.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PD-13	School Resource Officer	107,699		x	1.00	Revenues from Lake WA School District partially support this position with the current contract calling for a yearly payment from LWSD in the amount of \$66,911. Uniform costs are \$1,611, Training costs are \$1,000, and Overtime costs are \$4,521. Oversight of this position is provided by the Community Services Unit Supervisor.
PD-14	Neighborhood Resource Officer	104,859	x		1.00	Uniform costs are \$1,611, Training costs are \$1,000, and Overtime costs are \$4,521. Oversight of this position is provided by the Community Services Unit Supervisor.
PD-15	Family Violence Detective	107,217	x		1.00	This position is assigned to the Investigations Division. Although listed as Discretionary, the position is responsible for all Domestic Violence incidents in the City. Elimination of the position would create a burden on the Investigations Division by the increased workload. Uniform costs are \$1,062, Training costs are \$1,000, and Overtime costs are \$4,442.

**FUND/DEPARTMENT: General Fund/Police****DRAFT**

Discretionary Services continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PD-16	Family/Youth Advocate	80,528		x	1.00	Minimal revenues are generated from Advocacy services provided to the Point Cities. This position is assigned to the Investigations Division and reports to that Division's Sergeant. Although listed as Discretionary, the position is vital in providing assistance, intervention, and counseling to victims of domestic violence as well as providing immediate crisis intervention to those victims and appearing with them at court hearings. The position also oversees the DART (Domestic Abuse Response Team) volunteer program. Uniform costs are \$385, Training costs are \$629, and Overtime costs are \$435.
PD-17	Community Services Unit Supervisor	117,232	x		1.00	The position provides direct supervision to the School Resource Officer and the Neighborhood Resource Officer. The position also interacts with citizen and business groups and provides crime prevention information to the public. Uniform costs are \$1,611, Training costs are \$1,000, and Overtime costs are \$4,521.
PD-18	Eastside Domestic Violence Program	31,264		x		The department is planning to move funding for this program from its budget to the Parks Human Services budget in the 09-10 fiscal year. Partial funding is available through CTED.
PD-19	Special Response Team	15,100	x			It should be noted that although categorized as discretionary, the elimination of this service/program poses liability concerns. Personnel costs for FTE's assigned to this unit are budgeted within other divisions. Training costs are \$5,000.
PD-20	Crisis Negotiations Team	7,500	x			It should be noted that although categorized as discretionary, the elimination of this service/program poses liability concerns. Personnel costs for FTE's assigned to this unit are budgeted within other divisions. Training costs are \$4,000.
PD-21	Eastside Narcotics Task Force	117,688		x	1.00	Revenues are generated from seizure of property or money associated with illicit drug activity. Revenues must be used to fund narcotics related programs or equipment. Uniform costs are \$1,061, Training costs are \$1,000, and Overtime costs are \$4,450. Additionally, a narcotics investigation fund in the amount of \$7,500 is attached to this position.
PD-22	Crime Analysis	94,377	x		1.00	It should be noted that although categorized as discretionary, the position is responsible for mandated crime statistic reporting. The position also provides vital information on criminal activity (patterns, MO, etc.) that assists officers in the apprehension of criminals. Uniform costs are \$385, Training costs are \$629, and Overtime costs are \$435.
PD-23	K-9 Unit	106,146	x		1.00	Direct supervision provided by a Patrol Sergeant. Expenditures include necessary supplies for the police service dog as well as overtime for the officer. Uniform costs are \$1,611 and Training costs are \$1,000.

**FUND/DEPARTMENT: General Fund/Police****DRAFT**

Discretionary Services continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
PD-24	Explorer Program	3,150	x			Although listed as discretionary, the Explorers provide a variety of assistance to the City for Special Events, such as Traffic Control, etc. Budgeted expenditures pay for a small portion of their uniforms and training. The Post generates revenue from their assistance at City and regional events, using that revenue for purchases not funded by the General Fund Police budget.
PD-25	Chaplain's Program	1,000	x			The Police Chaplain performs a wide variety of volunteer services for the department and its' employees. The expenditures represent fees for attendance at a yearly training conference, a portion of which is funded by the FBI.
PD-26	Volunteer Program	1,250	x			Expenditures are for necessary clothing and uniform items utilized by our volunteers including our Speed Watch volunteers and DART volunteers.
PD-27	ProAct Unit	513,937	x		5.15	A total of 5 FTE's are assigned to this unit consisting of one Sergeant, three Officers, and one support position with oversight of the unit provided by 0.15 Management Staff (Lieutenant). Expenditures include salaries and benefits for the FTE's as well as uniforms and overtime. Training costs for the unit are \$4,629. Costs for Management Staff are \$21,308.
100% Revenue-Supported Services		Expenditures			FTE's	Notes
PD-28	Parking Enforcement	138,412			2.00	Expenditures include salaries and benefits for the FTE's as well as uniforms, overtime, and supplies associated with Parking Enforcement. Oversight is provided by the Traffic Sergeant. Training costs are \$1258.
PD-29	CJTC Instructor	109,390			1.00	All costs associated with this position are reimbursed by the Criminal Justice Training Commission. Overtime costs are \$3,950. Uniforms and Training for the position are provided by CJTC.
Administration		Expenditures	Revenue Offset?		FTE's	Notes
	Director and Staff Coordinator	275,398	x		2.00	Salaries and benefits for Chief and Staff Coordinator. Uniform costs for Chief are \$1,500 and Training costs are \$3,129 (\$2,500 Chief, \$629 Staff Coordinator).
	Support Staff	358,402	x		4.00	Staff consists of the Administrative Corporal, Training Officer, and two Administrative Support positions who provide Timekeeping & Payroll duties, register and arrange all department training and travel, and perform a wide variety of clerical support. Uniform costs total \$2,770 (\$1,000 each for sworn position and \$385 each for support position), Training costs total \$3,258 (\$1,000 each for sworn positions and \$385 for each support position), and Overtime costs are \$2,870 (\$950 for each sworn position and \$435 for each support position).
	IT Charges	977,429	x			Includes Operating, Replacement & Telecom for all department staff.

**FUND/DEPARTMENT: General Fund/Police****DRAFT**

Administration continued		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Fleet & Radio Charges	816,351	x			Includes Fleet Operating & Replacement for all department vehicles and Radio Operating for all department radios.
	Facilities Charges	189,347	x			Internal charges for rental of City Hall and evidence space at the Maintenance Center and Kirkland Municipal Court.
	Liability Insurance	165,354	x			
	Department Supplies & Other Miscellaneous Fees	164,208	x			Includes department supplies consisting of firearms supplies (lethal & less lethal) and office & operating supplies, as well as fees for postage, repairs & maintenance of equipment, association dues, and a wide variety of professional fees that provide support for functions in both the Operations and Services Divisions.
	Communication Fees	62,190	x			Fees for all data lines, radio lines, pagers, and phones.
	Professional Fees	31,900	x			Provision of funds for costs related to grant consulting, annual leadership retreat, and regional records management data bases which provide vital criminal history information.
<b>Total</b>		<b>13,837,022</b>			<b>110.50</b>	

**CITY OF KIRKLAND SERVICES MATRIX****FUND/DEPARTMENT: General Fund/Fire and Building****DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FB-1	Emergency Management	98,698	x		0.50	50% Admin Deputy Chief + Operating cost = \$25,214
FB-2	Fire Training	430,502		x	2.20	20% Deputy Chief Salary/Benefits plus 2 Training Officers + Firefighter Training Costs
FB-3	Fire Inspection	357,072		x	2.90	ADC .20%, Fire Marshall (.90%), DFM (.80%), Inspector (100%), Operating Cost = \$26,558
FB-4	Fire Investigation	62,868	x		0.30	10% Fire Marshal, 20% Deputy FM, = Operating cost/OT Stand-by =\$41,700
FB-5	Safety Fund	2,560		x		Safety Committee, Admin Budget
FB-6	Fire/Bldg Records Management	67,587		x	1.60	85% Fire Clerk, 75% Building Clerk = Professional Services cost \$3,000
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FB-7	Fire Suppression/EMS	519,585		x	3.80	80% Deputy Chief Salary/Benefits & Operating Costs plus 3 Shift Battalion Chiefs
FB-8	Station 21	1,332,916		x	12.00	Salary/Benefits + 15% of all Stations Operating Budget
FB-9	Station 22	1,636,079		x	15.00	Salary/Benefits + 20% of all Stations Operating Budget
FB-10	Station 24	515,546		x		10% of Budget plus Firefighter OT (12 Hrs)=327,442 (Conversion 4 Firefighters to OT)
FB-11	Station 25	1,332,916		x	12.00	Salary/Benefits + 15% of all Stations Operating Budget
FB-12	Station 26	1,652,507		x	15.00	Salary/Benefits + 20% all Stations Operating Budget
FB-13	Station 27	2,138,579		x	20.00	Salary/Benefits + 20% of all Stations Operating Budget
FB-14	Reserve Program	51,600		x		
FB-15	Trench Rescue and Training	8,100		x		
FB-16	Hazardous Materials	21,900		x		

**FUND/DEPARTMENT: General Fund/Fire and Building****DRAFT**

<b>Essential Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
FB-17	Confined Space Rescue	6,450		x		
FB-18	Water Rescue	9,750		x		
FB-19	Motor Vehicle Rescue	11,520		x		
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
FB-20	Chaplain's Program	8,400		x		Funded from Reserve Program Budget Line Item. The Chaplain's Program provides a wide variety of services and support for employees as well as citizens in crisis.
FB-21	Public Education Coordination	104,493		x	1.00	Public Education Coordinator/Benefits/OT +operating cost \$11,308
FB-22	My Bldg. Permit.com	52,067		x	0.60	Transactional Credit Card -time for committees.
FB-23	Code Enforcement	72,345			0.85	Bldg. Inspectors, including landlord tenant resolution
<b>100% Revenue-Supported Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
FB-24	Addressing	63,834			0.75	Permit Techs
FB-25	Plan Review	803,000			8.10	Bldg. Plans Examiners, 2 (vacant) third party review + Operating Costs
FB-26	Construction Inspection	544,910			5.85	Building Inspectors, Permit Transcriber + Operating Costs
FB-27	Permitting	346,960			3.63	Permits Techs + Operating Costs
<b>Administration</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
	Director (1); ADC (.30); Admin Asst. (2); Admin Clerk (.15)	446,192		x	3.45	Salaries/Benefits/Benefits/OT/on-call + Operating Costs = \$69,606
	Internal Charges	2,521,179		x		Includes Fleet, IT, Norway Hill, and Communications (including Dispatch)
<b>Total</b>		<b>15,220,115</b>			<b>109.53</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: Lodging Tax Fund/City Manager's Office

**DRAFT**

Mandated Services	Expenditures	Revenue Offset?		FTE's	Notes
		None	Partial		
Essential Services	Expenditures	Revenue Offset?		FTE's	Notes
Discretionary Services	Expenditures	Revenue Offset?		FTE's	Notes
100% Revenue-Supported Services	Expenditures			FTE's	Notes
Tourism Services	208,745			0.90	Includes program staff, tourism intern, professional services, grants, advertising, printing, and admin
Administration	Expenditures	Revenue Offset?		FTE's	Notes
<b>Total</b>	<b>208,745</b>			<b>0.90</b>	

**DRAFT****CITY OF KIRKLAND SERVICES MATRIX****DEPARTMENT: Public Works - Street Fund**

	Mandated Services	Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ST-1	Bridges	2,252	x		0.20	Bridge Maintenance
ST-2	Sidewalk Grind	14,412	x		0.11	Sidewalk Offset Grinding
ST-3	Streetlight Maintenance	21,618	x		0.17	Streetlight Inspect/Repair
ST-4	Streetlight Operations	370,723	x			Budget Operational Costs - Streetlights; PSE
ST-5	Signal Maintenance	157,178	x		1.29	Signal Maintenance/Repair
ST-6	Electrical	72,058	x		0.05	Electrical Repair
ST-7	Crosswalk Maintenance/Inspection	19,141	x		0.15	Lighted Crosswalk Maintenance/Inspection
ST-8	Signal Operations	142,579	x			Budget Operational Costs - Signals
ST-9	Sign Shop	205,592	x		1.68	SignShop Operations
ST-10	Sign Shop Operations	187,194	x			Budget Operational Costs - Signs
	Essential Services	Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ST-11	NTCP	52,903	x			Program Cost Budget handled by Traffic Engineering
ST-12	Parking Management	30,224		x	0.50	Program Cost Budget handled by Traffic Engineering; Tami White
ST-13	Shoulders	11,935	x		0.09	Shoulder Grading
ST-14	Curb/Gutter	7,206	x		0.05	Curb/Gutter Repair
ST-15	Temp Patch	19,141	x		0.15	Pothole Repair
ST-16	Hot Patch	299,718	x		2.46	Asphalt Hot Patching
ST-17	Saw Cuts	65,078	x		0.53	Asphalt Saw Cutting
ST-18	Extruded Curb	9,457	x		0.07	Extruded Curb Repair/Install
ST-19	Conc. Repair	40,983	x		0.33	Flat Concrete Repair



**DEPARTMENT: Public Works - Street Fund****DRAFT**

ST-41	Street Litter	7,206	x		0.05	Street Litter
ST-42	Spraying	14,412	x		0.11	Spray program
ST-43	Roadside Litter	4,729	x		0.03	Litter removal from roadside
ST-44	Ancillary Operations	6,267	x			Budget Operational Costs - Ancillary
ST-45	Graffiti	103,810	x		0.85	Graffiti Removal ROW and Parks
ST-46	CBD Appurtenance	36,255	x		0.29	CBD focus activities
			<b>Revenue Offset?</b>			
	<b>Administration</b>	<b>Expenditures</b>	<b>None</b>	<b>Partial</b>	<b>FTE's</b>	<b>Notes</b>
	Admin. Operations	161,380	x		1.28	Budget Operational Costs
	Grounds Maintenance - Admin	67,555	x		0.60	Public Grounds Supervision
	Maint/Supv. Operations	275,001	x			Budget Operational Costs - Maint/Supervision
	IT Charges	99,230	x			
	Fleet Charges	311,152	x			
	Facility Charges	124,697	x			
	Insurance	81,808	x			
	<b>Total</b>	<b>3,800,702</b>			<b>15.40</b>	

**DRAFT****CITY OF KIRKLAND SERVICES MATRIX****FUND/DEPARTMENT: Parks Maintenance Fund/Parks and Community Services**

<b>Mandated Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
PM-1	Inspections / installations	8,100	x		0.10	Inspect play areas, docks, lighting, repair and document, ADA accessibility
<b>Essential Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
PM-2	Ballfield Maintenance	215,200		x	3.00	Ballfield prep, maintenance, scheduling, administration
PM-3	Park & City/School partnership mowing	162,400	x		2.00	Mowing and turf maintenance, administration
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
PM-4	Garbage / litter collection /park closure	40,600		x	0.50	Removal of garbage & litter, close parks and lock gates
PM-5	Restroom operations	32,500		x	0.50	Maintenance, repairs, labor
PM-6	Irrigation	65,000		x	0.40	Maintenance & operation of irrigation systems, utilities, supplies, labor, training
PM-7	Night and Weekend coverage	66,500		x	1.00	Staff for ballfield prep, garbage/litter, restroom maintenance after 5 pm Mon - Fri and all day Sat/Sun
<b>Administration</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
	Interfund Charges	118,785	x			
	Insurance	17,955	x			
<b>Total</b>		<b>727,040</b>			<b>7.50</b>	

## CITY OF KIRKLAND SERVICES MATRIX

FUND/DEPARTMENT: Recreation Revolving Fund/Parks and Community Services

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
RR-1	Water Safety Instruction	118,352		x	0.45	Revenue supported program plus hourly employees. Revenue for this program is \$155,000.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
RR-2	Youth Sports: programs and camps	118,120		x	0.60	Revenue supported program: Revenue=121,400
RR-3	Adult Sports	88,792		x	0.60	Revenue supported program. Revenue=94,600
RR-4	Outdoor programs	33,857		x	0.05	Revenue supported=40,000
RR-5	Swim/Dive Team	7,800		x	0.10	Revenue = 20,000
RR-6	Preschool Programs	106,000		x	0.40	Additional hourly employees. Revenue = 112,000
RR-7	Youth Programs & camps	92,000		x	0.30	Additional seasonal employees. Revenue = 123,500
RR-8	Adult General Programming	62,000		x	0.30	Contracted professional services. Revenue=48000
RR-9	Adult Fitness Programs	43,000		x	0.30	Contracted professional services. Revenue=57000
RR-10	Summer Concert Series	24,650		x		Seasonal employees. Split between General fund and 126. Revenue includes grants and donations. Revenue=30,000
RR-11	Recreation Brochure	60,000		x		Combined with General fund. Includes Sr. Center brochure, printing and postage
RR-12	Senior Fitness, Lifelong learning, enrichment programs	56,000		x		Combined with General Fund costs. Revenue=82000
RR-13	Senior Center Special Events	10,000		x		Combined with General Fund costs. Revenue=3500
RR-14	Senior Van Trips	17,300		x	0.15	Combined with General Fund costs. Revenue=15300
100% Revenue-Supported Services		Expenditures			FTE's	Notes

**FUND/DEPARTMENT: Recreation Revolving Fund/Parks and Community Services****DRAFT**

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Professional Services Interfund	54,000	x			
	Fleet interfund	10,500	x			
	Facility interfund	52,162	x			
	GIS interfund	23,149	x			
	Banking fees ( credit card usage )	24,500		x		These are added into Recreation fees.
	Insurance	10,360	x			
	PKCC Coordinator	41,140			0.50	.5 PKCC Coordinator authorized by Council in 2007/2008. Not hiring this coordinator. This represents salary, benefits, and inferfund charges
	<b>Total</b>	<b>1,053,682</b>			<b>3.75</b>	

**CITY OF KIRKLAND SERVICES MATRIX****FUND/DEPARTMENT: Facilities Maintenance Fund/Public Works****DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FM-1	ADA Code Compliance	24,000	x		0.10	Elevator & automatic door maintenance
FM-2	Ergonomics	18,000	x		0.25	Installation of keyboard trays, etc.
FM-3	Maintain Fire/Life & Safety Systems	51,000	x		0.15	Inspection, monitoring & maintenance of fire suppression & alarm systems (incl phone lines & Fire Station doors & alarm systems)
FM-4	L&I Compliance	5,000	x		0.05	Boiler certification, training, safety meetings
FM-5	Flags	2,000	x		0.02	Flags & conformance with "half-staff" schedule
FM-6	DOH Compliance -Backflow Tstg	1,000	x			Required testing of backflow prevention assemblies on boilers, etc.
FM-7	Pesticide Certification (Grounds)	1,000	x			Required certification and training for pesticide handling
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
FM-8	24 Hour Coverage/Emergency Response	19,000		x		Standby Pay & Overtime
FM-9	HVAC/Air Quality Issues & Energy Conservation	119,000		x	0.82	Maintenance of HVAC systems at all city buildings
FM-10	Emergency Systems Support	31,000		x	0.10	Inspection & maintenance of generators & UPS
FM-11	Public Building Infrastructure & Systems Maintenance	203,000		x	1.35	Maintenance of infrastructure & systems -painting, repair, plumbing, lighting, electrical, etc. (incl. supplies & gen prof svcs & rpr/maint)
FM-12	Security Systems	36,000		x	0.30	Maintenance, installation and purchase of locks, keys, security systems, etc.
FM-13	Pest Control	7,000		x	0.01	Contracted pest control services
FM-14	Life Cycle Projects	38,400		x	0.40	Coordination, review and management of building life cycle projects
FM-15	Rental Property Management & Maintenance	40,000		x	0.05	Coordination of rental properties & fees for contracted management & maintenance & leasehold excise taxes
FM-16	Janitorial	214,000		x		Cleaning services at all city buildings
FM-17	Janitorial -Supplies	16,000		x		Supplies for cleaning all city buildings

**FUND/DEPARTMENT: Facilities Maintenance Fund/Public Works****DRAFT**

<b>Essential Services continued</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
FM-18	Janitorial -Carpet & Upholstery Cleaning	29,000		x		Carpet & upholstery cleaning @ all facilities
FM-19	Janitorial -Entry Mat Cleaning	2,000		x		Cleaning & replacement of entry mats
FM-20	Landscaping -City Facilities	67,000		x	0.55	Public Grounds staff landscaping
FM-21	Landscaping -City Facilities (hourly wages)	22,000		x		Public Grounds seasonal landscaping
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
FM-22	Janitorial -Window Cleaning	5,000		x		Exterior window cleaning
FM-23	Janitorial -Art Display Cleaning	1,000	x			Contracted City Hall art cleaning
FM-24	Janitorial -Restroom Deodorizer Svc	3,000		x		Contracted restroom deodorizer service (monthly at most buildings)
FM-25	Office Reconfiguration	8,000	x		0.14	Moving furniture, reconfiguring cubicles
FM-26	New Construction/Tenant Improvements	7,000	x		0.08	New hard-wall offices, etc.
FM-27	Training	8,000		x		Training needed for maintenance staff to keep level of knowledge & certifications - Travel & Subsistence included
FM-28	Inventory Control	11,000		x	0.13	Maintenance & distribution of supplies (esp. janitorial)
FM-29	Project Management	14,400		x	0.15	Management of non-Life Cycle projects
FM-30	Space Planning	8,000	x		0.04	Ongoing space planning efforts - largely coordination of consultants
FM-31	Work Order System	9,000	x		0.10	Maintenance of work order system
FM-32	City signage (maint. and repair, lighting and new signs)	2,000	x		0.01	Maintenance of large, wood signs at various facilities
<b>100% Revenue-Supported Services</b>		<b>Expenditures</b>			<b>FTE's</b>	<b>Notes</b>
FM-34	Admissions Tax to KPC	35,000				Portion of Admissions tax given to KPC per agreement. This payment is 100% covered by admissions tax revenue.

**FUND/DEPARTMENT: Facilities Maintenance Fund/Public Works****DRAFT**

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	Facilities Admin	53,000	x		0.45	PW Facilities & Admin Mgr (40%); Maint & Inv (5%)
	Grounds Admin	41,000	x		0.40	Public Grounds Supervisor (35%); Street Division Manager (5%)
	Other Admin Costs -Facilities & Grounds	6,000	x			Office supplies, uniforms, etc.
	Interfund Transfers	830,100	x			Debt Svc (CH) - 347,294; Debt Svc (MC) - 346,358; Lifecycle project transfer - 136,400
	IT, Fleet, Radio & Telecom Charges	94,000	x			Internal service charges
	Municipal Court Lease	284,000	x			Lease & associated costs for Municipal Court space (rent, prop tax, prop ins, common area prof svcs)
	Insurance	102,000	x			Insurance on city building contents
	Utilities	482,000	x			Water, Sewer, Electricity, Gas for all city buildings
	Refuse Collection & Disposal	4,000	x			Trash removal at three fire stations outside Kirkland city limits
	Accounts Payable	22,000	x		0.25	Requisition activities, etc.
	Communication	4,000	x			Cell phones, pager
	False Alarm Charges	1,000	x			Kirkland PD
	<b>Total</b>	<b>2,979,900</b>			<b>5.90</b>	

**CITY OF KIRKLAND SERVICES MATRIX**  
**FUND/DEPARTMENT: Equipment Rental Fund/Public Works**

# DRAFT

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ER-1	Vehicle Licensing	10,036		x	0.05	Fleet Supervisor's time (0.05 FTE - \$6,036), and licensing fees (\$4,000).
ER-2	Vehicle Insurance	42,597		x	0.05	Fleet Supervisor's time (0.05 FTE - \$6036), insurance cost (\$36,561).
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ER-3	Fuel/Fuel System & Tanks	488,257		x	0.40	Includes all fuel (\$446,940), system administration - Fleet Supervisor's time (0.20 FTE - \$24,144) Fleet Admin's time (0.20 FTE - \$12,773) , and fueling software support (\$4,400). Gasoline for all city vehicles.
ER-4	Vehicle/Equipment Maintenance	618,606		x	4.15	Includes staff labor (\$365,762) consisting (4.0 FTE) mechanics and (0.15 FTE) inventory control shared with Public Works. Plus parts, outside vendors, shop equipment, tools, tires (\$310,366). Removal would require negotiations of impacts with the Teamster Union.
ER-5	Vehicle/Equipment Acquisition	749,178		x	0.15	Fleet Supervisor's time (0.15 - \$18,108) plus amount budgeted for vehicle acquisition in 2008 (\$730,573), plus advertising of bids (\$497). Not replacing vehicles will increase the cost for repairs and maintenance.
ER-6	Vehicle/Equipment Disposition	6,036		x	0.05	Includes Supervisor's time (0.5 FTE - \$6,036) included in surplus and auction of equipment. Exclusion will impact maintenance and replacement costs.
ER-7	800 MHZ Radio/Access Repair	175,854		x	0.20	ESPCA access charges (\$108,510), repair contract (\$42,849), and Fleet Supervisor's time (0.15 FTE - \$18,108), and Admin Asst. time (0.05 - \$6387). Elimination would degrade our ability to operate with other governmental agencies as well as internally degrading the public safety communications for the City.
Discretionary Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
ER-8	Vehicle Cleaning	5,000		x		vehicle washing at vendor white Swan, 90% is Police vehicles conducted by officers. Impact would be the Police officers time to care for their vehicles which would take away public safety duties and increase the use of the wash station at the maintenance center.
100% Revenue-Supported Services		Expenditures			FTE's	Notes

**FUND/DEPARTMENT: Equipment Rental Fund/Public Works*****DRAFT***

Administration		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
	General Administration - Supervisor	24,144		x	0.20	Fleet Supervisor time (0.1 FTE)
	Accounting, Budgeting, Database	66,007		x	0.90	Fleet Supervisor time (0.15 FTE - \$18,108) Admin Asst (0.75 FTE - \$47,889).
	IT and Facilities Charges	213,273		x		IT and Facilities charges.
<b>Total</b>		<b>2,398,988</b>			<b>6.15</b>	

## CITY OF KIRKLAND SERVICES MATRIX

## FUND/DEPARTMENT: Information Technology Fund/Information Technology

**DRAFT**

Mandated Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
IT-1	Support for Finance systems	212,480		x	0.22	Mandated by the state and federal agencies (reporting to IRS, DRS, etc.). Includes all parts of finance systems (GL,AP,PY, timekeeping, etc.). .22 of an ongoing FTE (which is shown here) goes to support timekeeping. There are two one-time funded FTE's working on the other parts of this set of systems (those salaries are not shown here). Basic maintenance and operations takes 1.0 FTE, and forward progress to implement best practices, auditors recommendations, process improvement, etc., takes the other FTE. The work is shared to provide backup.
IT-2	Support for Document Management systems	142,691		x	0.30	New digital WAC mandates management of electronic records.
IT-3	City-wide desktop software licensing	106,300		x		We are in a contractual relationship with Microsoft for the next three years to keep software licenses up to date. Includes Microsoft enterprise agreement and Microsoft software assurance.
Essential Services		Expenditures	Revenue Offset?		FTE's	Notes
			None	Partial		
IT-4	PC support	520,577		x	2.96	Includes Help Desk, help desk system, help desk staff, training, Council meeting support, PC replacements, desktop management. PC replacement is done using one-time funded staff resources this budget.
IT-5	GIS	355,937		x	2.82	GIS also receives significant CIP funding as a separate revenue source. A large portion of the CIP funding for GIS is from utilities.
IT-6	Central server & network support	396,687		x	2.37	Includes staff costs, cabling and cable installation, backup tapes, network equipment maintenance, and software, network consulting and support. Replacement funding for servers and network equipment is in the CIP.
IT-7	Telecomm and support	122,741		x	0.58	Telephone system operation and maintenance, call accounting, bill management, voice mail, etc.
IT-8	Permit system and support	80,905		x	0.47	Includes permits and inspections, business licensing, and field mobility.
IT-9	Police system and support	321,484		x	1.23	Police CAD, RMS, mobility, field reporting, jail, evidence tracking, etc. Includes support for police technology systems for Medina and Mercer Island. Some of these costs will be shifted to NORCOM and we are contractually bound to do this. They are not expected to shift before the 09/10 budget.
IT-10	Fire system and support	34,542		x	0.23	Fire is dispatched through Bellevue and the majority of their system costs reside there and are paid through contract. We primarily support records management and inspection. Also expected to partially shift to NORCOM, but perhaps not until 2011 or 2012.

**FUND/DEPARTMENT: Information Technology Fund/Information Technology****DRAFT**

<b>Essential Services continued</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
IT-11	Copier purchase and support	77,998		x		Lease and maintenance costs for city copiers.
IT-12	Telecommunications Franchising and Management	53,441		x	0.30	Negotiate and manage telecommunication franchise agreements granted by the City. Includes antenna siting and leases, cable franchise, and franchise management.
<b>Discretionary Services</b>		<b>Expenditures</b>	<b>Revenue Offset?</b>		<b>FTE's</b>	<b>Notes</b>
			<b>None</b>	<b>Partial</b>		
IT-13	Parks system and support	34,690		x	0.19	Includes recreation software support and staff assistance.
IT-14	Public Works system and support	63,963		x	0.33	Maintenance management system which tracks utility assets such as pipes and valves and management of public works work orders.
IT-15	Web system	152,780		x	1.11	Intranet and internet system and support.
IT-16	Print media Production	207,049		x	2.10	Supports communication to the community and within the organization. Design and create information signs that get used on park kiosks; design, create and produce brochures, posters, flyers, invitations, newsletters, manuals for the organization. Prepares graphics for use with television and for web. Includes on-call graphic support.
IT-17	City Council Meeting support	30,664		x	0.28	Produces live video of regularly scheduled Council meetings and study sessions. Includes preparation and test, actual filming and may include minor editing.
IT-18	Television Station Management	51,738		x	0.33	Draft, maintain, update and in some cases manage forms, packets, applications, resolutions, ordinances, manuals (e.g. Natural Resource, Planning Design Guidelines...) job descriptions, employee identification cards, labels, city telephone and contacts roster & contracts for the city.
IT-19	Document support services	45,421		x	0.60	Maintains Official City Documents, and prepares more complex word documents such as forms with fields, e-forms, creates style sheets, incorporate graphics throughout documents, multiple columns with section breaks, creating template and the blending of two or more documents.
IT-20	Other Video Services	20,340		x	0.15	Copy DVDs on request, video of debates and others special events, misc, video associated work. Includes time spent managing the video that we do. One-time funded (actual work is not reflected in this spreadsheet).
<b>100% Revenue-Supported Services</b>						<b>Notes</b>
IT-21	Utilities systems and support	44,781			0.19	Staff and maintenance for the utility billing systems.

**FUND/DEPARTMENT: Information Technology Fund/Information Technology*****DRAFT***

Administration	Expenditures	Revenue Offset?		FTE's	Notes
		None	Partial		
Director and Admin Assist	252,050		x	2.00	
Staff costs and supplies	6,146		x		Includes department van and advertising.
City-wide support	112,871		x		Includes repair shipping, internet circuit and services fees, Earthlink, PC hardware coverage/repairs, general printer maintenance and parts for checkout projectors and laptops.
<b>Total</b>	<b>3,448,276</b>			<b>18.75</b>	

**CITY OF KIRKLAND****City Manager's Office**

123 Fifth Avenue, Kirkland, WA 98033 425.587.3001

[www.ci.kirkland.wa.us](http://www.ci.kirkland.wa.us)

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**MEMORANDUM**

**To:** Dave Ramsay, City Manager

**From:** Marilynne Beard, Assistant City Manager  
Marie Stake, Communications Program Manager

**Date:** April 30, 2008

**Subject:** PUBLIC EDUCATION AND PARTICIPATION STRATEGIES REGARDING CITY FINANCES

**BACKGROUND**

At the 2008 City Council retreat, information was presented on how best to communicate about the City's current financial condition and future outlook, specifically the 2009–2010 budget. Communication strategies presented included:

- Developing key messages
- Increasing media relations (TV, newsprint and web)
- Increasing public speaking opportunities and skills

The presentation also included an overview of public participation concepts and planning processes that can provide meaningful ways to engage community members in either helping to resolve or reduce the long term structural imbalance between revenues and expenditures. Staff presented key public participation (P2) concepts focused on the importance of the P2 planning process which results in determining the appropriate level(s) of participation and the appropriate tools to engage the public. The IAP2 Spectrum of Public Involvement is attached for reference.

The purpose of this memo is to provide an outline of proposed communications and public involvement strategies and associated costs so that the City Council can provide direction to staff about which to pursue.

**COMMUNICATIONS STRATEGIES**

The City Council is about to begin its 2009-2010 budget deliberations. Its discussion around the financial gap will need to raise public awareness about the difficult choices that will need to be made by the City Council for the coming biennium. Kirkland has tried a number of different approaches in the past to inform and engage the public about the City budget. At the Retreat, the City Council expressed the desire

to have timely communications aimed at educating and informing the community about:

- Revenue sources, how they work and trends (especially property tax)
- Services provided and expenditure trends
- Current and forecasted financial condition and budget-balancing options

It is anticipated that the following strategies can create a renewed level of interest by community members.

***Strategy I: Develop Key Messages***

As shared at the March retreat, the City's communications strategies will be most effective if key messages are developed and used consistently by City officials. "Key messages" need to describe the situation in straightforward terms that are simple and memorable. The key messages should reflect that the financial gap is a serious issue that the City is addressing reasonably, sensibly, and responsibly.

Sample key messages were presented in the staff memo prepared for the retreat. Although Council did not have an opportunity to comment on the key messages, we propose incorporating the following key messages in written materials, presentations and other materials:

- The City of Kirkland is committed to providing quality public services to its residents and businesses.
- Kirkland residents value the level and quality of services they receive. These services are provided by City staff and employee compensation represents 70% of the budget.
- The City's expenses are growing faster than the revenue base due in large part to tax-limiting initiatives and the economic downturn.
- The City must live within its means and prepare a balanced budget.
- The Kirkland City Council will need to make difficult choices to balance the budget that may include service level cuts, tax increases, or both.
- The City's highest priority continues to be the protection of the health and safety of the community.
- The Kirkland City Council needs the community's input about how to balance the budget and create a more sustainable financial future.

Developing and agreeing on key messages is the first essential step in communicating to the public about issues associated with the upcoming budget, city finances and the City's financial outlook. Once key messages are identified, they need to be articulated consistently throughout the process by City officials so that the organization speaks with one voice. While individuals may not agree on the solution to the problem, there is value in presenting a unified message to the public about the nature of the problem and the range of solutions.

Staff recommends that the Council discuss and refine the key messages offered by staff at the May 7 meeting so that staff can begin productions of written and presentation materials to support the communications plan described below.

## ***Strategy II: Increase & Enhance Media Relations***

Once key messages are identified, they can be communicated through various media. For purposes of this staff memo, newsprint includes the City's newsletter (City Update), as well as local newspapers, such as the Kirkland Courier Reporter. Additionally, television media is available including the City's government access channels – KGOV (Channel 21) and KLIFE (Channel 75) as well as web-based media including the City's website which has the capability to video stream.

Some ways to increase and enhance media coverage regarding City finances is through:

- **News Releases.** News releases are intended to garner the interest of media (TV, print, radio) so that a feature story is printed or aired. City news releases are generally distributed internally (City Council, City Manager's Office, City Public Information Officers, KirkNet and boards and commissions).

External distribution is made via the City website (News Room) to TV, radio and newspaper media and to community contacts (Business associations, other jurisdictions, neighborhood associations).

*Recommendation:* News releases should be issued where there is a public comment (e.g. public hearing) opportunity, community involvement opportunity (e.g. open houses), or when the City Council is about to or has made a major decision about changes to levels of service or revenue.

- **Guest Editorials.** An editorial is an analysis of or commentary on news events or public concerns written by someone whose credibility is based on his/her knowledge of a particular subject and/or position in an organization. Although guest editorials may be submitted by City officials, they may not be published. Publication is at the discretion of the newspaper's editor.

*Recommendation:* It is recommended that a guest editorial authored by the City Council be drafted following the acceptance of key messages and that this first editorial announce the City Council's commitment to informing the community about the budget issues. Additional editorials could be drafted when a major policy decision has been made by the City Council as a means to explain the reasoning behind the decision.

## ***Strategy III: Enhance City Newsletter***

The City's newsletter (City Update) can be an effective communication tool that has the potential to reach all residents and businesses. In the 2006 citizen survey, most residents indicated that Kirkland was doing a "good" (54%) or "excellent" (10%), job of keeping citizens informed. Those who said communication was "only fair" (25%) or "poor" (8%) tended to say that a better job could be done via a newsletter. When asked to choose from a set list of ways to disseminate City information, 35% preferred to get information from a City newsletter.

For a number of years, City Update was designed, produced and mailed by the City directly to homes and businesses within city limits. The publication ranged from four to eight pages and was mailed quarterly. In 2002, funding was reduced due to budget constraints and the City moved to its current format.

The current City Update is published in the Kirkland Courier Reporter ("Courier"). The Courier was purchased in 2007 by Sound Publishing Company and became a weekly publication; instead of a monthly publication. The Courier's current distribution is 26,400 (including the potential annexation area) with limited distribution to multi-family (condos and apartments).

City Update is published in the first edition of each month. The publication is a full page advertisement which costs \$1,580 per month (with the recent addition of color). The annual cost is \$18,960. Although the Courier posts its editions on the web, it does not post paid advertisements.

Since the City began publishing City Update in the Courier, more advanced and less expensive printing methods (digital printing and web press) have become available. The annual funding for City Update may be more effectively utilized by re-instituting the City-produced publication.

A preliminary cost estimate for a City-produced newsletter indicates that the current budget could support a stand-alone, four- or eight-page publication (similar to the original City Update publication) produced up to three times per year. This estimate includes printing and postage. Based upon the average of three vendors' estimates, the cost to print 20,000 copies of an 8-page, 4-color publication on newsprint-type paper is \$2,200 and the associated cost for postage is approximately \$2,200. One vendor's estimate of the number of households and businesses is 16,000. Extra copies can be available as counter copies at City and public facilities. A sample of a similar publication from the City of Shoreline was provided in the retreat packet.

The 2008 budget could be used to publish at least one or two issues in 2008 (if current publication in the Courier ceases as of June, 2008). It is estimated that three publications could be produced annually in the coming biennium if the same level of funding is approved.

A multi-page direct mail edition of City Update would reach most households and businesses and could be very effective in informing the public about the budget situation. An "All About the Budget" edition would incorporate the key messages agreed to by City Council and contain:

- A description of the problem and causes
- Sources of revenue
- Services provided
- Explanation of how property taxes work
- Discussion of Council's decision process and how public input will be sought and used

*Recommendation:* An inaugural issue should be published that would be dedicated to the budget. Follow-up issues could have dedicated feature stories about the budget issues, their status and how citizens can stay informed and be involved. As an alternative, a one-time publication could be mailed and the one-page ad in the Courier could be retained as the normal publication.

#### ***Strategy IV: Educational Video***

The cost to develop a stand alone educational video on budget issues/city finances depends on several factors including the length of the video and the use of graphics and animation. Time would be needed to develop a script (based upon the key messages), schedule production and complete film editing. IT staff estimates that a short video could be produced by mid-July. The video would be aired on KGOV and KLIFE and streamed as “On Demand” programming from the City’s website.

The City’s Multimedia Services (MMS) provides consultation on developing story ideas for stand alone program videos as well as for “Currently Kirkland,” the monthly news magazine show that airs on KLIFE, Channel 75. The Video Production Specialist’s time is funded half-time as a regular general fund employee and half-time from “one-time” funded special projects. The regular funding covers City Council meetings, program scheduling, and other administrative tasks such as streaming video, equipment maintenance, etc. In order for MMS to produce a stand alone video for the budget process, the Video Production Specialist’s labor would need to be charged back to the General Fund. The estimated cost of a stand-alone video produced in-house could be as much as \$10,000.

As an additional or alternative method, Currently Kirkland, the monthly magazine show on KLIFE, should contain a budget piece centered around the key messages. Based upon the current production schedule, the earliest show that the budget messages could be incorporated is the July show.

*Recommendations:* It is recommended that a script be developed based around the key messages and be incorporated into the July edition of Currently Kirkland. Additionally, “basic budget” information could be included in future editions. Further direction is needed from Council regarding whether to produce a stand-alone video.

#### ***Strategy V: On-line Budget Calculator***

The retreat staff memo described how some cities use a web-based tool for the purposes of helping citizens understand how to “balance the budget.” The Council has expressed an interest in developing a budget calculator tool for educational purposes.

The Association of Washington Cities (AWC) created a standard budget calculator that can be loaded onto the City’s website. AWC’s calculator is developed as a sequel-based (SQL) application; however, AWC has advised us it is working to correct administrative and reporting capabilities of the application. The calculator is being pulled from its website in the coming weeks and won’t be available until later this summer. As presented in the retreat memo, the City of St. Paul, Minnesota developed a customized on-line budget calculator that appears to be SQL based. A request has been made by Kirkland about the possibility of obtaining the code from St. Paul. A response was not received at the time of finalizing this staff memo. Kirkland’s IT Department does not have in-house staff that could create the SQL-based application. If Kirkland was to hire a programmer, the hourly rate is estimated at \$75 to \$100 per hour. We do not have an estimate of the number of hours needed to develop the budget calculator.

A second type of calculator, currently used by the cities of Spokane Valley and Mukilteo, is essentially an Excel spreadsheet. It is possible to download the spreadsheet and customize it for Kirkland's purposes or to create one in-house.

*Recommendation:* The City currently does not have the in-house expertise to develop an SQL-based on-line budget calculator and staff will further explore options to obtain one that meets our purposes. IT, Finance and CMO staff will further explore the functionality of an Excel-based on-line application. However, it could not be available until the fall. Council direction is needed regarding whether or not to continue to pursue this tool for the future.

### ***Strategy VI: Create and Promote a Budget Speakers Bureau***

A speaker's bureau can be an effective means to continuously and consistently carry the City's key messages in a person-to-person format. The bureau would be comprised of City Council members and key staff who would be available to speak at neighborhood, business and community association meetings. Speakers would be equipped with printed materials, a PowerPoint slide show and other relevant resources.

As a means to enhance the public speaking skills of the speaker's bureau, the City could engage the services of a communications consultant to work with Council and key staff on effective techniques for staying on message and responding to the public. Michael Buschmohle, Applause Associates, is a communications consultant that has worked with a number of cities and City Councils in Washington on similar projects. He estimated a cost of \$3,000 for a full day of training or \$1,500 for a half-day training session that could be supplemented with individual coaching at a rate of \$250 for 90 minutes.

*Recommendation:* It is recommended that a consultant be hired to advise Council members and key management staff on how to best communicate the budget information. Promoting the speaker's bureau will be coordinated by the Communications Program Manager using the City's various communications tools.

## **PUBLIC PARTICIPATION**

The section above describes the communications strategies which can be considered the techniques associated with the **"Inform"** level of public involvement on the IAP2 Spectrum. During the Council's discussion about public involvement in the budget process, some general principles were outlined concerning the level and type of public involvement that would be appropriate for the upcoming budget. Under the "inform" mode of P2, the promise is that "We will keep you informed."

Council believes that **educating and informing** the public about the City's finances and the current challenges was most important and should be initiated as soon as possible. We should also inform the community about the decision-making process and how they will be involved. Council also agreed that public involvement would be most helpful once the Council has narrowed the tool set to a range of options that the public could comment on.

Council was clear that the budget decisions would be in the hands of the City Council (including whether or not to seek voter-approved tax increases) and that the public involvement effort is most appropriate at the **“Consult”** level (i.e. “We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.”). Methods that are typically used at the consult level include soliciting public comment at hearings, using feedback cards, focus groups and public meetings. As noted earlier, an important consideration is how the input will be used by the Council in their decision-making process. In a “consult” mode, using voting or workshop-type formats can be misleading because it may imply that the input will be directly reflected in the Council’s decision rather than simply taken into consideration.

Specific methods that we may consider include:

- Webpage with email feedback and streaming of educational video
- Response forms included in mailing
- Speakers bureau with facilitated discussion and recording of comments
- Small format meetings (speakers bureau with facilitated discussion) out in community
- Open houses
- Informational materials at community fairs and farmer’s markets

Our efforts will need to reach a broad cross-section of interests:

- Age/diversity
- Homeowners and renters
- Single family and multi-family
- Small, medium and large businesses
- Involved citizens (opinion leaders) and those that typically aren’t involved
- Internal stakeholders (employees, unions, board and commission members)
- Public and non-profit institutions

Each stakeholder group has unique interests and will respond to different modes of communication. They will be compelled to participate for different reasons and so our outreach should be designed to capture their input on the issues most important to them in the venue most accessible to them. To that end, we recommend that we begin contacting representatives from each of these interest groups to determine the venue and timing best suited to their needs. We already have a number of established groups to work with including the Business Roundtable, Neighborhood Associations, Chamber of Commerce, etc. and it may take some time to get on their agendas. The work plan discussed below demonstrates the need for quick and focused attention in order to conduct a meaningful process before the budget recommendation is prepared.

**WORKPLAN AND BUDGET**

Before the public input phase can begin, the educational process needs to be well underway. One of the most important first steps will be Council’s agreement on key messages and endorsement of a special mail-out edition of City Update to begin the education process. Staff should begin the process of scheduling presentation to neighborhoods, businesses and community groups. A work plan is shown below that suggests a proposed sequence of activities. Major tasks and milestones include:

<b>“Inform”</b>	May 7	Budget Study Session – Key Messages Identified
	May–June	Prepare City Update Special Edition and Web Page Initiate Stakeholder Contacts for Public Involvement Phase
	May 29	Second Budget Study Session
	June 5	Mid-Year Budget Meeting – General Policy Guidance Provided by Council Media Contacts (press release and/or guest editorial)
	Mid-June	Print and Mail City Update and Publish Web Page
	Early July	Communications Training
	July 15	Budget Balancing Strategies Finalized
	Mid-July	Currently Kirkland Feature Story
<b>“Consult”</b>	July–Mid-Sep	Community Meetings
	Sep 16	Report Back to Council and Community on Input Public Hearing
	Sep–Oct	City Manager prepares Budget Recommendation
	Oct 21	Budget Transmitted to City Council Media Contacts (press release and/or guest editorial)
	Nov–Dec	Budget Study Sessions and Adoption Public Hearing
	Dec	Second Issue of City Update regarding Budget Outcomes (including how public input was used)

In order to support these efforts, staff recommends that selected temporary staff currently devoted to annexation be redirected to the development of the newsletter, presentation materials and website. Two positions—an Administrative Assistant and ICMA Local Management Fellow—were funded through the end of 2008 for annexation. These staff would be reassigned to work on this effort and related budget documents.

	<b>Direct Costs (excludes staff support)</b>		
	<b>Low</b>	<b>High</b>	
Special Edition of City Update	4,400	4,400	One special edition—20,000 @ 8 pages
Educational Video	6,500	14,000	Range based on content
Communications Consultant	3,250	5,500	Half day with individual consults or full day with individual consults
General Printed Materials	2,500	5,000	
<b>Total</b>	<b>16,650</b>	<b>28,900</b>	

Funding for the staff support and the communication elements would come from annexation study savings.

## **SUMMARY**

Educating the public about City finances will need to be an ongoing effort that extends beyond this budget cycle. The 2009-2010 Budget process is approaching quickly and time is of the essence if meaningful public input is sought in time to help shape the budget. In order to move forward with this plan, Council direction is needed on May 7.

1. What changes/additions/deletions are needed to the proposed key messages?
2. Should the City Update be produced as a four to eight page mail-out instead of a full-page ad in the Courier on an ongoing basis, as a single special edition or not at all?
3. Would Council like to further pursue a short educational video?
4. Would Council like to further pursue a budget calculator for future use?
5. Is the Council interested in scheduling communications training?
6. Does the City Council support redirecting annexation staff to assist with the budget process?



International Association  
for Public Participation

# IAP2 Spectrum of Public Participation

*Increasing Level of Public Impact*

## Public participation goal

### Inform

To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.

### Consult

To obtain public feedback on analysis, alternatives and/or decisions.

### Involve

To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.

### Collaborate

To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.

### Empower

To place final decision-making in the hands of the public.

## Promise to the public

We will keep you informed.

We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.

We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision.

We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.

We will implement what you decide.

## Example techniques

- Fact sheets
- Web sites
- Open houses

- Public comment
- Focus groups
- Surveys
- Public meetings

- Workshops
- Deliberative polling

- Citizen advisory committees
- Consensus-building
- Participatory decision-making

- Citizen juries
- Ballots
- Delegated decision