



WASCO COUNTY SUMMIT 2023 NOTES

The Wasco County Management and Strategic Planning Summit was held on February 23-24, 2023 at the Washington Family Ranch. These minutes reflect the session discussions.

SAFETY AGREEMENT

The group reviewed our previous Safety Agreement statements:

- Listen actively with grace
- Don't finish someone else's sentence
- Question for clarification
- Hold harmless for questions/opinions
- Don't hold "it" against me
- Civility, Professionalism & Respect
- There are no bad ideas
- Be diplomatic
- Do not interrupt
- Trust
- Have Fun

Some additional thoughts are:

- There are no stupid questions, and no bad ideas
- Be diplomatic, but be honest
- See through others' lens before judging
- It's not "who," but "what"
- Start with questions
- Know we're on the same team, even though we run our own team
- Quiet is okay
- Be open to others
- Please and thank you!
- Grace for the facilitators

CREATING A CLIMATE WHERE TRUTH IS HEARD

The Wasco County management team reviewed the four principles we use to ensure we foster a climate of truth:

1. Lead with questions, not answers – ask why until something is fully understood.
2. Engage in dialogue and debate, not coercion – search for the best answer.
3. Conduct autopsies, without blame – we are looking for "what" went wrong, not "who" went wrong.
4. Build "red flag" mechanisms to focus the discussion on information that cannot be ignored.

FINANCIAL OVERVIEW

Our Finance Director gave the team an overview of the county's financial health. A copy of the presentation slides are included at the end of this document.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS AND TRENDS (SWOTT) ANALYSIS

As pre-work for the Summit, each team was asked to provide a SWOTT list from their perspective. The group at Summit then brainstormed a county-wide SWOTT list. Each participant was then given "dots" to mark their top three items of importance. And finally, the group did a brainstorming session on what strategies we could employ to either leverage or mitigate those items.

STRENGTHS

Here are the top three strengths as collated from the department strategic plans, and the possible strategies to leverage these strengths.

1. Customer service – positive, excellent, above and beyond, solutions-oriented
 - a. Taking services out into the community (public outreach)
 - b. Showing people how to help themselves
 - c. Hear difficult feedback
 - d. Problem solve instead of default to "the rules"
2. Dedicated staff – great work ethic, few doing the work of many, high quality work
 - a. Employee appreciation
 - b. Flexible or hybrid work schedules
3. Positive work environment – staff has fun, enjoys the work, helps each other
 - a. Teambuilding events - STAR Team
 - b. Character-based evaluations

Here is the list of organization-wide strengths the group identified:

- Financial Resources
- Communication
- Support staff
- Leadership relationships
- Focused on who we serve/commitment to civil service
- Experienced leaders
- Quality staff
- Openness – care for community
- Adaptive/agile
- Proactive
- Positive atmosphere
- Diverse skill set
- Hiring talent
- Training and growth
- Nice people
- We ask for help
- Solution focused

- Low “crisis” level
- Purpose driven
- Knowing how to think critically
- Good brand
- Strategic planning

The group then identified the top three county-wide strengths, and strategies to leverage them:

1. Financial Resources
 - a. Allows us to address weaknesses, threats or opportunities
 - b. Take a position of leadership in the community
 - c. Ability to do long-term planning within departments because we have financial resources
2. Solution Focused
 - a. Invest in training on problem solving
 - b. Incorporate problem solving as a culture foundation
 - c. Encourage creativity
 - d. Develop a framework for decision making
 - e. Telling our story – public relations
3. Quality Staff
 - a. Invest in professional development and training
 - b. Continue to build on current hiring practices
 - c. Promote from within
 - d. Encourage engagement with associations and outside opportunities
 - e. Share employee success stories
 - f. Encourage/offer creativity outside a core function, or to bring it into their core function
 - g. Provide feedback

WEAKNESSES

Here are the top four weaknesses as collated from the department strategic plans, and the possible strategies to mitigate these weaknesses.

1. Workload and staffing levels – too much for too few, limited bandwidth, challenging timelines. Do we have access or necessary training to get people up to speed?
 - No, some are highly technical and others are administrative development
 - Lack of knowledge to use funding from their budget for training
 - a. Hire more people
 - b. Cross-train within departments
 - c. Budget for more overtime/comp time
2. Staffing changes / process training - lots of new staff, new staff need time and training, trying to balance training with work requirements
 - a. Emphasis on training
 - b. Mentor program
 - c. Recruit experienced staff / lateral hires

3. Lack of connection/communication – reduced interaction, communication with other departments, following up, still struggling with rebuilding culture, silo departments
 - Shifting culture to match hybrid environment and new perspective
 - b. Teambuilding events
 - c. Department group meetings
4. Space needs – lack of office space, sharing work station
 - Blurred lines for responsibilities
 - b. Purchase additional buildings
 - c. Budget for remodels

Here is the list of organization-wide weaknesses the group identified:

- Dispersed facilities – spread out
- Aging buildings/infrastructure
- Having the tough conversations
- Turnover of high-quality staff
- THE ELEVATOR!!!
- Slow adopters of technology
- Access related to remote work
- Lack of accountability
- Open meeting laws
- Lack of key performance indicators, defining tangible success metrics
- Lack of redundancy
- Burnout/workload
- Lack of diversity
- Lack of manpower
- Hiring quality people – recruit and retain
- Security for staff
- Security for buildings
- Culture has taken a hit
- Split staff time
- Inability to rumble
- New staff lack history and institutional knowledge
- Lack of capacity
- Equity – what does that really mean?
- Systems thinking / building resilient systems
- Space issues
- Silos – bounced back into them
- Technical training

The group then identified the top three county-wide weaknesses, and strategies to mitigate them:

1. Space Needs – this was a larger discussion which is captured in the Pathways portion of this document
2. Workload/burnout

- a. Offer sabbaticals
 - b. Be creative about workloads and workflow – “straighten the pipes”
 - c. Look at hiring someone to analyze workloads and how to improve them
 - d. Review complexity of services and how to deal with increasing legislation and regulation
 - e. Look at incorporating measurement – are we getting better or worse?
 - f. Analyze staffing levels – what are industry standards?
 - g. How do we ensure accountability?
 - h. Support hybrid work
 - i. Provide clearly defined agendas for meetings – who really needs to attend?
3. Aging Infrastructure
- a. Look for grants to offset infrastructure costs
 - b. Plan for life-cycle replacement
 - c. Conduct an infrastructure assessment – IS network, vehicles/fleet, software, buildings

OPPORTUNITIES

Here are the top five opportunities as collated from the department strategic plans, and the possible strategies to leverage them.

1. Grants – opportunities for state and federal funding, Global Grant Services and others
 - a. Expand the contract with GGS
 - b. Hire an in-house grant writer
2. New funding sources – Google funds, enterprise zones, solar farms, Redd zones
 - a. Invest in immediate infrastructure needs
 - b. Continue to invest in a competitive compensation package
3. Property development – 10th Street, Area 154, court house, fairgrounds, county owned lands
 - a. Hire a consultant for a feasibility study
 - b. Expand Facilities Department
 - c. Explore rental potential/income from property sales
4. Collaboration / partnerships
 - a. Actively support outside partners / quasi county organizations
 - b. Engage partners in all decision levels, management teams, budget
5. Technology – advancements in software, increased connectivity, more self service
 - a. Support IS upgrades and infrastructure needs – off the top
 - b. Expand IS department – 140:1?

Here is the list of organization-wide opportunities the group identified:

- Pursue Diversity, Equity and Inclusivity (DEI)
- Wider employment pool with remote work
- Partnering with agencies to pursue funding
- New momentum in community and agencies
- Collaboration with other counties and agencies on projects, regional collaboration
- Public/private partnerships
- Shifting public sentiment
- Promoting good stories
- Outreach to other organizations and the community

- Service partnerships
- Lots of training available
- Strategic technology adoption
- Growth due to broadband
- South county municipalities
- Embrace new technology
- Property development
- Set the example of governing, operations, culture
- Benchmark for others
- Space needs – new building
- Communication
- Economic development – land and buildings
- Alternative energy

The group then identified the top three county-wide opportunities, and strategies to leverage them:

1. Property Development
 - a. Conduct a priority assessment for development
 - b. Drive economic development and/or address community need with use of properties
 - c. Master Plan creation and cross-over with space needs
 - d. Story of leadership - the county is making decisions with these purchases that will have generational impact
 - e. Cyber property - How do we meet our citizens in the digital space
2. Space Needs – this was a larger discussion which is captured in the Pathways portion of this document
3. Grants
 - a. Understand grant scoring
 - b. Training on grant writing
 - c. Let staff write grants
 - d. Serve on grant selection committees
 - e. Get the right people on the Washington DC trip

THREATS

Here are the top three threats as collated from the department strategic plans, and the possible strategies to mitigate them.

1. Market conditions – inflation, supply chain issues, recession
 - a. Economy of scale, mass purchases, group purchases
 - b. Purchase redundant systems or extra materials when available
2. Employment market – recruitment, retention, job hopping, new employee expectations
 - a. Expand HR department – dedicated budget for recruitment and retention
 - b. Expand training – accept the fact of staff rollover and focus on training and development
3. Increased Regulation – political directives, state mandates, increased risk / litigation
 - a. Hire legislative support team – Wasco County lobbyist
 - b. Hire in-house legal support team

Here is the list of organization-wide threats the group identified:

- Cost of construction
- Work from home/remote work
- Cyber attacks
- Employees getting poached
- Lack of vision
- Drought/wild fires
- Changing financial landscape
- Increased threat landscape
- Litigation
- NSA/regulatory issues
- Homeless and mental health
- Lack of community trust
- Health care
- Community can be risk averse
- Lack of controlled messaging
- Physical violence
- Increasing public records requests and costs
- Partner competency
- Lack of workforce
- Lack of state partnership
- Reliance on state grants
- Pandemic impact
- Rising cost of living
- Lack of housing
- Increasing salaries / impact on overall finances
- Lack of/cost of childcare
- Quality of volunteers
- Economy
- Other taxing entities in our county – funding requests from them and lack of stability
- Unfunded legislative mandates
- Climate change and regulation
- Increasing polarization of government agencies
- Perception that we're getting too progressive – we're losing the "small town" feel
- We don't know about projects and how to do them

The group then identified the top three county-wide threats, and strategies to mitigate them:

1. Regulatory Issues
 - a. Be proactive on associations that work with legislators and positions – have a seat at the table when they're being written
 - b. Tell our commissioners where we need support in Salem
 - c. Consider hiring a lobbyist
 - d. Develop strong state agency relationships
 - e. County team focused on legislation
 - f. Work with BOCC who have a direct line to legislators
 - g. Invite legislators to our events
 - h. Get training on regulatory issues – CJIS, Government Accounting
 - i. Leverage partnerships / collaboration
 - j. Citizen input – How do we engage our citizens to carry the water on some of these issues
2. Workforce Issues

3. Mental health / drug use issues

The group ran out of time to brainstorm strategies to mitigate items 2 and 3. We'll need to revisit this in a management meeting.

TRENDS

Here are the top two trends as collated from the department strategic plans, and the possible strategies to leverage them.

1. Increased expectations – public wants everything, added pressure, immediacy, more demands
 - a. Increased public engagement and outreach, tabling / process events, communication - PIO
 - b. Get full BOC support – have a conversation about public expectations and pressure
2. Changing funding – both good and bad, more complicated budgeting, dependence on outside funding – state formulas, federal programs come and go, grants are not sustainable
 - a. Hire legislative support team – Wasco County lobbyist
 - b. Expand finance team, investment and forecasting
 - c. Have a conversation about funding core services first

Here is the list of organization-wide trends the group identified:

- Increased demand for services
- Cyber issues – increased threats, costs
- Costs are increasing
- Polarization / political environment
- Retirement of boomers
- Artificial intelligence
- Reliance on technology
- Risky tech adoption
- Cost of living increases
- Complex reporting requirements
- Complex regulations – HR, etc.
- Policy / legislative increase impacting operations
- Transitional workforce – constant change
- Generational gaps in staff
- Mental health and drug use increasing
- Alternative healthcare
- Entitlement around services
- Impact of population shift
- Data analysis
- Wealth gap
- Reliance on broadband
- Financing gaps, especially businesses
- Decrease in faith-based and community group involvement
- Federal funding for EV/GHG mitigation

The top three trends identified by the group were:

1. Complex regulations
2. Polarized political environment
3. Mental Health / drug use

The group ran out of time to brainstorm strategies on these top trends. We'll need to revisit this in a management meeting.

VISION, MISSION, & VALUES

Our current Vision, Mission and Values statements were created in 2016. The goal was to create something specific to Wasco County, rather than a generalized statement that could be used by *any* county.

Vision Statement – *Pioneering Pathways to Prosperity*

- The vision statements should be used as a litmus test: Is the decision I'm making a new/innovative way of doing things? Is there a reason to continue doing it the way we've always done it?
- Does it open a pathway?
- Recognize that there will always be tension between progress and preservation.

Mission statement – *Partner with our citizens to proactively meet their needs and create opportunities*

- How can we be proactive in serving citizens?
- Are we opening up opportunities, or creating barriers?

Core values

1. Embody the 100% Love Culture
2. Relationships are primary
3. Do the right thing even when no one is watching

The group discussed that we may need to look at these through the DEI lens and determine whether to modify them.

PATHWAY REVIEW

The next agenda item was to review the seven Pathways used in our Strategic Plan and determine whether they need updating.

1. **Technology** – This pathway was given a “thumbs up” in terms of relevance. However, it was decided that the Strategy Statement needed updating. The newly proposed statement is: *“Develop and use technology as a platform to provide safe and efficient service.”* The group also discussed modifying one or more of the Directional Statements to capture using data to help inform decision making.

Strategy Statement: Develop and use technology as a platform to provide safe and efficient service.

Directional Statements:

- a. The county will develop and implement integrated technologies to provide services.
- b. Utilize public-facing technology to make Wasco County government more transparent.
- c. Provide tools that enable the public to communicate with the county.
- d. Digitally modernize Wasco County.

- e. Use data to drive business intelligence for making informed decisions.
2. **Customer Service** – This pathway was given a “thumbs up” in terms of relevance. There was a discussion about the blurred lines between customer service and communication. Customer service is more about improving what we do and delivery of service. We also discussed proactively meeting needs and creating opportunities. At the end of the conversation, the group decided to leave the Strategy Statement and Directional Statements as they are.
 3. **Infrastructure and Resources** – This pathway was given a “thumbs up” in terms of relevance. However, there was a robust discussion about the Strategy Statement and Directional Statements:
 - a. Doesn’t include any resource development like Area 154 and the resolution center
 - b. It doesn’t include assets
 - c. We now have the financial health to be able to use our resources to maintain and benefit the community

Here are the proposed changes for this pathway, which will need to be reviewed and approved at a management meeting.

Strategy Statement: Maintain and modernize infrastructure, and strategically invest in projects.

Directional Statements:

- d. Categorize our inventory and plan for replacement of assets.
 - e. Develop alternate or innovative methods for extended asset life and work efficiency.
 - f. Strategically invest in capital projects that enhance Wasco County.
 - g. Utilize grants or other funding programs to maximize our existing resources.
 - h. Build capital reserve fund (s) to address long-term needs.
4. **Communication** – This pathway was given a “thumbs up” in terms of relevance. However, the group felt the Strategy Statement and Directional Statements needed tweaking.
 - a. Missing – not just about mission, vision and values. It's how we communicate with constituents, customers and partners

Here are the proposed changes for this pathway, which will need to be reviewed and approved at a management meeting.

Strategy Statement: Actively communicate both internally and externally the Vision, Mission and Values of Wasco County.

Directional Statements:

- b. *Communicate with the public and partners in a timely manner that informs and provides transparency.*
- c. *Develop and roll out external communication that educates and gives opportunities for feedback on services.*
- d. *Use technology to engage citizens so they become active participants in county government*

e. *Strengthen internal communication to support a shared vision and message*

5. **Financial Health** – This pathway was given a “thumbs up” in terms of relevance. However, the group felt the Strategy Statement and Directional Statements needed tweaking.

Here are the proposed changes for this pathway, which will need to be reviewed and approved at a management meeting.

Strategy Statement: Work to achieve financial sustainability through both innovative and responsible efforts to manage available resources.

Directional Statements:

- a. Budgeting will be done with a realistic approach to assigning resources.
 - b. Identify and establish new funding streams that will supplement traditional revenue
 - c. Evaluate and prioritize programs through cost/benefit analysis
 - d. Conduct regular fiscal monitoring and reporting for departments
 - e. Maintain and develop long-term budget strategies
 - f. Ensure safeguards are established to provide financial health
6. **Safety** – This category was given a neutral rating, and was decided it needed more discussion. The conversation revolved around whether “Health” should be added to the pathway category, with a Strategy Statement along the lines of “*Maintain and promote a healthy, safe and vibrant work environment.*” *We’ll need to revisit this in a management meeting.*
7. **Organizational Development** – This pathway was given a “thumbs up” in terms of relevance. However, the group did not have time to discuss this pathway. *We’ll need to visit this in a management meeting.*

PATHWAY ANALYSIS: COMMON THEMES AND ORGANIZATIONAL FOCUS

The final section of Summit revolved around discussing the common themes from the department plans, and whether any of them had enough importance to garner organization-wide focus. These themes were also cross-referenced from the top SWOTT themes.

As part of the activity, the group brainstormed what success looks like if we were to address that theme, and what are possible solutions for achieving it (begin with the end in mind).

Pathway 1: Technology

The common themes from department plans were:

- ❖ *Electronic Record Access:* Electronic records, digitizing files, scanning licenses, converting paper files to electronic.
- ❖ Software upgrades and improvements

The theme determined to have enough importance for preliminary organizational focus was “**Electronic Record Access.**” Here is what that would look like:

- Digitized Road records - available on GIS or other single web portal. Easy to access and find the information.
- The county has gone paperless, and scanned documents have Optical Character Recognition so they can be easily searched
- Documents are digitized, researchable, accessible to the public and paper copies are eliminated
- Be able to run reports and have a dashboard for data that’s been digitized
- We ensure that records are secure and meet security requirements
- Work to have the multiple formats of records - paper, microfilm, electronic - reviewable and searchable
- Records that are currently only in paper format are scanned and accessible, with proper security access in place
- A platform framework is needed as a foundation for records - technology is an enabler

The possible solutions for achieving this organizational focus include:

1. Hire a third-party contractor to do the scanning
2. Create a Scanning Center, with in-house staff
3. Eliminate paper files - no more “pack-rat” activities
4. Create a centralized secure storage of permanent records (in all formats)

Pathway 2: Customer Service

The common themes from department plans were:

- ❖ *Communication about service:* Social media account, update webpage, public kiosk, improve public access to information
- ❖ *Process Improvement of services (straighten the pipes)* - E-recording issues, payment portal, Hearings Examiner, Treatment Program collaboration, timely review of submittals
- ❖ *Delivery of Service (proactive outreach and services in the community)* - Voter registration events, tabling at community events, Maupin office hours

The group did not have time to discuss the importance of these themes and whether any rated organizational focus. *We’ll need to discuss this in a management meeting.*

Pathway 3: Infrastructure and Resources

The common themes from department plans were:

- ❖ *Evaluation/Planning for needs:* facility improvement plan, transportation improvement (fleet upgrade), county-owned land process, long-term space needs
- ❖ *Immediate needs:* Backup 911 center, election center, workspace for HR
- ❖ *Asset maintenance /upgrades:* Upgrade equipment and vehicles, fleet upgrades, radios, body armor, safety items

The theme determined to have enough importance for organizational focus was “**Evaluation/ Planning for Space Needs**” Here is what that would look like:

- Clerk – all core services within 4 walls
- HR – office with two work spaces for privacy, not behind a meeting room
- BOCC – be in same building as staff
- Admin – a floor that includes HR, Finance, IT, etc.

- Sheriff – exterior (development of Resolution Ctr), internally (relocation of new evidence processing room). Justice Center
- DA – office for each attorney, conference room, victim advocate on same floor with some separation
- A&T - County campus, co-located departments, one-stop shop for citizens
- Public Works - they would get their building back and could potentially lease space for additional income

The possible solutions for achieving this organizational focus include:

1. Build a new County Campus that can house all county teams
 - a. Pros - we can design and build exactly what is needed
 - b. Cons - lack of large enough land to build on, public is unlikely to support a bond to pay for it, too expensive to build without a bond
2. Purchase a building in The Dalles that could house all non-justice related departments, then move all justice-related departments into the Courthouse.
 - a. Pros – could satisfy short/long term needs, mores space, makes productive use of a commercial space, bond not needed, more centralized space, one step forward to justice center, easier to access IT controls, confidentiality opportunities, good use of saved dollars, takes better care of constituents, defines public work space, potential for revenue in vacated spaces
 - b. Cons – some people stay in courthouse, parking is limited, it’s not a campus, big lift for IT infrastructure, impacts to staff, courthouse space is inefficient for departments that move into it, why buy a building if we do remote work, moving the vault, moving surveyor away from road department, doesn’t solve all of our space issues, what is the impact to taxes, spends down reserves, still need to do courthouse security improvements

The discussion about space needs also prompted a conversation about County-owned Lands and the recent purchase of the property at the west end of The Dalles:

- The purchase was made with a long-term look into our future and how we might utilize 154 acres
- Worst case scenario: it’s used for a 53 space RV park and land bank (Urban Growth Boundary), Potential for “natural place” for public
- Best case: it provides a path toward an improved Kramer Field (5-6 multipurpose fields with option for state tourney), indoor recreation facility, Fort Dalles Rodeo, school district needs, amphitheater, equestrian use
- The hospital is a potential domino effect that allows all these things to fall into place, along with housing options with old hospital

Pathway 4: Communication

The common themes from department plans were:

- ❖ *Timely and varied communication about service:* Social media account, update webpage, public kiosk, improve public access to information
- ❖ *Transparency and building public confidence:* Community outreach, public engagement, PIO services, speaking engagements (government affairs, radio programs, local groups)

In the SWOTT analysis discussions, a theme that rose to the attention of the group was more about internal conversations, and whether our organizational focus should be **“Be willing to work through difficult conversations.”** What that would look like includes:

- Ask the questions, use the opportunity constructively to dig deeper
- Remember there are different personalities and differing communication styles
- Ask ourselves “what am I doing to improve the situation?”
- Continue to have conversations – follow up

The group made a commitment to each other to do this work. The next step would be to have a discussion about how we hold ourselves accountable to this commitment.

Pathway 5: Financial Health

The common theme from department plans was:

- ❖ *Leverage and extend existing resources* - Grant opportunities, cost-share agreements, local agency partnerships, IGAs

The group also discussed that when it comes to financial health, there will be “top-down” decisions made for the organization by the Finance Director and Administrative Officer (with approval from the budget committee), to invest in things like another PERS side account. The funding for this is taken “off the top” of the resources available to the county.

The theme for organizational focus was **“Pursue focused grant application and management.”** Here is what that could look like:

- Hire a dedicated grant coordinator, writer and manager (research options, write the grant proposals, manage the funding when it comes in).
- Expand the Global Grant Services contract, have interested departments dedicate a liaison from their staff to work with GGS.

We will need to review this further at a management meeting, as the discussion was very limited in scope.

Pathway 6: Safety

As discussed in the pathway review, this topic needs to be discussed further to reflect the “health” aspect.

The common themes that came from department plans were:

- ❖ *Safety Investments (how to keep citizens and employees safe):* Safe Streets and Roads 4 All, election safety, parking lot improvements, updating tools, roadway safety improvements
- ❖ *Safety training (training employees how to be safe):* identify safety issues, review safety policies and procedures, new and ongoing training like cybersecurity and evacuation/active shooter

We will need to review this further at a management meeting, as the discussion was very limited in scope.

Pathway 7: Organizational Development

The team did not have time to discuss this pathway at all. However, the common themes from department plans included:

- ❖ *Appropriate staffing:* review staff positions, add or develop needed positions, succession planning

- ❖ *Inter-departmental Relationships (burning down the silos):* Cross training, team building activities, employee meeting or summit, culture development

We will need to review this further at a management meeting.

FINAL NOTE: We will need to have a “priority discussion” about the Organizational Focus themes and which ones we want to tackle in the next 1-2 years.

APPROVED this 5th Day of April, 2023.

WASCO COUNTY BOARD OF COMMISSIONERS



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