

COMPREHENSIVE PLAN GUIDELINE FOR WASHINGTON'S PUBLIC PORTS

A REPORT BY THE TRANSPORTATION & INFRASTRUCTURE COMMITTEE
DECEMBER 1994 (UPDATED 2009)

REPORT PURPOSE: State of Washington comprehensive planning requirements for port districts differ substantially from those of city and county jurisdictions. The general membership and Executive Committee of the Washington Public Ports Association (WPPA) requested a comprehensive planning guideline for member ports. This guideline provides the current statutory requirements for port district comprehensive planning, current port district planning practices, contemporary comprehensive planning by other governments, and port district planning basics.

CURRENT STATUTORY PORT COMPREHENSIVE PLANNING REQUIREMENTS

In planning jargon, “comprehensive planning” and “comprehensive scheme” are often used interchangeably to describe a complex land use planning process. Port districts, however, need to differentiate because statutory references address “scheme,” as opposed to “plan.” Scheme, as a planning term, generally connotes a conceptual emphasis, while plan connotes a more detailed effort that would include many elements that tend to be of greater concern to general purpose municipalities (i.e., housing, recreation, police enforcement, schools, street improvements, etc.).

The scheme/plan differentiation is important to port districts because a comprehensive scheme not only provides for greater flexibility, but is the current statutory requirement. Comprehensive planning has evolved into a whole profession that is concerned with many levels of definition and implementation processes. State law provides port districts more options regarding the extent of necessary comprehensive planning than general purpose governments.

Many port districts and municipalities engage in strategic planning, which is different from comprehensive planning. The strategic plan is a policy guideline for providing direction on how to accomplish the stated mission or purpose of an organization. The strategic plan often incorporates financial and business plans, with an emphasis on process as to how the plan is to be accomplished (the strategic planning process is covered extensively in the Comprehensive Planning Guidebook Strategic Plan Appendix). Strategic plans usually incorporate comprehensive plan elements, especially land use maps. It is a contemporary planning method that can be used to develop a comprehensive plan. While there are statutory references on comprehensive plans, the statutes are silent regarding strategic planning. Strategic planning is useful as a contemporary process to develop comprehensive plans, but is not necessary under port statutes.

Current statutory references to comprehensive planning for port districts are few, short and specific. Essentially the requirements evolved out of initial port district authorizing legislation in 1911, with later amendments to include airports and Industrial Development Districts. The original legislation pre-dated the Open Public Meetings Act and public disclosure legislation. The original intent and purpose of comprehensive scheme legislation was to require communication between the port district commission and their “public” regarding spending for capital improvements that the port district was planning. This still holds true today.

Through the intervening decades from 1911, environmental regulations required ports to develop a substantial amount of information for the public regarding a particular project under review, but the information is not

required as part of the port comprehensive scheme. A typical comprehensive scheme often evolved from a “metes and bounds” land description format in commission resolutions.

As a result, and unlike cities and counties, port district comprehensive schemes and plans now vary considerably between different port districts.

The specific base requirement that all port districts follow is located in Chapter 53.20 of the Revised Code of Washington State. As articulated, the statute may have been originally intended as a predecessor to modern “sunshine laws” – the Open Public Meetings Act and the Public Disclosure Act – than as a planning tool. The specific chapters, plus an associated chapter on Industrial Development Districts, 53.25.090, are as follows:

53.20.010 Adoption of harbor improvement plan. It shall be the duty of the port commission of any port district, before creating any improvements hereunder, to adopt a comprehensive scheme of harbor improvements in the port district, after a public hearing thereon, of which notice shall be published once a week for two consecutive weeks in a newspaper of general circulation in the port district, and no expenditure for the carrying out of any harbor improvement shall be made by the port commission other than necessary salaries, including engineers, clerical and office expenses of the port district, and the cost of engineering, surveying, preparation and collection of data necessary for the making and adoption of the general scheme of harbor improvements in the port district, unless and until the comprehensive scheme of harbor improvements has been so officially adopted by the port commission.

53.20.020 Improvement to follow plans adopted. When such general plans shall have been adopted or approved, as aforesaid, every improvement to be made by said commission shall be made substantially in accordance therewith unless and until such general plans shall have been officially changed by the port commission after a public hearing thereon, of which at least ten days notice shall be published in a newspaper in general circulation in such port district.

53.25.090 Conditions precedent to making improvements. No expenditure for improvement of property in an industrial development district, other than the expense of preparing and submitting a plan of improvement shall be made by a port district, and no property shall be acquired by it therefor except as provided for hereinbefore until it has been made a part of the comprehensive scheme of harbor improvements and industrial developments or amendments thereto.

That said comprehensive scheme or amendments thereto shall provide for the development or redevelopment of those marginal lands acquired and a provision for the continuing of the land uses which are hereby declared to constitute public uses and the purposes for which public moneys may be advanced and private property acquired.

From the above and other supporting sections, it is clear port districts must prepare and adopt a comprehensive scheme before expending funds on improvements to properties. Expenditures necessary and incidental to developing the scheme itself, however, are excluded from that requirement.

Judicial interpretations over the years have indicated that the comprehensive scheme must fairly inform the taxpayers of the district of the nature and extent of the proposed improvements, but it is not essential that such plans contain a level of detail required for final construction of the improvements. It is also clear that its requirements, for most ports, fall short of modern planning needs, essentially requiring a map of port lands and facilities accompanied by narrative describing present and reasonably anticipated future facilities and land uses, and compilation of port resolutions to support the plan.

The actual plan must disclose the general character of proposed improvements, for example, dockage facilities, dredging of channels, leveling and filling of land, construction of access roads, railroad spurs, and other utilities. It also should be noted that no expenditure for the improvement of property shall be made by a port district, and no property (with certain exceptions) shall be acquired within an industrial development district until it has been made part of the comprehensive scheme of harbor improvements. The Washington Supreme Court has determined that the acquisition of unimproved land not within an Industrial Development District does not require an amendment of the port's comprehensive scheme.

Also of note, the Washington State Supreme Court ruled unanimously that a comprehensive scheme need not necessarily be contained in one document, declaring that “neither the statute nor the case law requires that the comprehensive scheme must consist of a single document titled ‘comprehensive scheme’... the statutory requirement for a comprehensive scheme of harbor improvements may be met through a single document or a series of documents.”

CURRENT PORT COMPREHENSIVE PLANNING

A 1994 sample survey of WPPA member ports on their comprehensive plan/scheme efforts confirmed that port districts are generally meeting statutory requirements concerning comprehensive schemes, but that those schemes vary considerably in quality and expansiveness. Some of the more extensive comprehensive plans result from public interest on a particular project, for example, a high profile project that generated substantial public interest such as a new marina. In other cases they were the result of planning criteria needed to obtain state or federal financial matching funds.

It should also be pointed out that airport planning needs to follow Federal Aviation Administration (FAA) guidelines and those port districts that have airports also have to be consistent with FAA criteria in their comprehensive planning process.

Until the passage of the Growth Management Act (GMA) legislation in 1990 (Chapter 36.70A RCW), current port district planning in Washington State typically emphasized cargo terminal, marina, and industrial development projects. This included land purchases, environmental impact requirements, and analysis of long-term trends related to proposed development.

Since GMA, most port districts have had greater association with the planning efforts of their host city and county communities. In these cases the port district improvement planning was communicated to the host municipality, often requiring additional supporting information. In addition, many port districts have undertaken strategic planning efforts that have resulted in additional public input and institutional reflection on various planning issues, as opposed to projects. Many ports expended a considerable amount of planning effort associated with GMA planning activities and, though not always directly related to the comprehensive scheme, some material may be useful as additional planning data. It should be noted, though, that ports do not have any direct planning requirements under GMA.

CONTEMPORARY CITY AND COUNTY COMPREHENSIVE PLANNING

Professionally managed city and county comprehensive planning has evolved since efforts in the 1920s to control land use in large communities. This became a well developed national (and international) trend, resulting in increasingly complicated and thorough land use regulation. Up until the 1940s and early 1950s, most urban

planning was limited to land use zoning and building code efforts. In the 1950s and 1960s, urban planning increasingly emphasized transportation planning due to the development of interstate freeways and growing transit problems. This was also the beginning of urban planning efforts to solve social issues, which, by the 1980s and 1990s, became increasingly oriented to dealing with problems such as housing, crime, education, welfare, and other demographic issues.

Typical urban and regional comprehensive planning is now aimed at achieving environmental and social ends, which may or may not be related to market forces. Port development plans are generally aimed at connecting public policy goals with business-like considerations and objectives of the port, such as creating jobs and expanding trade opportunities. By soliciting public input to the planning process at the policy level, the public gains a better understanding of the port's business environment and how it is related to port and community policy objectives, rather than focusing solely on the anticipated impacts of a particular facility. At the same time, with a policy level plan in place, the community can, and will, expect the port to demonstrate that its proposed facilities are responsive to long-range policy objectives, as well as shorter-term market needs.

The Shoreline Management Act of 1971 (Chapter 90.58 RCW) was a major shift of the powers that city and county governments have over port district land use development. This was the first major effort that required port districts to coordinate planning with their host government(s). In practice, once initial shoreline “zoning” was established, port district input was relegated to implementation refinement and permitting requirements. After time, however, the impact of the Shoreline Act did not really alter overall planning efforts of most port districts. Permitting, not comprehensive plan coordination, became the primary planning issue for port districts.

The GMA elevated comprehensive land use planning to a new level in an attempt to better coordinate between jurisdictions and to coordinate individual planning efforts (land use, housing, transportation, etc.) into a more comprehensive whole. Cities and counties have embarked upon an unprecedented level of planning activity throughout most of the State of Washington. Virtually every port district has been impacted by GMA efforts of their host government(s) and substantially greater port involvement is required than was the case with Shoreline Management Act legislation.

The evolution of contemporary comprehensive planning has resulted in two impacts: (1) cities and counties are more responsive to public input than in the past, and (2) cities and counties are increasingly dependent upon other agencies and associations to provide expertise and leadership on economic development issues.

Both cases provide port districts with several important lessons: (1) public input is a greater requirement for planning than ever before, (2) formal coordination with host communities is advised in order to fulfill primary port district functions, and (3) port districts have a growing responsibility as the primary (sometimes only) public economic development advocate in city and county comprehensive planning efforts.

PORT DISTRICT PLANNING BASICS

Port districts are able to provide a wide range of activities in which they can own land and operate facilities. Generally, these fall into four categories:

- (1) Marine terminals for cargo and passengers
- (2) Marinas
- (3) Airports
- (4) Industrial development

Ports also have broad authority to engage in economic development and promote tourism. This includes building and operating parks and recreational facilities; developing terminal and transfer facilities for various transportation modes; and constructing, purchasing, or operating railways. State law provides ports with a high degree of planning flexibility to meet changing market conditions and fulfill their mission to their communities.

The state currently does not provide guidelines for developing a comprehensive scheme for port districts. To technically meet comprehensive scheme statutory requirements, the port district need only to identify its capital improvements, both existing and planned for the reasonable future, and make the plan available to the public. At the minimum it would be prudent to include a description of the port's inventory, development of a general statement of how the port intends to spend their funds (most often with a mission, goals, and objectives process), and a general description of how the port district intends to implement their plans (such as a capital improvement plan). As noted earlier, a comprehensive scheme need not necessarily be contained in one document in order to meet statutory requirements.

The state-of-the-art for comprehensive planning by cities and counties, especially due to GMA and programmatic Environmental Impact Statements (EIS) considerations, has become an extensive process. A programmatic EIS is an EIS on a “program,” as opposed to a specific project. Each port district needs to assess the extent of comprehensive planning that fits their own situation beyond that of minimal comprehensive scheme requirements.

In general, port districts are advised to move closer to the more extensive process of other municipalities, which, for many ports, means staff and commission review of goals and objectives and the implementation into a land use plan, preferably as a formal amendment to the comprehensive scheme.

Contemporary planning requires a greater effort than that in port statutes, for two reasons. One, extensive project-level planning obviously is required by a host of other state statutes and regulations (e.g., building codes, shoreline and land use codes, environmental laws and regulations). Second, comprehensive planning or policy level planning, while not mandated for ports by any statute, facilitates a logical, consistent and organized base from which decision-makers and the public can evaluate and prioritize individual projects and facilities – and, in addition, it may be necessary to pass the court of public opinion.

SUGGESTED ESSENTIALS OF A PORT COMPREHENSIVE PLAN

Most port districts have a land base to carry out one or more of the five general activities listed above (marinas, marine terminals, airports, industrial land development, and economic development/tourism) and their comprehensive plan should cover what they are generally doing with their funds on their respective land base. Stated very simply, a comprehensive plan should provide enough information so that an average citizen can understand where capital spending will be dedicated.

The comprehensive plan can be condensed into a three step “how to” process that describes the port's assets, what is going to be done with them, and how. The plan is the result of these three steps.

- A. An inventory of assets
- B. Proposed use of assets
- C. The implementation plan

The inventory includes lands and facilities. This should be in map form, at least for port district properties. It should be reproducible in order to show additions, changes and proposals, and include base studies as necessary that are applicable to the port efforts. Community data, employment characteristics, commerce or passenger forecasts may

be useful and pertinent. Any information that will help in understanding the port's role in the community could be included.

The proposal being made can include the port district's mission, goals and objectives, in addition to descriptions of the capital proposal. Enough detail should be provided to adequately communicate to a broad section of the citizenry as to what the funding is to be used for. If needed, supporting studies and other supporting documentation and analysis required to make the decision may be useful.

Implementation should include a land use map when applicable, the steps involved in carrying out the plan and additional factors, such as timing, problems to be encountered, and financial aspects. Most port districts have an annually adopted budget, usually including a capital improvement plan (CIP). If the CIP is not included, it can be referenced.

Public review is required to develop a comprehensive plan, with a full hearing on the adoption and consideration of amendments, as prescribed as part of Chapter 53.20 RCW. In developing a comprehensive scheme, a port district should be able to answer the following questions:

1. Do I have a full document available to local port district citizens that explains what the ports future plans are, including a land use map and general goals and objectives? Is it easily understood and readable by the general citizenry?
2. Is my comprehensive scheme, or plan, consistent and coordinated with my host government(s)?
3. Is my comprehensive scheme, or plan, current? Can it be easily amended?
4. Is my comprehensive scheme, or plan, "comprehensive," or project specific? Does it incorporate completed planning documents that could help explain the port district's comprehensive plan?

This Guideline provides the current statutory requirements related to developing a comprehensive scheme. A Planning Guidebook Strategic Planning Appendix, under separate cover, was developed for those ports which are contemplating a much more extensive planning program, and provides examples for setting a vision, mission, goals, and objectives; how to incorporate existing studies, environmental reviews and public involvement; and a definition of terms. A copy of the expanded version can be obtained at the WPPA office in Olympia or on the WPPA website at www.washingtonports.org.

**COMPREHENSIVE PLAN GUIDEBOOK
STRATEGIC PLANNING APPENDIX
FOR WASHINGTON STATE PUBLIC PORTS**

Prepared by the Transportation & Infrastructure Committee of the
Washington Public Ports Association
December 1994 (Updated 2009)

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FOR PORT DISTRICTS OF WASHINGTON STATE**

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I. INTRODUCTION

The purpose of the Comprehensive Plan Guidebook Strategic Plan Appendix is to provide direction to those public port districts that may choose to engage in a greater comprehensive planning and strategic planning process than currently required under Washington State law. The statutory requirement in Washington State for a port district comprehensive scheme is limited and provides little guidance. Other municipalities in Washington follow more extensive planning procedures, especially as a result of Growth Management Act (GMA) legislation.

This Guidebook Appendix was prepared in response to Washington Public Ports Association membership and Executive Committee requests for an appraisal of current comprehensive planning requirements, and a desire for general information on the planning process, such as that used by other municipalities.

Chapter II (Current Comprehensive Scheme Requirements) examines existing comprehensive scheme statutory requirements for port districts in Washington State.

Chapter III (Comprehensive Plan Outline) reviews contemporary comprehensive port planning along the general lines of other municipalities in Washington State.

Comprehensive planning emphasizes land use and often assumes that many of the in-depth strategic questions are already answered, and will be incorporated into the comprehensive plan. Comprehensive plans typically include the preparation of business plans, master land use plans, multi-year capital improvement plans, and annual budgets.

Chapter IV (The Strategic Planning Process) provides a step-by-step process for developing an in-depth comprehensive port plan by using strategic planning.

An important difference between strategic planning and comprehensive port planning is the relative emphasis on the assessment of changes taking place in an organization's internal and external environment. Strategic planning emphasizes an in-depth evaluation of the current status, trends that are likely to have an impact, and potential changes applicable to a particular port's environment. Strategic planning is typically a broader effort than comprehensive planning and places greater emphasis on process versus a product (such as a land use map).

This Guidebook Appendix is a tool to help those port districts embarking upon greatly expanded planning process, and is well in excess of current statutory requirements. The intent of this Guidebook Appendix is to provide a common source of information that will allow a port district to be consistent with the contemporary planning processes, consistent with other ports, and consistent with other municipalities.

II. CURRENT PORT DISTRICT COMPREHENSIVE "SCHEME" REQUIREMENTS

A. INTRODUCTION

In planning jargon, “comprehensive planning” and “comprehensive scheme” are often used interchangeably to describe a complex land use planning process. Port districts, however, need to differentiate because statutory references address “scheme,” as opposed to “plan.” Scheme, as a planning term, generally connotes a conceptual emphasis, while plan connotes a more detailed effort that would include many elements that tend to be of greater concern to general purpose municipalities (i.e., housing, recreation, police enforcement, schools, street improvements, etc.).

The scheme/plan differentiation is important to port districts because a comprehensive scheme not only provides for greater flexibility, but is the current statutory requirement. Comprehensive planning has evolved into a whole profession that is concerned with many levels of definition and implementation processes. State law provides port districts more options regarding the extent of necessary comprehensive planning than general purpose governments.

Many port districts and municipalities engage in strategic planning, which is different from comprehensive planning. The strategic plan is a policy guideline for providing direction on how to accomplish the stated mission or purpose of an organization. The strategic plan often incorporates financial and business plans, with an emphasis on process as to how the plan is to be accomplished. Strategic plans usually incorporate comprehensive plan elements, especially land use maps. It is a contemporary planning method that can be used to develop a comprehensive plan. While there are statutory references on comprehensive plans, the statutes are silent regarding strategic planning. Strategic planning is useful as a contemporary process to develop comprehensive plans, but is not necessary under port statutes.

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Current statutory references to comprehensive planning for port districts are few, short and specific. Essentially the requirements evolved out of initial port district authorizing legislation in 1911, with later amendments to include airports and Industrial Development Districts. The original legislation pre-dated the Open Public Meetings Act and public disclosure legislation. The original intent and purpose of comprehensive scheme legislation was to require communication between the port district commission and their “public” regarding spending for capital improvements that the port district was planning. This still holds true today.

Through the intervening decades from 1911, environmental regulations required ports to develop a substantial amount of information for the public regarding a particular project under review, but the information is not required as part of the port comprehensive scheme. A typical comprehensive scheme often evolved from a “metes and bounds” land description format in commission resolutions.

As a result, and unlike cities and counties, port district comprehensive schemes and plans now vary considerably between different port districts.

The specific base requirement that all port districts follow is located in Chapter 53.20 of the Revised Code of Washington State. As articulated, the statute may have been originally intended as a predecessor to modern “sunshine laws” – the Open Public Meetings Act and the Public Disclosure Act – than as a planning tool. The specific chapters, plus an associated chapter on Industrial Development Districts, 53.25.090, are as follows:

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From the above and other supporting sections, it is clear port districts must prepare and adopt a comprehensive scheme before expending funds on improvements to properties. Expenditures necessary and incidental to developing the scheme itself, however, are excluded from that requirement.

Judicial interpretations over the years have indicated that the comprehensive scheme must fairly inform the taxpayers of the district of the nature and extent of the proposed improvements, but it is not essential that such plans contain a level of detail required for final construction of the improvements. It is also clear that its requirements, for most ports, fall short of modern planning needs, essentially requiring a map of port lands and facilities accompanied by narrative describing present and reasonably anticipated future facilities and land uses, and compilation of port resolutions to support the plan.

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Port districts are able to provide a wide range of activities in which they can own land and operate facilities. Generally, these fall into four categories:

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- (2) Marinas
- (3) Airports
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Ports also have broad authority to engage in economic development and promote tourism. This includes building and operating parks and recreational facilities; developing terminal and transfer facilities for various transportation modes; and constructing, purchasing, or operating railways. State law provides ports with a high degree of planning flexibility to meet changing market conditions and fulfill their mission to their communities.

The state currently does not provide guidelines for developing a comprehensive scheme for port districts. To technically meet comprehensive scheme statutory requirements, the port district need only to identify its capital improvements, both existing and planned for the reasonable future, and make the plan available to the public. At the minimum it would be prudent to include a description of the port's inventory, development of a general statement of how the port intends to spend their funds (most often with a mission, goals, and objectives process), and a general description of how the port district intends to implement their plans (such as a capital improvement plan). As noted earlier, a comprehensive scheme need not necessarily be contained in one document in order to meet statutory requirements.

The state-of-the-art for comprehensive planning by cities and counties, especially due to GMA and programmatic Environmental Impact Statements (EIS) considerations, has become an extensive process. A programmatic EIS is an EIS on a “program,” as opposed to a specific project. Each port district needs to assess the extent of comprehensive planning that fits their own situation beyond that of minimal comprehensive scheme requirements.

In general, port districts are advised to move closer to the more extensive process of other municipalities, which, for many ports, means staff and commission review of goals and objectives and the implementation into a land use plan, preferably as a formal amendment to the comprehensive scheme.

Contemporary planning requires a greater effort than that in port statutes, for two reasons. One, extensive project-level planning obviously is required by a host of other state statutes and regulations (e.g., building codes, shoreline and land use codes, environmental laws and regulations). Second, comprehensive planning or policy level planning, while not mandated for ports by any statute, facilitates a logical, consistent and organized base from which decision makers and the public can evaluate and prioritize individual projects and facilities – and, in addition, it may be necessary to pass the court of public opinion.

D. SUGGESTED ESSENTIALS OF A PORT COMPREHENSIVE SCHEME

Most port districts have a land base to carry out one or more of the five general activities listed above (marinas, marine terminals, airports, industrial land development, and economic development/tourism) and their comprehensive plan should cover what they are generally doing with their funds on their respective land base. Stated very simply, a comprehensive plan should provide enough information so that an average citizen can understand where capital spending will be dedicated.

The comprehensive plan can be condensed into a three step “how to” process that describes the port's assets, what is going to be done with them, and how. The plan is the result of these three steps.

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- B. Proposed use of assets
- C. The implementation plan

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The proposal being made can include the port district’s mission, goals and objectives, in addition to descriptions of the capital proposal. Enough detail should be provided to adequately communicate to a broad section of the citizenry as to what the funding is to be used for. If needed, supporting studies and other supporting documentation and analysis required to make the decision may be useful.

Implementation should include a land use map when applicable, the steps involved in carrying out the plan and additional factors, such as timing, problems to be encountered, and financial aspects. Most port districts have an annually adopted budget, usually including a capital improvement plan (CIP). If the CIP is not included, it can be referenced.

Public review is required to develop a comprehensive plan, with a full hearing on the adoption and consideration of amendments, as prescribed as part of Chapter 53.20 RCW. In developing a comprehensive scheme, a port district should be able to answer the following questions:

1. Do I have a full document available to local port district citizens that explains what the ports future plans are, including a land use map and general goals and objectives? Is it easily understood and readable by the general citizenry?
2. Is my comprehensive scheme, or plan, consistent and coordinated with my host government(s)?
3. Is my comprehensive scheme, or plan, current? Can it be easily amended?
4. Is my comprehensive scheme, or plan, “comprehensive,” or project specific? Does it incorporate completed planning documents that could help explain the port district's comprehensive plan?

It should be emphasized that this section of the Guidebook Appendix provides the current statutory requirements related to developing a comprehensive scheme. A much more extensive planning program is presented in the following sections, which includes examples for setting a vision, mission, goals, and objectives; how to incorporate existing studies, environmental reviews and public involvement into a thorough strategic plan; and a definition of terms.

III. COMPREHENSIVE PLAN OUTLINE

A. INTRODUCTION

A Comprehensive Plan provides specific detail and land use information. It also incorporates supporting studies, surveys, and various community input. This section reviews contemporary comprehensive planning used by other municipalities, discusses a port district survey on what selected port districts provide, and a generalized comprehensive port district plan.

B. CONTEMPORARY CITY AND COUNTY COMPREHENSIVE PLANNING

Professionally managed city and county comprehensive planning has evolved since efforts in the 1920s to control land use in large communities. This became a well developed national (and international) trend, resulting in increasingly complicated and thorough land use regulation. Up until the 1940s and early 1950s, most urban planning was limited to land use zoning and building code efforts. In the 1950s and 1960s, urban planning increasingly emphasized transportation planning due to the development of interstate freeways and growing transit problems. This was also the beginning of urban planning efforts to solve social issues, which, by the 1980s and 1990s, became increasingly oriented to dealing with problems such as housing, crime, education, welfare, and other demographic issues.

Typical urban and regional comprehensive planning is now aimed at achieving environmental and social ends, which may or may not be related to market forces. Port development plans are generally aimed at connecting public policy goals with business-like considerations and objectives of the port, such as creating jobs and expanding trade opportunities. By soliciting public input to the planning process at the policy level, the public gains a better understanding of the port's business environment and how it is related to port and community policy objectives, rather than focusing solely on the anticipated impacts of a particular facility. At the same time, with a policy level plan in place, the community can, and will, expect the port to demonstrate that its proposed facilities are responsive to long-range policy objectives, as well as shorter-term market needs.

The Shoreline Management Act of 1971 (Chapter 90.58 RCW) was a major shift of the powers that city and county governments have over port district land use development. This was the first major effort that required port districts to coordinate planning with their host government(s). In practice, once initial shoreline “zoning” was established, port district input was relegated to implementation refinement and permitting requirements. After time, however, the impact of the Shoreline Act did not really alter overall planning efforts of most port districts. Permitting, not comprehensive plan coordination, became the primary planning issue for port districts.

The GMA (Chapter 36.70A RCW) elevated comprehensive land use planning to a new level in an attempt to better coordinate between jurisdictions and to coordinate individual planning efforts (land use, housing, transportation, etc.) into a more comprehensive whole. Cities and counties have embarked upon an unprecedented level of planning activity throughout most of the State of Washington. Virtually every port district has been impacted by GMA efforts of their host government(s) and substantially greater port involvement is required than was the case with Shoreline Management Act legislation.

The evolution of contemporary comprehensive planning has resulted in two impacts: (1) cities and counties are more responsive to public input than in the past, and (2) cities and counties are increasingly dependent upon other agencies and associations to provide expertise and leadership on economic development issues.

Both cases provide port districts with several important lessons: (1) public input is a greater requirement for planning than ever before, (2) formal coordination with host communities is advised in order to fulfill primary port district functions, and (3) port districts have a growing responsibility as the primary (sometimes only) public economic development advocate in city and county comprehensive planning efforts.

C. PORT DISTRICT COMPREHENSIVE PLAN SURVEY AND FINDINGS

A 1994 sample survey of WPPA member ports on their comprehensive plan/scheme efforts confirmed that port districts are generally meeting statutory requirements concerning comprehensive schemes, but that those schemes vary considerably in quality and expansiveness. Some of the more extensive comprehensive plans result from public interest on a particular project, for example, a high profile project that generated substantial public interest such as a new marina. In other cases they were the result of planning criteria needed to obtain state or federal financial matching funds.

It should also be pointed out that airport planning needs to follow Federal Aviation Administration (FAA) guidelines and those port districts that have airports also have to be consistent with FAA criteria in their comprehensive planning process.

Until the passage of GMA legislation in 1990, current port district planning in Washington State typically emphasized cargo terminal, marina, and industrial development projects. This included land purchases, environmental impact requirements, and analysis of long-term trends related to proposed development.

Since GMA, most port districts have had greater association with the planning efforts of their host city and county communities. In these cases the port district improvement planning was communicated to the host municipality, often requiring additional supporting information. In addition, many port districts have undertaken strategic planning efforts that have resulted in additional public input and institutional reflection on various planning issues, as opposed to projects. Many ports expended a considerable amount of planning effort associated with GMA planning activities and, though not always directly related to the comprehensive scheme, some material may be useful as additional planning data. It should be noted, though, that ports do not have any direct planning requirements under GMA.

D. GENERALIZED ELEMENTS FOR A PORT COMPREHENSIVE PLAN

A long range comprehensive plan typically consists of at least three sections, background information (studies, surveys, community group input, etc.), a proposal for a future operational and capital development plan, and how the plan is to be implemented. The effort or extent of these elements depend entirely upon the individual need of the port district, and can vary from a simple in-house staffing effort of a few pages in length to a multiple volume exercise using extensive consulting assistance.

1. Background information. Information leading up to the development plan includes the preparation and collection of all pertinent maps, studies and analysis that will be needed for considering future use of port district properties.

- a. Base maps. A minimum requirement is to have adequate maps of port properties that are reproducible and capable of displaying any proposition the district is considering.

b. Analysis of factors impacting the port district. Demographic data, trends of the basic areas of opportunity for the port district, and other data that would be useful to the port's mission. For example, a new marina would require studies on site characteristics, studies on environmental aspects, and recreational demand analysis.

2. Development of the port property plan. Actual plan development is dependent upon the port district's overall mission and what the district intends to do in the future with its properties and capital. The plan might include the following elements:

a. Marine terminal plan. Expansion or development of new terminals should examine the history of the operations and possible alternatives to meet future needs. A capacity analysis and market assessment would be useful to determine purpose and need, a competitive analysis for pricing and financial analysis, engineering analysis to determine estimated costs and environmental impact, and basic environmental assessments for permitting criteria in a scoping meeting with environmental agencies.

b. Industrial development plan. An industrial development plan should be based upon economic background assessments that determine market potential, siting problems (e.g., wetland issues, soil conditions, and land use restrictions such as zoning or conflicting uses), financial analysis, and engineering costs.

c. Airport plan. Larger airports will be required to have an aviation plan that meets Federal Aviation Administration (FAA) criteria, which also requires regular updates. Smaller airports may find FAA criteria as a guideline useful source. FAA criteria clearly define improvements needed and how to show future development.

d. Other plans, such as a recreational plan for public access or marina development; or for development associated with port district powers, such as railroad bridges, or tunnel development.

3. Plan Implementation. The most common form of implementation for port districts is through the capital improvement program that is usually adopted annually as part of the budget process. The capital improvement program should include priorities, anticipated costs, and a brief description. The capital improvement plan should also include the financial sources expected to pay for the proposed plan.

IV. STRATEGIC PLANNING OUTLINE

A strategic plan differs from a comprehensive plan by emphasizing the process and multiple elements of the plan. The strategic plan can help an organization “get on the same sheet of music” for determining what is important, what is needed, and where a comprehensive plan fits in. A comprehensive plan is usually a primary product of a strategic plan, emphasizing the land use component of the plan. Essential elements for a strategic plan are as follows:

1. *VALUES STATEMENT*: A values statement designates the organizational values and beliefs which underlie the organization's policy and administration.
2. *VISION STATEMENT*: A vision statement describes a general image of what the organization should look like and what it should do in the future.
3. *MISSION STATEMENT*: A mission statement defines the organization's purpose and explains why it exists.
4. *GOALS*: Goals are the general directions in which an organization wants to travel; the general purposes it wants to achieve.
5. *OBJECTIVES*: Objectives are the general destinations to which an organization wants to travel; the general outcomes which serve the identified purposes (goals).
6. *IMPLEMENTATION*: Implementation involves developing strategies that take an organization to where it wants to go. The above items are often the sole product of a strategic planning process, however, the remaining items are needed to complete a strategic plan. Though this may take several forms, the following are often needed:
 - a. Specific business plans for each department of an organization
 - b. Master land use plans
 - c. A capital development plan
 - d. A budget

These series of implementation plans are the tangible products of the comprehensive planning process. Each should support one or more of the organization's stated goals and objectives.

7. *PERIODIC REVIEW AND UPDATING*: Before an organization puts its implementation plans into action, it should specify a procedure to periodically review its progress and make mid-course corrections. In addition, the organization should designate a time after which it will review all conclusions made during its strategic planning process and make changes where necessary.

The strategic planning process is a contemporary planning tool that provides direction as to how an organization's purpose or vision is to be developed and implemented. The value of this section of the Guidebook to those port districts desiring an extensive planning effort is that all the steps needed to complete a strategic plan are outlined in detail.

A. PUBLIC INVOLVEMENT

The port district should consider the level and type of public involvement it should incorporate into its comprehensive planning process. In some communities, extensive public involvement is a consensus building tool, as well as building the public's awareness of and ownership in port operations. A variety of ways to involve the public might include the use of citizen advisory committees, public hearings and "open houses." The media can also be useful to help publicize port district activities and for obtaining public comment and input.

B. ENVIRONMENTAL REVIEW

Creating a new comprehensive plan or modifying a previous plan may require some form of environmental threshold analysis to determine and consider any potential adverse environmental impacts associated with the plan. The port district must ensure that its project is in environmental compliance. Those port districts starting on a new strategic planning program, especially if they contemplate significant changes in the existing comprehensive plan, may want to incorporate federal or state environmental review as part of the process. The incorporation of a programmatic EIS can offer many advantages, which need to be assessed at the start of the planning process.

C. VALUES STATEMENT

1. What's a Values Statement? Values are subjective beliefs which are held by individuals and which shape their outlook and actions. A values statement is a listing of the values which exist among the individuals who make up your organization, the sum total of which create an organizational "culture." This cultural belief system influences the policy and administration of the organization.

The process of developing a values statement draws out the individual values within the organization, highlights areas where consensus exists, and uses the consensus as a statement of the organization's corporate values. The process may also highlight areas of disagreement as well. This is also useful in that it allows the organization to focus the areas of disagreement and to subject them to further discussion.

2. It Is Important That Organizational Values Be Known And Acceptable To All Members Of An Organization. These values should be periodically reevaluated as the organization's membership or environment changes.

D. VISION STATEMENT

1. What's a Vision Statement? A vision statement is an assertion of what and where the organization would like to be at some point in the future. It's an opportunity for the organization to change direction, confirm its present course, and/or address major policy questions.

Vision statements observe many of the rules which guide mission statements. A vision statement should say, in a future tense and in very broad terms, what business you'd like to be in, who you would like your customers to be, and what your general boundaries will be.

Specific issues in its vision statement which the port may want to address, and rank in priority, are:

- a. Does the Port see itself as "profit-oriented" or "service-oriented"?

b. What is the port's role?

- 1) An economically viable business entity
- 2) A competitor with other businesses
- 3) A municipal corporation which creates employment and stimulates economic development in the port district (even though it may have to do so by using tax revenues)
- 4) An employer of an enthusiastic and well educated staff
- 5) A landlord
- 6) An operator of an industrial park
- 7) An airport operator
- 8) A marina operator
- 9) A deep-water, international port
- 10) A park and recreation area
- 11) Other

c. How should the port obtain its revenue?

- 1) Fees and charges for use of its facilities
- 2) Profit from enterprise activities
- 3) Tax revenues
- 4) Debt securities
- 5) Other

d. What role should job creation and economic development of the community play in the port's pricing policy?

e. Should the port subsidize some of its operations (economic development or cargo operations) through its other ventures? Should taxes be used?

A vision statement can be as simple or as complicated as you want to make it, and you can pick any point in the future as a target. Notwithstanding this fact, you will find that there are practical constraints once you start visioning.

2. Length. Most organizations limit their vision statements to a paragraph or two so that they are concise enough to be useful.

On the other hand, the visioning process is an excellent place to wrestle with basic organizational questions. A concise vision statement might be accompanied by a series of explanatory notes which provide more detailed answers to these questions.

Don't confuse a vision statement with goals and objectives. If the vision statement runs much over a short paragraph, distill its contents and save the details for goals or objectives.

3. Duration. All vision statements should have a stated duration. Three to five years is a common time span in deference to the rapidly changing environment which most organizations face. Also, most organizations will find that their outlook changes after a few years and that they will want to periodically reevaluate and revise their vision statement.

4. Avoid wanting “to be the best.” There is a tendency by any group which writes a vision statement to include “best” statements. “*We want to be the best (fill in the blank) in the region.*” It sounds good, but doesn't give direction to the organization. How will we be the best? What does it look like, feel like, smell like, sound like? How do you know when the organization is going in this “best” direction? If your vision is to be the best, take the next step and explain what being “the best” looks like.
5. Avoid negative statements. Group discussions about vision development often include a few “don't want” statements.

“We don't want to be rated second in total dollar sales anymore.”

“We don't want to encourage an economic monoculture for the county.”

These statements are negative wishes, which will never come true; they can't, they don't provide direction for an organization or specify any place for it to go. They do however contain the kernel of an idea, but one which needs further development so that it can be framed as a positive statement. If your group includes some “don't wants” in an early draft of its vision statement, ask the next question which is, “so, what DO we want here?”

E. MISSION STATEMENT

1. What's a Mission Statement? A mission statement announces, in a very succinct manner, why your organization exists, and provides it with an ongoing sense of purpose. It is a thesis statement or a credo under which all goals, objectives, and business plans must fit. It answers the question of “*what is our business?*”

A mission statement does the following:

- a. Tells what your organization is – states why you are in business.
 - b. Tells who your customers are – defines who your organization serves.
 - c. Explains in very broad terms what you do for them.
 - d. Sets, by implication, a general boundary beyond which you will not go.
 - e. Specifies for your organization a direction in which it will travel – rather than attempting to specify destinations along the way.
2. What doesn't go into a Mission Statement? A mission statement should:
 - a. Not list specific activities
 - b. Not mention time or set deadlines

- c. Not discuss who should do what
 - d. Not be confused with Goals or Objectives
3. What does a Mission Statement look like? A mission statement must be a succinct statement of the organization's purpose and limited in length (some advocate that it should be no more than one to two sentences long). The following are examples of port mission statements:

The purpose of the Port of__ shall be to vigorously manage its assets to provide maximum benefits to the citizens of the port district. To do this, the port shall BUILD relationships, facilities and infrastructure that help the port district's economy GROW, while it serves those who MOVE products and people and accepts a role to IMPROVE__ recreational options and environment.

To develop marine commerce, engage in economic development, earn sufficient revenue to cover direct and indirect expenses, maintain facilities, provide for a prudent level of reserves, and produce capital for future development.

To be a proactive, customer-oriented, financially healthy service organization whose primary purpose is to maximize the flow of waterborne commerce by providing highly productive facilities, equipment, and support services.

To be a leader in providing services and facilities to accommodate the transportation of goods and passengers by air, land, and water to foster economic development for the benefit of the port district.

To induce capital investment in an environmentally responsible manner to create jobs and enhance public recreational opportunities.

F. GOALS

1. What's a Goal? Once you have defined the purpose of your organization, you can begin to set goals for it. A goal is merely a description of *the direction in which you want to travel* in order to achieve you organization's purpose. It is the compass heading for the journey that you are taking. It is not a specific destination or a plan for getting there. For example:

GOAL: "To make the port economically viable as a commercial enterprise."

GOAL: "To increase the public's understanding of the port's operations."

GOAL: "To facilitate economic development in the county."

GOAL: "To develop a better working relationship with the general purpose governments (the county, the cities, and the State of Washington) within the port district."

2. General Factors. Goals are:
- a. Limited to one subject. If you have an "and" in the goal statement, chances are you are crowding several goals into one sentence. In such a case, try making each into separate goal statements.

If your goals statement has a lot of adjectives (“...develop a constructive, beneficial, healthy, and progressive work environment”) and/or prepositional clauses (“...by working with...”), you are probably mixing your goal with its objectives. Try deleting the adjectives and subordinate clauses and saving them for the list of objectives.

b. Concise and independent of each other. If one goal sounds like another, sharpen your focus and rewrite. If they still sound alike, consolidate them.

c. Stated in general terms. Goals should not mention specific activities or set deadlines. Save these for objectives.

d. Supported by Objectives. If you can't think of at least one measurable objective for each goal, it's not a real goal.

3. Avoid “Process” Statements. A goal must state an end. It must describe the thing that you want to achieve with sufficient specificity that you are able to formulate objectives and business plans for each.

There is a natural tendency in formulating goals to sometimes describe them as a process. When someone offers a process statement to characterize a goal, ask him/her to take the next step and identify the aim or end at the end of the process.

Examples of these “process statements” would be:

* *“To facilitate the port's planning process”*

The actual goal here might be to increase the port's income. The objective, modifying that goal might be to increase the amount of land which the port leases or to change the type of leasing arrangement to a more profitable use. The business plan, supporting that objective, might call for port staff to take a series of steps, including hiring adequate planning staff, applying for necessary permits, and finishing land use studies which are a prerequisite for obtaining the permit. Facilitating the port's planning process however is not an obtainable goal.

* *“To amend the development standards for the airport”*

Here, the goal may be to add a new runway or to add new facilities for an air cargo service, or to demolish obsolete facilities. Merely amending airport development standards however does not state a goal which will support objectives and business plans.

When determining if you have a process statement in your list of goals, ask yourself if you feel like you are working too hard at finding objectives to fit underneath it, or if you are having to guess at the “goal's” meaning. If you are, put some more time into refining the aim of the goal.

G. OBJECTIVES

1. What's an Objective? Objectives are *destinations which you aim for as you undertake your journey*. They are concrete statements describing the specific things which you wish to achieve under each goal. They are a description of “outcomes”; of what “success” will look like when you achieve it. Objectives describe your target and what the target will look like after you hit it. All goals pave one or more objectives. For example:

GOAL: To make the port economically viable as a commercial enterprise.

OBJECTIVE: Increase the net profit of all port business centers by 10% by 1996.

OBJECTIVE: Mitigate or eliminate all port activities which lose money by 1994.

OBJECTIVE: Eliminate the port's reliance on property tax revenues to fund port operations by 1995.

2. Elements of an Objective. An objective must be:
 - a. MEASURABLE. An objective must be specific enough *to describe the ultimate outcome* that you want and to act as a basis for developing your business plans.
 - b. DATED. Objectives must have a *target date* by which they are to be completed.
 - c. FEASIBLE. This is a reality-check. Once you have considered outcomes, target dates, and ownership of an objective, you should have a pretty good idea whether the objective is feasible. If it doesn't appear to be, cross it off the list. If you can't find at least one workable objective for each goal, chances are that it is not a real goal for your organization. Put it aside and move on.

Determining what your organization's goals and objectives are is an exercise in creative struggle. The brainstorming, discussion, and decision-making processes required take effort and perseverance, but they are worth it. When your organization sets clear goals and objectives during its strategic planning phase, its members and staff will not be forced to guess at what they are when they implement their business plans. Once you have worked through the goal-and-objective-setting process, pat yourself on the back knowing that you have saved your organization time, money, and frustration.

3. Types of Objectives. Once you define your objectives, you may (or may not) then choose to organize them in various ways. The following are some examples:
 - a. *Long Term vs. Short Term.* Creating a distinction between short and long term objectives may be helpful in situations where ongoing responsibilities require periodic benchmarks along the way. Short term goals provide nearby targets to shoot for. Long term goals keep you thinking beyond a week-by-week perspective.
 - b. *New vs. Ongoing.* As an organization adds goals and objectives to its list, it may find it important to distinguish its ongoing responsibilities from its new goals.

- c. *Mandatory vs. Discretionary.* A governmental body may find it useful to highlight which of its objectives are mandated by law or compelled by situations beyond their control, such as emergencies. This will give the members an idea of how many of the objectives on the discretionary list are possible given budget constraints.
- d. *Product vs. Organizational.* In listing its objectives, an organization may want to distinguish its products from the things that it needs to produce them. In the former case, the organization will naturally develop a number of “product” objectives (i.e., those objectives which identify the goods and services which the organization produces as part of its business). In the latter case, it will list the objectives necessary for operating and improving its organization. These “organizational objectives” will be related to employees, their individual needs, their functional inter-relationships, and the overall operation of the organizational structure. An organizational objective usually has an “in order that” sort of relationship to the product objectives.
4. Efficiency and Accountability. Well-defined objectives create efficiency and accountability within an organization. They give policymakers a means to consider the feasibility of the policy directives which they create. Clear objectives also require policymakers to give administrative staff clear directions and promote a two-way line of communication. Finally, they allow policymakers to control their own agenda and give them a sense of accomplishment when the objectives are achieved.

In addition, clear objectives tell staff what is expected of them and promote accountability. They provide a means for staff to give policymakers feedback and reality checks on work which is being planned or is under way. They discourage open-ended tasks and give staff a sense of accomplishment when an objective is finally realized.

H. IMPLEMENTATION

The strategic planning process can be implemented in a variety of ways. Most commonly is the development of the above steps into an acceptable consensus by all parties involved, which would include at least the policy board and supporting staff with input from the port district's stakeholders (including the public, media, labor, other agencies, special interest groups, etc.). Getting to this point in the strategic planning process will have already required significant background detail to be developed (financial data, business aspects, competitive factors, and inventory assessments, for example).

After consensus is developed, a series of steps will need to be completed to reach a final plan, including the elements of a comprehensive plan, i.e., land use, financial, and other items important to the specific port district. These steps are identified in the following:

1. CREATE A BUSINESS PLAN FOR EACH OBJECTIVE

- a. What's a Business Plan? A business plan contains the steps which are necessary to achieve your organization's objectives. It is the *travel plan for your journey – a strategy to get you from where you begin to your designated destinations.*

There are many ways to create a business plan. It may be developed on a “project basis,” focusing on the projects which are necessary to achieve specific objectives, a “departmental basis,” focusing on the organizational units which will undertake to achieve the objective, or any other basis which services the organization's needs. Organizations can have one or more business plans, as their needs so require.

The process of creating a business plan is a refinement of the objective-setting process and turns on the same principles of *measurability, accountability, and feasibility*. Business plans have the following elements:

- 1) **TASK PLAN ELEMENT.** A task plan is merely a list of the all of the steps which you must complete to fulfill an objective. The list is typically organized in a strategic manner and tells you which task must come first, which second, and so forth. Tasks must be:
 - a) **Measurable.** A task must be described with sufficient detail to make clear the work which must be done. A clear description advises staff of what is expected of them and gives management an objective yardstick to measure staffs performance. It also puts others on notice of what your organization intends to do.
 - b) **Dated.** A task must have deadlines; a time specified by which it is to be completed. It may also have a timeline, with milestones along the way, indicating when partial completion of the task is required.
 - c) **Owned.** A task must be assigned to a person with primary responsibility to ensure that the work is done and the deadlines are met. It must designate “where the buck stops.”
 - d) **Feasible.** A task must be achievable. In creating a series of tasks, ask yourself if, after taking all things into consideration, the staff person assigned has a reasonable chance of performing the work in the time specified. If not, rethink and reformulate your task.
 - e) **Periodic Review Process.** A task should be reviewed periodically to ensure that work is being performed on schedule.
- 2) **FISCAL ELEMENT.** The fiscal element of a business plan serves several purposes. Through it, you will calculate the cost of your undertaking, identify your source of funding, and compile the data necessary for developing an overall budget for your organization. In developing the fiscal element of your business plan, you should:
 - a) **Estimate the Cost.** What will it cost to meet each objective? How many persons / hours, how much material, and what facilities are necessary to achieve the desired outcomes.
 - b) **Identify the Funding Source(s).** Where will the money come from? Once you have defined the cost, figure out how you will pay it. Do you have existing funds, or do you have to create fees or raise taxes, or will you reduce budgets in other programs, or do you go back and reduce the size of the task.

3) SOCIAL / POLITICAL ELEMENT. The social / political element of your business plan is a form of market research. It is a means to calculate your chances of business success once you have identified your products and formulated your budget. This element is particularly important for organizations working in the public sector.

a) Calculate your Objective's Marketability. Now that you have defined your task and its cost, do your customers really need it? Will they buy it? Will they support your decision to produce it? What are the political ramifications, both pro and con, of following through with it? How will it read in the papers?

In this portion of your business plan, you should outline what the impacts of your objective will be if it is implemented.

b) Define the Stakeholders. Stakeholders are those persons or organizations which will either help or hinder you as you pursue your objective. Listing them and knowing their interest provides an important reality-check in the planning process. Bringing them into the project as early as possible allows them to build their ownership in it. If a stakeholder is an opponent, their inclusion can help to focus the substance of the conflict and distinguish it from the areas of agreement.

In order to define your stakeholders, look for individuals or organizations who have an interest which will be served or jeopardized by achieving the objective. Stakeholders may be local businesses, community organizations, labor, environmental groups, neighborhood associations, ethnic groups, the media, the city, the county, the state, the federal government.

4) PRIORITIZE YOUR OBJECTIVES. By now, you have done a lot of work. You can now proceed with prioritizing your objectives in a fully informed manner and deciding which of them you will undertake. The next step is to convey all of the above direction-setting into tangible land use and capital improvement plans.

2. PREPARE MASTER PLANS FOR PORT PROPERTIES AND FACILITIES

a. What's a Master Plan? A master land use plan (master plan) is the guidance document for a specific property or facility. Whether you use the term master or comprehensive plan for the property or facility is your choice (for example, the Marina Comprehensive Plan, or the Marina Master Plan). However, it may be confusing if a port district has a facility comprehensive plans and the port district comprehensive plan. The following are potential elements of a master plan:

- 1) An inventory of land and facilities
- 2) Allowed uses
- 3) Site plan layout
- 4) Development standards
- 5) Landscaping standards
- 6) Area character
- 7) Building design
- 8) Circulation

- 9) Parking
- 10) Utilities
- 11) Other

Since port district properties are located within some other municipalities boundaries, preparation of the master plan should be coordinated with the host jurisdiction and existing regulatory documents.

3. PREPARE CAPITAL IMPROVEMENT PLANS

a. What's a Capital Improvement Plan? A capital improvement plan is the financial plan for the acquisition and development of capital improvements. All projects are budgeted by year, which serves to prioritize each project by when it will be implemented. Capital improvement plans are linked to other comprehensive plans which recommend a capital improvement.

In order to be eligible for most federal and state transportation funds, a project must be included within the port's capital improvement plan, or its transportation improvement plan, if the port has one. In addition, many grant programs assess as part of their evaluation criteria whether a project is incorporated into planning documents. For instance, the state's Freight Mobility Strategic Investment Board (FMSIB) awards points to projects that are included in the regional transportation improvement plan. The Boating Facilities Grant Program, which is administered by the Washington State Recreation and Conservation Office, considers planning success and GMA when scoring grant applications.

I. CREATE A REVIEW AND UPDATE PROCEDURE

1. A Plan to Review the Plans. Everything changes with time. The composition of your organization will change as people come and go. The environment in which you do business will change as economic, social, and political conditions evolve. The question arises then, how can your organization and its business plans keep pace of a changing strategic environment? Also, note: *All plans have a limited shelf-life and their age is inversely proportional to their chances of being useful.*

Your business plans will be effective only if the choices and assumptions upon which they were developed remain valid. Therefore, an organization dedicated to comprehensive planning will periodically reevaluate its plans.

2. Regular Times for Review and Reevaluation. It is best to build in a formal review procedure when your organization first creates its comprehensive planning process. Review and reevaluate your organization's choices, assumptions, and plans. Pick a regular time during the year to do so. Retain the healthy diversity of opinions which helped make your comprehensive planning process successful during the prior planning cycle. If portions of the planning process need to be tailored to present conditions, make changes accordingly. Consider an organizational retreat, away from phones and other office matters as a desirable forum in which to conduct your review.
3. Continuous Review Process. Organizations which don't have the time to periodically review the procedural assumptions and substantive products of their comprehensive planning process will sooner or later find themselves going one way while their market and customer base goes another.

V. STRATEGIC PLAN RESOURCE LIST

Comprehensive Plans

Executive Summary of the Comprehensive Plan for the Port of Anacortes
Port of Olympia Comprehensive Plan
Port of Port Angeles Comprehensive Scheme of Harbor Improvements
Port of Royal Slope, A Comprehensive Plan for the Port of Royal Slope
Port of Tacoma Comprehensive Plan Summary

Master Plans

Port of Anacortes Marina Master Plan
Port of Edmonds Master Plan
Port of Friday Harbor Water Access Recreation Plan 1994 - 1998
Port of Friday Harbor Airport and Seaplane Base Master Plans
Port of Seattle Container Terminal Development Plan & Final Environmental Impact Statement

Sources

Jim Goche', Port of Olympia, Creating A Strategic Planning Process, May 18, 1993.
American Association of Port Authorities, Strategic Planning: A Guide for the Port Industry, September 1988.