

Strategic Plan 2020
City of Columbia Trends and Observations
September 24, 2019

The data tell our collective stories.

We're a growing community where unemployment is low but where almost one-fourth of residents live in poverty. Although the gap between black and white citizens is trending favorably, if you're black in Columbia, you're still more likely than your white counterparts to have a lower high school graduation rate, higher unemployment, lower household income and a higher death rate.

Citizens care about the community and, because each of our own stories is different, we value things differently. Through our annual survey, a representative population tells us to keep working on three top priorities: public safety, streets and infrastructure. In focus groups, under-represented voices put more emphasis on City communication, City leadership, transit and housing.

City staff care deeply about public service but are alert to the accelerating tipping point where available resources can no longer fulfill the promise of a "full service city." There are significant fiscal disparities between what the City can afford and what is required to keep Columbia running.

The loom on which these stories are woven is Earth's changing climate. Even as the City adapts its operations and services in a warming world, all of our individual and collective stories are likely to change.

Questions emerge from these trends.

Do we have the capacity to make Columbia "...the best place for everyone to live, work, learn and play"?

Are our current strategic priorities still valid, or are they a bridge to a more nimble plan that accommodates continuous change?

How can we best use our strategic advantages in the public interest?

The Trend Statement Team offers this document to all City colleagues, leaders and policy makers who will create the City's next strategic plan.

TREND STATEMENT AREA: Community Demographics

Trend

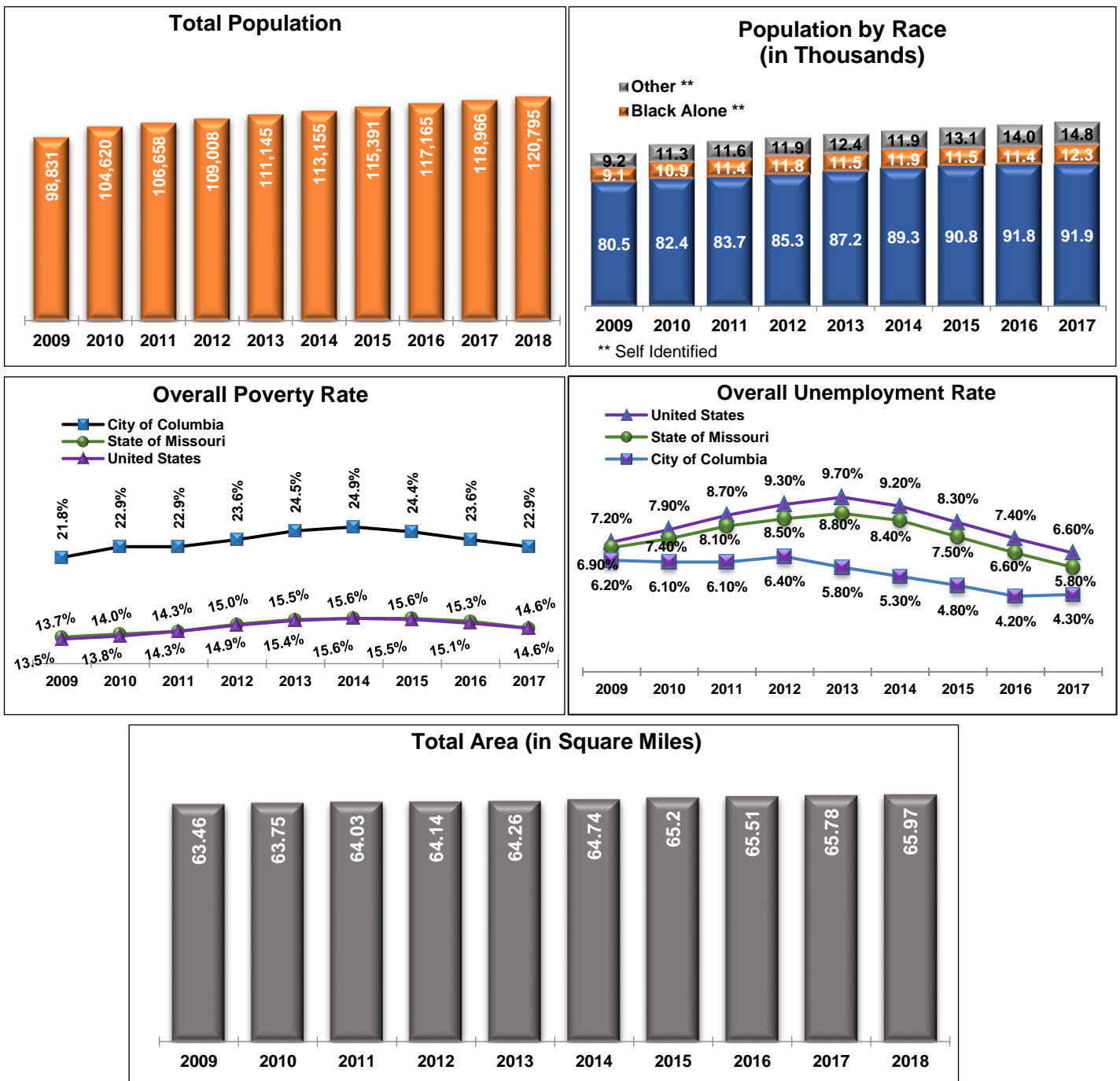
The City has experienced positive, manageable population growth over the ten year period with an average growth of 2.35% each year. Columbia's overall poverty rate has been significantly above both the Missouri and United States poverty rates for the period shown. The City's overall unemployment rate has been significantly below both the Missouri and United States unemployment rates for the period shown. The City's area in square miles has increased 3.96% over the period shown.

Implication

Over time, stability in population and geographic growth appear manageable but do not fully reflect the effects of development intensity and demand for service. A stable poverty rate while unemployment continues to decline may mean that even though more people are working, they don't have economic mobility.

Source

(American Community Survey) five year estimates



TREND STATEMENT AREA: Citizen Voice

Resident Voice - Random Sample of General Population

Trend

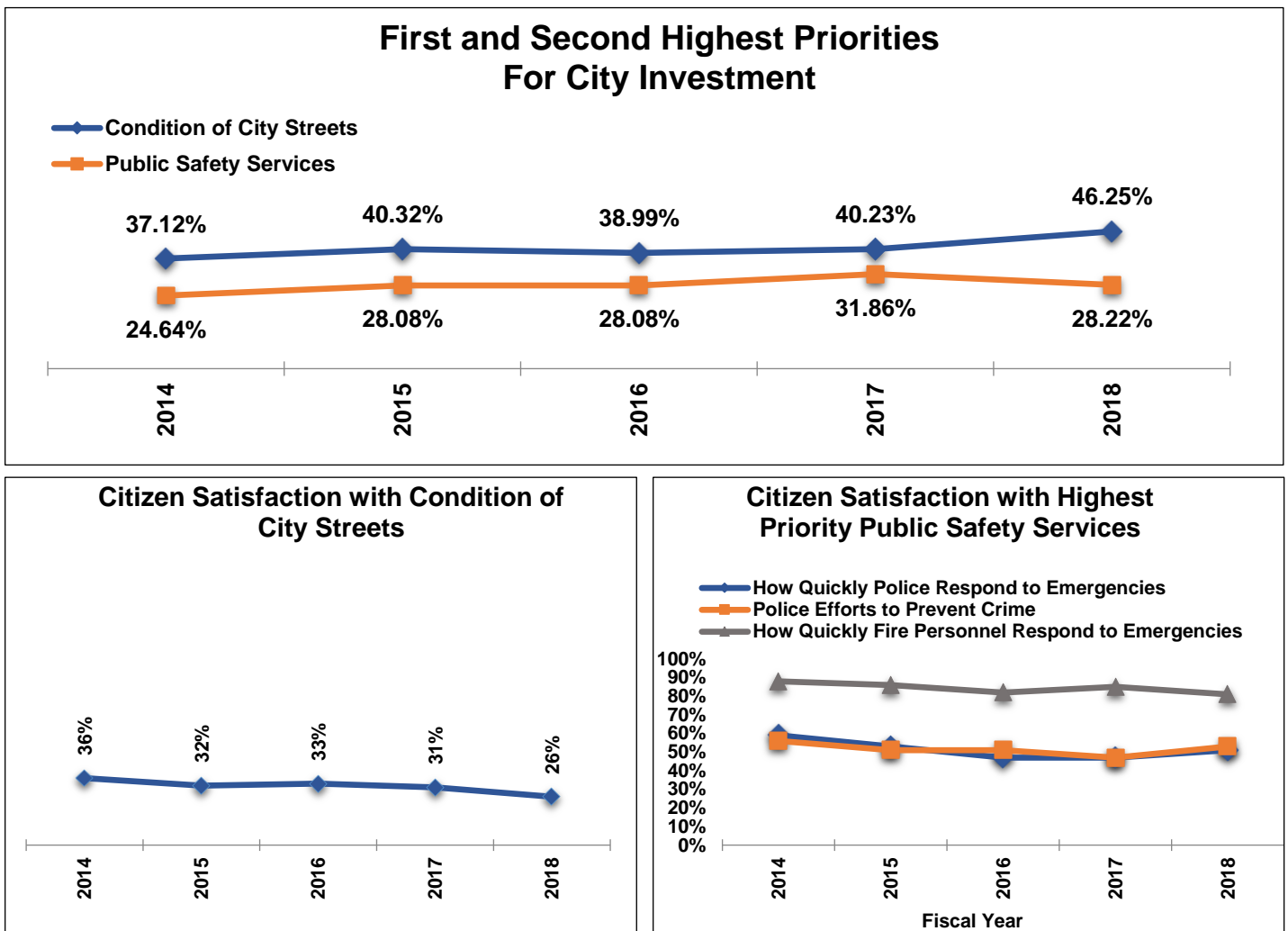
The Importance/Satisfaction ranking in the annual citizen satisfaction survey consistently shows that street conditions and public safety services are the first and second highest priorities for City investment.

Implication

Assuming there is trust in both the source and survey methodology, the data suggests allocating additional resources and strategic emphasis in these areas could improve citizen satisfaction.

Source

DirectionFinder Citizen Satisfaction Survey 2014-2018



TREND STATEMENT AREA: Citizen Voice

Resident Voice – Reconciling the Differences

Observation

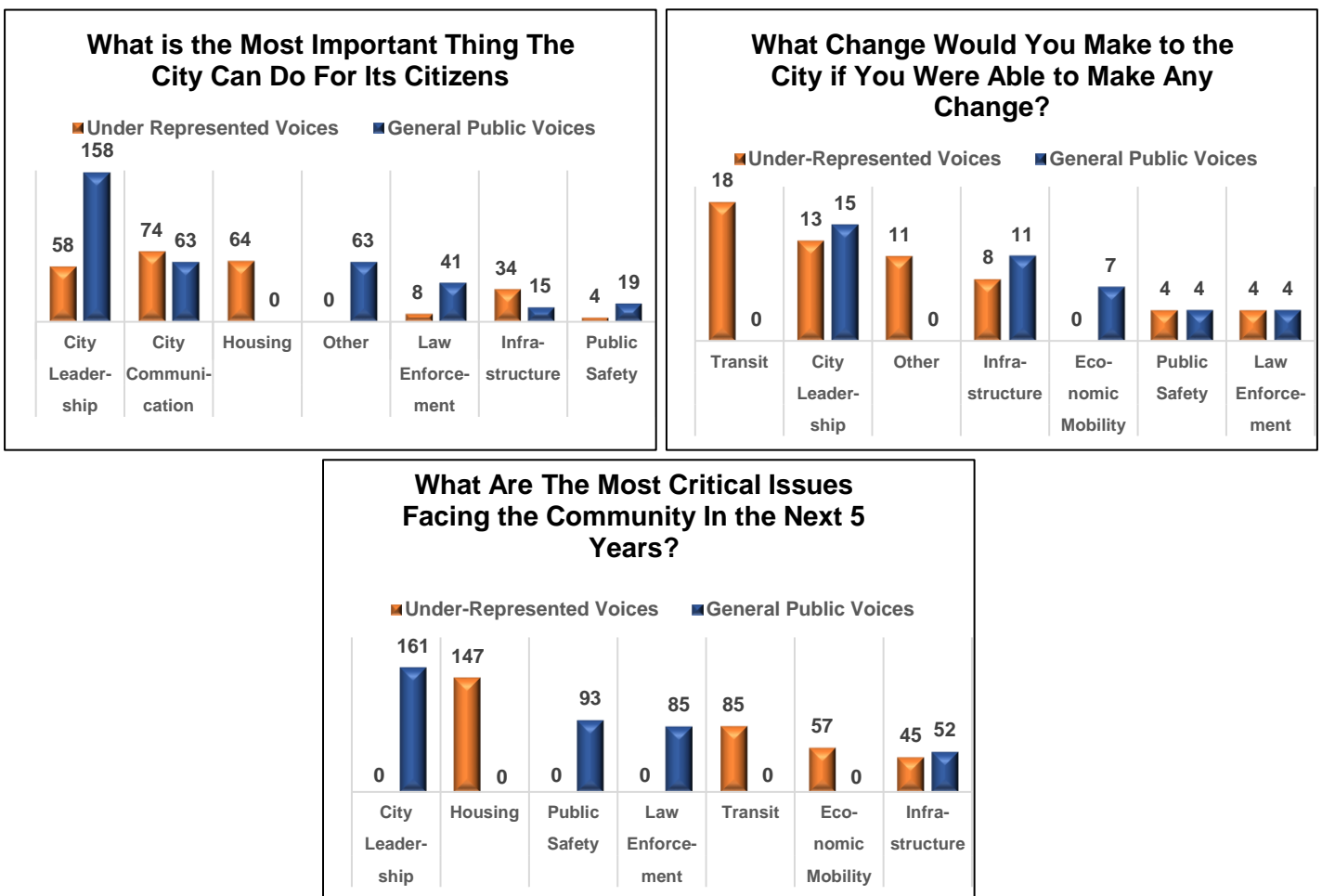
The variety and nuance of input the City receives when creating opportunities for under-represented voices to be heard paints a different picture of what services are most important for the community. The annual Importance/Satisfaction ratings suggest increasing investments in service lines where dis-satisfaction and importance are high. While not a direct equivalent, comparing what focus group participants say is important to what they say they would change (as a proxy for dis-satisfaction) also could guide investment.

Implication

By ordinance, the Columbia Vision Commission has a duty to hold at least four meetings each year to gather input for the City's strategic plan, and it may use other methods to capture residents' voices. Focus group participants were enthusiastic and hoped they would see results from their work. Continuing to actively engage citizens may require additional resources to assure high-quality and wide representation.

Source

Focus Group Meetings



TREND STATEMENT AREA: Climate

Expected Climate Changes for Columbia

Trend

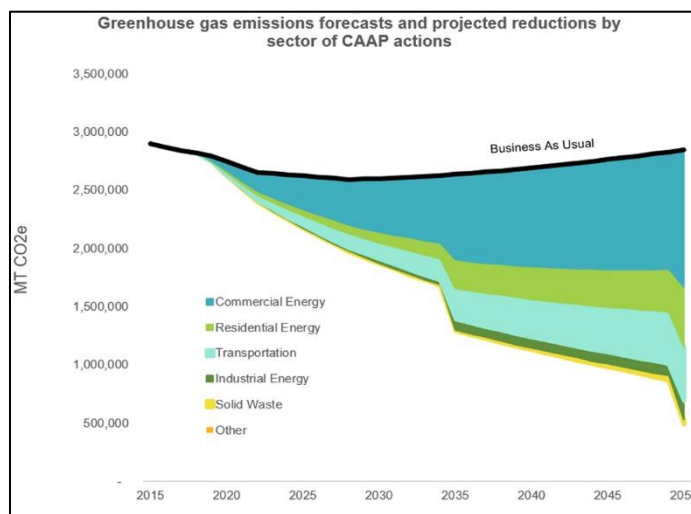
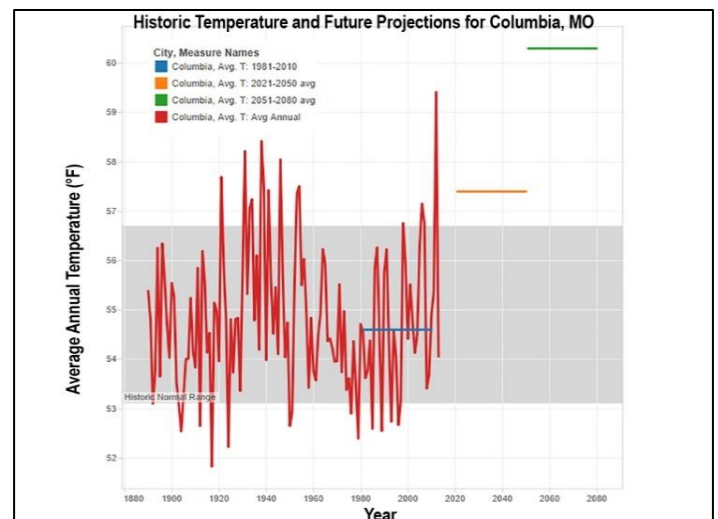
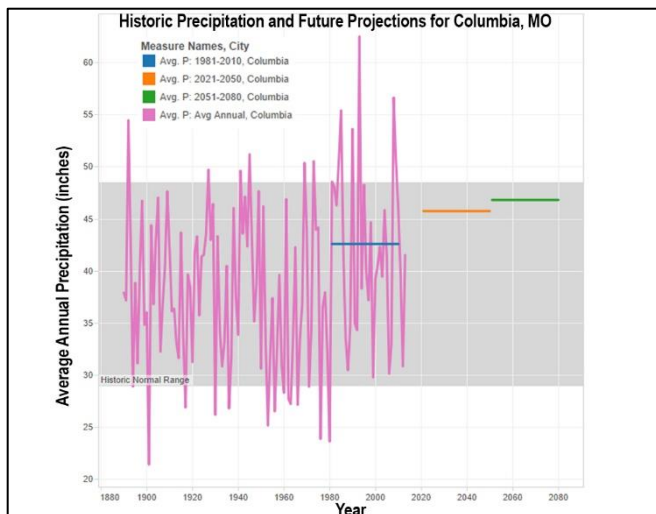
Columbia will likely experience warmer annual temperatures, more precipitation, and heavier precipitation events.

Implication

Warmer days and nights during the Summer months will create greater cost for cooling homes. Utility costs greatly impact housing affordability. Without cost effective energy efficiency upgrades Columbians living in more affordable and often less efficient housing will bear greater cost as temperatures warm. Localized flooding risk could increase with increases in precipitation and with heavier precipitation events. This trend will be compounded by continued development that increases the area of impervious surfaces (roofs, parking lots, driveways, roads, etc.). In June of 2019 the Council adopted the Climate Action and Adaptation Plan, achieving the goals of the plan will require changes in operations and services. The current trend for GHG emissions (Business As Usual) will not continue to reduce emissions. Strategies across all sectors, but especially commercial energy, will be needed to meet the City's 80% reduction goal by 2050. Meeting the City's own Municipal GHG reduction goals will also require action. A major source for municipal emissions is energy use in City facilities which has remained relatively the same over the last 5 years.

Sources:

- 1 - Climate in the Heartland
- 2 - Climate Action and Adaptation Plan, June 2019, pg. 47



TREND STATEMENT AREA: Economy

Racial Disparities

Trend

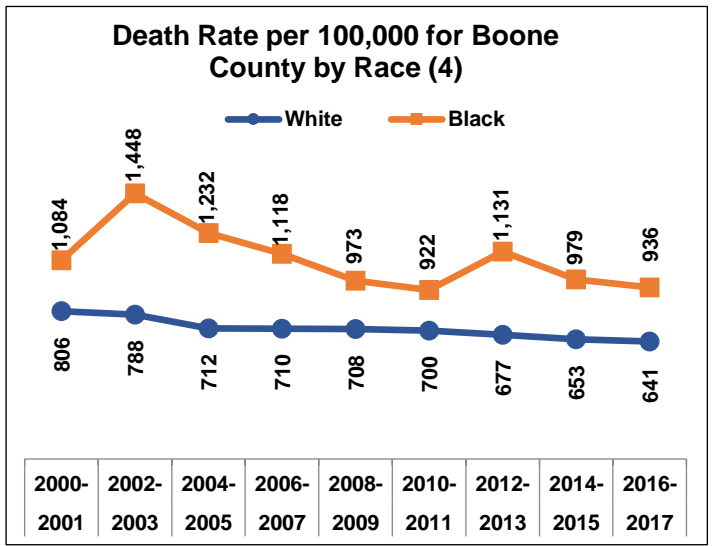
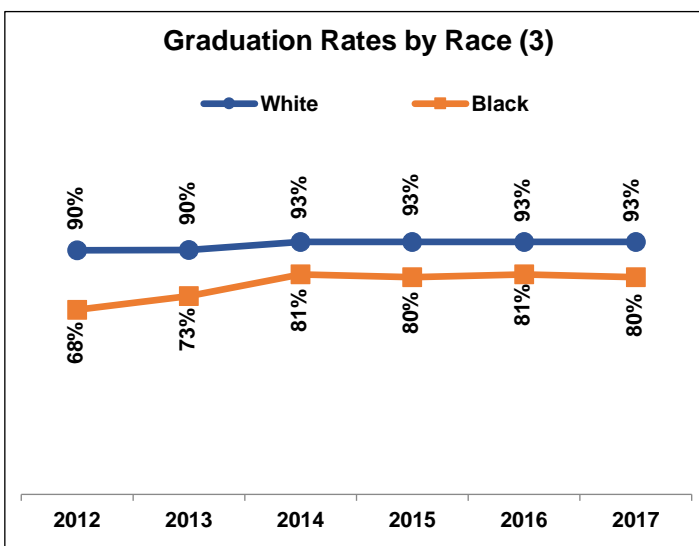
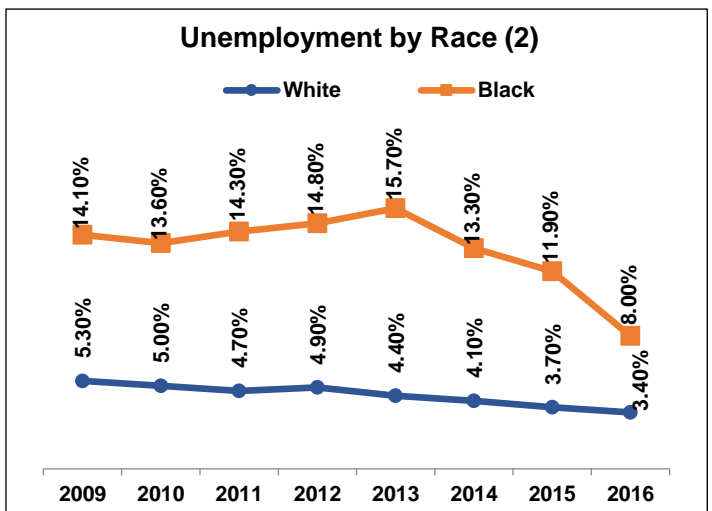
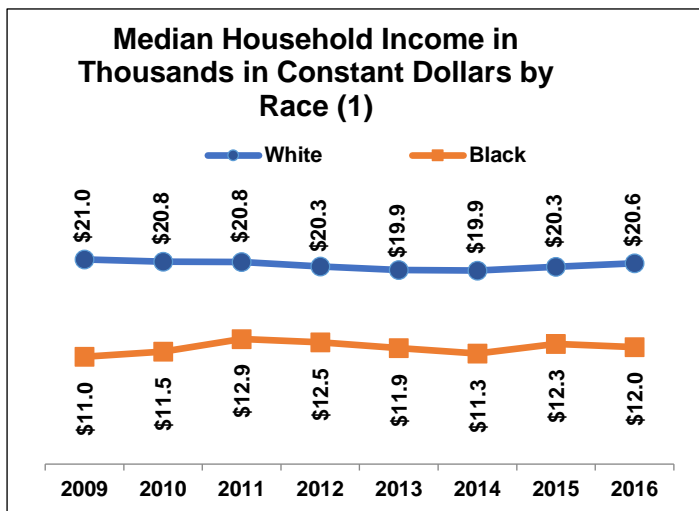
Disparities persist between white and black Columbians for income, unemployment, graduation rates, death rates and other measures.

Implication

Although disparities between white and black Columbians persist, the gap between the groups is trending in the right direction. High school graduation is closely tied to employment, income and, ultimately, factors affecting death rates. One of the City's current strategic priorities is to create a hospitable environment for jobs that pay at least a living wage. Continuing to address these factors in the interest of closing racial disparities also improves opportunities for household and individual success.

Sources

1. ACS Five Year Estimates
2. ACS Five Year Estimates
3. Columbia Public Schools
4. DHSS - MOPHIMS - Death MICA



TREND STATEMENT AREA: Economy

Housing Trends - Affordable Home Prices

Trend

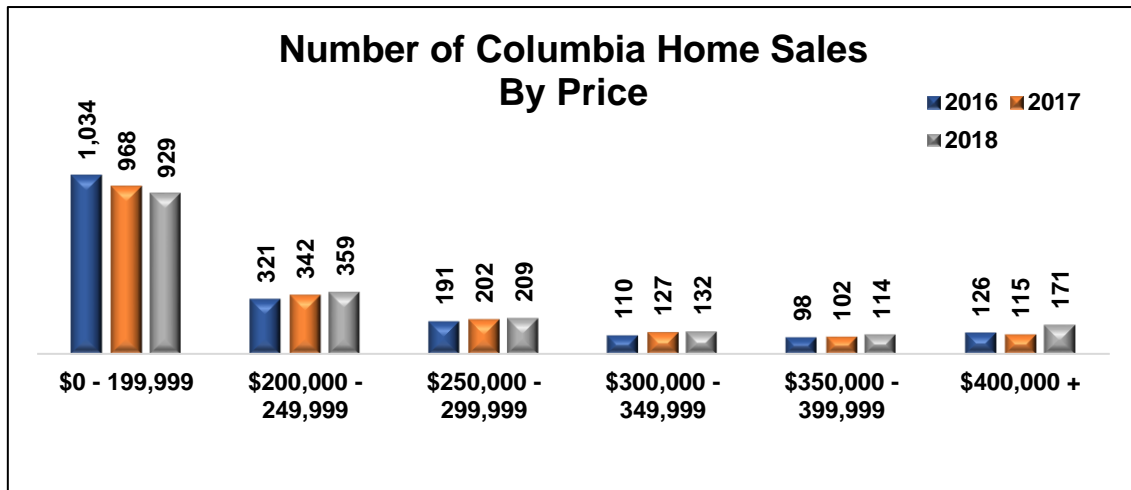
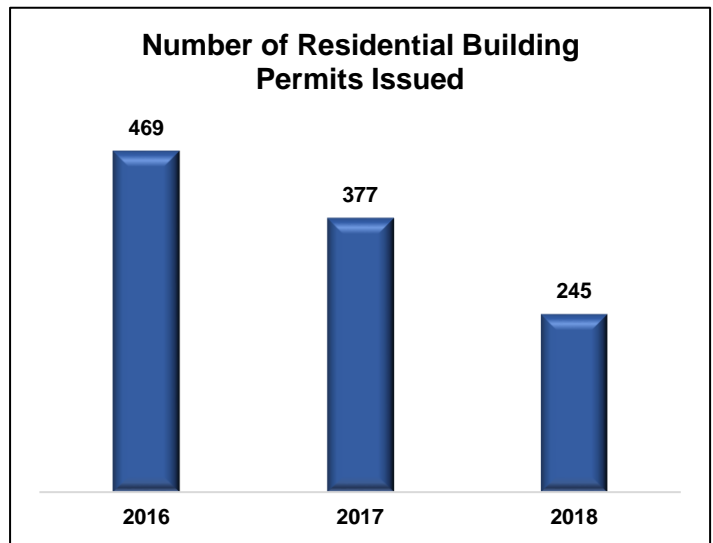
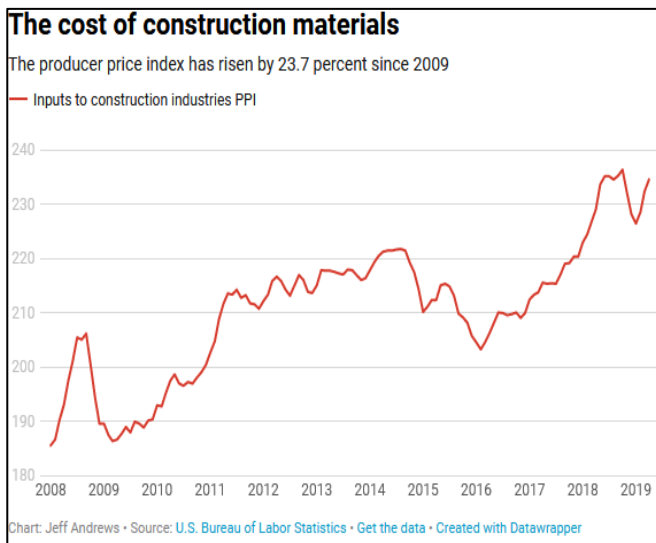
The cost of construction materials and labor continue to increase. The producer price index has risen by 23.7% since 2009. Lumber prices have fluctuated over the past two years to almost twice the cost of lumber in 2008. Single family residential building permits decreased from 469 in 2016 to 245 in 2018, while the estimated value of homes issued permits increased from \$237,878 in 2016 to \$249,506 in 2018. The number of home sales for homes below \$200,000 have decreased from 2016 to 2018, while home sales in all categories over \$200,000 have increased.

Implication

The rising cost of construction materials and labor will continue to greatly reduce the capacity of the City's Housing Programs Division to produce additional affordable housing. The decrease in building permits issued indicates less additional supply of housing for Columbia's market. The decrease in home sales below \$200,000 and increase in all higher price categories indicates a lack of affordable starter homes. This continued trend will likely result in a decrease in access to homeownership opportunities within Columbia for lower to middle income households. A lack of housing supply will likely place further upward pressure on pricing and further decrease the availability of affordable housing.

Sources

U.S. Bureau of Labor Statistics
City of Columbia Community Development Department
Columbia Board of Realtors



TREND STATEMENT AREA: Economy

Housing Trends - Median Monthly Rent and Homelessness

Trend

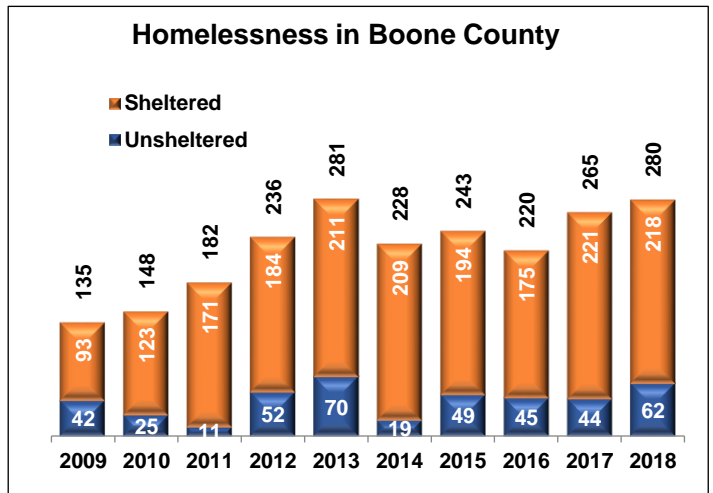
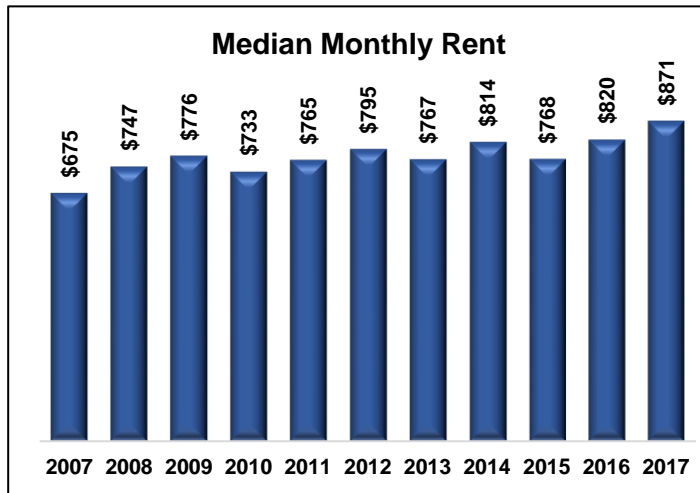
Median monthly rent increased from \$675 in 2007 to \$871 in 2017. The median home value for owners has increased from \$164,700 in 2010 to \$185,300 in 2017. Homelessness in Boone County has increased 107.41% from 2009 to 2018.

Implication

The rise in monthly housing costs continues to impact the number of housing cost burdened households in Columbia. 2017 ACS 5 year estimates indicate 16,262 housing cost burdened households in the City of Columbia. A rise in homelessness creates increased demand for homeless shelters and social service funding.

Sources

American Community Survey Data 1-year estimates
City of Columbia - Division of Human Services



TREND STATEMENT AREA: Social Equity

Uninsured Rate

Trend

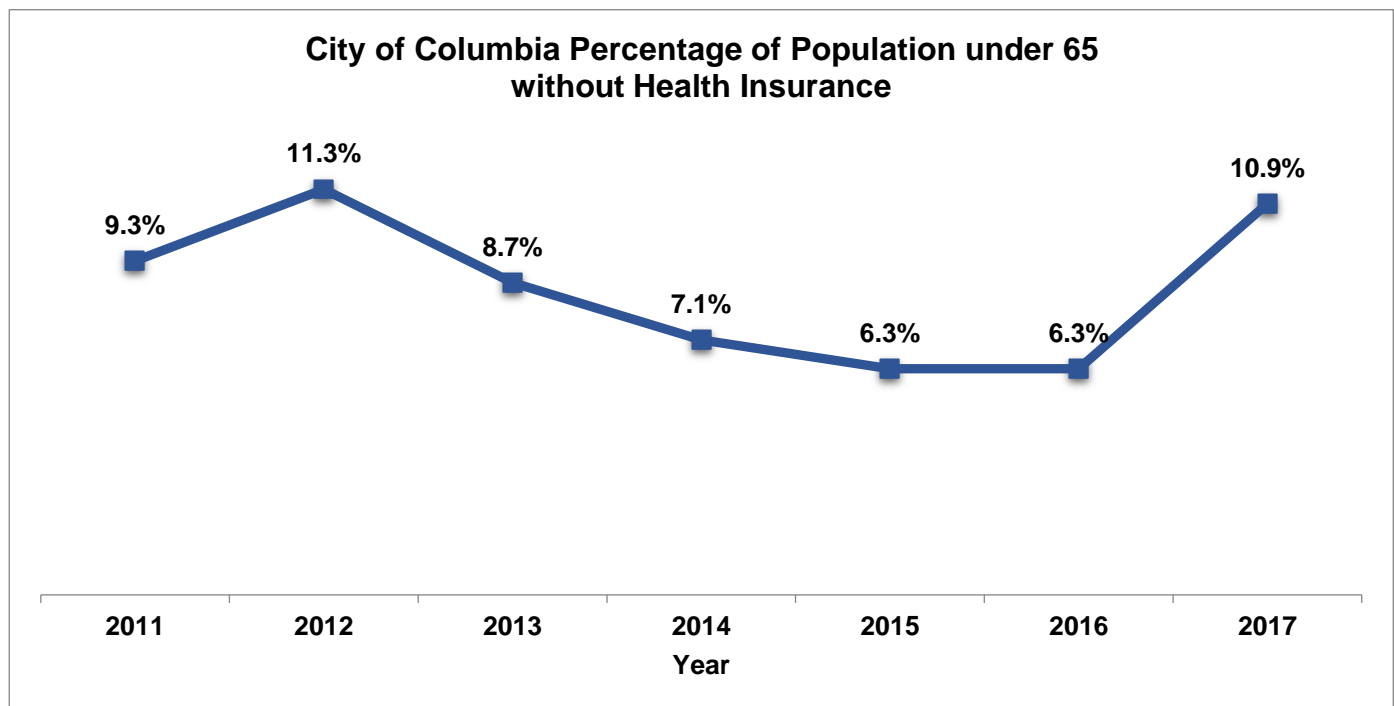
The percentage of residents under 65 without health insurance has decreased since 2012 but is rebounding. While the overall trend is improving, there are census tracts in Columbia where uninsured rates are between 15 – 20 percent.

Implication

Lack of health insurance is a significant barrier to getting health care and maintaining financial security. Going without coverage can have serious health consequences for the uninsured because they receive less preventive care, and delayed care often results in serious illness or other health problems. Being uninsured can have serious financial consequences, with many unable to pay their medical bills. They face debt collectors, spending choices and possibly long-term conditions that affect their ability to live, work, learn and play in this community.

Source

Boone Indicators Dashboard



STRATEGIC TREND STATEMENT AREA: Social Equity

Flat budgeted expenditures in Health Department amid growing population and increasing demand for services

Trend

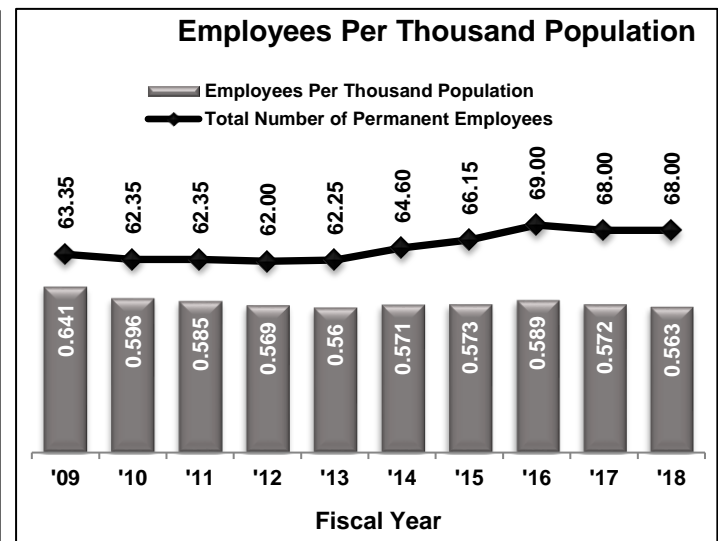
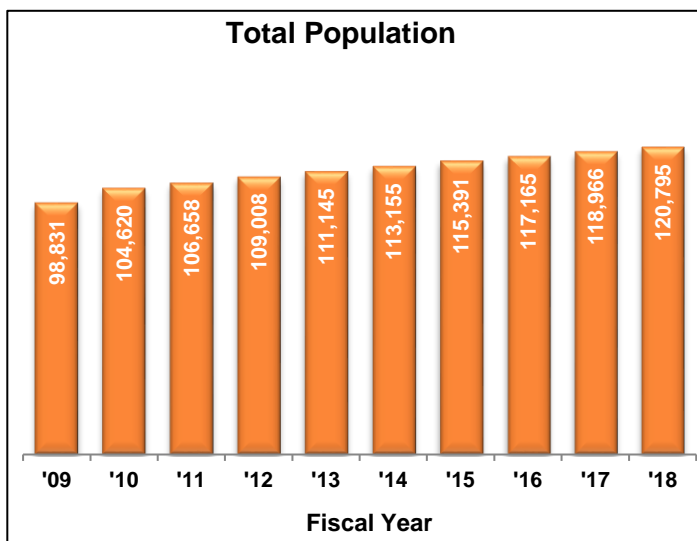
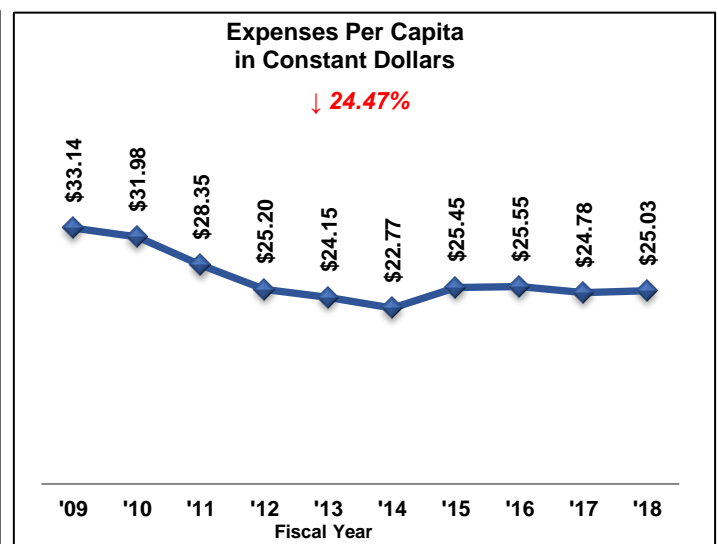
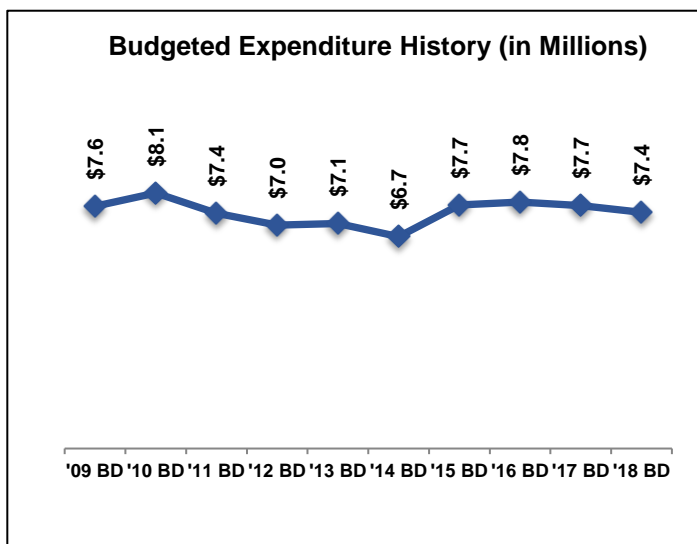
Budgeted expenditures for public health and human services have remained flat from FY 2010 through FY 2018, while Columbia's population has grown by nearly 15,000 people over the same period. Expenses per capita in constant dollars decreased 24.47%, and the total number of employees per 1,000 population decreased 12.18%.

Implication

Several studies support the conclusion that the most effective form of public health spending is at the local level. Local health departments play a vital role in protecting many aspects of the public's health, including infectious diseases, chronic diseases and natural disasters, all while expanding focus on the social determinants of health.

Source

City of Columbia Budget Document



STRATEGIC TREND STATEMENT AREA: Social Equity

Social Services funding Per Capita <100% Federal Poverty Level

Trend

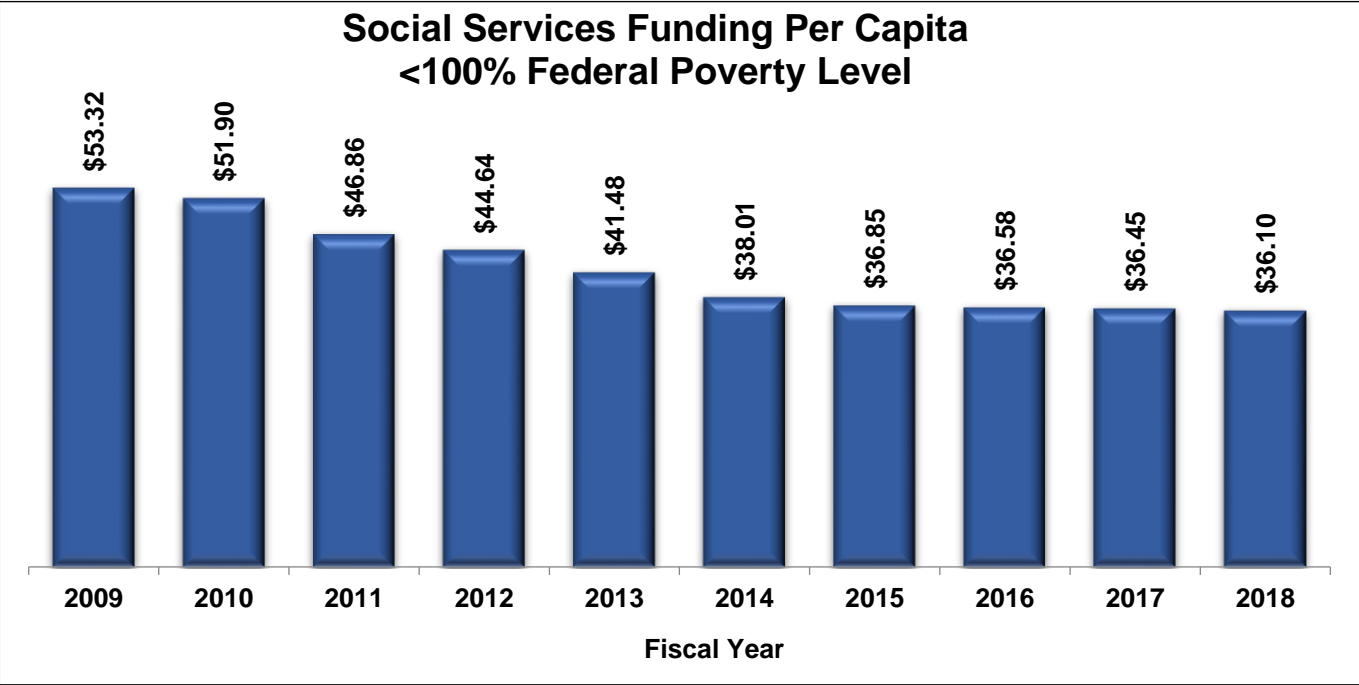
The City's per capita investment in social services has declined significantly over the past 10 years.

Implication

Poverty rates have steadily increased, while local, state and federal resources for social services have declined, leaving low-income residents without the resources needed to meet basic needs and achieve self-sufficiency. The City's investment in social services has not kept pace with the growing rate of poverty in our community. A five-year American Community Survey estimate (2012 - 2016) shows that 39% of Columbia residents are living in low-income households. Basic needs has been identified during the 2018 Community Health Assessment as one of four strategic priority areas.

Source

City of Columbia Budget Document



TREND STATEMENT AREA: Public Safety

Sufficient Staff Capacity for Fire Incidents

Trend

The number of incidents requiring Fire Department response has grown faster than Columbia's population. The number of Department employees per thousand is not keeping up with Columbia's growth. From FY 2009 to FY 2018, population increased 23.16%, and the number of incidents increased 39.10%. Much of the increase in budgeted expenditures was due growth in pension and health insurance costs.

Implication

These trends, coupled with declining General Fund revenues, toughen the Department's capacity to effectively respond to incidents. A low flow of revenue hampers CFD's ability to hire and keep firefighters. Opening new stations and reallocating employees allows CFD to cover more ground but may reduce needed staff capacity at stations with high call volumes.

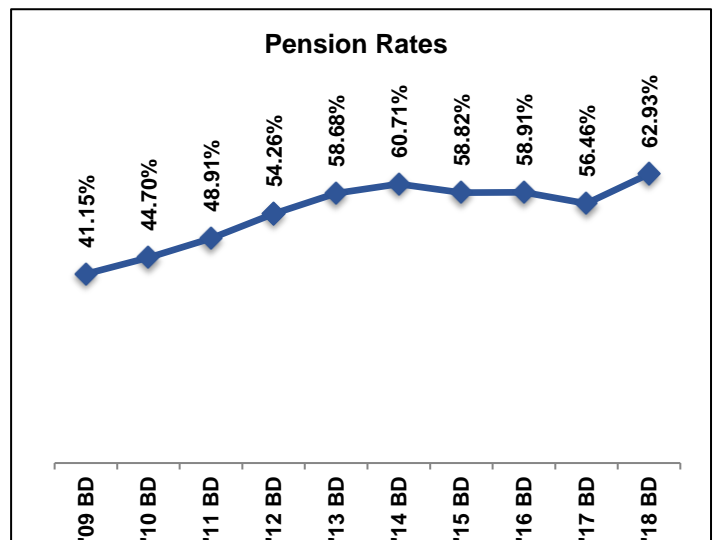
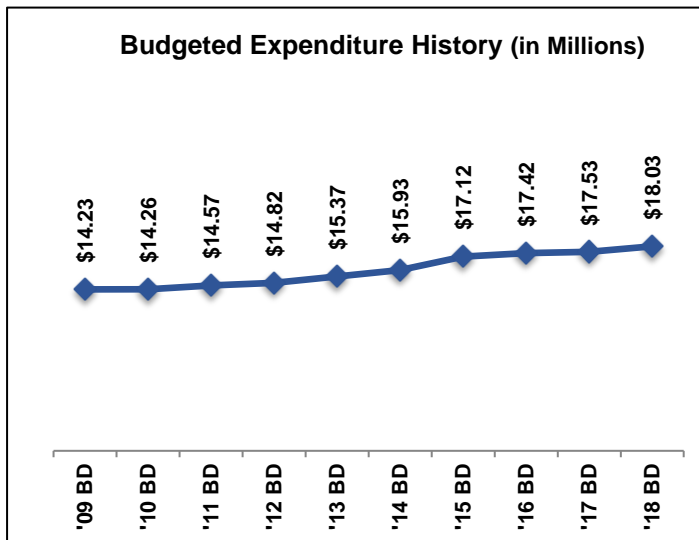
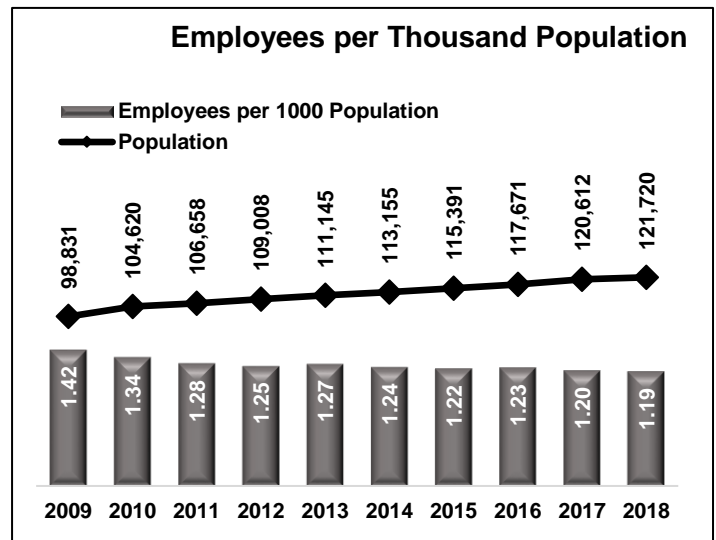
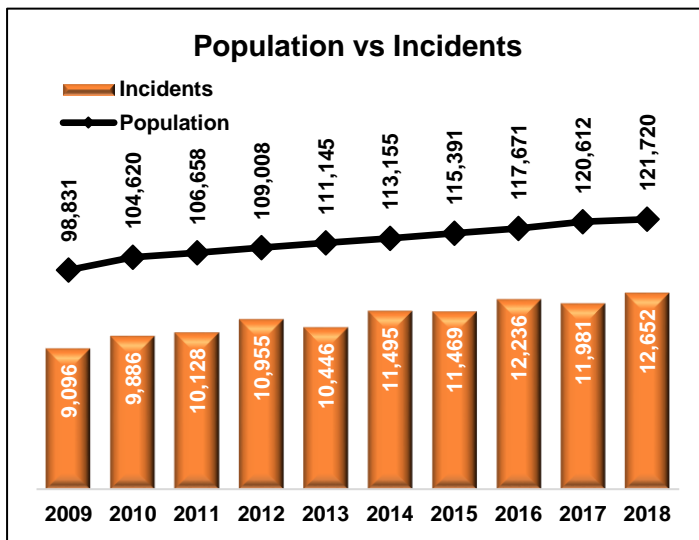
Sources

Columbia Fire Department, 2019

American Community Survey Fact Finder - U.S. Census Bureau (5-year estimates) <https://www.census.gov/programs-surveys/acs/>

City of Columbia Human Resources Department, 2019

DirectionFinder Survey by ETC Institute <http://www.como.gov/survey-results/>



TREND STATEMENT AREA: Public Safety

Sufficient Staff Capacity for Police Calls

Trend

Since 2009, on average, each Columbia police officer has responded to between 427 – 478 calls per year. CPD's call volume is consistently in the top tier of 30 benchmark cities across the nation. Even with officers added in recent years, the number of officers per thousand has not kept pace with our population growth. At 1.41 officers/thousand, CPD is right at the average of the benchmark cities.

Implication

Population, calls for service and workload projections are unlikely to remain constant. Coupled with declining General Fund revenues and the interest in consistently assigning officers to specific neighborhoods, these trends indicate limits on the Department's capacity to both effectively respond to calls and use discretionary time to develop strong community partnerships.

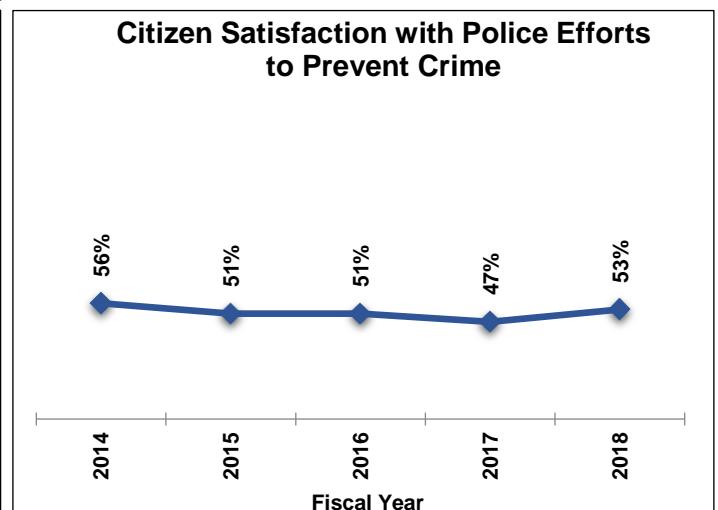
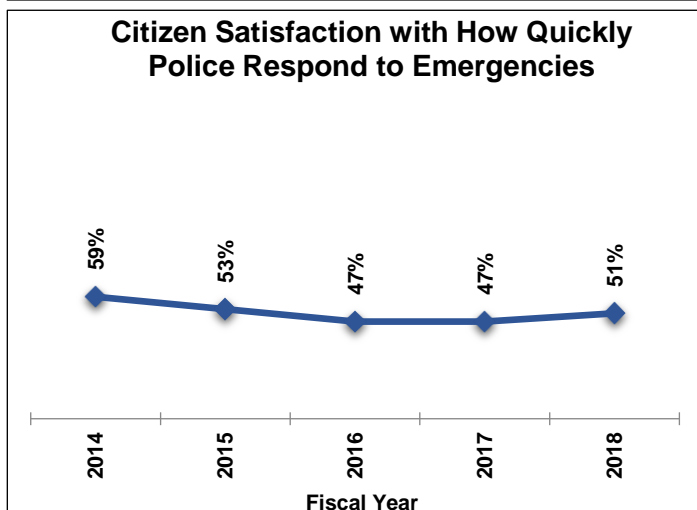
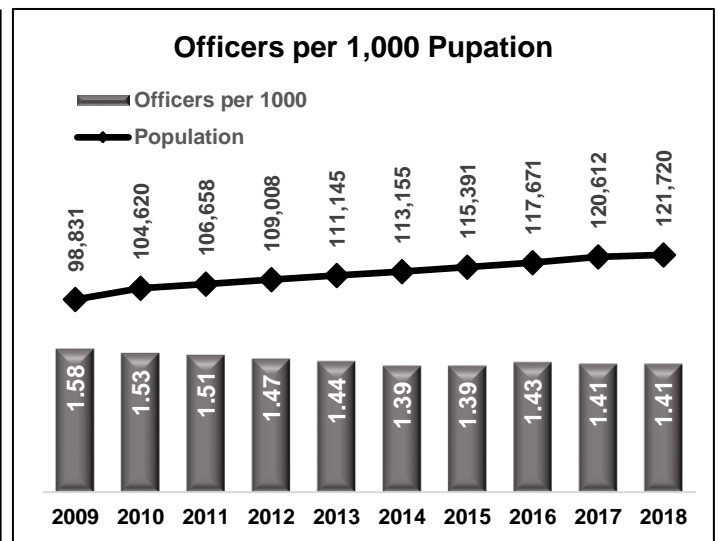
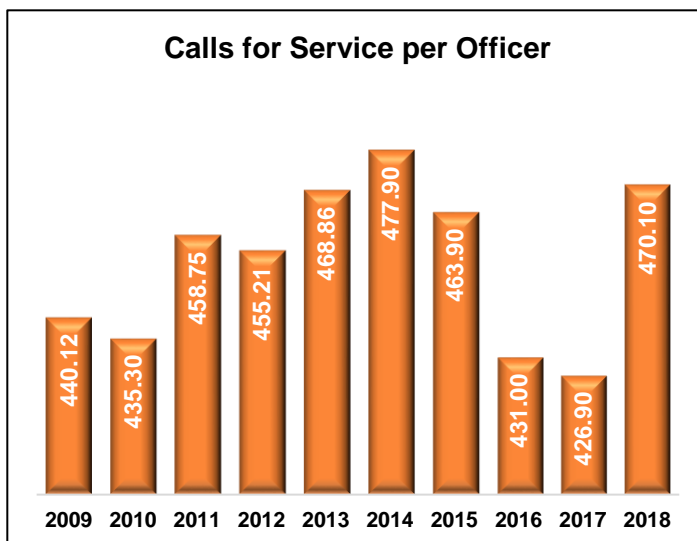
Sources

Overland Park, Kansas - Benchmark Cities Survey <https://www.opkansas.org/maps-and-stats/benchmark-cities-survey/>

Police Department

City of Columbia Budget Document

DirectionFinder Survey by ETC Institute <http://www.como.gov/survey-results/>



TREND STATEMENT AREA: Public Safety

Staff Performance for Cleared Homicide Cases

Trend

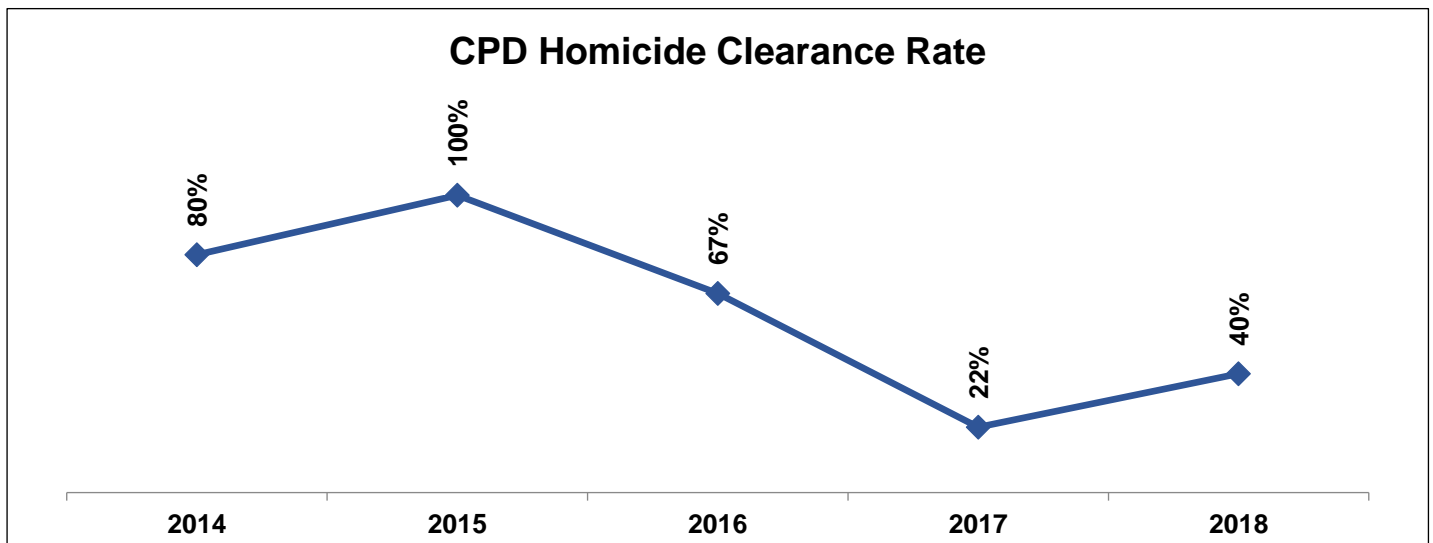
CPD cleared 100% of homicides in 2015. After a steep, two-year decline over the succeeding two years, the clearance rate started to improve in 2018.

Implication

Open cases negatively affect areas with high levels of violent crime and inefficiently deplete department resources over time as staff continues to work these cases instead of clearing them. Without better performance, the public's trust in CPD will continue to erode.

Source

Columbia Police Department UCR Data, 2019



TREND STATEMENT AREA: Public Safety

Emergency Room Visits For Mental Health Episodes

Trend

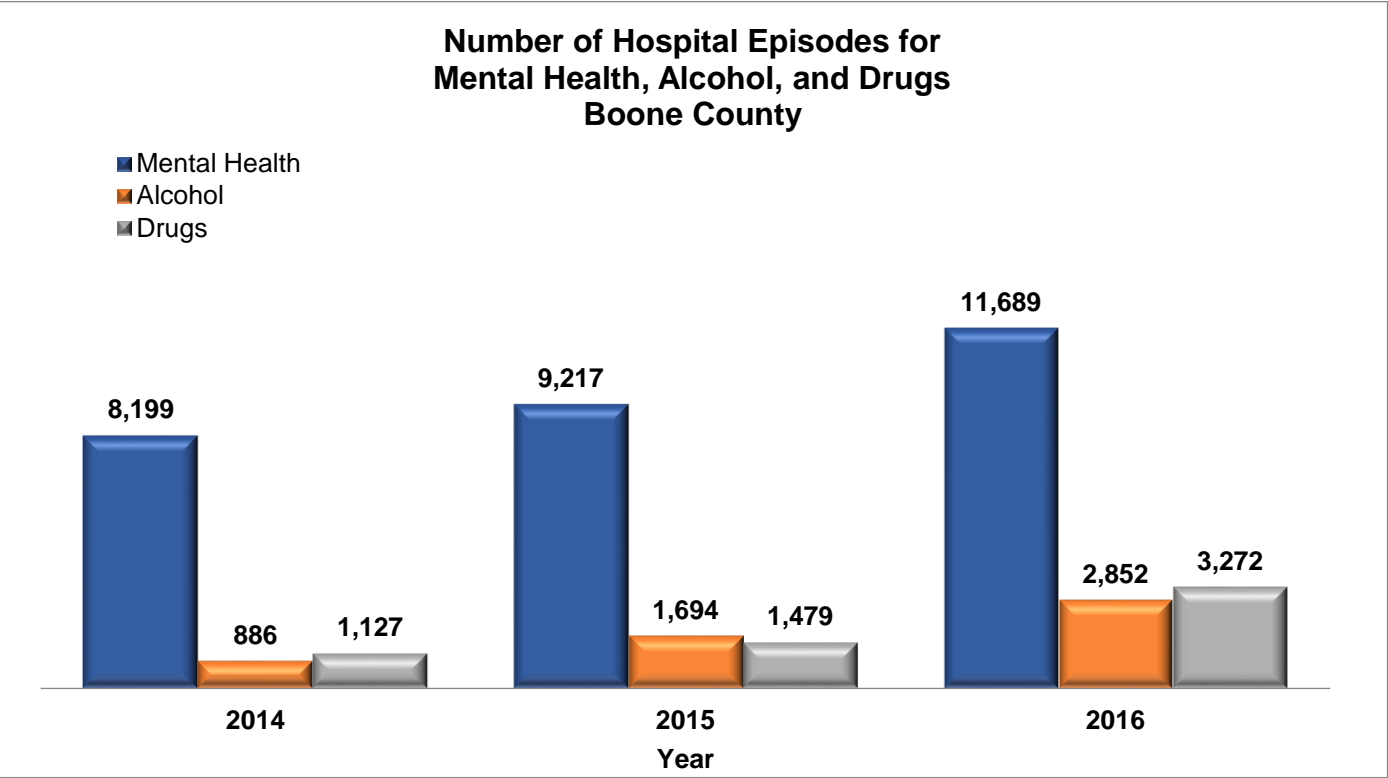
In Boone County, hospital emergency room visits for mental health episodes and substance use disorders have increased each year from 2014 – 2016. All categories continue to grow.

Implication

Untreated behavioral health conditions affect our community and strain the capacity of City health, safety and court services; local health care providers; and social service agencies. People can experience different types of mental illness or disorders, often at the same time. Sometimes one disorder can worsen or contribute to another. Stakeholders involved in the 2018 Community Health Assessment identified mental health as a strategic priority area.

Source

2018 Status Report on Missouri's Substance Use and Mental Health (MODHSS)



TREND STATEMENT AREA: Infrastructure Conditions

Street Maintenance Funding

Observation

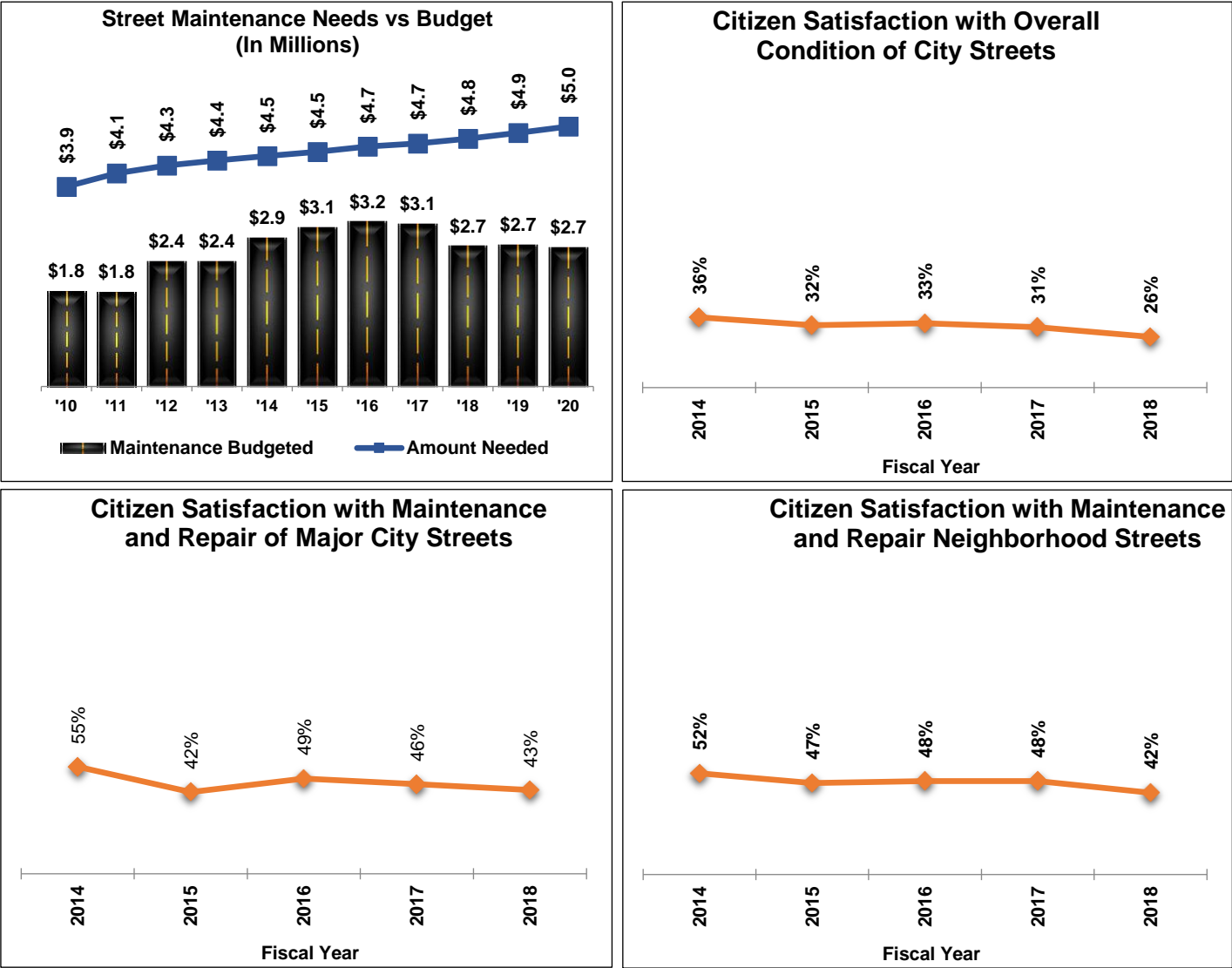
As the City grows, the number of lane miles grows and this increases the long-term maintenance costs.

Implication

Street maintenance funding, which is primarily funded with transportation sales taxes, competes with transit and airport funding for the same dollars. As the number of lane miles continue to increase, material costs increase and the City has a challenge keeping street maintenance positions filled, the dollars allocated to street maintenance do not go as far as they need to go. This, in turn, impacts citizen satisfaction with street conditions and street maintenance. Citizens have identified condition of city streets as one of the top priorities for City investment.

Sources

City of Columbia Budget Document
DirectionFinder Survey by ETC Institute <http://www.como.gov/survey-results/>



TREND STATEMENT AREA: Infrastructure Conditions

Utility Infrastructure Replacement Funding

Observation

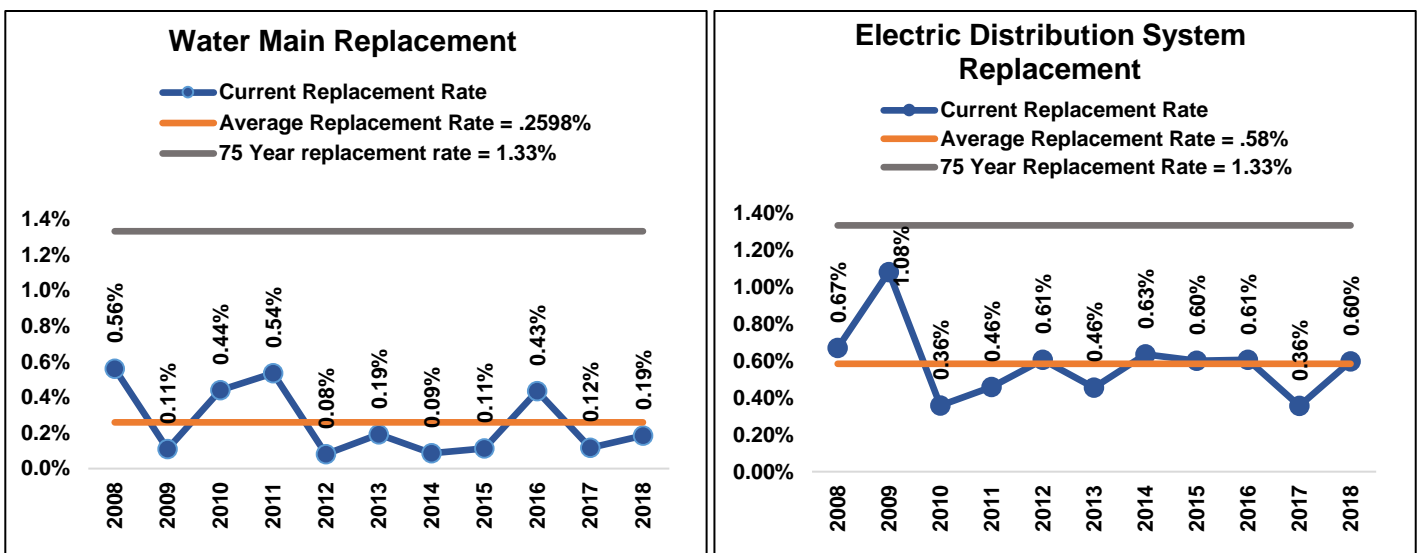
Maintaining and replacement of water and electric infrastructure is critical in ensuring reliable service to our citizens.

Implication

Assuming a 75 year replacement rate for water and electric infrastructure, the City has an average replacement rate which has fallen significantly below the rate needed to ensure timely replacement of infrastructure. The level of funding has allowed the department to address infrastructure that fails but has not been sufficient enough to allow for proactive replacement.

Sources

City of Columbia Utilities Department



TREND STATEMENT AREA: Operational Excellence

General Fund resources need to increase over time to meet increased demands for services as population and inflation increase over time

Trend

Over the last ten years, total general fund revenues increased \$6.6 million (8.57%). General fund revenues adjusted for inflation, however, decreased \$2.6 million (7.24%). Revenues per capita adjusted for inflation and population growth decreased 24.11%.

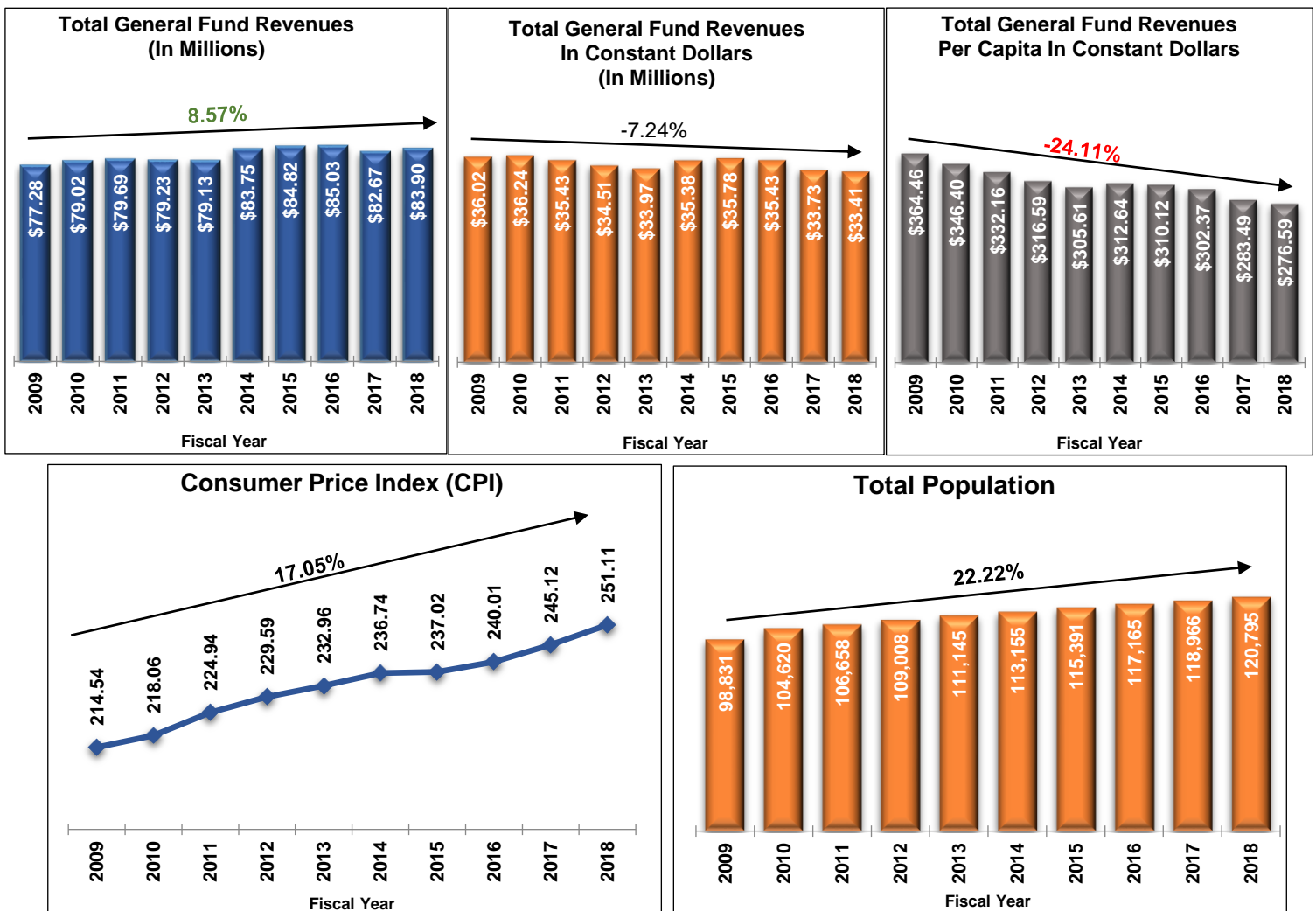
Implication

General fund revenue growth is not keeping pace with inflation and population growth. Sales tax is the City's largest funding source (28% of all general fund revenues). It's negatively affected by the growth in online sales which aren't subject to local sales tax or (because voters have not approved one) to a local use tax. As a result, it is estimated the City loses over \$2 million per year in general fund revenues.

The general fund supports key services such as police, fire, parks and health. A continued decline in per capita constant dollar general fund revenues hinders the City's ability to expand or even continue services at the same level as it has in the past. This also affects the City's ability to keep fully trained employees over time due to the lack of funding for pay increases. Employees leave City service for better paying jobs elsewhere.

Sources

- City of Columbia Comprehensive Annual Financial Report - Required Supplementary Information - Budgetary Comparison Schedule <http://www.como.gov/finance/accounting/financial-reports/>
- Consumer Price Index: <https://www.bls.gov/cpi/>
- Population Estimates: U.S. Census Bureau - American Community Survey (ACS) population estimates https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml



TREND STATEMENT AREA: Operational Excellence

Growth in Online Sales

Trend

Since 2009, national estimates suggest Columbia's online sales increased from 4% to 9.6% (a 140% growth rate). It is estimated that the general fund has lost \$18.1 million in general sales taxes; \$9 million in transportation sales taxes; \$4.5 million in parks sales taxes; \$4.5 million in capital improvement sales taxes; and \$0.8 million the public improvement fund. Total estimated loss to the City is \$36.8 million over the past ten years.

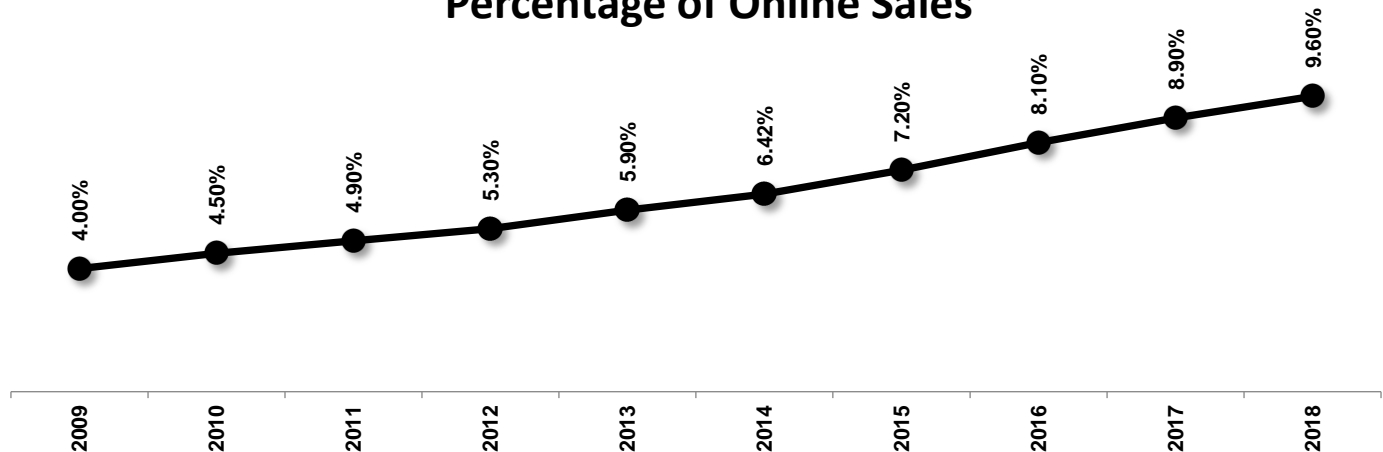
Implication

Currently online sales are not subject to local sales taxes or (because voters have not approved one) to a local use tax. Sales tax is the City's largest funding source (28% of all general fund revenues). As online sales increase, the growth in City sales tax revenue from brick and mortar stores declines. This affects both critical general fund budgets and City services with dedicated taxes outside of the general fund. The transportation sales tax funds streets, sidewalks, transit and airport. The parks sales tax funds parks and recreation, recreation services and parks capital projects. The capital improvement sales tax funds capital projects for streets, police and fire. A portion of the general sales tax is used in the capital project fund to support capital projects for any general fund department (and has primarily funded public safety capital projects).

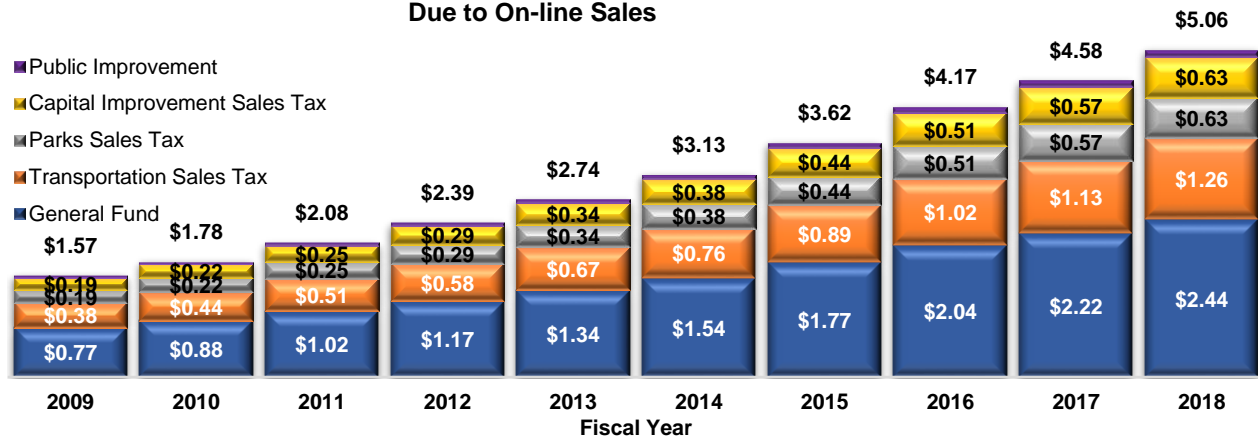
Sources

- City of Columbia Comprehensive Annual Financial Report - Required Supplementary Information - Budgetary Comparison Schedule <http://www.como.gov/finance/accounting/financial-reports/>
- Online sales: <http://www.census.gov/retail/#ecommerce>

Percentage of Online Sales



City of Columbia Estimated Sales Tax Revenue Loss (in Millions) Due to On-line Sales



TREND STATEMENT AREA: Operational Excellence

General Fund Budgeted expenditures need to keep pace with population growth and inflation

Trend

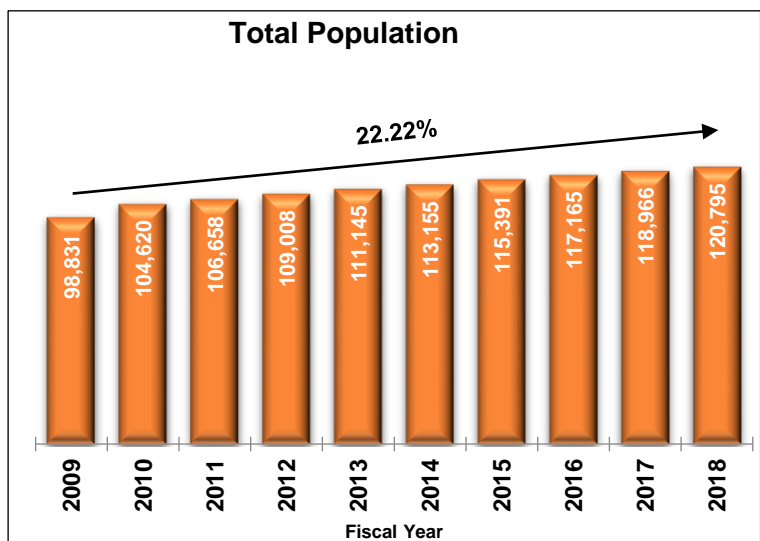
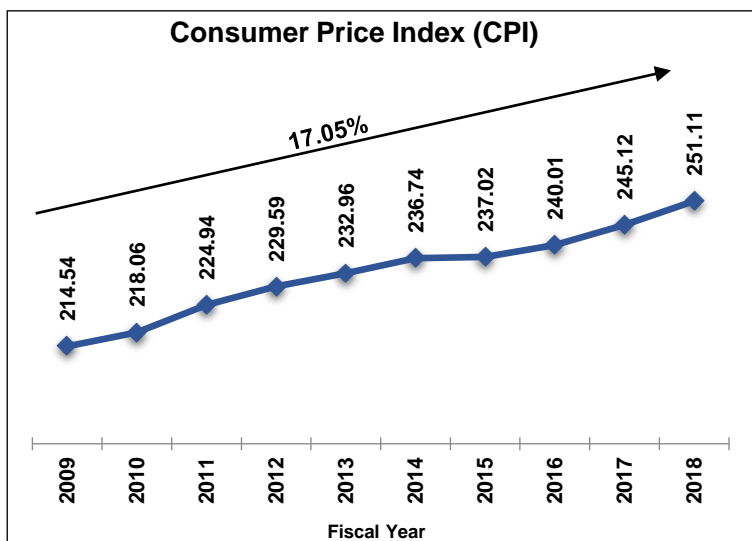
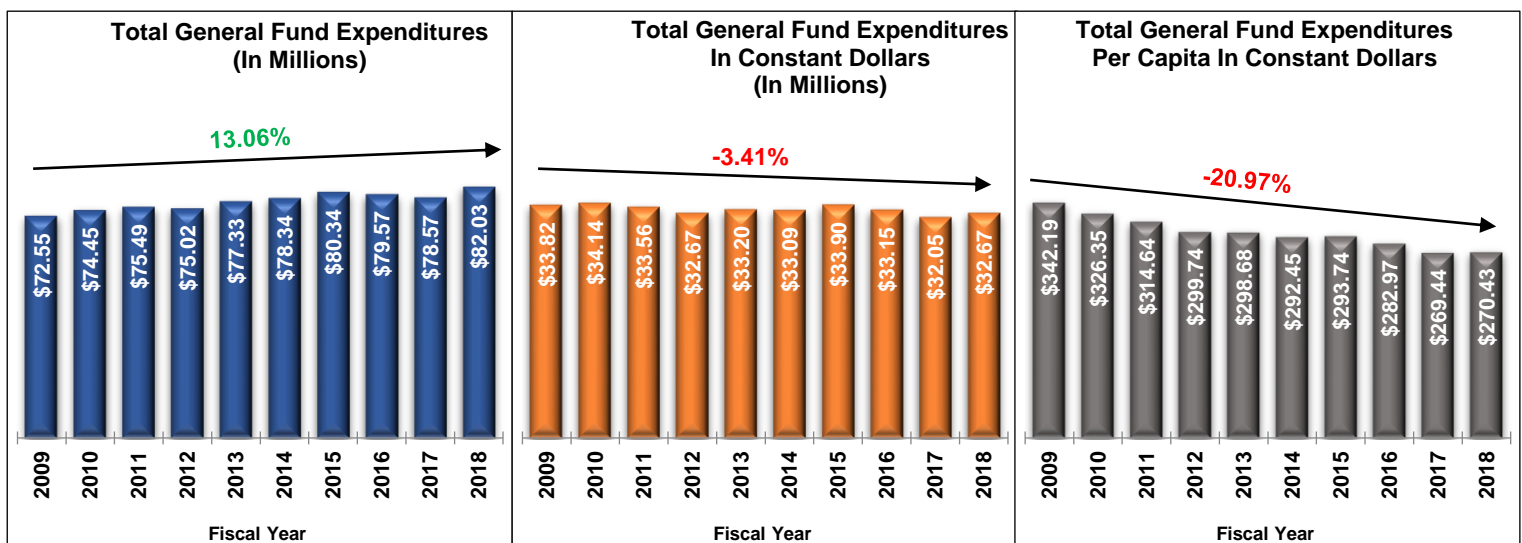
Over the last ten years, total general fund expenditures increased \$9.5 million (13.06%). General fund expenditures adjusted for inflation, however, decreased \$1.2 million (3.41%). Expenditures per capita adjusted for inflation and population growth decreased 20.97%.

Implication

General fund expenditures are not growing at the same rate as inflation or population, mainly due to similarly lagging general revenue growth. The general fund supports key services such as police, fire, parks and health. A continued decline in general fund revenue growth hinders the City's ability to expand or even continue services at the same level as it has in the past. This also affects the City's ability to keep fully trained employees over time due to the lack of funding for pay increases. Employees leave City service for better paying jobs elsewhere.

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- Population Estimates: U.S. Census Bureau - American Community Survey (ACS) population estimates https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml



TREND STATEMENT AREA: Operational Excellence

General Fund staffing needs to increase over time as the population increases and community needs increase

Trend

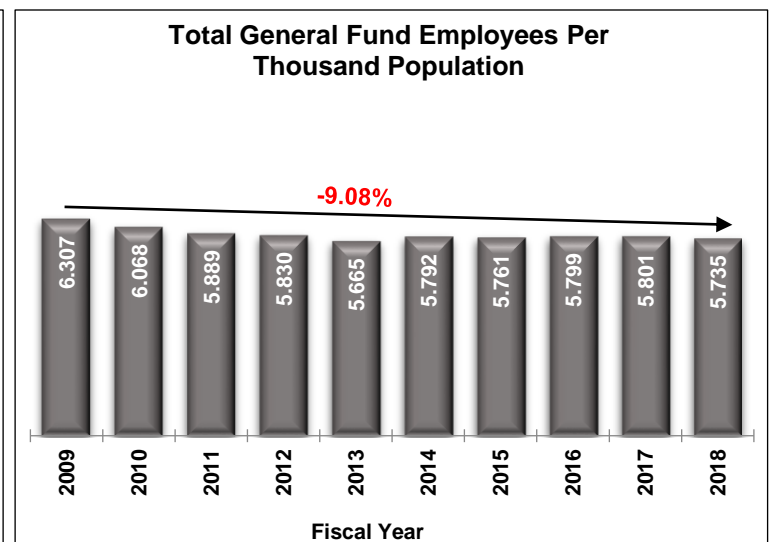
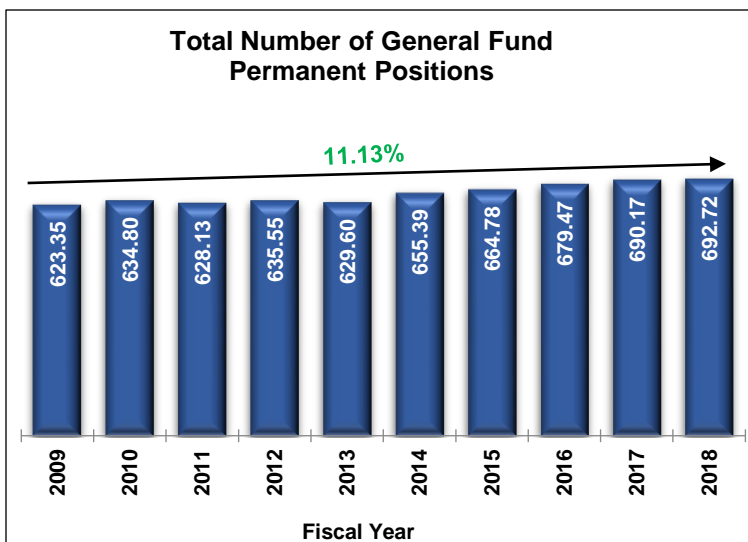
From FY2009 - FY 2018 total general fund full time positions increased 69.37 FTE (11.13%), but employees per thousand population decreased 9.08%. The general fund has not been adding positions to keep up with population growth.

Implication

While not all City service lines necessarily should be keeping pace with population trends, with services such as police and fire face increasing demands for service as more people join the community. A lack of growth in general fund revenues hinders the City's ability to add positions to critical service lines, which can result in longer wait times for citizens.

Sources

- City of Columbia Comprehensive Annual Financial Report - Required Supplementary Information - Budgetary Comparison Schedule <http://www.como.gov/finance/accounting/financial-reports/>
- Consumer Price Index: <https://www.bls.gov/cpi/>
- Population Estimates: U.S. Census Bureau - American Community Survey (ACS) population estimates https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml



TREND STATEMENT AREA: Operational Excellence

Hiring and Retaining Talented Employees

Trend

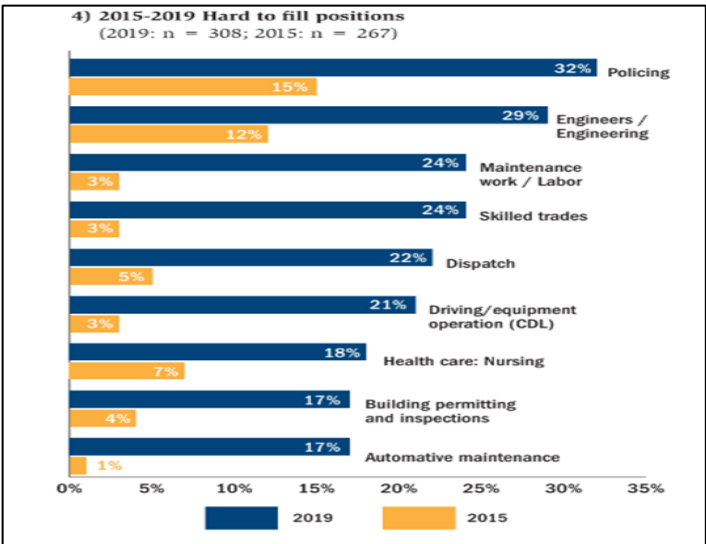
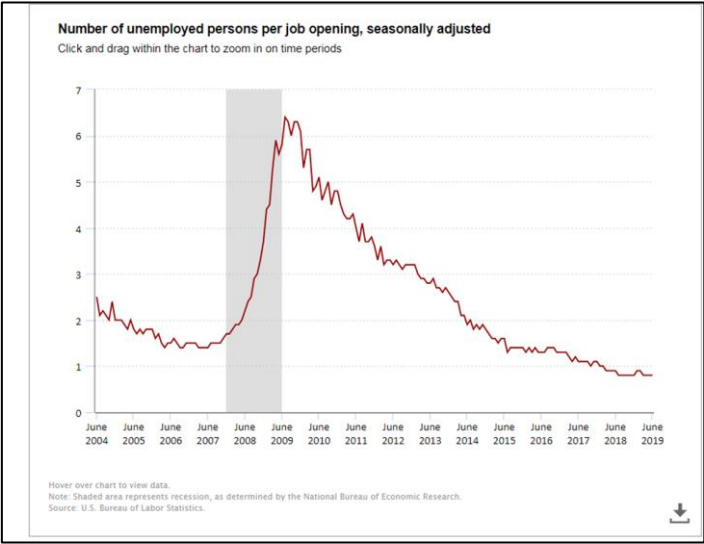
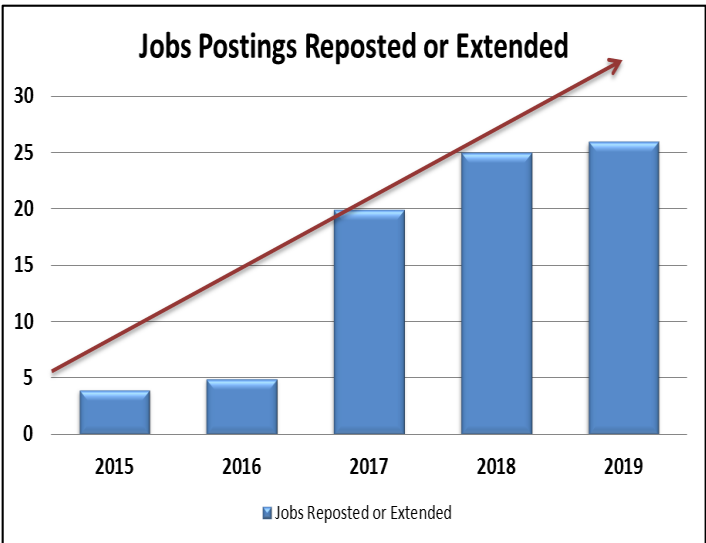
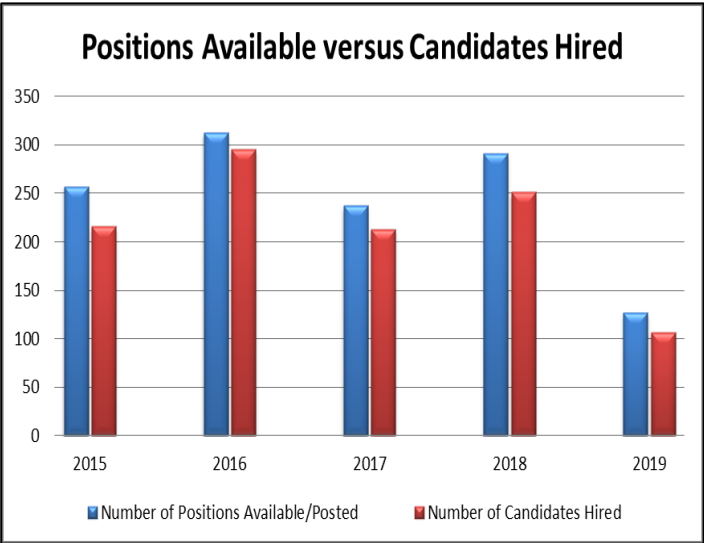
From FY 2015 through FY 2019, there have been more positions available than candidates hired to fill City of Columbia positions, causing more job postings to be extended or reposted during this time. According to the Bureau of Labor Statistics, all employment sectors report fewer applicants per position. Other government agencies also have difficulty hiring specific jobs, such as police officers, engineers and laborers, as shown by the State and Local Government Workforce 2019 survey.

Implication

Without qualified and skilled employees, the City is unable to fill vital positions required to support the organization and our commitments to citizens. This puts strain on employees and affects City service delivery.

Sources

Bls.gov. (2019). *Number of unemployed persons per job opening, seasonally adjusted*. [online] Available at: <https://www.bls.gov/charts/job-openings-and-labor-turnover/unemp-per-job-opening.htm#> [Accessed 16 Aug. 2019].
Gacities.com. (2019). *State and Local Government Workforce: 2019 Survey*. [online] Available at: <https://www.gacities.com/Resources/Reference-Articles/State-and-Local-Government-Workforce-2019-Survey.aspx> [Accessed 16 Aug. 2019].



TREND STATEMENT AREA: Operational Excellence

Increased Employee Turnover has been negatively impacting employee retention since FY 2015

Trend

Since FY 2015 the City's turnover rate has increased steadily to a high of 13.32% in FY 2018. Increased turnover, particularly with employees with less than five years of service, combined with a large group of City employees eligible to retire in FY 2019, creates a loss of knowledge, productivity and gaps in service. The Turnover by Tenure chart shows an alarming trend of knowledge loss and the strain felt by employees with 5 - 10 years of service.

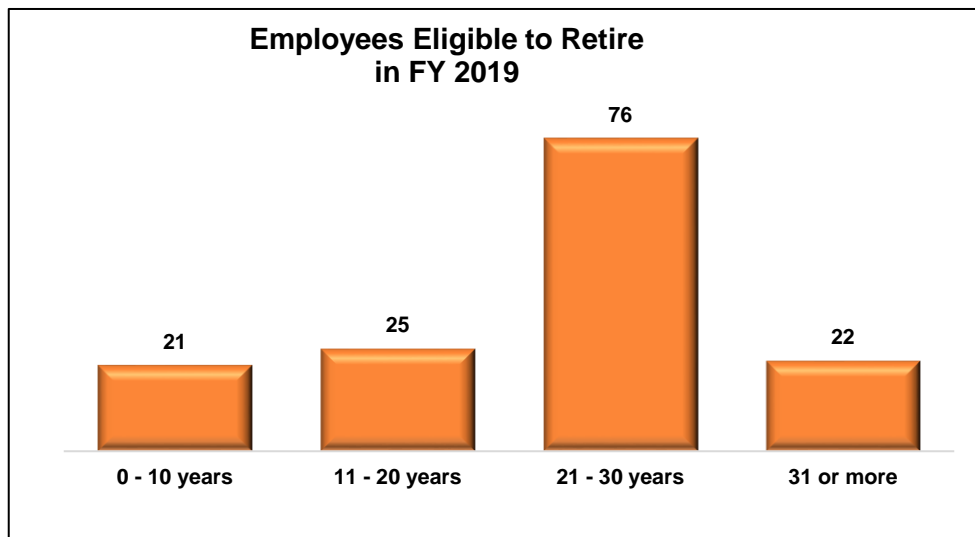
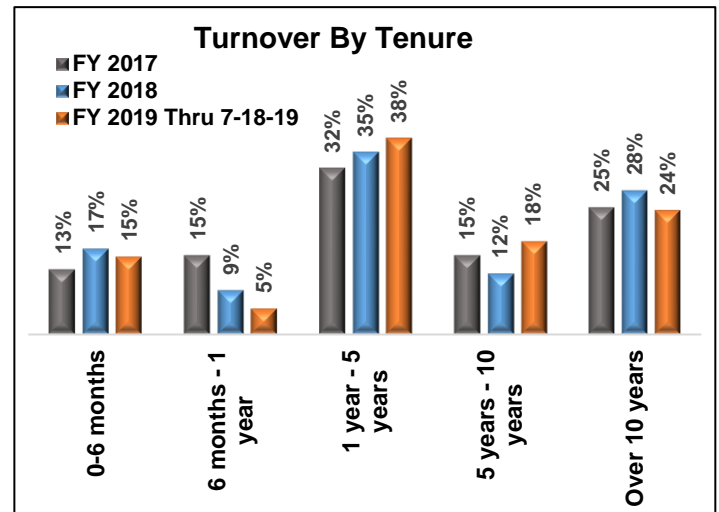
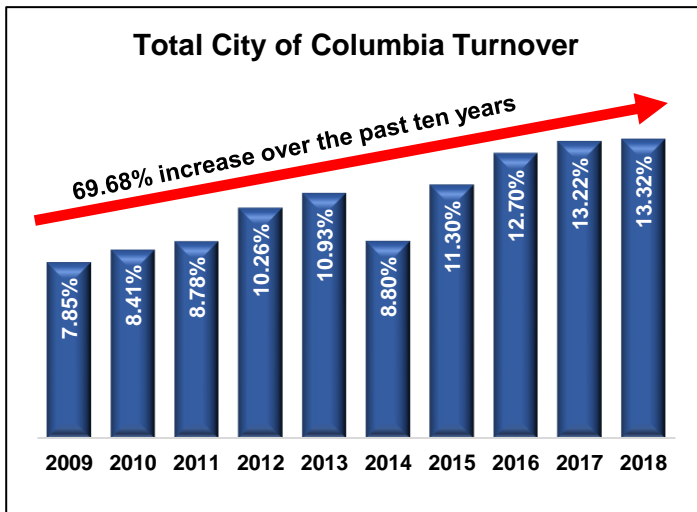
Implication

Without the ability to attract and retain qualified and skilled employees to learn and fill the gaps of longer-term trained employees who leave, the City struggles to provide services and quality work.

Sources

City of Columbia Turnover Report - Required Supplementary Information

<https://www.mycolumbiamo.com/document/turnover-analysis-report>. City of Columbia (2018). *Turnover Report*. Columbia, p.3.



TREND STATEMENT AREA: Operational Excellence

Employee Engagement

Trend

According to a recent survey, Columbia City employees have not yet reached the engagement benchmark for employees in a sample of other local governments. Our employees feel less positive than other communities in that sample regarding pay; consistency between City Management actions and City values; and management of the City, as a whole. Employees feel better than other communities regarding respect for supervisors and department leaders; supervisor feedback and availability; and department leaders' interest in keeping them informed.

Implication

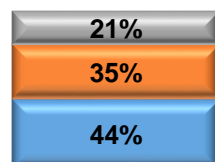
Limits on pay already affect the City's ability to attract and keep qualified employees. A workforce continually in transition severely limits our ability to achieve operational excellence both in management and direct service functions. Although respectful relationships with supervisors and department leaders won't mitigate concerns about pay, continuing to inform employees as this issue develops could create mutual trust and support.

Source

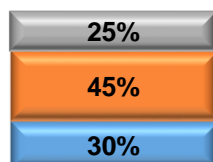
CPR HR Consulting Report 2/1/2019

Overall Employee Engagement Levels

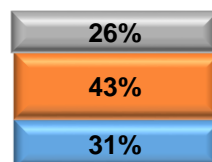
■ Fully Engaged ■ Somewhat Engaged ■ Not Engaged



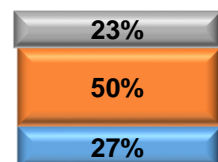
Private Sector Benchmark



Government Benchmark



Local Government Benchmark



City of Columbia

Largest Positive Gaps

	Negative	Neutral	Positive	Mean	Gap
I have a high level of respect for my department's leaders	13.1%	16.1%	70.8%	3.85	21
My supervisor provides constructive feedback on my job performance	13.1%	16.1%	70.8%	3.85	21
My department's leaders keep me informed about matters that affect me	13.1%	16.1%	70.8%	3.85	21
I have a high level of respect for my supervisor	13.1%	16.1%	70.8%	3.85	21
My supervisor is available when I need him or her	13.1%	16.1%	70.8%	3.85	21

Largest Negative Gaps

	Negative	Neutral	Positive	Mean	Gap
I feel that my pay adequately reflects my performance	58.8%	18.4%	22.7%	2.44	-36
Compared to people doing a similar job in other organizations, I feel my pay is reasonable	59.6%	15.2%	25.3%	2.43	-34
I am paid fairly for the work that I do	49.8%	17.6%	32.6%	2.64	-28
I believe the actions of City Management are consistent with the City's values	37.9%	32.3%	29.8%	2.83	-27
I feel that the City of Columbia as a whole is managed well.	45.2%	29.4%	25.4%	2.65	-27