

A G E N D A

MILWAUKIE CITY COUNCIL

PLANNING WORK SESSION

January 11, 2003
City Hall Conference Room
8:00 A.M.—12:00 P.M.

- 1) Review and Change/Agenda--Group
- 2) Mission--Mike
- 3) Vision--Mike
- 4) Values--Mike
- 5) Goals--Mike
- 6) Council Communication Agreement and Meeting Procedures—Jim
- 7) Additional Issues—Group
- 8) Adjourn



TO: Mayor and City Council
FROM: Mike Swanson, City Manager
DATE: January 4, 2004
RE: January 11, 2003 Proposed Agenda

I have attached a proposed agenda for our January 11, 2003 meeting. You will recall that we scheduled this meeting in order to develop some direction to assist the Budget Committee in its upcoming deliberations. The first of its meetings on the projected shortfall is January 15, 2003. Once that process is completed, we will almost immediately segue into the FY 2003-04 budget process.

So on the one hand, the January 11 meeting is timely. On the other, however, it does present you with a difficult task. I usually like to give a new governing body a reasonable amount of time to work together before jumping into this task. It is difficult for new members to get up to speed on every issue, and all members of the new Council team ideally should have time to adjust and to learn working styles and group dynamics. But we do not have that luxury.

My ideal planning process would find you reaching a consensus on the following issues:

- City's Mission—Why do we exist?
- City's Vision—What do we wish to be in the future?
- City's Values—What are the principles upon which we are founded and which determine how we treat people both internally and externally?

- City's Goals—What, in a more specific sense, do we wish to accomplish?¹

Given the fact that we have not had a great deal of time to work together, it may be difficult to accomplish everything. Perhaps it will not. In any event, we need to remember that we need to emerge from that meeting with enough to give the Budget Committee some direction to assist it in its deliberations. If we do not complete every task, we can return to it at a later date.²

I have included the following for background information:

- The last three goal setting results—one each from 1997, 1999, and 2002;
- A summary of the neighborhood visions produced during the original process leading to the 1999 Goals;
- The Council Communications Agreement; and
- Draft copy of the City Manager Performance Review Criteria.

This material, together with a review of the briefing papers I distributed in December, should provide a good background on the history of goal setting in the City as well as significant issues we face.

My vision of the January 11 meeting is of a more informal meeting where we can brainstorm the items as they appear on the agenda (after reviewing and approving, or changing, the agenda, of course).³ I'll try to keep us on track so we come up with a product.

¹ Oftentimes local government establishes goals that are short term in order to fit nicely into their evaluation processes. We should look both at the short term goals, but we need also to set what has been called "BHAGs," or Big, Hairy, Audacious Goals. "Setting the BHAG . . . far into the future requires thinking beyond the current capabilities of the organization and the current environment.. Indeed, inventing such a goal forces an executive team to be visionary, rather than just strategic or tactical." "Building Your Company's Vision" by James C. Collins and Jerry I. Porras. *Harvard Business Review*, September-October 1996, page 73.

² In fact, remember that we will, as we will be bringing on a new member in early summer after a May 2003 election.

³ "The rules of brainstorming are simple: let each member of the team speak, don't interrupt, don't analyze or criticize . . . just let it be. A team of six will have begun to speak about their vision of the

As a bit of background, I am not sure how far we have really gone on a mission, vision, and values. One can find evidence of mission statements, but whether or not they had much effect is less certain. I also believe that there is a vision for the City, but whether or not it is clearly articulated is less certain. Finally, the only stated values I could find were actually written by a staff member. I do believe that the immediately past Council articulated very specific goals that were in line with their vision, and I do believe that they formed the basis for staff direction. Much of what they articulated was accomplished—because they clearly stated it.

My personal bias is that we do need to go through the whole exercise of mission, vision, values, and goals, even if we do not get it all done on the 11th. But once begun it is important to remember that the final product will be only as useful as our commitment to it. For example, I believe that in many ways the creation of values is the foundation of the whole process. One cannot hope to realize a mission or vision if you cannot marshal the human resources necessary to get the job done. That's where values come in. Over the past two years we have stressed two values—respect and trust. We have concentrated our efforts on building our internal and external trust and respect, because without them we will accomplish little. But consistency with the values begins and must be demonstrated by us first before anyone will believe and reciprocate. So, if we jump in, we are committing to swimming.

future The dreams begin to take form, the hopes find a way of expressing themselves, the team begins to create a field of mutual respect, shared ideas, hopes and dreams. The energy of this collective dreaming is vital to the process—it inspires excitement and fosters support and mutuality. People feel privileged to have their visions heard and they find it moving to hear other dreams of the future." *Living Strategy* by Lynda Gratton, page 134. Pearson Education Ltd. 2000, ISBN 0-273-650157.

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Vision Statement

By the year 2015, Milwaukie is a culturally and economically diverse city that capitalizes on its role as a transportation and economic hub in the region. Milwaukie's established and stable neighborhoods connect to an expanded civic, commercial and cultural center. A mix of employment opportunities incorporates new technology and efficiently uses the city's human and natural resources. The riverfront, city center and other neighborhood and employment centers are connected by a greenspace network. The city is easily walkable. Residents and visitors alike enjoy the vibrancy of healthy commercial districts, high quality schools, innovative urban design, and safe and attractive public spaces.



Why Have a Vision?

- * Proactive approach to the problems and opportunities that accompany growth
- * Self-directed policies and plans
- * Context for future ideas
- * Revitalization that builds upon our assets



City Mission Statement

The mission of the City of Milwaukee is to maintain Milwaukee as a good place to live and work, which is clean, safe, responsive and provides quality services.



The City has a commitment to achieving and maintaining:

- * the sense of place, history and future that defines Milwaukie and distinguishes it from other areas;
- * a livable, safe environment including preservation and enhancement of both built and physical environments; and
- * a private and public partnership which provides for the maximization of business and individual opportunities.



COUNCIL GOALS

The Milwaukie City Council supports this mission and its citizens' 2015 Vision through adoption of the Council's 1997-1999 Goals



Continue to provide effective city services in a cost effective manner

City of Milwaukee

09/19/97

7



Maintain effective Community Oriented Police Services (COPS).

City of Milwaukee

09/19/97

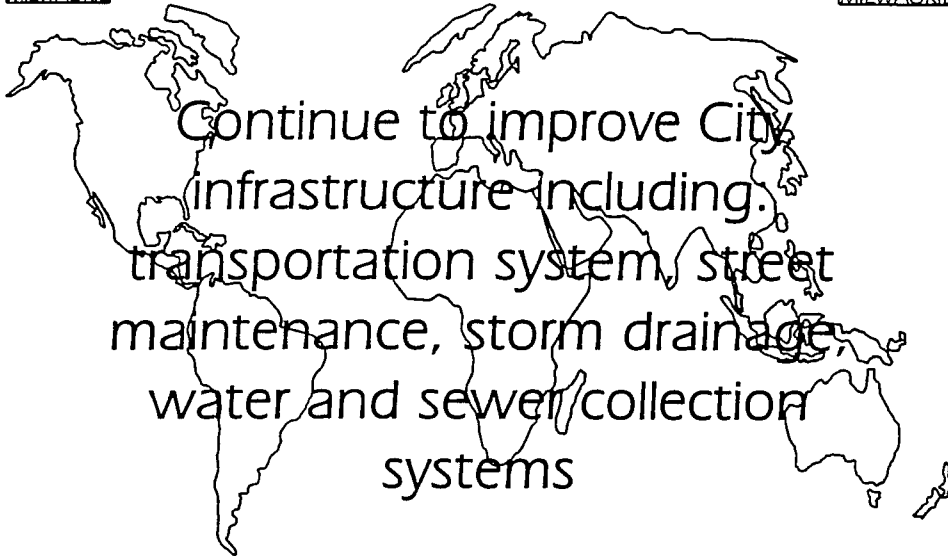
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Encourage civic responsibility by providing opportunities for increased Citizen involvement in all aspects of the City.



Continue revitalization of the City Center and the Riverfront



Continue to improve City infrastructure including transportation system, street maintenance, storm drainage water and sewer collection systems



Maintain involvement in the development and implementation of regional transportation plans, including light rail.



DRAFT CITY COUNCIL GOALS

This document reflects the City Council's discussion at its February 19, 1997, and March 19, 1997, and March 31, 1997, work sessions. The underlined text has been added based on our discussion. The objectives have been pulled from the Vision Action Plans, departmental goals, Council discussion, or review of the MIS Report on Goal Setting in Local Government.

Vision Statement:

By the year 2015, Milwaukie is a culturally and economically diverse city that capitalizes on its role as a transportation and economic hub in the region. Milwaukie's established and stable neighborhoods connect to an expanded civic, commercial and cultural center. A mix of employment opportunities incorporates new technology and efficiently uses the city's human and natural resources. The riverfront, city center and other neighborhood and employment centers are connected by a greenspace network. The city is easily walkable. Residents and visitors alike enjoy the vibrancy of healthy commercial districts, high quality schools, innovative urban design, and safe and attractive public spaces

City Mission Statement:

The mission of the City of Milwaukie is to maintain Milwaukie as a good place to live and work, which is clean, safe, responsive and provides quality services.

The City will have a commitment to achieving and maintaining:

- the sense of place, history and future that defines Milwaukie and distinguishes it from other areas;
- a livable, safe environment including preservation and enhancement of both built and physical environments; and
- a private and public partnership which provides for the maximization of business and individual opportunities.

City Council Goals:

The Milwaukie City Council supports this mission and its citizens' 2015 Vision through adoption of the Council's 1997-99 goals:

DRAFT COUNCIL GOALS

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- Continue to provide effective city services in a cost effective manner

OBJECTIVES:

- ⇒ respond to Citizens needs and demonstrate that we are using public resources well
- ⇒ evaluate two services against “best practices” benchmarks

- Maintain effective Community Oriented Police Services (COPS).

OBJECTIVES:

- ⇒ reduce drug-related crimes,
- ⇒ reduce vehicle speeding
- ⇒ involve Citizens in addressing neighborhood security issues
- ⇒ enhance neighborhood safety. (More visible patrols and quicker responses)
- ⇒ reduce juvenile crime and the number of repeat offenders

- Encourage civic responsibility by providing opportunities for increased Citizen involvement in all aspects of the City.

OBJECTIVES:

- ⇒ continue development of neighborhood service delivery model including code enforcement
- ⇒ assist neighborhoods to develop their own visions consistent with the overall City Vision
- ⇒ assist in the formation of business/industrial Neighborhood District Associations
- ⇒ recognize the diversity within our City and encourage participation of all members of the community
- ⇒ promote active involvement in City Government, Boards, Commissions, Neighborhood Associations, and Council meetings
- ⇒ provide support services for Citizens to educate themselves about community activities

- Continue revitalization of the City Center and the River Front

OBJECTIVES:

- ⇒ Complete land-use designations
- ⇒ Complete design review ordinance

- ⇒ Identify viable public-private partnerships to initiate phase one projects of the City Center Master Plan
 - ⇒ evaluate relocation of downtown transit center
 - ⇒ evaluate the future uses of the Milwaukie Junior High School site and other public lands
 - ⇒ establish the ability to quickly respond to potential development/redevelopment opportunities
- ⇒ Riverfront
 - ⇒ acquire additional Riverfront property
 - ⇒ Identify viable public-private partnerships to construct phase one improvements
- Continue to improve City infrastructure including: transportation system, street maintenance, storm drainage, water and sewer collection systems
 - OBJECTIVES:
 - ⇒ implement the Transportation System Plan including the Lake Road Multi-modal Plan
 - ⇒ implement the storm drainage master plan
 - ⇒ implement the pavement management plan
 - ⇒ implement the School Trip Safety Plan
 - ⇒ develop a coordinated funding strategy for:
 - Transportation System Plan (TSP)
 - Street Maintenance and Repair
 - Street Improvements
 - Stormwater System Improvements
- Maintain involvement in the development and implementation of regional transportation plans, including light rail.
 - OBJECTIVES:
 - ⇒ Obtain funding for Milwaukie Transportation priorities through inclusion of major regionally significant projects in the Regional Transportation Plan and regional funding strategies
 - ⇒ participate in designing the best possible transit system for Milwaukie

DRAFT COUNCIL GOALS

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⇒ promote citizen participation in review and comment on the Draft Environmental Impact Statement and the Final Environmental Impact Statement.

- Implement City service area expansion plan.

OBJECTIVES:

- ⇒ Complete Urban Service Agreements with sanitary sewer; water; fire protection; parks, open space and recreation; and streets, roads and mass transit districts by the next Comprehensive Plan Periodic Review in 1998.
- ⇒ Coordinate Clackamas Regional Center Area Plan implementation with City of Milwaukie Comprehensive Plan through City Planning Commission and Council involvement.
- ⇒ evaluate the impacts of annexing areas within our current urban growth agreement
- ⇒ annex areas identified as mutually beneficial

- Enhance the City's natural environment

- ⇒ complete master plans for City owned open spaces
- ⇒ identify and prioritize parks, and open space projects for the City to be implemented by NCPRD
- ⇒ develop and implement urban forestry plan

[draft Goals developed 3/31/97]



*** M E M O R A N D U M ***

June 22, 1999

To: Mayor and City Council
From: Dan Bartlett, City Manager
Re: City Council Goals

A handwritten signature in dark ink, appearing to read "Dan Bartlett", is written over the "From:" line of the memo header.

Action Requested

I have modified the Council Goals Summary sheets as directed by council at your June 14, 1999 Work Session. These summaries are ready for Council to adopt.

Background

Council has devoted several months to prepare a long-term set of Goals. These Goals will guide and direct your decision-making and establish your priorities for the next five years.

These Goals were developed through an extensive process including: Neighborhood Vision presentations, Board and Commission Goals, individual Councilor's Goals, and departmental mandates and goals. Council considered all of this information, then narrowed and prioritized this input into the attached Goal Summaries.

At Council direction, staff has prepared draft work plans for each of the objectives under these goals. These work plans will be refined. Resource allocations and budgets will be developed to implement each objective. Some objectives will be accomplished in a few months; others will take several years.

Fiscal Impact

The costs for implementing most of the 1999-2000 Objectives have been included in the Budget. The long-term costs of some of these objectives can not be identified until additional planning has been completed. Some objectives (e.g. Junior High purchase) may require future Council, Budget Committee and voter approval, if general obligation bonds are determined to be the best source of funding.

cc: File -- cm2232/hd



City Council Goals 1999-2004 Strategic Direction

Goal: Support community environmental sustainability (livability) through review of zoning and subdivision ordinances; establishing a design review process; implementing an urban forestry program; and acquiring open space and trails property while it is available.

Objectives

- ◆ Modify Zoning and Subdivision Ordinance to enhance neighborhood livability.
- ◆ Develop and Adopt Neighborhood Design Review Ordinance, including a Design Review Board or Committee
- ◆ Adopt and Implement Urban Forestry Ordinance and Management Plan, becoming a Tree City USA within two years.
- ◆ Acquire Open Space, Park and Trail Properties NOW while it is available.
- ◆ Increase Code Enforcement Activity



City Council Goals 1999-2004 Strategic Direction

Goal: Continue efforts toward development of the downtown and riverfront through a planning process, acquisition of key properties, and construction of key public projects to support a long-term public private partnership.

Objectives

- ◆ Develop and adopt Downtown Plan
- ◆ Develop and adopt Riverfront Plan
- ◆ Develop and adopt Streetscape Plan
- ◆ Develop and adopt Downtown Design Standards
- ◆ Develop and adopt Downtown Development Plan
- ◆ Develop Milwaukie Junior High School Re-use and Site Plan
- ◆ Develop a Plan to relocate Kellogg WasteWater Treatment Plant within 10 years.
- ◆ Initiate Implementing Actions for All Plans

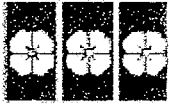


City Council Goals 1999-2004 Strategic Direction

Goal: Encourage board, commission and neighborhood goals that are consistent with council goals which includes continued funding of neighborhood grants; creating a Citizen Involvement Board; encouraging more youth involvement; and supporting neighborhood visions.

Objectives

- ◆ Continue Grant Funding for Neighborhoods, including increasing allocations by \$1,000 up to a total of \$10,000 per year per neighborhood.
- ◆ Develop Action Plans and Funding Proposals to support Neighborhood Visions.
- ◆ Develop and adopt a Citizen Involvement Board Ordinance.
- ◆ Develop and implement programs, which encourage more Citizen and Youth Involvement in City matters.
- ◆ Review and Update Board and Commission Responsibilities.



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City of Milwaukee Community Goals (Last Revised: April 2002)

GOAL: Support community environmental sustainability and livability.

OBJECTIVES

- Modify Zoning and Subdivision Ordinances to both enhance neighborhood livability and to promote the upgrade of our community.
- Develop, design, and implement a neighborhood design ordinance, including options for neighborhood design review.
- Encourage preservation of historic trees and promote planting of new trees.
- Acquire open space, park, and trail property as appropriate.
- Support and enhance code enforcement activity.

GOAL: Support the development of existing commercial and industrial areas throughout the City.

OBJECTIVES

- Create the Milwaukee Development Commission dedicated to encouraging and promoting healthy community commerce, residential, and business environments throughout the City.
- Implement the Downtown, Riverfront, and Streetscape Plans.
- Develop and implement an acquisition and re-use plan for the Milwaukee Middle School.
- Develop and implement a plan to decommission the Kellogg Treatment Plant within five years.

GOAL: Encourage community, board, commission, and neighborhood goals that are consistent with community goals.

OBJECTIVES

- Continue support for the Neighborhood Grant Program by increasing each District Association's allocation by \$1,000 annually to reach the target amount of \$10,000 in 2004 as well as \$1,000 for each neighborhood for tree planting by 2004.
- Develop action plans and funding proposals to support neighborhood visions.
- Develop and implement programs that result in more citizen and youth involvement in City matters.
- Meet with appointed advisory Boards and Commissions to review and approve



Summary of Neighborhood Visions

Community Level Human Services

Human services and community building activities that support families and youth should be encouraged. Inspire volunteerism and involvement by all ages. Facilitate and support access to the arts, alternative education options, and community gathering places.

Land Use and Zoning

Create design guidelines and improve design review procedures to mitigate the negative impacts of flag lots and infill development. Preserve open spaces and encourage cohesive neighborhoods. Ensure neighborhood review of development activity that has local impact. Limit commercial uses in residential areas to neighborhood-service level intensity.

Historic Preservation

Preserve Milwaukie History and continue to discover and document community history through the neighborhoods. Encourage audio and visual recordings, collection of maps and memorabilia and the preservation of stories, customs, places and structures for future generations of Milwaukians.

Economic Development

Encourage economic development in the downtown area to create an aura of friendly gathering, local spending and employment opportunities. Support neighborhood businesses that provide close-in services so auto-dependency is reduced. Make policy that directs the flow of dollars into and within Milwaukie. Approve home-based businesses that are discreet and compatible with the surrounding neighborhood.

Infrastructure

Existing drainage, traffic management, pedestrian and bicycle safety, water, sewer and lighting problems should be identified and addressed through better communication and partnership between the City staff, Neighborhood residents and City leadership. Adequate infrastructure should precede or accompany new development.

Cultural Resources

Nourish and inspire local cultural resources: arts, music, history, farmer's markets, museums, dance and other community endeavors that build pride, celebrate talent, enrich the lives of our citizens and contribute to community identity.

Safety & Crime Prevention

Standardize collaboration and communication between the Police and the neighborhoods in the form of neighborhood watch, citizen patrols, traffic safety education and enforcement, graffiti abatement, school safety programs and community policing.

Parks & Recreation

Preserve, make safe and acquire more land for parks, natural area restoration, open spaces and places for organized neighborhood activities, exercise or peaceful contemplation. Riverfront open spaces and parkland should be accessible to all citizens.

Transportation, Circulation and Pedestrian Access

Direct regional flow-through traffic and truck traffic away from neighborhoods. Traffic calming solutions should address problems identified by the neighborhoods. City, regional, and state transportation planning staff should work with neighborhoods and schools on transportation planning and traffic calming to balance auto circulation and rail passage with safe pedestrian and bicycle access. Develop a trail system that connects the community.

Environmental Concerns

Preserve and restore wildlife habitats in the neighborhoods through wetlands restoration, open space acquisition, point-source pollution reduction or elimination and a tree ordinance. Raise awareness of environmental concerns through education and require or provide incentives for sustainable development. Design for minimal impervious surfaces and maximum compatibility with the natural environment.

Property Maintenance

Property upkeep and neighborhood pride is vital for strong neighborhoods. Neighbors should work with Code Compliance staff to identify and solve code problems. Provide volunteer or grant assistance to neighbors who cannot afford to or are physically unable to bring properties into compliance on their own. Encourage pride-building activities such as garden clubs, landscaping incentives and holiday lighting contests.

Housing

Preserve and maintain existing housing stock and rehabilitate historic structures. Consider redevelopment of lots with dilapidated housing that is beyond repair. Expect and Improve maintenance of neglected rental units. Design review guidelines for new construction should be developed to preserve neighborhood character and reduce the negative impacts of infill development.

Communication

Open, constructive and frequent communication between City leadership, staff, residents and businesses should be a mutual commitment. Involve more people in the issues and the development of policies that affect them. Solve problems together, share responsibility for implementing solutions.

Communications Agreement

1. I am respectful of Councilors, citizens and others appearing before us, and city staff.
2. I am respectful of all thought and ideas. I clarify facts and opinions to ensure understanding. I stay focused and fully participate until the issue is resolved.
3. In all discussion, I present my views in a positive and forthright manner, respond to questions clearly and directly, and maintain the focus of the discussion. I will not personalize my comments, and in matters of opinion, I will speak only for myself.
4. Before taking a public position on City matters, I notify the group of my position, and I provide reasonable advanced notice of matters I am introducing at meetings.
5. I work toward consensus and accept the collective decision-making process of the group. If I disagree with a decision of the group, I respect and accept that decision.
6. I look for ways to positively praise efforts and accomplishments. If issues or concerns arise between team members, I first attempt to resolve such matters by addressing the issue in an appropriate, private, and timely manner.
7. I engage the community in a shared dialogue in order to fulfill my responsibility to make decisions that serve the best interests of the community.
8. I communicate with staff to gather information and to cultivate ideas. I do not give direction except through the City Manager after agreement with the Council.

City Manager Performance Review Criteria

1. Budget Issues

- Balance the budget
- Create a 3 year & 5 year plan anticipating further shortfalls
- Retain Key employees
- Obtain concessions from labor unions
- Implementation of cost analysis/performance based budgeting
- Finalize movement of dispatch services to Lake Oswego
- Progress on roads funding

2. Sewage Treatment Plant

- Complete analysis of removal
- Develop strategy/plan
- Plan implementation/progress
- Progress on waterfront development

3. Regional Issues

- South Corridor
- N industrial park development plan
- McLoughlin project
- Develop a Promote Milwaukie campaign

4. Safeway Site Development

- Get RFPs by deadline
- Guide proposal selection
- Keep project on track and on schedule

5. New Council

- Bring new members up to speed quickly
- Schedule retreat/effective team development
- Facilitate unified council
- Keep priorities/projects focused

6. Annexation

- Bring study to a conclusion
- Analyze results/make recommendation
- Develop plan
- Plan implementation/timelines with steady progress