

**MILWAUKIE CITY COUNCIL
WORK SESSION
AUGUST 30, 1999**

The work session began at 5:35 p.m. in the City Hall conference room.

Council present: Mayor Tomei and Councilors King, Lancaster, Kappa, and Marshall.

Planning Commissioners: Cartmill, Cook, Hammang, Miller, Ouderkirk, and Steward.

Staff present: City Manager Bartlett; Assistant City Managers Richards and Bennett; Planning Director Rouyer; Associate Planner Gessner; Neighborhood Services Director Gregory; and Information Specialist Wheeler.

Information Sharing

1. **Mayor Tomei** and **Councilor King** discussed their attendance at the recent National League of Cities Leadership Conference held in Oregon. One of the topics addressed at the Conference was involving youth in advisory boards and commissions, and the Council was supportive of implementing a program in Milwaukie.
2. **Councilor Kappa** asked if the City Council would approve an \$8,000 appropriation to Milwaukie Together to fund a part-time staff person. **Bartlett** added that a recent grant application had been denied. The Mayor and other Councilors said they were not opposed to supporting youth; however, they wanted more information on Milwaukie Together's goals and objectives prior to making any funding decision. **Bartlett** discussed potential policy issues and the City's social services grant application. **Councilor Lancaster** suggested only considering those proposals from those organizations that could show a link to implementing or contributing to the Council's adopted goals.
3. The City Council directed staff to prepare a letter supporting Tualatin Mayor Lou Ogden for the League of Oregon Cities Treasurer's position.
4. **Councilor Kappa** attended the recent National League of Cities Leadership Conference in Welches and recommended the City consider a Council shadow program.

Open Community Forum

Susan Stone spoke regarding the raised crosswalks on 32nd Avenue and her concerns about their locations. The 1995 Task Force did not recommend installation of a speed bump or raised crosswalk at Floss Street. She believed the location sent a wrong message to Ardenwald Elementary School Children crossing at that intersection.

Mayor Tomei had spoken with the Ardenwald principal and crossing guard, and each indicated they felt these were the best locations.

Stone said the 1997 School Trip Safety Plan (STSP) Update indicated there would be traffic calming in the school zone, but the recommendations had not been implemented. The 1999 report, however, indicated raised crosswalks, and three were installed this summer. She believed these should have been deferred for a more complete project that included traffic calming on both sides of the crosswalks. The Ardenwald Neighborhood wants a good product to ensure livability on 32nd Avenue. Stone requested additional speed bumps in the school zone this year and indicated she did not believe the project was carried out well based on traffic engineering principles.

Councilor King suggested painting the street as an alternative if the additional humps could not be installed.

Stone said there needs to be a physical device because paint does not slow cars.

Councilor Lancaster asked the boundaries of the project, and **Stone** replied south of Filbert and north of Roswell.

Stone added that 32nd Avenue still has a livability issue because the recent improvements calmed traffic in only a very small area. Residents want to protect the neighborhood from the deteriorating effects of traffic volume and speeds.

Councilor King said, speaking from her experience as an Ardenwald Elementary School teacher, she believed the Floss Street crosswalk was needed.

Stone responded that children do not always use crosswalks, and they need to be protected. She added that the City does not respect residents' livability and pointed out that the apartment building at the intersection of 32nd Avenue and Floss Street has been negatively impacted by the raised crosswalks. She did not feel the crosswalks were carefully planned or engineered.

Ken Roberts congratulated the Traffic Safety and Transportation Board on doing such a thorough job of enhancing livability and protecting safety in the Neighborhood Traffic Management Program (NTMP). He encouraged the City Council to adopt the Board's recommended revisions. Staff has made some good points from the engineering perspective, but the neighborhoods favor the Board's recommendations. He pleaded with the City Council to complete the full traffic calming project on 32nd Avenue as quickly as possible.

Ron Silverman discussed his letter to the City Council and Public Works Department requesting additional traffic calming on 34th Avenue. He had addressed the Traffic Safety and Transportation Board (TSTB) at a recent meeting, and he believed the Board concurred with his request. Traffic problems are increasing as more and more drivers use 34th Avenue as a cut through from the MarketPlace. Vehicular volume will not decrease unless the traffic calming project is re-engineered. He discussed the double-yellow line and made some specific recommendations including changing the angle of the traffic signal at 34th Avenue and Lake Road and adding a speed hump between Lake Road and the most southern existing speed hump. He did not receive any further response from the TSTB after his presentation, but the Board did recommend the letter to the City Council for review.

Bennett said the double yellow line is mandated by state statute and that she would respond to Silverman's other questions within two weeks.

Silverman felt everything to date had just been Band-Aids and that a traffic engineer needed to look at the entire problem to prevent volume from simply being shifted from one street to another.

Julie Wisner, Traffic Safety and Transportation Board (TSTB) member and 34th Avenue resident, addressed collector streets and livability. If the entire street is not calmed, livability is sacrificed. She agreed with Stone's assessment of the 32nd Avenue raised crosswalks and the need for additional speed bumps on both sides of the crossing for additional protection. She stated that a lot of regional traffic was using 34th Avenue as a cut through to Hwy. 224 and, as a result, ruining neighborhood livability. Residents all agree that they want a traffic engineer to look at the problem. She implored the City Council to adopt the TSTB revisions to the Neighborhood Traffic Management Plan (NTMP) because they encompass the best engineering and livability solutions gathered from other jurisdictions in the region.

Planning Commission Work Plan

Rouyer said the intent of this portion of the work session was to review the Planning Commission's July 27, 1999 goals. The purpose of the work session was to evaluate these goals with those adopted by the City Council.

Hammang presented Goal 1: Consider Amendments to the Comprehensive Plan, Zoning Ordinance, and Municipal Code that would make the codes more consistent and would better protect neighborhood livability in Milwaukie. He suggested remodeling these documents so that development issues would be put to rest in such a way that community livability would be protected while still allowing construction. From the points of views of efficiency and aesthetics, the City is near the end of its land supply. He discussed implementation of a design review process that would be sensitive to neighborhood livability, connectivity, aesthetics, and safety. He urged giving people some say in how their community develops.

Councilor Marshall hoped any proposed amendments would not favor efficiency over livability.

Mayor Tomei referred to staff report page WS.3.2 and asked for clarification of the terms "mass" and "bulk".

Hammang said, for example, if there were a minor land partition in a neighborhood of single-story, ranch-style homes, the mass and bulk of a new, two-story house would not be consistent with the existing neighborhood. The thought is to have a uniform community without visual obstructions.

Councilor King referred to the same staff report page and the bullet having to do with retaining mature vegetation. She recommended language that would relate to maintaining habitat for diverse species in established neighborhoods.

Hammang believed people would become more sensitive to these issues as they began to understand how Milwaukie will develop.

Miller added that the Planning Commission needed enforceable rules and criteria that would require certain development standards.

Councilor Kappa hoped the proposed revisions would lead to a subdivision ordinance that would incorporate these issues.

Councilor Lancaster asked how specific the ordinance language would be. For example, would it define "mature vegetation"?

Hammang replied that the ordinances are not yet drafted.

Rouyer added that the Tree Ordinance could be drafted in a way that certain vegetation is protected or performance standards relating to sustaining mature vegetation are identified.

Cartmill introduced the second goal relating to design review: Continue to serve as the review body for applications for development. The Planning Commission believes a Design Review Committee, made up of citizen volunteers with an interest or background in design, should be developed to support the Commission once the first goal is attained. The Design Review Committee would be less formal and act as a buffer between the applicant and the Planning Commission. The Commission also hopes to improve the quality of application materials in order to facilitate decision making. The Design Review Committee could address issues such as height and color before the application goes before the Planning Commission. Cartmill did, however, express concern with staff availability and length of time needed to process applications.

Councilor King asked if new design standards would be developed.

Rouyer responded that the concept was to set up the tools to streamline the application process. Once better regulations are adopted, either staff or a citizen group can better discuss and evaluate development. The Planning Commission and staff would look at models from several other jurisdictions to help select the best one for Milwaukie.

Councilor Kappa discussed the importance the Endangered Species Act (ESA) as it relates to development.

Hammang briefly addressed current application documents and the need to set standards that included legible, correctly labeled drawings.

Ouderkirk commented on the City of Portland's process and the benefits of having a buffer to help the applicant organize his or her thoughts. This also serves Planning Commission needs by providing better application materials upon which it can base its decision.

Miller discussed the third goal: Develop and recommend a Tree Ordinance and Urban Forestry Program. The objective is to meet Tree City USA standards. Work began on this program in 1994, and the Planning Commission submitted three documents to the City Council in October 1996. Council adopted an ordinance in June 1999 that provided interim regulations on street and right-of-way trees pending adoption of the Urban Forestry Program. He urged that the project move forward as quickly as possible.

Hammang reviewed the fourth goal: Implement changes to the Comprehensive Plan, Zoning Ordinance to bring Milwaukie into compliance with the Metro 2040 Plan. The Planning Commission had suggested that, from an economic standpoint, the timing might not be right for Title 1 and 6 changes. He discussed "Main Street Mapping" for 32nd Avenue and 42nd Avenue and King Road. The Commission recommended that limited work should be done in these areas in

order to focus on other projects including the Riverfront/Downtown Project and the MacFarlane property. He felt the community might easily misconstrue activity relating to Titles 1 and 6 as the City Council's failing to meet its commitment to hearing citizen input on density issues. Now is not a good time to go to the community to plan for more density. He discussed the under-utilized north industrial area and the potential for 32nd Avenue between Harrison and Balfour Streets.

Rouyer agreed that the City should go more slowly on the "Main Street" element and indicated the Planning staff felt it could make progress toward the February 2000 deadline.

Hammang added that the Planning Commission did not want to move forward on rezoning when the focus should be on the Riverfront, MacFarlane property, hospital site, and the north industrial area. He saw no pent up demand for commercial space at this time.

Councilor Marshall agreed that the City needed to put its resources into the downtown project and show some progress toward 2040 Functional Plan compliance.

Rouyer said there were two parts to Title 1: the Main Street element for which the City could seek an extension if that was the direction and the housing and employment figures upon which staff could make some progress.

Councilor King reminded the group that 32nd Avenue between Balfour and Harrison Streets was affordable housing.

Ouderkirk discussed the fifth goal: Participate in the Downtown/Riverfront Planning effort. The Commission wants to receive the Riverfront Board minutes in order to be better prepared. It will also work toward supporting all efforts to complete the project.

Hammang asked for clarification of the study area boundaries.

Mayor Tomei said the focus is on the commercial and retail development downtown, and the study area is generally west of the railroad tracks.

Steward reviewed the sixth goal: Ongoing commitment to community outreach to inform citizens about planning services and regulations. The Planning Commission has found it difficult to respond to applicants and suggests a list of those projects that do and do not need permits. He also noted that businesses are moving to Clackamas and recommended the City work with Metro and the Chamber to retain and create new jobs that are near people's homes and to increase Milwaukie's tax base. It was his sense that more medium-sized or modular commercial facilities were needed in the City.

Hammang noted that two previous goals were deleted: work on the sign code and implementation of the ZORRO "Smart Growth" findings. Sign issues seem to have diminished and Smart Growth is a politically charged issue and is not representative of the Commission's goals.

Rouyer added that staff is able to administer most sign-related issues.

Hammang explained the theme of the Planning Commission's work program was to address those issues that matter to the community while being sensitive to staff time.

Rouyer commented that ZORRO can be used as a resource in the development code.

Councilor Lancaster asked if project priority was reflected by the Commission's presentation order.

Hammang said it did pending any staff or legal concerns.

Councilor Marshall suggested Milwaukie consider R-15 and R-20 zoning, and the City Council agreed to discuss this idea further as it related to annexation and choice of housing types.

The City Council agreed that the Planning Commission had done an excellent job on its goals and work program.

Urban Forestry

Rouyer reviewed the Urban Forestry project schedule with a City Council work session in October to review the draft ordinance and preliminary public outreach strategy. The target for enforcement would be July 2000.

Mayor Tomei suggested allowing time to discuss the current Council's concerns.

Rouyer understood one of the policy issues was the degree and timing of regulation on private property. Staff was working on developing a phased approach that emphasized education. A tree that was identified as being significant would be designated on an inventory similar to an historic home.

The group discussed voluntary designations on private property and implementation of the regulations as the program grows.

Mayor Tomei thought a major issue would be street trees and the adjacent property owners' maintenance responsibilities.

Councilor Marshall recommended that the City be responsible for trees in the public right-of-way to provide consistency, but the financial impacts of doing so would also have to be considered.

Councilor Lancaster agreed with staff comments that education was key including the actual location of the public right-of-way. Residents take ownership in that piece of land in front of their homes and include it in their landscaping.

Bartlett said staff would prepare an ordinance and identify fiscal impacts. He suggested staff provide the City Council with an array of options for a street tree program that would best meet Tree City USA standards.

Mayor Tomei added that the previous Tree Committee was concerned with keeping old stands on private property.

Councilor Kappa was concerned about legislating tree removal on private property.

Councilor Marshall felt it was time to "raise the bar" and set some higher community standards in Milwaukie.

The group discussed regulation issues on private property and sustainability and habitat.

Bartlett pointed out the City Attorney needed clear and objective standards when preparing the enacting ordinances.

Coleman added that the term "under developed" needed to be clarified and defined in a functional and workable manner. One option is to define it as a ratio between lot size and the footprint of the new development.

The group discussed the effect of overlay zones and what might potentially happen to the overall canopy. **Rouyer** said staff would return with an array of options with a focus on a significant tree voluntary program, street trees, and definitions of "under developed" and "undeveloped".

Bartlett added that the ordinance will call for an inventory.

Mayor Tomei endorsed the idea of using the Planning Commission and Park and Recreation Board (PARB) to support the program.

Councilor Marshall recommended a Parks and Forestry Commission instead of adding more responsibilities to the Planning Commission's already full agenda. He suggested the PARB hold the hearings.

Rouyer said the Planning Commission would have a regulatory function regarding trees on private property. She suggested the PARB be responsible for long-range planning and education.

Coleman added that the Planning Commission could hear appeals and make quasi-judicial decisions.

The group discussed a public information element coinciding with Arbor Day and either sharing an arborist with another jurisdiction or contracting for those services.

City Vision and Mission

Bartlett proposed the draft Vision and Mission Statements be reviewed by the City Council at its September 18, 1999, work session. After the session, draft results would be sent to the Neighborhood District Associations (NDA) and Boards and Commissions for comment. Council would then review this input at its November 1 work session and schedule for adoption at the regular session on the following night.

The City Council accepted the proposed work program and timeline.

Letter to Oak Lodge Community Council

In response to a suggestion from Councilor Kappa that the Milwaukie City Council meet with the Oak Lodge Community Council, Bartlett prepared a letter to that group suggesting a meeting after January 2000. If approved for the Mayor's signature, the letter would also be sent to the special districts serving that area. The letter noted that elected officials are working through the SB 122 urban services planning process and that the Oak Lodge Community Council is meeting with the special districts.

It was group consensus to authorize the Mayor to sign the letter as drafted.

Other Items

- Gary Michael has prepared a grant application to the Regional Arts Commission on behalf of the MDDA to implement an outdoor sculpture program on publicly-owned property. The City's role as the property owner will be to bring the property within the existing Community Service Overlay.
- TCI upgrade and projects in public right-of-way. Richards indicated there was one property owner complaint.
- Marilyn Wall signed a letter to DLCD on behalf of the North Clackamas Chamber of Commerce supporting local selection of a consultant team for regional projects which in Milwaukie's case is ODOT.

- Councilor Kappa said the ACLU apparently has no interest in providing a legal opinion on the Charter and Council rules. He felt it still needed to be clarified at some point
- Bartlett responded to Silverman's letter regarding additional speed humps on 34th Avenue in writing and included Tom Lancaster's earlier engineering study.
- Jail inspection issues have been addressed.
- The group discussed the use of the Milwaukie Police Department logo on neighborhood alerts and the concern that its use made them appear to be official police documents. Councilor Lancaster was concerned that the challenge to Macken-Hambright's use of the logo might be perceived as being based on content.
- The group agreed to discuss the City Manager's performance criteria at its October 4, 1999, open work session, so the public has the ability to comment.
- The Library Board needs members and wants to be involved in the Riverfront Plan.
- The group discussed full Council packets to the Board and Commission chairs.
- Councilor Marshall felt the current Traffic Safety and Transportation Board (TSTB) needed to be a Traffic Calming Board and another board created to look at actual regional traffic problems.
- Councilor King discussed current Johnson Creek Watershed issues and the need to address building codes and standards for development.
- Bartlett announced that the City now owned the Hosely property on Home Avenue at Monroe Street.
- Upcoming meetings: Metro Growth Management, September 7; Johnson Creek Blvd. Improvement Project Open House and Metro Council Meeting at Milwaukie City Hall, October 12; and Clackamas County Growth Conference, October 15.

Downtown Riverfront

Bartlett reminded the City Council of the September 22 Town Hall Meeting at which time refined plans and associated cost estimates will be shared. Crandall has gathered information from outside agencies and ODOT is providing a cost estimate for bridges. Fish and Wildlife does not support the Kellogg Lake Marina concept but does like the open waterway proposal.

The meeting ended at 9:00 p.m.

Pat DuVal
Pat DuVal, Recorder

**CITY OF MILWAUKIE
CITY COUNCIL WORK SESSION AGENDA
AUGUST 30, 1999**

MILWAUKIE CITY HALL

Second Floor Conference Room
10722 SE Main Street

WORK SESSION – 5:30 p.m.

Discussion Items:

	<u>Time</u>	<u>Topic</u>	<u>Presenter</u>
1.	5:30 p.m.	Dinner and Information Sharing	Group
2.	6:00 p.m.	Open Community Forum	Group
3.	6:30 p.m.	Planning Commission Goals Review	Commission Chair Alice Rouyer
4.	7:00 p.m.	Urban Forestry and Tree Ordinance	Alice Rouyer
5.	7:30 p.m.	City Vision and Mission	Bartlett

The Council may vote in work session on non-legislative issues.

At the end of the work session, the Council may hold an Executive Session under the authority of Oregon Revised Statutes 192.660 as needed.

*For assistance/service per the Americans with Disabilities Act (ADA)
dial TDD 786-7555.*

The Council requests that all pagers and cell phones be either set on silent mode or turned off during the meeting.



To: City Council and Planning Commission

Through: Dan Bartlett, City Manager *DB*
Martha Bennett, Assistant City Manager *MB*

From: Alice Rouyer, Planning Director *AR*

Subject: Planning Commission Goals Review

Date: August 30, 1999

Action Requested

City Council review and discussion of the 1999/2000 Planning Commission goals and Planning Division work program.

Background

On February 10, 1999, Commissioner Tracy Cook presented a preliminary list of Planning Commission goals to the City Council at their Strategic Planning meeting. The City Council took all of the board/commission goals into consideration when drafting three major goals and objectives in their five year Strategic Planning exercise.

1999/2000 Planning Commission Goals

On July 27, 1999, the Planning Commission refined the 1999/2000 goals in a work session with staff. This exercise was intended to introduce Planning Director Alice Rouyer to the thoughts and values of the Commission and blend the Commission goals with the City Council Strategic Direction goals. The following are the goals and objectives outlined by the Planning Commission:

1. **Consider amendments to the Comprehensive Plan, Zoning Ordinance, and Municipal Code that would make the codes more consistent and would better protect neighborhood livability in Milwaukie.**

Objective: Implement the Neighborhood Design Workshop Outcomes to integrate into the codes. Consider creation of a design review process.

Commission Comments:

A new Design Review process should be developed to ensure that new development improves neighborhood livability, connectivity, aesthetics and

safety. The following should be considered when amending the zoning ordinance and developing a design review process:

- Maintain character of neighborhoods.
- Retain mature vegetation for compatibility with existing neighborhoods.
- Implement regulations that provide balance between livability and economics.
- Give staff and the Commission expanded authority to impose conditions or modify plans to ensure high quality development.
- Create standards for scale, bulk, number of stories, mass, height, and compatibility in neighborhoods.
- Revisit flag lot regulations to strengthen them further.
- Subdivision regulations should include design guidelines/standards that address:
 - Lot shape
 - Environmental preservation
 - Open Space
 - Maximum square footage/height requirements for homes

2. Continue to serve as the review body for applications for development.

Commission Comments:

- A Design Review Committee should be developed to support the Commission, once the new zoning ordinance amendments are adopted. The Committee should be a citizen volunteer group composed of individuals who have an interest or background in design. The Committee would convene to offer recommendations/reports to the Planning Commission for current planning projects. The Committee could be composed of three Planning Commission members for now, then more citizen volunteers could be folded in once the Committee begins to function and more interested citizens are identified.
- Quality of plans and application materials submitted to staff and the Planning Commission needs to improve. Currently, imprecise or inaccurate information is submitted, making it difficult for the Commission to make a decision.
- Relating to Goal #1, the Commission needs stronger regulations in order to have tools to implement design goals and impose legally defensible conditions of approval.

3. Develop and recommend a Tree Ordinance and Urban Forestry Program

Commission Comments:

- Ordinance and program needs to meet Tree City USA standards
- City Street Tree Planting Program as part of City Capital Improvement Program (CIP).
- Promotions, education, and incentives for home owners.

- Program should promote the unique character of Milwaukie as a tree city.
- The adopted Ordinance should retain the integrity of 1996 Ordinance draft.

4. Implement changes to the Comprehensive Plan, Zoning Ordinance to bring Milwaukie into compliance with Metro 2040 Functional Plan:

- Title 1 (Requirements for Housing and Employment Accommodation)
- Title 3 (Natural Resources)
- Title 6 (Regional Accessibility)

Commission Comments:

- Economic conditions may not be ripe now for Title 1 or Title 6 changes.
- Neighborhood input is important.
- Staff should consider delay action on Title 1 and Title 6 in order to allow resources to be concentrated on other work projects.

5. Participate in the Downtown/Riverfront Planning effort.

Commission Comments:

- Planning Commission wants to receive Riverfront Board minutes to be kept "in the loop" on this project, in order to be equipped when the project will require Planning Commission actions (i.e., Zoning Ordinance, Comprehensive Plan amendments).
- Support all efforts to complete the project this time.
- Do not revisit neighborhood issues around the downtown.

6. Ongoing commitment to community outreach to inform citizen about planning services and regulations.

Commission Comments:

- More outreach to neighborhood groups
- Information packets about city regulations for home owners, builders, real estate professionals.

7. Reevaluate the zoning and permitted land uses for industrial properties on the northern edge of the city.

Commission Comments:

- As these properties turn over in tenancy, it may be a good time to evaluate if the market would better support different land uses than those already allowed by zoning.

The following goals were deleted by the Planning Commission since the February 10, 1999 Goals Presentation at City Council Strategic Planning Meeting:

1. Continue to work on City's Sign Code.

Commission Comments:

- Not a high priority goal at this time.

2. Implement the "Smart Growth" findings (ZORRO)

Commission Comments:

- May be too politically charged
- Does not represent Planning Commission goals
- The "Smart Growth" findings can be a resource for staff as the Zoning Ordinance is rewritten to implement Goal #1.

Planning Division Work Program

Staff has developed a long-range planning project work program for the 1999/2000 fiscal year. This list does not include any current/development review projects, since these are an ongoing function of the Planning Department.

This preliminary work program was presented to City Council in June 1999 in response to City Council's subsequent adoption of the City Council 1999-2004 Strategic Direction. The work program items respond to many of the goals articulated by the Council in that process. The projects have been grouped into two categories: Those projects beginning the first six months of this fiscal year and those beginning the second six months of this year. It is not expected that all projects listed in each of these categories will start and finish during this time period, because many will require a public process which will carry their completion date into the following six months.

First six months of 1999/2000 (July 1, 1999 – December 31, 2000):

1. **Urban Forestry: Program Development and Adoption of Regulations.**
Project is underway and is considered a top priority for the early part of the 1999/2000 fiscal year.
2. **New Annexation Ordinance: Revise the Milwaukie Zoning Ordinance to be compliant with Metro regulations and Oregon Revised Statutes.**
Project is underway and should be completed by early October.
3. **Development Code Revisions: Bring the City's Natural Resource regulations into compliance with Title 3 of the Metro Functional Plan-- Riparian, Habitat and Floodplain Protection regulations.**
Project is underway and should be completed by early summer 2000.

4. **Permit/Development Review Automation: Automate the City's development review/building permit process to increase efficiency, tracking capabilities, and improve customer service.**
Planning Division will be part of a larger staff team from the Public Works, Building, and Information Technology Divisions who will be charged with designing the software package to meet the needs of the City of Milwaukie. Project will get underway in fall 1999.
5. **Functional Plan Phase II: Second round of revisions to the bring the Milwaukie Zoning and Subdivision Ordinances into compliance with the Metro Functional Plan.**
Project will get underway in the fall 1999.

Second six months of 1999/2000 (January 1, 2000 – June 30, 2000 and beyond)

1. **Zoning Ordinance Revisions: Revise the Milwaukie Zoning Ordinance to respond to concerns about neighborhood livability, Planning Commission Goals, and Neighborhood Visions.**
Staff is developing a list of "problem areas" in the ordinance as a means to begin scoping this project. Project will formally get underway in January, 2000. This project will be ongoing.
2. **Transportation Impact Code Revisions: Transportation & Growth Management (TGM) grant to implement regulations enforcing the policies adopted in the Transportation System Plan.**
This project is dependent on obtaining grant funding from Oregon Department of Transportation (ODOT). If awarded, the project is projected to get underway in January 2000.
3. **McLoughlin Seam Specific Plan: TGM grant to develop corridor improvements and a redevelopment plan for land uses along McLoughlin Blvd. in the downtown area.**
Project is dependent upon obtaining grant funding from ODOT. If awarded, the project will get underway in January, 2000. This project would be coordinated with the Riverfront Redevelopment project.
4. **Riverfront Implementation/Milwaukie Center: Implement the outcome of the Riverfront Master Plan and Milwaukie Center goals through Comprehensive Plan amendments and Zoning Ordinance amendments.**
Staff is staying involved with the work of the Riverfront Board. Planning Division work projects expected to commence in early 2000.
5. **Annexation Phase II: Develop an annexation strategy for the unsewered areas surrounding Milwaukie.**
Project will commence in Winter and Spring 2000



To: City Council

Through: Dan Bartlett, City Manager *DB*
 Martha Bennett, Assistant City Manager *MB*

From: Alice Rouyer, Planning Director *AR*

Subject: Urban Forestry Program update

Date: August 30, 1999

Action Requested

City Council review of the Urban Forestry project schedule and discussion of policy questions.

Background

The Tree Committee began working in 1994 with the follow vision:

To distinguish Milwaukie as a 'Place of Trees'. Each gateway to the City and every public place and parkway will be distinguished by a canopy of colorful and majestic trees.

During 1995 and 1996, the Committee worked with city staff to outline an urban forestry program and develop a draft urban forestry ordinance. Both the Planning Commission and City Council reviewed the draft ordinance in late 1996. The project was set aside since that time, in response to other project demands and staff turnover. City Council received a project update in April, 1998.

Staff is now prepared to move quickly in late 1999 and early 2000 to implement the work of the Tree Committee. By the end of 2000, staff hopes to apply for Tree City USA designation. This is awarded on an annual basis with an application deadline at the end of December each year. In order to qualify for this designation, the City must have the following elements in place:

- a. A Tree Board or Department (i.e., a supporting board who oversees the tree program and/or a staff team to oversee the program)
- b. A Community Tree Ordinance

- c. A Community Forestry Program with an Annual Budget of at least \$2 per capita (this is already included in the 1999/2000 budget).
- d. An Arbor Day Observance or Proclamation

Project Schedule

- 1. City Attorney Review of Draft Ordinance: August 23, 1999 - September 3, 1999.
- 2. Project Management Team Meeting to discuss program implementation. This team will consist of city staff from Planning, Public Works, and Neighborhood Services: September 6 – September 10, 1999.
- 3. Planning Commission Work Session to review draft ordinance and preliminary public outreach strategy: September 28, 1999
- 4. City Council Work Session to review draft ordinance and preliminary public outreach strategy: October, 1999.
- 5. Begin public outreach, including state-mandated notice to affected property owners: November and December 1999.
- 6. Planning Commission and City Council public hearings to adopt Urban Forestry Ordinance: January and February 2000.
- 7. Develop public information brochures and education program: Winter 2000.
- 8. Arbor Week public workshops and community tree observance: April 2000.
- 9. Begin Phase II of program development: Spring/Summer 2000
 - a. Develop Urban Forestry Master Plan; including street tree guidelines, policies for planting trees in public spaces, and tree education programs.
 - b. Develop “significant tree” inventory and begin public outreach concerning protection of significant trees. Planning Commission and City Council consideration of regulations for “significant trees.”
- 10. Begin Ordinance enforcement: July 1, 2000.

Policy Questions

Staff needs policy direction from Council on the following issues at the August 30, 1999 work session:

1. Degree of regulation on private property. The 1996 draft ordinance regulates private property in the following way:
 - a. Large tree removal.
 - b. Tree protection during development.
 - c. Tree removal and pruning on undeveloped and underdeveloped land; and
 - d. Tree removal and pruning of designated "significant" trees and groves of trees.

Staff received input from Council on October 1, 1996 (see attached meeting minutes). At that time, the Council expressed reservations about how the new regulations might be received by the public. In particular, the Council wanted to be sure that the ordinance and urban forestry program included a user-friendly, educational component and did not unduly burden any segment of the community. With this in mind, staff would recommend that the Council consider adopting regulations for private property in two phases. Items a –c listed above would be considered in the first phase; while regulations concerning "significant" (or heritage trees) would be considered in phase two of the program development. This will allow staff and the Council more time to consider options for regulating significant trees, develop an inventory while offering more time for public education. With this option, large trees would still be regulated by the phase one regulations while the significant tree policies and regulations are being developed and considered.

2. Commission support of the Urban Forestry program. The 1996 draft ordinance included provisions for a Milwaukie Urban Forestry Commission. The ordinance envisioned a five-member commission including citizens having a professional background or interest in landscape architecture, arboriculture, or related field.

The Council should consider if another Commission is needed to support the Urban Forestry Program. Creating a new commission requires both citizen and staff resources. Citizen volunteers are needed to serve on the commission. Staff resources are needed to support the ongoing work of the commission. The Council might consider delegating the responsibilities of the Urban Forestry Commission to existing Commissions and Boards. Staff recommends that the Council consider the Planning Commission and Parks & Recreation Board as the supporting entities for the Urban Forestry Program.

Currently, the Planning Commission has regulatory authority over development on private property. This group could be equipped to handle any public hearings concerning tree regulation on private property. Currently, the Commission has at least two members with significant knowledge of native plants, landscape design and environmental planning.

In a recent work session with Council, the Parks and Recreation Board expressed interest in the development of Urban Forestry program. This board could provide

advice to staff in the development of the Urban Forestry Master Plan and the implementation of policies concerning trees in the public right-of-way or other public spaces. This group currently provides direction to staff concerning master planning, use and acquisition of public properties. This responsibility would be consistent with other duties already performed by this Board.

3. Staffing. Staff is not seeking Council direction on urban forestry program staffing at this time. Rather, staff wants to highlight to Council that that this program will require ongoing staff and budget resources. The Tree City USA standards require that the City provide a budget to support tree programs at a minimum of \$2 per capita of the city's total population. City Council adopted a line item of \$40,000 in the 1999/2000 budget to support urban forestry. This will need to be maintained in order to gain Tree City USA status in 2001.

An Urban Forestry Project Management team will be assembled in the next two weeks to include staff from Planning, Public Works, and Neighborhood Services. This group will begin considering different program and staffing options to support urban forestry in Milwaukie. The responsibilities for this program must be shared between departments in order to be successful. Education, enforcement, and tree planting/maintenance on public lands are all issues that need to be considered. At a minimum, the city will need to retain the services of a certified arborist to provide regular consulting and guidance in managing the urban forestry program.

Councilmember Kappa said he felt it was important to stress to the public that Monroe is still in the process, and the proposed third alternative shows the process is working.

Mayor Lomnicki said the planning community is doing an excellent job in continuing to work toward keeping costs down, and he particularly thanked Collins for her work. This seems to be an option that will both reach the downtown center and address other community issues. Estimated travel time and ridership are almost identical to the other alternatives. The cost is less, and there are no residential takings.

Bartlett said the DEIS process is designed to evaluate options and determine the most promising. There will be a 45-day comment period and a written mitigation plan.

Councilmember Trotter commented there would be no impact to either the park and ride or maintenance studies. Bartlett said everything to the north will continue to be studied and evaluated for possible redevelopment opportunities. He discussed the Regional Center Plan and inclusion of the Murphy property.

Urban Forestry Concept

OCTOBER 1, 1996 MEETING MINUTES

Collins presented the staff report and introduced **Keith Liden**, Planning Consultant for McKeever Morris, who has worked on the project since April. She briefly reviewed the background information used by The Milwaukee Tree Committee which included language from other cities' ordinances. The Planning Commission established goals, objectives, and tasks for the program. The Vision Statement suggests trees are part of the visual beauty of the community.

She said it is assumed the program will be implemented for safety and the public welfare and to promote urban forestry and the City vision. Knowing this will be a long-term program, guidance is needed to determine how to proceed on the various aspects including education and regulation. Most of the cities in the region have a tree ordinance and some sort of a regulatory program.

Councilmember Kappa said he would like to see a forestry program with both educational and regulatory elements in place. His areas of concern were enhancing livability while promoting infill, preserving the natural environment, and protecting trees during light rail construction.

Councilmember Trotter thanked Committee and staff for addressing his previous comments. He was in favor of community livability and trees; however, he expressed concern over the costs of implementing the regulatory element.

One area of concern was the cost to the property owner for hiring an arborist to maintain trees in the public right-of-way. He also had a question about how significant or historic tree designations might relate to developed or underdeveloped land.

Councilmember Schreiber urged that whatever is put in place be user friendly. People within the urban growth boundary will not want to be annexed into a City that has more enforcement on his or her private property than can be understood. She agreed that the sheltering environment needed to be addressed but done succinctly.

Councilmember Farley felt it was important for builders to have legal guidelines when they come into the City of Milwaukee. He agreed trees are necessary for the protection of the environment.

Mayor Lomnicki agreed with Kappa's and Trotter's previous statements and with the need for a program. He felt the Milwaukee Urban Forestry group should be a board rather than a commission based on the general ordinance definition. He felt, instead of the annual \$1 per capita fee being established in the ordinance, reference should simply be made to the need for program support. Referring to page 59 of the staff report, he said he was concerned that tree preservation not stand in the way of responsible development. He was concerned about the property owner's comfort with marking a tree on his property for potential removal particularly if it was on the interior of the property. He was also concerned about the property owner being responsible for the entire cost for street trees if they are to be considered a public asset. The responsibilities listed on page 20 of the staff report were extensive, and he was concerned the Community Development Director would almost have to be an arborist. He also felt the language on page 20 of the staff report regarding public hearings was very convoluted, and the group should have board status with hearings before the Planning Commission with appeals to the City Council.

Mayor Lomnicki continued to discuss his concerns with permit requirements and tree maintenance companies applying for licenses and meeting license standards. He did not feel this could be imposed as part of the Milwaukee business license process. The Community Development Director should probably not be responsible for revoking a license due to irresponsible or unethical behavior.

Councilmember Kappa said, based on the model ordinance, he felt the structure indicated the group should be a board rather than a commission. He urged the rights of the property owner be respected while addressing protection

and livability issues in the community. Trees are important to the area, and the stock needs to be maintained. He recommended proceeding with the process, and asking the Planning Commission to respond to the Council's questions and comments.

Liden discussed trees in the public right-of-way. **Beery** said it is a common technique to remove the costs from the municipality's shoulders, but enforcement problems are not eliminated. If the City pays the costs, maintenance can be scheduled and risks could be less.

Collins added in a majority of the cases the responsibility rests with the property owners, and a strong education program is provided.

Councilmember Farley said there was already a code enforcement ordinance, and his basic concern was developing a program that would be acceptable to residents.

Councilmember Trotter expressed concern about a policy stating residents are responsible for making the City more livable. He felt the criteria on page 26 of the staff report were very subjective and could be very confusing to the property owner. He urged the designation criteria be more clear and objective.

Mayor Lomnicki indicated he felt the penalties were too severe and were unreasonable.

Councilmember Schreiber understood making restrictions on new development, but the concept for developed land needed to be more clear.

Councilmember Kappa said one group, such as developers, should not be targeted and take the brunt of the regulations without looking at the rest of the community. He felt the Planning Commission should review and respond to the City Council's concerns.

Councilmember Farley suggested each Councilor write down his/her concerns.

Councilmember Trotter discussed the section on tree removal standards on page 25 of the staff report and said he felt it was unclear. The section did not address removing trees which are in the way of building a structure. He agreed Council should prepare written comments for the Planning Commission and to share with each other. He felt an urban forestry program was needed and should be phased beginning with the educational process. While that phase was underway, the regulatory portion could be developed. He concurred the group should be a board rather than a commission.

Mayor Lomnicki agreed the educational element should be brought forward and urged moving slowly through development of the regulatory portion.

Collins summarized the discussion: have both an educational and a regulatory program; give the board responsibility for the educational arm of the program; develop concise, objective regulations and criteria; be sensitive to individual property owner's costs; research any legal questions; and determine budget impacts. She would look at street tree regulatory measures with Wheaton.

Councilmember Kappa said he would like the board to be appointed before the education process takes place.

Councilmember Trotter said work with undeveloped or underdeveloped property should be kept in the zoning arena that deals with environmental issues. He expressed concern with the penalty system, and pointed out the heavy hammer was probably not needed if the City wants voluntary compliance.

Mayor Lomnicki said a major issue is whether the individual property owner was or was not responsible for the street trees. This would be a philosophical and expensive policy issue. The value of street trees is an enhancement of the whole City. One issue is whether the City should or should not be responsible for the street trees or should it be the individual property owners.

Darrell Miller, 11048 SE Penzance, expressed concern as a property manager in the Washington/Penzance area. He felt some trees should be designated as undesirable species and recommended review of the City of Corvallis' regulations.

David Murray, a member of the Tree Task Force, spoke to the issue of needing regulations defining good tree maintenance standards.

Mayor Lomnicki adjourned the work session at 6:55 p.m.

Pat DuVal, Recorder/Secretary



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

August 24, 1999

To: Mayor and City Council
From: Dan Bartlett, City Manager
Re: Completion of City Vision and Mission Statements

Action Requested

Consider the following proposal to complete a draft Vision and Mission Statement for Council adoption on November 2, 1999.

Background

Council has directed staff to develop a proposal to expedite new Vision and Mission Statements for Milwaukie. Councilors have suggested that a long process is not necessary given the amount of public involvement that has been conducted for Council's Goals and the Neighborhood Vision process.

Staff would suggest that Michelle and Alice using the following documents (attached) draft a Vision and Mission Statement for Council's editing:

- Summary of Neighborhood Visions
- Council Goals Retreat Summary Notes
- Attributes of a Livable Community (Livable Oregon)
- Selected elements from the June 5, 1995, Vision Project

This draft would be presented to Council before the September 18, 1999, Training Session to be facilitated by Mike Swanson. He would incorporate developing the Vision and Mission Statement into the training activities as one of the exercises. This fits in with Chapter 1: Understanding Roles and Responsibilities, the James H. Sara, dichotomy-duality model, shown on page 20 of the Working Together book previously provided to Council. Under this model it is clear that defining the Vision and Mission are primarily the Council's role.

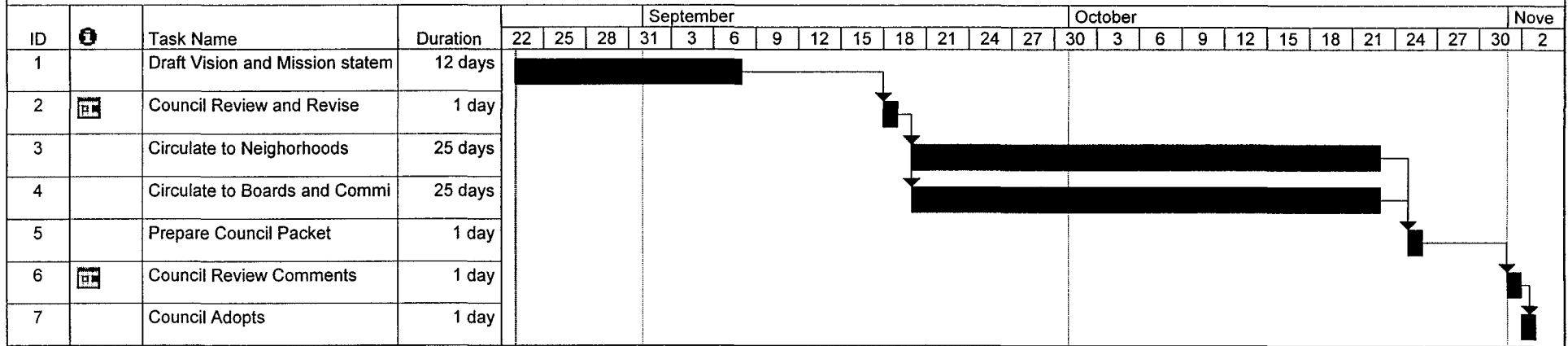
The management team would be at the training session to participate as resource persons. Council would review and revise the draft document.

After this session, the resulting draft would be sent out to each neighborhood association and the boards and commissions for their comments. We would ask that these comments be returned to Michelle Gregory and Pat DuVal no later than October 26, 1999. Council would review these comments at their November 1, work session and then adopt the final Vision and Mission Statements at the November 2, 1999, Council meeting.

cc: File - cm2243/hd

MILWAUKIE CITY HALL
10722 SE MAIN STREET
MILWAUKIE, OREGON 97222
PHONE: (503) 786-7555 • FAX: (503) 652-4433

Vision and Mission Proposed Process



Project: Vission and Mission Date: Mon 8/23/99	Task		Summary		Rolled Up Progress	
	Split		Rolled Up Task		External Tasks	
	Progress		Rolled Up Split		Project Summary	
	Milestone		Rolled Up Milestone			



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.

DRAFT

COUNCIL GOALS

Setting Policy and Direction
for the Maximum Benefit
of all Milwaukie Citizens

VISION STATEMENT

New vision statement.

Create and Maintain a Quality Local Government in Partnership With it's Citizens

- ☑ Provide stable, high quality services at an affordable price
- ☑ Encourage and receive substantial and ongoing resident participation
- ☑ Maintain high levels of trust and ownership from the community

It is a fun place to be -- lively, progressive, accepting, beautiful -- a city that values all its residents and workers and its natural resources -- a proud Tree City USA

Population

- All ages and income ranges living throughout the City. Downtown area is active and safe 24-hours a day with people living there and enjoying the area

Central Business District (CBD)

- Vibrant, beautiful, successful with a variety of businesses drawing people of all ages and backgrounds from all of Milwaukie and region
- Underground utilities
- Design review assures visual beauty.
- Many people living here in a wide variety of housing types over retail.
- Clean, safe, attractive transit center draws customers to CBD.
- Traffic-calmed, tree-lined, pedestrian-safe McLoughlin Boulevard links CBD to riverfront
- World class riverfront draws people of all ages from whole region for a variety of activities -- strollers, picnicking, watching wildlife, canoeing, swimming, and people watching

Types and Mix of Office

- Many offices in the CBD in upper floors close to transit center and throughout the City in appropriate zones -- especially medically-oriented around Milwaukie Providence Hospital
- Office/home businesses in residential area not discouraged

New Manufacturing

- Lots of new manufacturing where appropriately zoned without negative effect on neighborhood and environment
- Employing all ranges of ages and abilities, paying decent wage

DRAFT

Types of Retail

- All types of retail in appropriately zoned areas throughout the City
- In CBD, a wide range of types, concentrating on arts and entertainment
- No big box retail anywhere in City

New Retail

- Meets a variety of needs of residents so they don't have to drive to malls outside the City -- especially grocery stores, variety stores, hardware, bakery

Types of Service Industries (business, legal, finance, insurance, R.E., government)

- All types -- especially those that offer good wages and provide services residents need
- Bring City departments back to CBD so more City services are available in a recognizable central location

New Service Industries

- Be open to those that are clean, good neighbors paying decent wages
- Protect industrial land to provide more jobs and a greater tax base

20+ years from now I would like to see Milwaukie known as a Quality Community. In general, my vision would be along the lines of what we think of areas like Eastmoreland, West Linn, Alameda Ridge, and Willamette Blvd. area near the University of Portland.

20+ years from now, I want Milwaukie to be known for an abundance of Park and Open Spaces, enhanced by a healthy Urban Forest. With cleared, contributing streams that flow to a Sewer Plant-less Willamette River.

City of Milwaukie is known as a great place to work, and people want to stay because they know they are appreciated by their supervisors, Council, and community

I would like to see Milwaukie Downtown & Riverfront as a unique palace to visit and if chosen to live. My vision is for the people in the Metro Area to someday say, "this Council and our citizens" had the "Vision" and Courage to make a significant contribution to our Region.

The citizens take pride in their community and participate at many levels including Volunteerism, NDAs, boards and commissions, and local Government. There is an overall feeling of our community being able to do for itself, and local Government has learned to leverage the resources of the community to give its citizenry what it wants and needs.

- Milwaukie is a destination, not a drive through

Current:**City of Milwaukie Community Vision Summary:**

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

DRAFT

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.

MISSION

Current:

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.

Larry's Suggestion:

- **Build Trust in City Government**
 - Make all processes as open as possible
 - Communicate at every possible level
 - Continuously educate and invite participation
- Maintain and enhance small town personae as a safe, peaceful, friendly place to live, work, play, raise families, and grow old
- **Show Value in Everything We Do**
 - Develop realistic expectations
 - Quantify the return on investment
 - Provide exceptional customer service
- Business/Resident Relations
 - Expand and improve so Milwaukie is seen as a great place to live, raise a family and do business
 - City departments are seen as friendly to residents and businesses -- helpful and facilitative

DRAFT
VALUES

- ⊕ Honesty
- ⊕ Integrity
- ⊕ Fairness
- ⊕ Responsibility
- ⊕ Clearly defined roles
- ⊕ Accurate representation
- ⊕ Effective continuous communication

Current Labor Management Compact:

Our mutual value statement recognizes that Milwaukie employees are competent, confident, and contribute to the success of the organization. This will be accomplished through:

Customer Service: Each employee is approachable and willing to listen to all sides. Looks for a variety of solutions using creative means to improve customer service and productivity. Goes to the customer for assessment of what the customer wants and understands the customer's definition of service level, and how it is provided, the quality and the quantity.

A Milwaukie employee exhibits:

Teamwork, a means for improved quality services and products, through collaborative team efforts and by assisting within each employees area of expertise or if needed, by referring to the appropriate source for response.

Quality by consistently showing a high degree of accuracy, neatness, completeness, thoroughness, and excellent products and services.

Reliability by ensuring that every request receives a response. Additionally, each employee keeps the commitments made to external and internal customers, including fellow team members and supervisors. Time frames and processes (no surprises) are

DRAFT

communicated and timelines for job assignments are met. All telephone calls are returned no later than next work day.

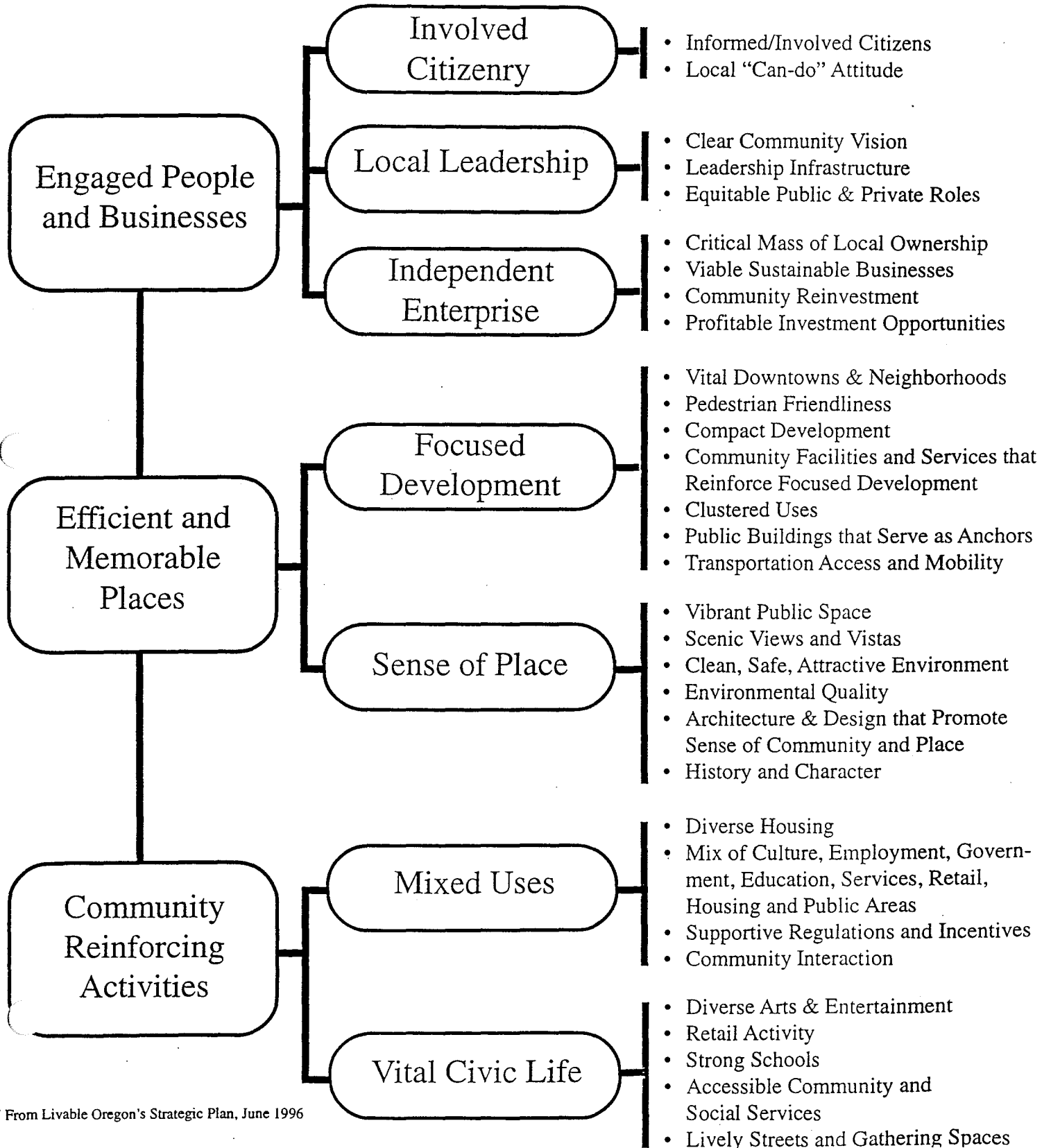
Integrity by doing the right thing even when no one is looking, being honest in actions and words, and remaining aware of each employee's impact on the perceptions of others.

Respect by acknowledging the rights and values of each individual. Employees treat customers with dignity and respect through verbal and non-verbal communication.

Safety by performing tasks in accordance with established safety procedures and by keeping up-to-date with changes in safety policies and procedures. Employees are willing to let someone know when there is a safety issue.

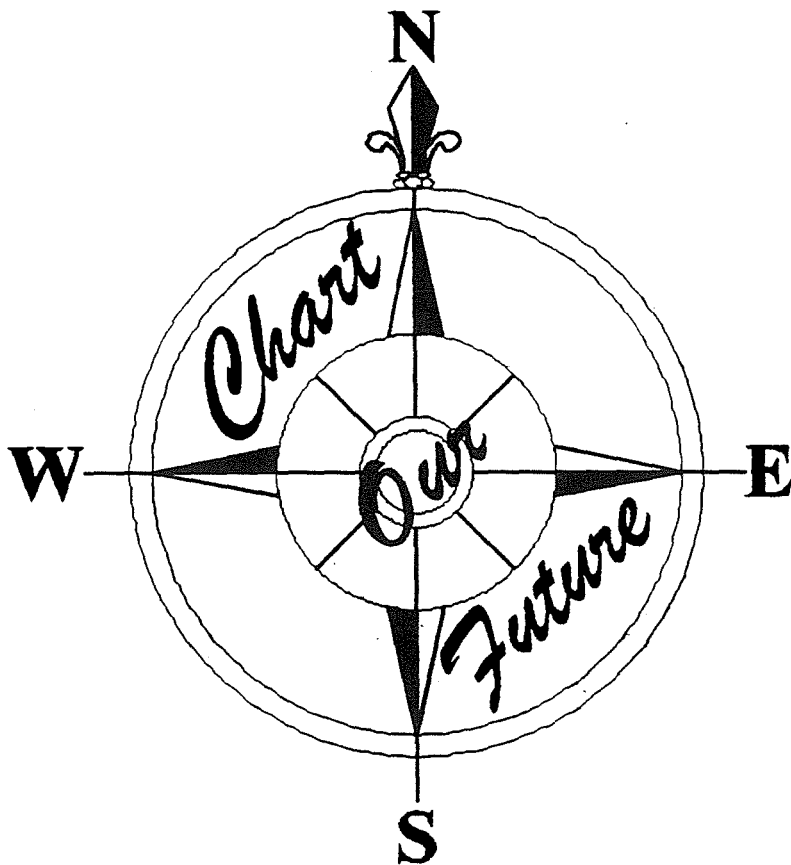


Attributes of a Livable Community*



* From Livable Oregon's Strategic Plan, June 1996

M CITY OF MILWAUKIE VISION PROJECT



Milwaukie Vision
Policy Committee
June 5, 1995

Final

Adopted by
City Council
June 20, 1995

Milwaukie Vision Summary Statement

By the year 2015, Milwaukie is a culturally and economically diverse City that capitalizes upon its role as a transportation and economic hub in the region. Milwaukie's established and stable neighborhoods connect to an expanded central civic, commercial, and cultural center. A wide mix of employment opportunities responds proactively to new technology and efficiently utilizes 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.

Introduction

The Milwaukie City Council set as one of its 1993-94 goals the initiation and preparation of a City Vision Statement. They recognized that creating a vision statement would require active participation of citizens. The City then embarked on an extensive public involvement program to ensure active participation. In February 1994, approximately 100 people participated in a City-sponsored forum, titled "Can Cities Survive?", with nationally recognized Neal Peirce as a keynote speaker. Peirce also spent the day discussing issues with Milwaukie City Councilors, Planning Commissioners, and Downtown Development Association representatives.

In April 1994, Milwaukie conducted a series of surveys to identify the community's core values, to assess citizen preferences regarding proposed community development, and to enable residents to see how their priorities compared with neighbors and various segments of the community. To obtain a more representative and statistically sound sampling of the community, an additional survey was conducted by telephone, involving 204 randomly selected city residents.

In May 1994, a community-wide urban design workshop was conducted with Peter Calthorpe Associates to address growth issues. The purpose of the workshop was to ask citizens to help show how downtown Milwaukie and the Marketplace area could evolve in the future. The exercise helped show how new jobs and people coming to the area might fit with Milwaukie's existing land use pattern.

In June 1994, a Visual Preference Survey event was held for community members to view photographs of residential areas, public spaces, downtowns, and commercial areas. Citizens were asked to express their likes and dislikes in an attempt to focus on design, and to begin shaping Milwaukie's preferred future.

In July 1994, a Vision Project Policy Committee was formed. This Committee is made up of citizens representing various facets of the community, with City Councilors and Planning Commissioners assisting the group. The Policy Committee was given the task of taking all the information gathered in the surveys, community forums, and workshops, and formulating a Draft Vision Statement for the City of Milwaukie. A Draft Vision Statement was mailed to every residence and business in the community. The feedback received during a 30-day public comment period was then considered for the final Vision Statement, which will be presented to City Council for review and adoption in June 1995.

Milwaukie Vision Statement

In the year 2015, Milwaukie is known as a friendly, full-service city where people want to live and visit. A legacy of established neighborhoods and a street grid system define Milwaukie as part of the region's inner core. The City has successfully transitioned to an urban character. This is a safe community where cultural and business diversity flourishes.

Milwaukie's Expanded City Center extends from the upland geography near 37th Avenue to the shoreline of the Willamette River. A larger-scale complex of housing units and medical facilities, linked by pedestrian networks, anchors this eastern edge. Typical commercial design for Milwaukie's Expanded City Center emphasizes retail on the first floor and office and/or residential on second or third floors. Parking is underground or in structures, which accommodates the pedestrian-oriented atmosphere.

With the return of public rail transit to Milwaukie, the Expanded City Center has taken on a bold look, with mixed office, commercial, and residential activity. People enjoy spending time in Milwaukie, strolling along the revitalized riverfront and taking advantage of a variety of options. Cultural events attract people from the region. The many public spaces are well used. Commercial activity mixes with residential use for people who now call city center "home." Transit options and commercial places keep the Expanded City Center alive after five o'clock. People feel secure and are surrounded with the positive energy that public places can provide.

Milwaukie's stable neighborhoods offer diversity in housing. These neighborhoods are linked through safe and attractive pedestrian and bicycle access. Because of the security and peace of its living areas, residents feel encouraged to be involved in neighborhood activities. Neighborhood associations participate with local governments in prioritizing services and needs. New housing areas are well-designed and blend into existing neighborhoods. Schools form a nucleus for neighborhood interest. Small commercial centers form a focus for public interaction in each of the neighborhoods. People watch out for one another.

With a diverse range of economic options, including home-based employment, people of many social and cultural backgrounds find Milwaukie a good place to work. New technologies continue to evolve in Milwaukie, especially in industrial areas. New business opportunities are expanded throughout the revitalized City.

Aggressive pursuit of transportation plan objectives have overcome barriers for vehicular travel and have created stronger east-west street connectors. Existing grid patterns carry many modes of transport. With new trails, sidewalks, bike lanes, and streets in place, Milwaukie is known as a community that is pedestrian-oriented with a city center that uses the human scale in its development designs. Good bus transit offers the option of getting to jobs in the City's commercial or industrial areas. Transportation facilities allow for freight movement on Highway 224 without adversely affecting the rest of the City. The small station for the regional high-speed rail line is integrated with the City's second light rail station at the eastern end of the Expanded City Center.

People recognize that they are entering Milwaukie by the tree-lined corridors. A network of pathways, parks, wetlands, and open spaces allow interaction between individual sections of the city and its neighborhoods. Johnson Creek is restored to a pristine urban stream, and its streambanks offer people and wildlife a natural refuge. An enhanced Kellogg Lake and the riverfront serve as a focal point for the City's park network.

A renaissance of urban design is resulting in a rebuilt physical environment that is timeless and serves economic needs. Milwaukie's residents carry a sense of pride of place, best symbolized by how the City has designed and taken care of its rebuilt city center, neighborhoods, and its open space areas.

VISION ACTION PLANS

TOPIC: EXPANDED CITY CENTER

Goals	Actions	Roles and Responsibilities
1. Increase types of viable uses.	a. Complete a downtown master plan that connects public spaces in the downtown area to the riverfront and encourages and actively recruits high quality diversified businesses and mixed uses with increased density to locate in the downtown area.	a. MDDA committees, citizens, City staff, land use planning/architectural consultants and Planning Commission.
	b. Adopt zoning which allows mixed uses, including housing.	b. City Council establish as Council goal and direct Planning Commission to begin project.
	c. Evaluate use of Milwaukie Junior High School site.	c. City Council approach school district to form task force.
2. Make an Expanded City Center instantly recognizable.	a. Develop and implement a master streetscape plan.	a. City staff assisted by business groups, MDDA representatives, and neighborhood districts.
3. Develop seamless connections between various city areas and the Expanded City Center.	a. Develop and implement multimodal connections within Expanded City Center area.	a. Transportation System Plan (TSP) project staff review and incorporate Target "A" study as appropriate.
4. Achieve a level of urban design that fits the needs and requirements of a Regional Center.	a. Review Calthorpe Concepts' impact on the Expanded City Center, with particular focus on cultural and civic uses.	a. City Council establish as Council goal and direct Planning Commission to begin project.
	b. Work with Metro to ensure 2040 framework plans support expanded City Center.	b. City Council.

TOPIC: NEIGHBORHOODS

Goals	Actions	Roles and Responsibilities
1. Maintain and enhance stable neighborhoods.	a. Develop a plan for neighborhood improvements.	a. Neighborhood District Associations with assistance from the Neighborhood Services Coordinator.
	b. Implement Neighborhood Watch Programs.	b. Neighborhood District Associations with Police Department.
	c. Investigate ways to incorporate/upgrade small commercial areas as key neighborhood centers.	c. Neighborhood District Associations, Planning Commission, City staff.
	d. Add Neighborhood Associations for commercial, downtown, and industrial sectors.	d. City Council with assistance from the Neighborhood Services Coordinator.
	e. Continue to emphasize schools as centers of neighborhood interest.	e. Neighborhood District Associations, North Clackamas School District.
	f. Consider higher densities near schools and provide open areas for children in high density.	f. Neighborhood District Associations, North Clackamas School District, North Clackamas Parks and Recreation District.
	g. Build incentives for improvement/excitement with neighborhood associations and for City Council recognition of neighborhood achievements.	g. Neighborhood District Associations and City Council.
2. Achieve diversity in housing options and housing stock.	a. Provide ways for new housing units and areas to blend in with existing neighborhoods.	a. Neighborhood District Associations; Planning Commission with assistance from Community Development Department, using Calthorpe Concepts.

TOPIC: ACCESSIBLE COMMUNITY

Goals	Actions	Roles and Responsibilities
1. Increase the share of trips that are pedestrian, bike, or transit.	a. Develop and implement the plan that achieves a walkable community throughout.	a. TSP project staff and Parks and Recreation Commission.
2. Achieve multimodal linkage between different areas of the city.	a. Develop an implementation plan to improve primary connections between neighborhoods (especially bike connections).	a. TSP project staff.
	b. Develop a street connections plan and implementation program that connects streets, including the repair of existing poor quality connections and spanning existing barriers like Highway 224 and the railroad.	b. TSP project staff.
	c. Develop a plan to visually connect the city, with design components (boulevards, visual connections, gateways).	c. City staff working with design professionals.
3. Maintain and enhance the City's excellent access position in the region as a transportation hub for water, railroad, freeway, highway, and transit, including light rail.	a. Implement the City's TSP.	a. TSP project staff.
	b. Pursue funding for successful construction of light rail.	b. City Council.
4. Support and integrate the information superhighway.		

TOPIC: GREENSPACE NETWORK

Goal	Actions	Roles and Responsibilities
1. Establish: <ul style="list-style-type: none"> • landscaped walkways; • usable water features; • increased fish /wildlife habitat; and • more neighborhood parks. 	a. Develop a park system master plan to include bike network, pedestrian network, and linkages to industrial areas and waterfront.	a. Parks and Recreation Commission takes the lead, with citizen groups, City staff, and a representative from North Clackamas Parks and Recreation District.
	b. Identify funding sources available for procurement.	b. Parks and Recreation Commission takes the lead, with citizen groups, City staff, and a representative from North Clackamas Parks and Recreation District.
	c. Identify sources for development.	c. Citizen committees working with City staff.
	d. Develop a plan to protect fisheries, wildlife, streams, and wetlands that incorporates resources from both public and private sectors.	d. Interested citizens and representatives from Parks and Recreation Commission and North Clackamas Parks and Recreation District.

TOPIC: RIVERFRONT

Goal	Actions	Roles and Responsibilities
<p>1. Achieve a variety of uses and a sense of civic identity for Milwaukie's riverfront area.</p>	<p>a. Complete a Riverfront Master Plan that examines a variety of uses including public spaces and commercial development; considers public and private sector opportunities; and provides safe connections for pedestrians to the downtown area.</p>	<p>a. Citizen advisory committee working with Planning Commission, City Council, and City staff.</p>

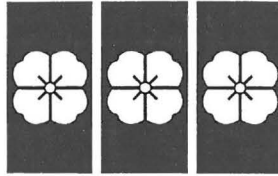
Milwaukie Vision Policy Committee Members

Dan Bartlett
Brent Collier
Maggie Dickerson
Merv Englund
Rick Farley
Don Graf
Paul Graham
Thom Kaffun
Rob Kappa
Bob Knudson
Joe Krumm
Stephen Loaiza
Craig Lomnicki
Richard McPike
Sister Betsy Mickel
Mike Miller
Karen O'Dowd
Jean Schreiber
Donna Tallman
Carolyn Tomei
Don Trotter
Marilyn Wall
Karen Williams

Production Staff

Maggie Collins, Community Development Director
Diana Myrvang, Public Involvement Coordinator
Marcia Hamley, Office Assistant
Jeanne Garst, Office Assistant
Milwaukie Community Development Department


C I T Y O F



MILWAUKIE

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

August 30, 1999

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

Action Requested

For your information.

Background

At the August 26th and 27th Innovations Group meeting, the City Manager of Ashland, Mike Freeman distributed the attached report on Strategic Planning. This looks a lot like where we are moving with the Council Vision, Mission, and Goals.

I thought that several of his examples would help stimulate your thinking before our September 18, 1999 session with Mike Swanson.

cc: dept. heads
File -- cm2247/hd

MILWAUKIE CITY HALL
10722 SE MAIN STREET
MILWAUKIE, OREGON 97222
PHONE: (503) 786-7555 • FAX: (503) 652-4433

City Council Communication

November 3, 1998

Submitted by: Mike Freeman

TITLE:

Discussion of strategic planning process for 1998 – 1999.

SYNOPSIS:

The City Council adopted a goal in 1998 to begin a comprehensive strategic planning process for the City. Staff believes this is an important goal and are very interested in working with the City Council in this effort. In fact, the staff have identified the development of a Citywide strategic plan as an important step in maintaining a progressive, innovative, successful organization that meets the needs of the community (see attached staff workshop document).

In one form or another, strategic planning has been used by organizations public and private for many years. In doing research regarding strategic planning, it is apparent that there are probably as many different approaches to strategic planning as there are organizations who are using it. Given the City's relative inexperience in organization-wide strategic planning, the staff are recommending that the City incrementally implement a strategic planning process.

The reason the staff recommend an incremental approach, is that many local governments and private organizations initiate strategic planning processes that cannot be sustained or actually implemented because they have tried to do too much and the organizational structure cannot effectively assimilate the new way of thinking and doing business. Studies have shown that strategic planning processes that are successful, begin slowly and build toward the ultimate ideal.

BACKGROUND INFORMATION:

For many years, the City Council has conducted a goal setting process that identifies short-term goals for the City which are subsequently tied to the budgeting process. The goal setting process has been a valuable tool for the City as it has created measurable, definable and implementable goals that have driven the finances and organization in a clearly defined way.

However, goal setting and strategic planning are different. "Strategic planning" is a movement toward considering the long-term direction of the organization, community, etc. Strategic planning is a process that seeks to stimulate progress around values and vision to enable a more positive future. Good strategic plans are much like a pyramid, values form the base, followed by vision, goals and objectives. Successful strategic planning

processes include integration of the values and vision into the organization, an implementation plan and a annual refinement/improvement process to ensure that with the passage of time, the strategic plan is constantly updated and refined to stay current.

Organizations that effectively use strategic planning processes do so in an evolutionary manner. After an organization becomes accustomed to a fairly focused and narrow planning process, it is common to expand the process and begin thinking more broadly about the future, incorporating more "inputs" and creating more process and dialogue around the values and vision.

WHAT IS STRATEGIC PLANNING?

Strategic planning is a systematic way to manage change and create the best possible future. It is a creative process for identifying and accomplishing the most important actions in view of strengths, weaknesses, threats and opportunities. Generally, strategic planning has some of the following elements:

- It is forward looking.
- It is a focused process that concentrates on selected issues.
- It explicitly considers resource availability.
- It assesses strengths and weaknesses.
- It considers major events and changes occurring outside the organizations or jurisdiction.
- It is action-oriented with a strong emphasis on practical results.

Some basic steps may include:

1. Identification of the key factors and trends important for the future.
2. Selection of a few key issues to focus on in the plan.
3. Establish the direction for the strategy development by setting some general goals.
4. Look in depth at outside forces affecting achievement of the goals.
5. Based on the external and internal analysis, decide what can be achieved with respect to each issue and how it will be achieved.
6. Be specific about timetables, resources and responsibilities for carrying out the strategic action.
7. Ensure that strategies are carried out by monitoring, updating and reporting back the results.

WHAT IS A VISION?

There is not a more powerful engine driving an organization toward excellence and long-term success than an attractive, worthwhile and achievable vision of the future, widely shared. Quite simply, a vision is a realistic, credible, attractive future for the organization. It is the articulation of a destination toward which your organization should aim, a future that in important ways is better, more successful, or more desirable for your organization than is the present. The Constitution, for example is a written description of the founding fathers vision for the United States, setting a clear direction and defining values but not specifying how to get there. (Nanus, Visionary Leadership)

WHAT ARE VALUES?

Values define who we are, what we stand for, they are guiding principles and should stand the test of time. Values are "core" attributes that should be maintained over a long period of time.

LOCAL GOVERNMENT VISION/VALUES/MISSION STATEMENTS

VANCOUVER, WASHINGTON

COMMUNITY VISION

Vancouver envisions itself as a robust, cohesive community where all share in the responsibility of participating in civic life. A strong sense of identity is enhanced by the City's location on the Columbia River as the gateway to the state of Washington with its surrounding natural beauty. Vancouver has a vibrant downtown where people throughout the community gather to live, work, shop and enjoy many entertainment options. The City has a strong commitment to providing lifelong educational, recreational, cultural and other opportunities for its diverse population. Special emphasis is given to our community's youth. Safe neighborhoods with distinct qualities and proud identities are linked by parks and greenspaces as well as a transportation system that provides mobility options for all. A vital economic base creates plentiful family-wage jobs. Vancouver citizens are proud of the community they continue to share in building.

CORE VALUES

- Active and Livable Neighborhoods
- Economic Vitality and Diversity
- Responsive Government
- Quality Urban Services
- Natural Resources
- Cultural Diversity
- Heritage

ORGANIZATIONAL MISSION

To foster leadership, stewardship, responsive services and community partnerships.

ORGANIZATIONAL VISION STATEMENT

Vancouver is recognized for its civic excellence. Employees are proud to work in an open, supportive environment where we are empowered to create solutions and outcomes which exceed the expectations of the citizens we serve.

THORNTON, COLORADO

VISION STATEMENT

Our vision for Thornton in 2020 is ...

- a well planned, environmentally sensitive community comprised of diverse, identifiable neighborhoods which provide a safe, secure environment and access to services and amenities
- a community with a transportation system that gets you safely and efficiently around neighborhoods, work, schools, shopping, and other places *desired locations*
- a community that provides an integrated system of open space and recreational and cultural opportunities
- a continuously developing partnership of citizens, the business community, and City government that creates strong community leadership, active involvement, and an exchange of ideas to enhance the community's image, services and activities
- a government responsive to the needs of its citizens, committed to citizen and business involvement
- a community with a stable but varied economic base that provides dependable revenue sources, as well as offering residents ample employment opportunities
- a community that capitalizes on its strategic location, preserves its business vitality by adapting to a changing environment, working both with existing and new businesses

MISSION STATEMENT

Our Mission as a community is to ensure the availability of a broad range of services using all available public and private resources. Thornton will provide for a high quality of life by being responsive to the physical and human requirements of its citizens through innovative leadership and planning.

PHILOSOPHY STATEMENT

We are committed to quality leadership for the benefit of our citizens. We will:

- be professional in our attitude and proficient in our tasks,
- encourage a spirit of cooperation in dealing with the mutual problems and challenges facing our community,
- expect and demonstrate courtesy and respect in all interactions,
- commit to excellence in all services provided to our community,
- be accountable and effective stewards of the public trust and

- resources,
- display innovation and initiative in responding to the current and future needs of the community,
 - participate in and promote the exchange of ideas through open communication,
 - recognize that all individuals living and working in the community are essential resources for achieving the City's mission and goals.

CORPUS CHRISTI, TEXAS

MISSION STATEMENT

Our Mission is to provide the citizens of Corpus Christi, collectively, excellent quality products and highly responsive services in the areas of:

Infrastructure Needs - including water, wastewater, gas distribution, solid waste, aviation, and streets.

Protective Services - including law enforcement, fire, and health.

Quality of Life Enrichment - including housing and community development, libraries, cultural and leisure activities.

Economic Development - including support of existing economic bases and encouragement of growth.

Development Services - including engineering, planning, and inspection.

In order to ensure that we are successful in fulfilling this Mission, we will conduct our affairs in a way that:

- We maintain the highest level of ethics and professional integrity.
- We demonstrate pride and commitment in providing public services.
- We instill in our organization a culture that integrates the principles of quality in all areas and activities.
- We develop a relationship of trust with our citizens by providing products and services that satisfy their needs and expectations.
- Our operations will maintain the safety and health of our people and the community. Safety remains our foremost objective.
- We are viewed as good citizens in our community and are in full compliance with applicable environmental standards.
- We enable all employees to reach their highest potential in an atmosphere of mutual trust and teamwork through effective leadership.
- We anticipate and plan for our future needs through the process of continuous assessment and evaluation.

- We provide fair and efficient services to our citizens through efficient and effective use of the assets and resources entrusted to us.

PRIVATE SECTOR VALUES AND VISION STATEMENTS

3M (founded in 1902)

- Innovation; “Thou shalt not kill a new product idea”
- Absolute integrity
- Respect for individual initiative and personal growth
- Tolerance for honest mistakes
- Product quality and reliability
- Our real business is solving problems

Mechanisms to Stimulate Progress Around the Vision at 3M

“15 percent rule” - a long-standing tradition that encourages technical people to spend up to 15 percent of their time on projects of their own choosing and initiative.	To stimulate unplanned experimentation and variation that might turn into successful, albeit unexpected, innovations.
“25 percent rule” - each division is expected to generate 25 percent of annual sales from new products and services.	To stimulate continuous new product development.
“Golden Step” award, granted to those responsible for successful new business originated within 3M.	To stimulate internal entrepreneurship and risk taking.
“Genesis Grants” -- internal venture capital fund that distributes parcels of up to \$50,000 for researchers to develop prototypes and market tests.	To support internal entrepreneurship and testing of new ideas.
Technology sharing awards, granted to those who develop a new technology.	To stimulate internal dissemination of technology and ideas.
“Carlton Society” -- a technical honor society.	To stimulate the development of new technologies and innovation.
“Own business” opportunities -- 3Mers who successfully champion a new product then get the opportunity to run it as his or her own project, department, or division.	To stimulate internal entrepreneurship.
“Dual ladder” career track that allows technical and professional people to move up without sacrificing their research or professional interests.	To stimulate innovation by allowing top professional and technical people to “advance”.
New product forums, where all divisions share their latest products.	To stimulate new ideas across divisions.
Technical forums, where 3M people present technical papers and exchange new ideas.	To stimulate cross-fertilization of ideas, technology, and innovation.
“Problem-solving missions” -- small hit teams sent out to customer sites in response to specific problems.	To stimulate innovation via customer problems.
“High Impact Programs” -- each division selects one to three priority products to get to market within a short, specified time frame.	To speed product development and market introduction cycles.
Small, autonomous divisions and units -- 42 products divisions in 1990, each with average annual sales of about \$200 million; plants -- spread across 40 states, mostly in small towns.	To stimulate individual initiative by promoting a “small company within a big company” feel.

BOEING (founded in 1915)

- Being on the leading edge of aeronautics; being pioneers
- Tackling huge challenges and risks
- Product safety and quality
- Integrity and ethical business
- To “eat, breathe, and sleep the world of aeronautics”

GENERAL ELECTRIC (founded in 1892)

- Improving the quality of life through technology and innovation
- Interdependent balance between responsibility to customers, employees, society, and shareholders (no clear hierarchy)
- Individual responsibility and opportunity
- Honesty and integrity

HEWLETT-PACKARD (founded in 1937)

- Technical contribution to fields in which we participate (“We exist as a corporation to make a contribution”)
- Respect and opportunity for HP people, including the opportunity to share in the success of the enterprise
- Contribution and responsibility to the communities in which we operate
- Affordable quality for HP customers
- Profit and growth as a means to make all of the other values and objectives possible

IBM (founded in 1911)

- Give full consideration to the individual employee
- Spend a lot of time making customers happy
- Go the last mile to do things right; seek superiority in all we undertake

“If an organization is to meet the challenges of a changing world, it must be prepared to change everything about itself except its basic beliefs as it moves through corporate life... The only sacred cow in an organization should be its basic philosophy of doing business.”

JOHNSON & JOHNSON (founded in 1886)

- The company exists “to alleviate pain and disease”
- “We have a hierarchy of responsibilities: customers first, employees second, society at large third; and shareholders fourth”

NORDSTROM (founded in 1901)

- Service to the customer above all else
- Hard work and productivity
- Continuous improvement, never being satisfied
- Excellence in reputation, being part of something special

Welcome to Nordstrom

We're glad to have you with our Company. Our number one goal is to provide outstanding customer service. Set both your personal and professional goals high. We have great confidence in your ability to achieve them.

Nordstrom Rules"

Rule #1: Use your good judgment in all situations.
There will be no additional rules.

PROCTER & GAMBLE (founded in 1837)

- Product excellence
- Continuous self-improvement
- Honesty and fairness
- Respect and concern for the individual

SONY (founded in 1945)

- To experience the sheer joy that comes from the advancement, application, and innovation of technology that benefits the general public
- To elevate the Japanese culture and national status
- Being a pioneer -- not following others, but doing the impossible
- Respecting and encouraging each individual's ability and creativity

The Sony Pioneer Spirit: Sony is a pioneer and never intends to follow others. Through progress, Sony wants to serve the whole world. It shall be always a seeker of the unknown... Sony has a principle of respecting and encouraging one's ability... and always tries to bring out the best in a person. This is the vital force of Sony.

WALT DISNEY (founded in 1923)

- No cynicism allowed
- Fanatical attention to consistency and detail
- Continuous progress via creativity, dreams, and imagination
- Fanatical control and preservation of Disney's "magic" image
- "To bring happiness to millions" and to celebrate, nurture, and promulgate "wholesome American values."

Disney Language:

Employees are cast members
Customers are guests
A crowd is an audience
A work shift is a performance
A job is a part
A job description is a script
A uniform is a costume
The personnel department is casting
Being on duty is on-stage
Being off-duty is backstage

THOUGHTS ON STRATEGIC PLANNING & VISIONING

"In short, we did not find any specific ideological content essential to being a visionary company. Our research indicates that the authenticity of the ideology and the extent to which a company attains consistent alignment with the ideology counts more than the content of the ideology. The very act of stating a core ideology (values, vision) influences behavior toward consistency with that ideology. The visionary companies don't merely declare an ideology; they also take steps to make the ideology pervasive throughout the organization and transcend any individual leader. The visionary companies more thoroughly indoctrinate employees into a core ideology than the comparison companies, creating cultures so strong they are almost cult-like around the ideology. The visionary companies more carefully nurture and select senior management based on fit with core ideology than the comparison companies. The visionary companies attain more consistent alignment with a core ideology -- in such aspects as goals, strategies, tactics and organizational design -- than the comparison companies." (Built to Last)

RECOMMENDED STEPS

Beginning in January, the Council and staff should work through the process of beginning a different kind of strategic planning program, one based on community vision. It is important to commit enough time to this effort so that steps 1-3 can be completed by April 1998 so the results can be incorporated into the 1999 – 2000 Budget process.

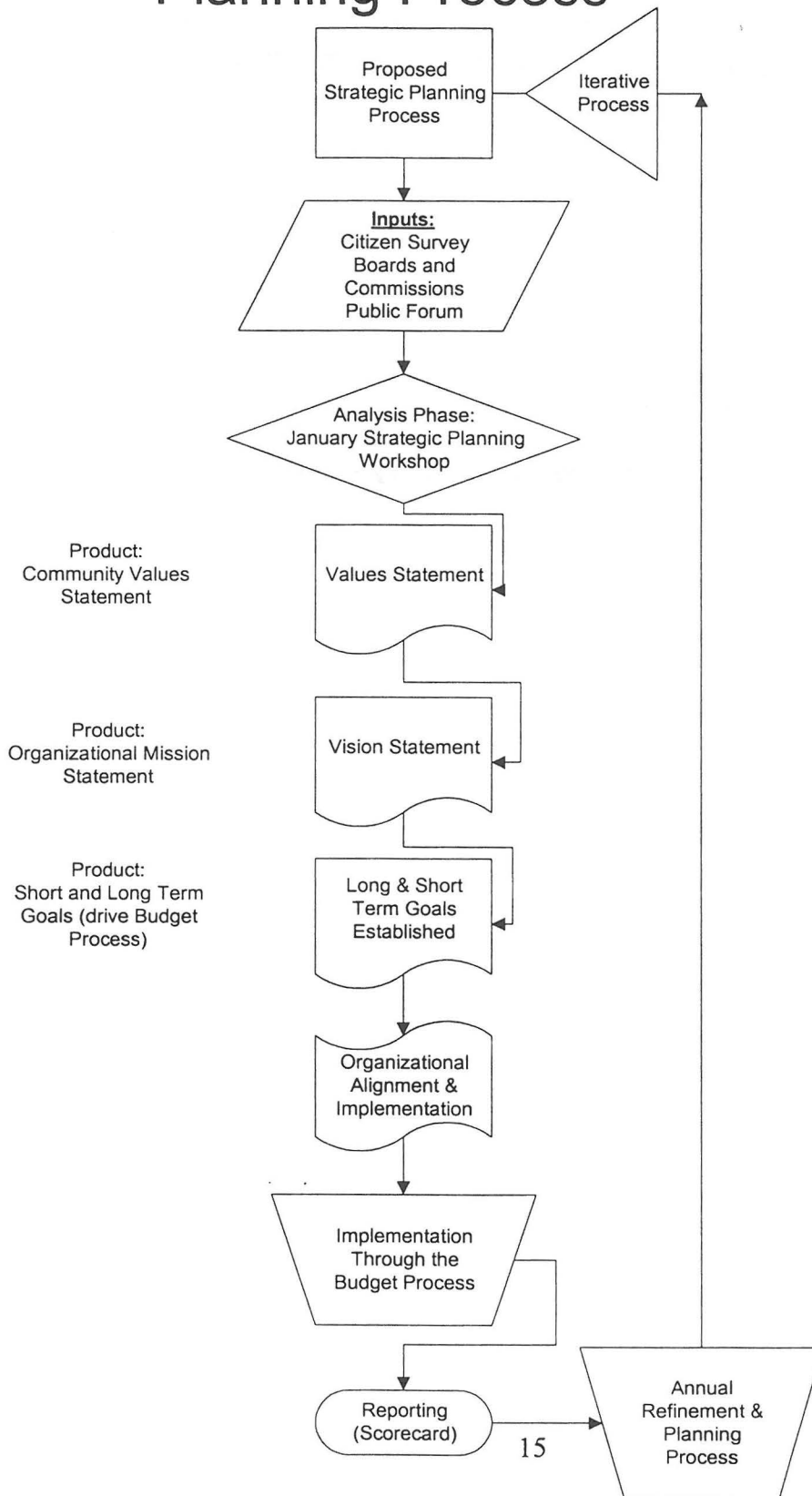
The steps:

1. Define Community Values (by January)
 - Use "Inputs"
 - Staff Workshop Results
 - City Council & Staff Viewpoints
 - Boards and Commissions
 - Public Forums
 - Values define who we are, what we stand for, they are guiding principles and should stand the test of time
 - Values should be the "core" essentials of who we are (generally a short list!)
2. Define Organizational Vision (January Council/Staff workshop)
 - Where are we headed?
 - Where do we want to be?
 - What is our purpose?
 - What is the organization's fundamental reason for being?

3. Short and Long Term Goal Setting (January Council/Staff workshop)
 - Determine the short-term goals that stimulate progress around the Values and Vision
 - Determine the long-term goals that stimulate progress around the Values and Vision
 - Determine the progress the organization needs to make to achieve the Values and Vision (alignment)
4. Implementation
 - Budget process for 1999 – 2000
 - Organizational initiatives
5. Reporting Progress
 - “Balanced Scorecard”
6. Annual Refinement and Updating

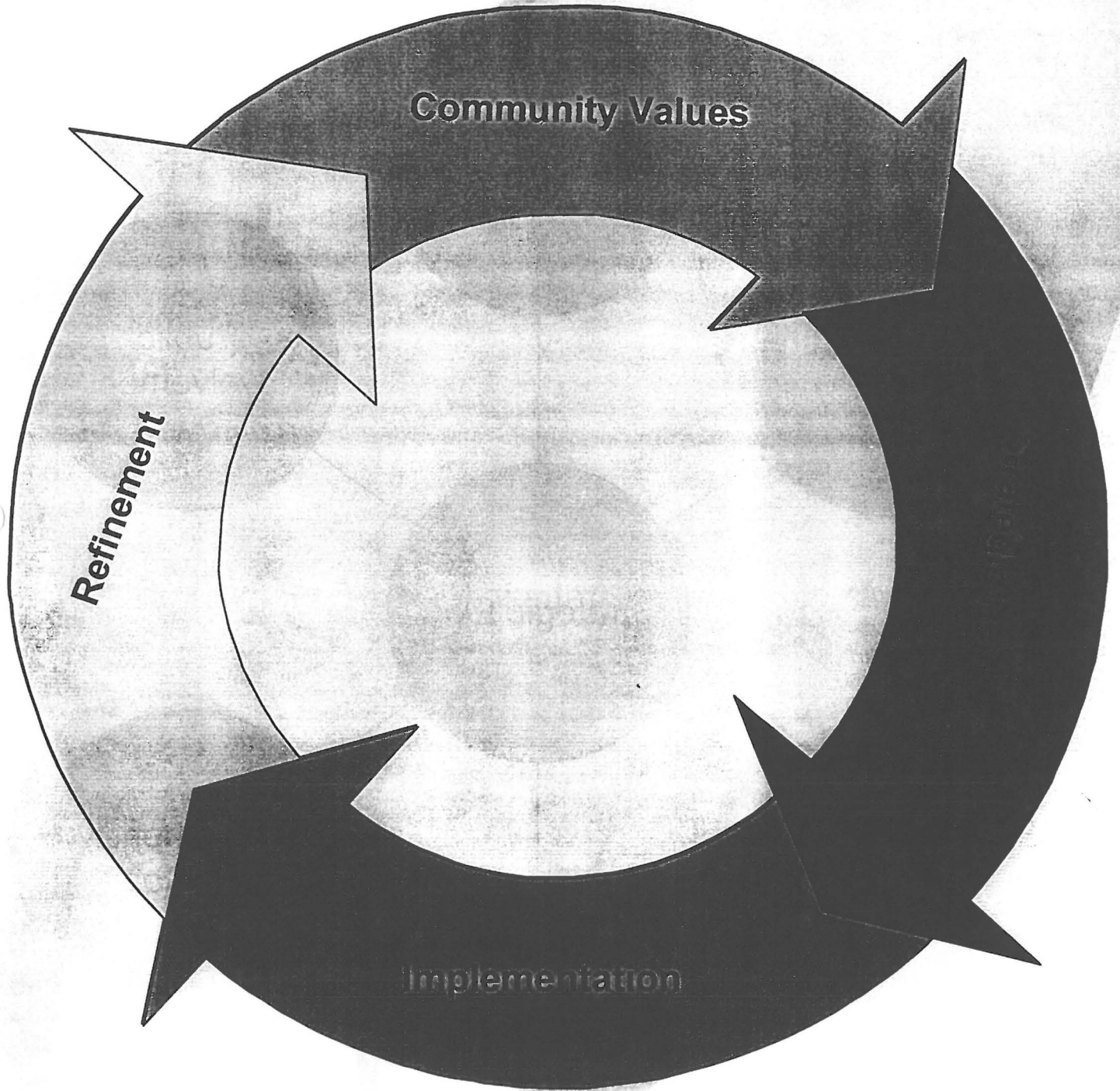
From: “Built to Last, Successful Habits of Visionary Companies”, James C. Collins and Jerry I Porras

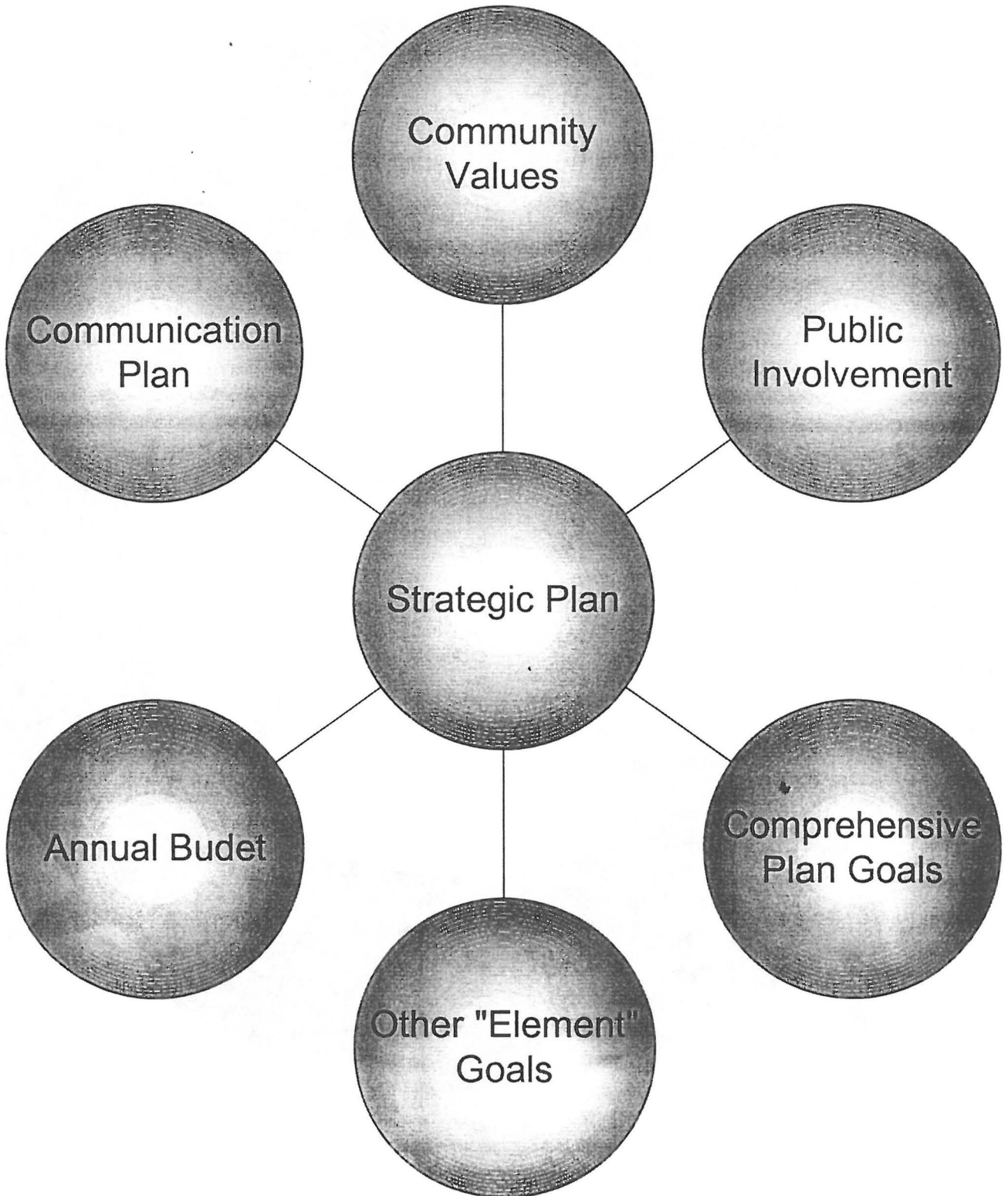
Proposed 1999 Strategic Planning Process



8/16/99

City of Ashland, Strategic Plan Interrelations





1999 – 2000 Ashland

Strategic Plan

April 20, 1999 City Council Meeting

COMMUNITY VALUES STATEMENT

Ashland respects its diverse people, natural environment, and rich heritage and culture. It values citizen involvement, initiative, innovation and a strong sense of community.

CITIZEN PARTICIPATION AND INVOLVEMENT

The City recognizes the value of citizen involvement and the wealth of information and resources that the citizens of Ashland possess. The City is committed to a high level of communication with the public.

1999 – 2000 Goals

1. Increase the use of technology to encourage citizen participation.
2. Staff should develop and present to City Council for approval, a plan that outlines how to make the best use of citizen involvement by outlining the essential steps the City will follow as it seeks public input on City programs, policies and projects. To the extent it applies, the Staff will use the Citizens Communication Committee report to establish these essential standards.
3. Continue with the Citizens Police Academy.

ENVIRONMENTAL RESOURCES

Ashland seeks to retain its natural beauty as it continues to grow and further development. The City seeks to strike a balance between urbanization and protecting air, water and noise pollution as well as protection from soil erosion and loss of small creeks and wetlands.

1999 – 2000 Goal

1. Finalize the riparian ordinance.

HOUSING

The City has a responsibility to ensure that proper amounts of land are set aside to accommodate the various housing needs in the City, and that its land development ordinances are broad enough to allow for variation in housing type and density.

1999 – 2000 Goals

1. Develop and implement a community land trust program to ensure that affordable housing needs are met.

ECONOMIC STRATEGY

The City seeks to provide opportunities for a variety of economic activities in the City, while continuing to reaffirm the economic goals of Ashland citizens. Economic development in Ashland should serve the purpose of maintaining and improving the local quality of life.

1999 – 2000 Goals

1. Develop printed materials that clearly outline the goals of the City of Ashland which impact business relocation to/within the community. The goals of the City are outlined in the comprehensive plan.
2. Study the Portland living wage ordinance and present the findings to the City Council.

PUBLIC SERVICES

The City will provide a full range of public services that meet the needs of existing and future citizens.

1999 – 2000 Goals

1. By June 1999 be Y2K ready regarding mission critical City services. Additionally, plan an important role in educating the community regarding Y2K issues.
2. Prepare an implementation plan for City Council for the TAP water pipeline intertie project.
3. Prepare and present to City Council for adoption standards for the construction of public buildings.
4. Improve the sound and video quality of the City Council chambers.
5. Install high-quality portable restrooms in the Calle area of Ashland Creek. Work with Parks to develop a long-term solution to restroom availability in the Plaza area.
6. Continue space-planning initiatives underway: Library, Fire Stations, and Hillah Temple.

TRANSPORTATION & TRANSIT

To retain Ashland's small-town character while it grows, the City must proactively plan for a transportation system that is integrated into the community and enhances the livability, character and natural environment.

Transit

1999 – 2000 Goal

1. Analyze service demand for transit and other alternative modes of transportation in the community. The analysis should solicit information from the community on transit needs relating to: work, school, recreation, shopping, special needs populations, worship and medical facilities. The analysis should address what barriers exist that keep people from using mass transit and should identify what measures the City could take to further encourage the use of transit services.

Parking

1999 – 2000 Goal

1. Update the downtown plan parking plan. The update should include analysis on overall street design in the downtown (i.e. traffic flow), capacity and efficiency of the existing streets for parking, evaluating a pay- for-parking concept that outlines the impact on the downtown and adjacent neighborhoods and addresses citizen parking versus tourist parking, and evaluates the necessity of a parking structure.

Transportation

1999 – 2000 Goal

1. Develop an agreed upon, financially constrained 10-year plan for transportation improvements. The plan should address the financial ability of the City to pay for these projects.

Regional Transportation

1999 – 2000 Goals

1. Study the feasibility of jurisdictional exchange for Highway 99 with the State and present to the City Council.
2. Study the feasibility of jurisdictional exchange for County roadways in the City with Jackson County and present to the City Council.

ENERGY, AIR AND WATER CONSERVATION

Ashland seeks to be a regional leader in the areas of energy, air and water conservation. The City seeks to continue this leadership role in further

development of goals, policies and programs that encourage citizens to conserve natural resources.

1999 – 2000 Goals

7. Develop a plan to meet the water conservation goals adopted as part of the 1998 Water Study.

PARKS, OPEN SPACE AND AESTHETICS

Ashland's character is intimately linked to its aesthetic resources, including its vistas, trees, parks and open space lands. The City seeks to develop a program that will preserve important open space and parkland, while accommodating continuing urbanization.

1999 – 2000 Goals

1. Encourage the Parks Commission to develop a long-term financial plan.

HISTORICAL SITES AND STRUCTURES

Ashland seeks to preserve its rich history through the preservation of its historical buildings and places.

1999 – 2000 Goals

1. Encourage the displaying of historic photos in community buildings.
2. Ensure that all City owned historic buildings are properly maintained.

REGIONAL STRATEGIES

Ashland seeks to develop unique partnerships with governments, non-profits and the private sector to ensure that regional issues of importance to the City and the region are addressed in a collaborative and effective way.

1999 – 2000 Goals

1. Explore intergovernmental delivery of services.
2. Acknowledge and discuss the relationship between the Rogue Valley Civic League's Blue Print document with the City's strategic plan.

3. Evaluate the feasibility of sub-regional planning with nearby local governments and service providers.

FINANCIAL MANAGEMENT

The City will be an accountable and effective steward of the public trust and public resources. The City will provide equitable and efficient services to the public through the efficient use of assets and resources.

1999 – 2000 Goals

1. The City will develop, implement and periodically review its financial management strategy that addresses existing and potential revenue sources to ensure that City revenues are balanced from property taxes, user fees, grants, and other revenues.
2. Provide comprehensive information to the community on City budget and financial issues to promote more thorough understanding of where the City receives its funding and how it is spent.
3. Ensure that the City's budget is consistent with the strategic plan.
4. Establish a funding policy for the undergrounding of electric poles and lines.

SOCIAL & HUMAN SERVICES

To ensure that all people in Ashland live in a safe, strong, and caring community, the City seeks to enhance the quality of life and promote self-reliance, growth and development of people. To these ends, the City will strive to provide resources and services to meet basic human needs.

1999 – 2000 Goal

1. Define the City's role and philosophy in the delivery of social and human services programs. This will be done by the creation of an ad-hoc committee (including Budget Committee members) coordinated by Councilmember Hauck.
2. Based on the determination of the City's role in social and human service delivery, develop a funding plan for community social services needs.

ORGANIZATIONAL EFFECTIVENESS

Our mission is to:

- Provide high quality, cost effective services
- Be responsive to community needs
- Be pro-active and innovative in meeting the needs of the community
- Engage employees in a collaborative partnership with management
- Promote community partnerships

1999 – 2000 Goals

1. Develop a schedule that outlines a timely review for all the elements of the comprehensive plan.
2. The City Council shall regularly review and amend as necessary the provisions of its strategic plan. The City shall plan for public participation as part of the review process.
3. Continue the internal organizational improvements initiated in 1998 through the Employee Advisory Committee.
4. Complete the Compensation/Classification plan for management positions.
5. Continue implementation of the City's strategic plan.
6. Integrate department work plans with the City's strategic plan.

City Focus

Background

The City Council began a process of developing a strategic plan for the City last year. Recently, the Council finalized the plan and adopted a series of goals and objectives to implement over the next 12 months. The strategic plan identifies the priorities of the City Council for the coming year, and will guide staff's work. It is important for all employees to understand the strategic plan and how it impacts the work you do for the public. Following is a summary of the significant strategic plan projects and priorities the City will pursue in the next six months. Copies of the entire strategic plan are available on the City's website www.ashland.or.us or by calling administration at 488-6002.

Citizen Involvement

The City relies heavily on community participation in programs and projects to ensure that decisions made by the Council and staff have had the benefit of input and involvement by the public. As with anything, there are always opportunities to improve. In the coming months, a committee will analyze past public processes to determine what steps the City can take to make public involvement in City projects more satisfying for citizens and ways to get more citizen participation in City projects. Administrative Services is coordinating this project.

Land Trust

A concern that came out in the 1998 citizen survey is the cost of housing in Ashland. The City's Housing Commission and the Community Development Department are studying and developing a program to present to the City Council to address this issue. The program is based on successful programs from other communities and is based on the purchase of land by the City to include in the trust for affordable housing programs.

Economic Strategy

The Comprehensive Plan includes a chapter on the economic strategy for the City and goals and objectives. Over the next year, the City will be updating the City's economic development strategy and developing new goals and objectives to pursue in the coming years.

Transportation

For many years, the City has sought to promote alternative modes of transportation through land use, incentives and direct contribution to providing mass transit in the community. This year, the City will attempt to gather and analyze information from the community to ensure that its transportation and transit strategy continue to promote alternative forms of transportation and to ensure that the City's limited

transportation resources are directed to those projects with the most public benefit. Administrative Services will be coordinating this project.

Downtown Plan

The City's existing Downtown Plan provides direction on capital improvement projects, land use, economic development strategy and parking in the downtown core. The existing downtown plan has served the City well over the past 10 years but is in need of updating. The Community Development Department will manage this update.

99/66 Exchange?

One of the recommendations included in the strategic plan is to pursue jurisdictional exchange with the Oregon Department of Transportation (ODOT) for Hwys. 99 and 66. Public Works staff will work with ODOT to determine if this exchange makes financial and operational sense.

Regional Strategies

Ashland interacts and interrelates with many other governments to perform the many responsibilities we have. The City Council has requested that staff look for additional ways to cooperate and interact more effectively with the governments and organizations that provide services within and outside of the community. Over the past year, staff has met with their peers at SOU and ASD to define and determine programs, projects and priorities of mutual interest. This coming year, Council and staff will seek to do the same with other nearby governments. Administration will coordinate this project.

Space Needs

The City has been working on meeting its space needs for the past several years. In the coming year, three significant projects will continue. The Hillah Temple will be re-designed and retrofitted to accommodate existing downtown operations. The Council is also committed to placing a bond issue on the November ballot for the construction of a new fire station and for the re-construction of the Ashland Public Library. It is expected that the Council will direct the staff to combine these projects into one bond issue for the public to vote upon. Administration will coordinate these projects.

Involvement

Beginning this past year, employees were asked to participate in developing a plan to address priority employee issues identified in the 1998 employee survey. A group of employees from all departments met over several months and reviewed the survey responses. The group decided to address four areas of concern: developing a computer loan program, emphasizing employee training, developing an evaluation system and promoting employee recognition. The group will continue their work to develop additional solutions to employee concerns. Administration will coordinate this project.

City Finances

Over the next year, the staff will review the City's long-range financial management strategies and will make any recommended changes to the City Council. The staff will develop long-range financial plans for each of the City's funds. Finance and Administration will coordinate this project.

Your input is needed...

Proposed Focus Areas

Technology: Ashland is a leader in the application of technology to, reduce the cost of providing service, improve service delivery, or make routine business processes more productive and efficient.

Citizen Satisfaction: Ashland is an organization that makes citizens the focus of our attention.

Information & Communications: Ashland provides timely, relevant and accurate information to the community and employees on our priorities, programs and projects.

Employee Involvement: Ashland involves employees in organizational decision making and the setting of priorities.

Public Participation: Ashland is committed to providing access and information to the community so they may participate in the establishment of community priorities, programs and projects.

Innovation & Learning: Ashland is committed to innovation in service delivery, organizational structure and individual and team learning.

Background

The City of Ashland is a tremendously successful organization. Look at some of its accomplishments: new ambulance service, the Ashland Fiber Network, spinning off the hospital, implementation of community policing, water plant automation, new wastewater plant, purchase of Ski Ashland, and many others. However, what has made us successful in the past is not necessarily the same recipe for future success. Our environment is changing and we must change with it.

Nearly a year ago, a discussion was initiated among the department heads about what has made the City a successful organization and one that makes us proud to work for. What came from this discussion was the belief that there are many things this City is doing well – and there are some areas that need to be addressed to better meet the needs of the public and employees.

To continue to meet the expectations of the public and our employees and to ensure the future success of this organization, six focus areas have been identified for the City to pursue in the coming years.

You are being asked to consider these six areas to determine if you believe these are the most important areas for us to focus on and to validate, subtract or add to this list. It is important that you have an opportunity to provide input into the identification of these important organizational priorities. After employees have provided input and determined the top priorities to address, these focus areas will be used to develop a more specific plan that will move the City forward toward these ideals.

Please return your comments to Administration by the end of August.

Comments/What is Missing from the List? Use the back of this document for additional comments.

Employee Response Form

Please place a check in the appropriate box indicating if you think the proposed focus area should be pursued by the organization.

Technology

- Yes
- No

Information & Comm.

- Yes
- No

Public Participation

- Yes
- No

Citizen Satisfaction

- Yes
- No

Employee Involvement

- Yes
- No

Innovation & Learning

- Yes
- No