



Lake Oswego Neighborhood Planning Kit

September 2014





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The Neighborhood Planning Program

The City of Lake Oswego recognizes that different areas of the City have their own identity and character. The neighborhood planning program was developed to provide an opportunity for neighborhoods to address a broad range of issues so that as change occurs, livability will be enhanced. Since the Neighborhood Planning program was approved by City Council in 1993, many neighborhood plans have been approved by the City Council.

There are over twenty recognized neighborhood associations in the city. While there are similarities between the neighborhoods, there are also differences. Neighborhood plans are a vehicle for recognizing the individuality of each neighborhood while also acknowledging that each neighborhood is one small part of Lake Oswego, Clackamas County, the Metro region, and the planet. Neighborhoods are impacted by change and decisions at these levels just as neighborhood decisions have an impact on the world beyond their boundaries.

What is a Neighborhood Plan?

A neighborhood plan is a document that describes a detailed vision for the future of a neighborhood and outlines a course of action to implement that vision over time. Neighborhood plans are a way to anticipate change and proactively develop plans to accommodate changing demographics, identify opportunities to accommodate different types of housing choices for different types of families, maintain or improve neighborhood character, enhance natural resources, build community, and provide high quality of life for all people. Creating a Neighborhood plan provides the opportunity for neighbors to look into the future and describe what the neighborhood should look like in 20 years. How should it change? How should it stay the same? How is the region changing? How can our neighborhood play a positive role in making our city a fantastic place to live, work and play?

Neighborhood plans are created by the people who live, work and play in the neighborhood, together with assistance from City staff. Approval of a neighborhood plan requires careful review and acceptance by the neighbors and also by the Planning Commission and the City Council. In that way, it is a commitment by all those involved to work toward the vision it embodies.

Neighborhood Plans Include:

Neighborhood Profile

- Context within the city
- History
- Demographics
- Character/Unique Features

20 Year Vision statement describing the neighborhood's desired future.

Inventory and Analysis of existing conditions in the neighborhood, including its strengths and weakness.

Neighborhood Objectives: statements pertaining to the strengths and weaknesses and strategies to enhance the strengths and mitigate the weaknesses.

Neighborhood Comprehensive Plan Policies that express unique neighborhood needs that are different from the rest of the city.

Neighborhood Action Steps

- Community Development Code
- Capital Improvement Projects
- Other projects and programs

Neighborhood Action Chart

- Implementation partners
- Timeframe for accomplishment
- Estimated costs
- Possible funding sources

We do make a difference -- one way or the other. We are responsible for the impact of our lives. Whatever we do with whatever we have, we leave behind us a legacy for those who follow. - Stephen Covey, the author of "The 7 Habits of Highly Effective People"

What is the Purpose of Lake Oswego's Neighborhood Plans?

Neighborhood action plans are developed to serve the following purposes for the City and the neighborhood:

TAILOR CONCEPTS

Tailor the citywide concepts of the Comprehensive Plan to the unique fabric of Lake Oswego's neighborhoods.

ARTICULATE VISION

Articulate a neighborhood's shared 20-year vision for the future of their area, within the context of the City's Comprehensive Plan and Metro regional plans.

PROVIDE FRAMEWORK

Provide a framework for neighbors, elected officials, boards and commissions, and staff to guide their planning efforts and decisions, and track progress on achieving the neighborhood's vision.

DEVELOP STRATEGIES

Develop strategies to guide future neighborhood change while respecting the character and culture of the neighborhood and recognizing the role the neighborhood plays within the City and the region.

EVALUATE ASSETS

Evaluate the assets and deficiencies of the neighborhood and develop policies and action steps to address them.

IDENTIFY OBJECTIVES

Identify neighborhood policies, objectives, development standards, prioritized projects and programs that may be requested for inclusion in the Comprehensive Plan, Community Development Code, Capital Improvement Plan and the City's budget process, or identified for the neighborhood's own work program.

PROMOTE COLLABORATION

Promote collaboration between the City and the neighborhood in order to create and achieve mutual goals and a shared sense of responsibility.

In addition to the primary purposes listed above, a successful neighborhood planning process may result in increased citizen involvement, the development of leadership amongst neighbors, and an increase in knowledge about the neighborhood and about local decision-making processes and procedures.

Guiding Principles for Neighborhood Plan Development

Neighborhood plans should articulate a vision for future development. This vision should respect the past while addressing the needs of future generations, acknowledging that our world, country, region and local community will change over time. These plans are a tool to direct that change and accommodate the current and future needs of the neighborhood.

The following general principles should guide the neighborhood and City's approach to plan development:

- Involve affected agencies, City departments, board and commissions, interest groups and the business community in the planning process.
- Conduct an open process with meaningful public participation so that the plan will be endorsed and embraced by a broad spectrum of neighborhood interests, organizations and residents.
- Meet neighborhood, City, regional and state goals and expectations. Comply with and implement local, regional, and state plans and policies and acknowledge the role the neighborhood plays in the broader regional context.
- Make recommendations unique to specific neighborhood conditions. These recommendations should support and must not conflict with Lake Oswego's Comprehensive Plan. Recommendations specific to the neighborhood could be proposed for inclusion in the Comprehensive Plan and Community Development Code. If recommendations are made that would apply citywide, they will be included in the neighborhood action plan for the neighborhood to pursue through citywide channels.
- View ideas and actions through the lens of sustainability. The plan should support the long-term well-being of the people, organizations, economy and natural resources of the neighborhood and the community in order to meet present needs without compromising the ability to meet future needs.
- Recognize that the neighborhood has the primary responsibility for championing the ongoing plan implementation, with City assistance.

Areas Located in the County?

It is important to note that if your neighborhood is located primarily or partially in unincorporated Clackamas County, most of the Neighborhood Action Plan items pertaining to the Comprehensive Plan, Community Development Code and the Capital Improvement Plan (CIP) will only apply to properties located in the City. For instance, if there is a pathway in the plan that is located in the County that pathway would not be eligible for inclusion in the City's CIP. However, there may be projects identified that can apply to areas outside of the City such as implementing an Adopt-a-Path program in the neighborhood to encourage pathway clean-up.

A hundred years after we are gone and forgotten, those who never heard of us will be living with the results of our actions.

*- Oliver Wendell Holmes,
U.S. Supreme Court justice*

How Are Neighborhood Plans Incorporated into other City Plans, Policies and Codes?

The neighborhood action plan and its components will be used in the following ways: (See diagram on the following page.)

ADOPTED by the City

Adoption into the Neighborhood and Special District Plans Volume of the Lake Oswego Comprehensive Plan:

Neighborhood Profile and Vision Statement

This will provide a broad overview of the neighborhood today, and include a brief description of its context within the city, history, demographics, neighborhood character/unique neighborhood features, and vision statement for the neighborhood.

Neighborhood Objectives

These are broad statements pertaining to the strengths and weaknesses of the neighborhood and how to enhance the strengths and mitigate the weaknesses in the future. These objectives will be supported by proposed new policies, community development codes, capital improvements and programs.

Neighborhood Policies

These are policies that express unique neighborhood needs that are different from the rest of the City, and are not already included in the Comprehensive Plan.

Adoption into the Community Development Code

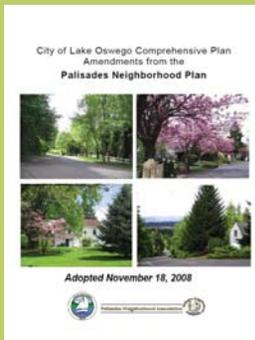
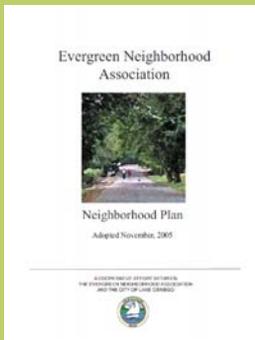
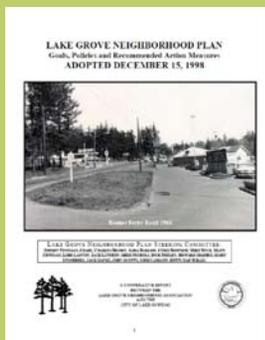
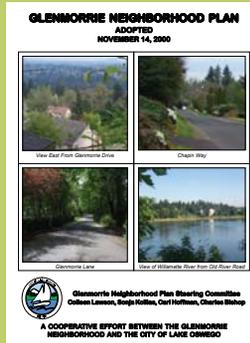
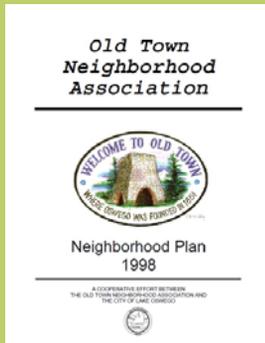
The neighborhood plan may propose amendments to the City Code to address the unique character of the neighborhood. These code provisions will be proposed for City adoption at the same time the plan components are presented for adoption into the Comprehensive Plan.

ACCEPTED by the City

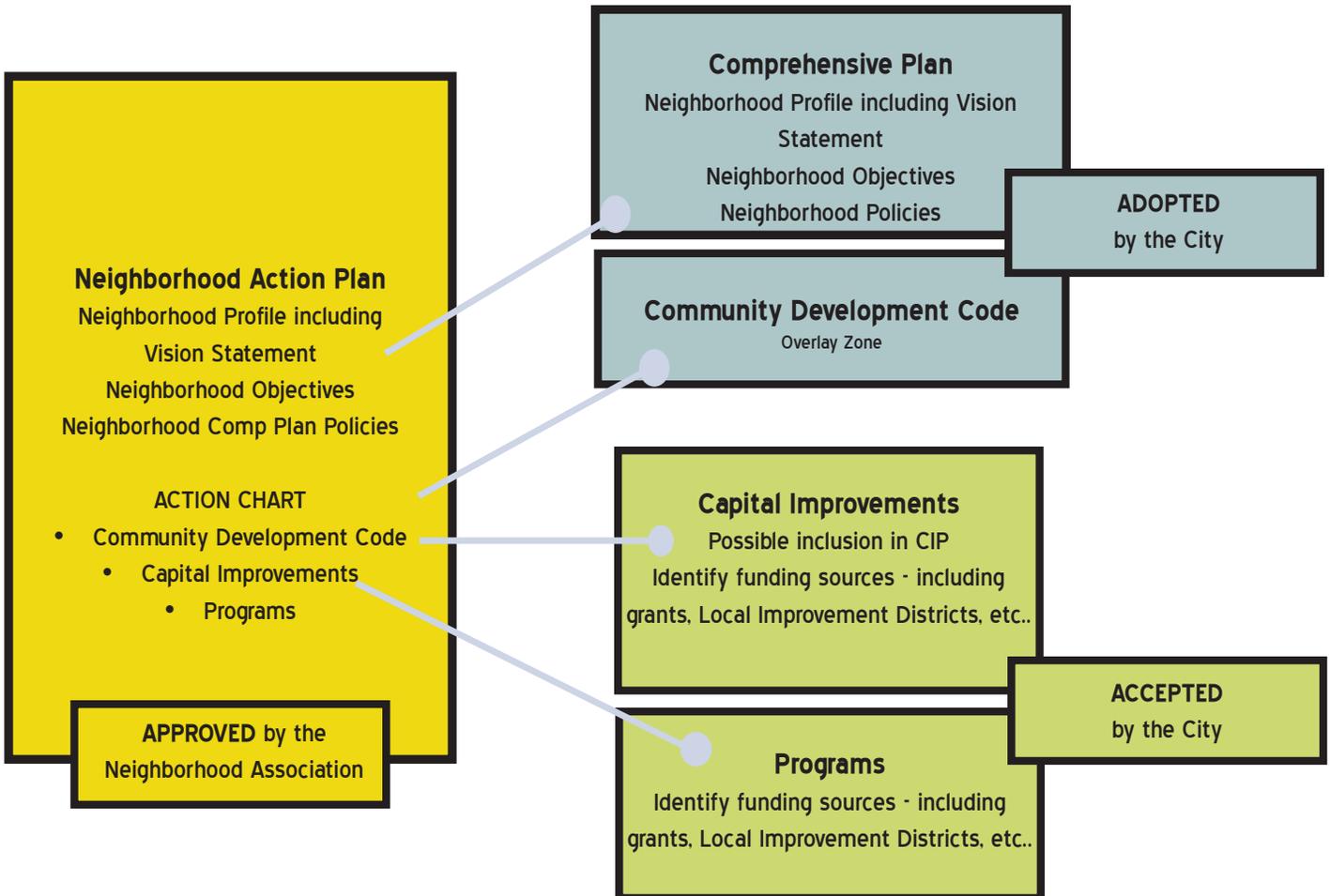
Proposed Capital Improvements and Programs.

As part of the neighborhood plan action steps, capital improvements and new programs may be proposed. Because the City needs to balance its resource allocation across many neighborhood-specific and citywide projects, neighborhood plan proposals will need to be considered as part of established processes and criteria for allocating City funds and staff time. The neighborhood plan action chart will also identify funding sources outside the City, such as grants and local improvement districts. The City Council will accept the neighborhood's recommended projects and programs only as recognition of the neighborhood's intentions and support for pursuing such ideas through other channels.

Lake Oswego Neighborhood Plans



Neighborhood Action Plans Relationship to City Plans and Programs



How Does the Neighborhood Plan Fit In with other City and Regional Plans?

Before the neighborhood can start thinking about developing a neighborhood plan, it is important to understand where the plan “fits” relative to other plans. Lake Oswego neighborhood plans have a responsibility to reflect and respond to citywide planning efforts, which must respond to state and regional planning goals.

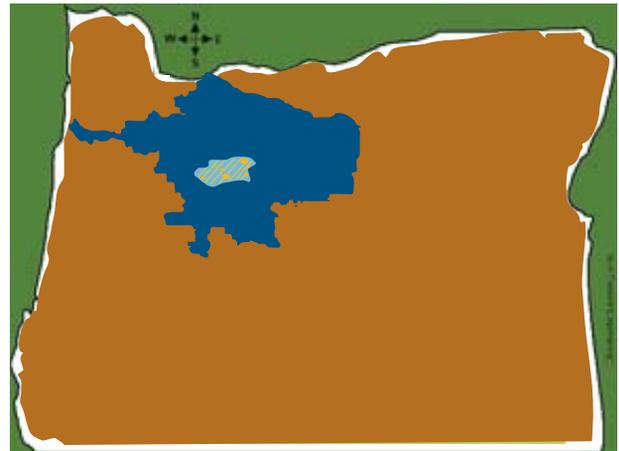
Let’s take a look at Oregon’s Statewide Planning Goals

Since 1973, Oregon has maintained a strong statewide program for land use planning. The foundation of that program is a set of 19 Statewide Planning Goals. The goals express the state’s policies on land use and on related topics, such as citizen involvement, housing, and natural resources. Most of the goals are accompanied by guidelines, which are suggestions about how a goal may be applied.

Oregon’s statewide goals are achieved through local comprehensive planning. State law requires each city and county to adopt a comprehensive plan and the zoning and land-division ordinances needed to put the plan into effect. The local comprehensive plans must be consistent with the Statewide Planning Goals. Plans are reviewed for such consistency by the state’s Land Conservation and Development Commission (LCDDC). When LCDDC officially approves a local government’s plan, the plan is said to be acknowledged. It then becomes the controlling document for land use in the area covered by that plan.

Oregon’s planning laws apply not only to local governments but also to special districts and state agencies. The laws strongly emphasize coordination - keeping plans and programs consistent with each other, with the goals, and with acknowledged local plan.

- Quoted from Oregon Department of Land Conservation and Development



Metro's Regional Functional Plan

Metro's Policies Encourage

- Safe and stable neighborhoods for families.
- Compact development, which uses both land and money more efficiently.
- A healthy economy that generates jobs and business opportunities.
- Protection of farms, forests, rivers, streams and natural areas.
- A balanced transportation system to move people and goods.
- Housing for people of all incomes in every community.

In addition to developing plans consistent with statewide goals, all of the City's plans need to be consistent with Metro's Urban Growth Management Functional Plan.

Metro is our elected regional government, which serves and plans for more than 1.5 million residents in Clackamas, Multnomah and Washington counties and the 25 cities in the metro region.

In the 1990's thousands of citizens participated in developing the 2040 Growth Concept, designed to guide long-term growth and development in the region. The plan contains 14 titles that set regional requirements for land use topics including Housing Capacity, Industrial and Other Employment Areas, and Nature in Neighborhoods.

The Plan sets the framework for the Functional Plan and is based on a set of shared values: thriving neighborhoods and communities abundant economic opportunity, clean air and water, protecting streams and rivers, preserving farms and forestland, access to nature, and a sense of place.



Metro Region

Lake Oswego's Comprehensive Plan

Land use planning involves the consideration and balancing of many different factors and issues to make the best decisions for the community both for the short and long term. The goals and policies and action measures of Lake Oswego's Comprehensive Plan are intended to guide the community in making these decisions.

The Plan is intended for use by all those who have a role in the City's land use planning process, including local officials, persons with development interests, state, regional and federal agencies, neighborhood and community groups, and citizens representing all interests.

The Plan is mandated by the state to be in conformance with 15 Oregon Statewide Planning Goals. Once acknowledged by the State's Land Conservation and Development Commission as meeting this test, it is the controlling document for land use within the City. The City's Community Development Code must be consistent with Comprehensive Plan goals and policies.

It is essential to recognize that the Plan is "comprehensive." There are no parts which can be considered separately from other parts. Plan goals and policies are intended to be supportive of one another. However, when using the plan to make decisions if conflicts arise between goals and policies, the City has an obligation to make findings indicating why the goal or policy being supported takes precedence over other goals found to be in conflict. This involves a decision-making process on the part of the City which balances and weighs the applicability and merits of the Plan's many goals and policies against one another.

The Comprehensive Plan has a primary role in directing land use decisions, but other planning activities and documents are also important in guiding Lake Oswego's future. However, any portion of these plans and any related action dealing with land use must be consistent with the policy direction of the Comprehensive Plan. Therefore, it is the obligation of the City to coordinate other public actions with the Comprehensive Plan.

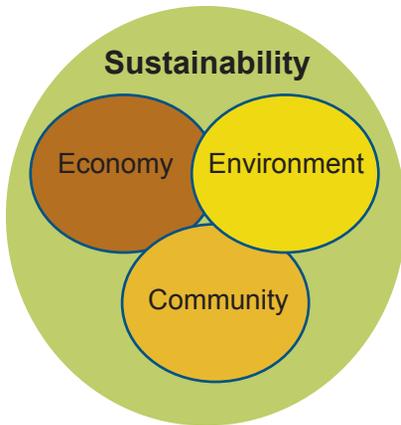
The Comprehensive Plan and the Community Development Code are intended to mutually support one another. The Plan does not contain specific standards for development. Instead it provides the policy basis for specific standards and procedures of the Community Development Code that are used to review new development, land use changes, and modifications to existing development.

Other Lake Oswego Plans

In addition to the Comprehensive Plan, there are many adopted planning documents that provide guidance to various City programs, services and districts. Each of these plans has been developed through a public process with community input, and should be respected as part of the City's planning framework. Plans include:

- Parks Plan 2025
- Transportation System Plan
- Specific park master plans
- Water Master Plan
- Wastewater Master Plan
- East End Redevelopment Plan
- Lake Grove Village Center Plan
- Capital Improvement Plan

Lake Oswego's Commitment to Sustainability



In November 2007 the City Council adopted a Sustainability Plan for City operations. The Plan defines a sustainable community as follows:

A sustainable Lake Oswego is a community that meets the vital human needs of the present without compromising our ability to meet future needs. This requires consideration of both long-term and short-term effects on ecological, economic, and community systems. Behaving sustainably means that we are leaving a legacy for the community of Lake Oswego and the planet.

Sustainability is a journey rather than a destination. A sustainable city is one that protects and enhances the immediate and long-term well-being of the community and its citizens, while providing the highest quality of life possible. Sustainability requires systems-based decision-making that takes into account economic, ecological, and community impacts as a whole.

The City's Sustainability Plan is founded on ten Guiding Principles. While the plan focuses primarily on City operations, the guiding principles should provide an excellent framework for developing neighborhoods actions plans. These principles can help neighborhoods ensure that wise decisions are made that take into account promoting conservation and efficient use of energy, water, native habitats, and other natural resources, and by considering the social and community implications of actions. By doing so, we can enhance and restore the natural environment and contribute to a healthy and vibrant community where all can thrive.

While the neighborhood may not upon first glance think that all of these principles apply to neighborhood planning, upon closer inspection and reflection neighbors will see that they do. For example, guiding principle eight states that the City should "operate in a fiscally responsible manner by selecting the most cost-effective programs and policies to meet community priorities...." Although neighborhood plans are neighborhood-specific, neighborhoods are connected to one another and create a larger Lake Oswego, therefore it is important to consider ideas that will impact other neighborhoods positively and meet community priorities. For instance when thinking about pathways in the neighborhood – does the pathway being proposed connect to another pathway or would it have more limited use? Prioritize the projects and goals that will have the greatest impact for the community as a whole.

Lake Oswego's Sustainable City Principles

1.

Create a future where the community, commerce, and ecosystems thrive together in harmony.

2.

Ensure a healthy and vibrant community by valuing cultural, economic, and ecological diversity and providing a safe, healthy, and viable setting for human interaction, education, employment, recreation, housing, commerce, and cultural development.

3.

Consider long-term impacts and use integrated decision-making to take into account economic, ecological, and social impacts as a whole, with the understanding that economic health, environmental quality, and social equity are interdependent.

4.

Protect and restore air, water, and land to preserve biological diversity, environmental health, and a natural resource base for future generations. Support policies and programs that ensure efficient use of, and reduced demand for, natural resources, while taking necessary precautions to prevent toxic pollution and waste and protect human health through proactive measures (e.g., the precautionary principle). Act locally to reduce adverse global impacts of rapid population growth and consumption, such as global warming and ozone depletion.

5.

Make procurement decisions (e.g., purchasing and contracting) that minimize negative environmental and social impacts, maximize long-term value, and contribute to local and regional economic health. This includes supporting local businesses that promote sustainability.

6.

Ensure that ecosystem impacts and the costs of protecting the environment do not unfairly burden any one geographic or socioeconomic sector of Lake Oswego.

7.

Use community resources efficiently by recognizing the interconnections between livability, growth management, land use, transportation, energy, water, affordable housing, air quality, economic development, and the natural environment. Adopt a holistic long term view of our investments that includes social and environmental costs.

8.

Operate in a fiscally responsible manner by selecting the most cost-effective programs and policies to meet community priorities. Use full cost accounting, a complete analysis of the associated costs and benefits including environmental and social costs and benefits.

9.

Develop cross-sector partnerships necessary to achieve City sustainability goals. Partnerships among local, regional, and state government, businesses, residents, and all community stakeholders are necessary to achieve a sustainable community. A sustainable Lake Oswego contributes to regional, state, national, and global sustainability.

10.

Build community awareness, responsibility, involvement, and education as key elements of successful policies, programs, and projects.

Neighborhood Planning Process PHASE ONE: PRE-PLANNING

Step 1. Discuss Your Neighborhood Planning Goals and Readiness

Before embarking on a neighborhood plan process, your neighborhood association should think through several important questions. In addition to determining whether your neighborhood is ready to begin a planning process, discussing these questions will help the neighborhood to prepare an Application for Neighborhood Planning Assistance, which the Planning Commission will use to help set priorities for staff assistance with neighborhood planning efforts.

The first step is for your neighborhood association board or general membership to consider its goals and desired outcomes from a Neighborhood Action Plan process:

- What are the association's current issues, concerns and desires for the neighborhood?
- What is the desired outcome from a neighborhood planning process?
- Is there consensus on the issues and desired outcome? If not, where is there disagreement?
- Are land use changes anticipated in the neighborhood?
- Is the neighborhood facing development pressure?

Once you have answered these questions, talk with your neighborhood planner to determine if a Neighborhood Action Plan is the right tool to achieve your neighborhood's planning goals. If your neighborhood wants to address a narrow set of issues, or resolve infrastructure problems, another process may be more appropriate.

Is Your Neighborhood Ready?

Your association should also consider the level of neighborhood participation and resources available to help lead a planning process. A few questions will help determine whether enough participation and commitment exists within the neighborhood association to begin this process. An honest self-assessment will reduce time delays and allow participants to create a plan that reflects everyone's needs.

The following checklist can be helpful in determining the readiness of your neighborhood association to develop a neighborhood plan.

- Is there consensus within your organization that a neighborhood plan is needed?
- Are there enthusiastic members willing to create a Neighborhood Action Plan Committee (NAPC)?
- Do they represent a broad range of interests in the neighborhood?
- Are the members of that committee ready to make a commitment to at least one year, but likely longer, of regular meetings?
- Does your neighborhood association conduct regular meetings to encourage feedback from not only residents, but also businesses (if any) within the neighborhood boundaries?
- Are the members of the organization ready to work cooperatively with the City to create a plan?

If the answers to the above questions are yes, the neighborhood is ready to start planning!

Neighborhood Planning Process PHASE ONE: PRE-PLANNING

Step 2. Recruit a Neighborhood Planning Committee

A neighborhood planning committee should be formed to guide the process, encourage broad participation and interpret neighborhood input.

The committee should consist of 5-9 members from the neighborhood. The members should reflect the diversity and variety of opinions in the neighborhood, and be geographically dispersed, so that different areas of the neighborhood are represented. Therefore, it is important to approach potential committee members from a broad mix of the neighborhood's civic, business and neighbor groups. If the timing is right, volunteers can also be recruited during the association's annual meeting.

Additionally, it would be beneficial to have "experts" on the committee. These experts might include planners, architects, economists, sustainability leaders, developers, bankers, traffic engineers, landscape professionals, geologists, communication specialists, etc.

Never forget, just as the Comprehensive Plan represents the City, the neighborhood plan you create will represent your neighborhood and everyone who lives and works there. For that reason it is important that everyone have a voice in the process. Keep this in mind every step of the way. During meetings, occasionally ask yourself, "Who isn't represented here that should be?" and then seek input from those people. This way you can feel confident that your process represents the entire neighborhood. As a committee member, it is also important to remember that you're working in the best interests of the neighborhood at large and should try not to let your own ideas dominate the process.

Once the committee is recruited:

Explain the Commitment

When issuing the invitation, be specific about the time commitment and workload expected. Tell people how often you plan to meet. You want people to see the process through to the end. Ask them to read this kit prior to committing.

Recruitment Ideas:

- Assign block captains to speak to neighbors within a certain radius about the plan process and how they can get involved.
- Invite a neighborhood planner to speak at a general neighborhood or board meeting about the process.
- Work with the neighborhood planner to contact the media to advertise your plan process.
- Include updates on the neighborhood planning process in the association's newsletter.
- Post the announcement on your neighborhood web page.
- Ask your neighborhood school to include an article in their school newsletter which is sent home with all students.
- Ask local news media to do a neighborhood story.

Each member of the committee should read this kit, which can be found online at:

[http://www.ci.oswego.or.us/planning/neighborhood-plans-0.](http://www.ci.oswego.or.us/planning/neighborhood-plans-0)

It should be discussed as a group

Step 2 continued.



The Lake Grove Neighborhood Plan Implementation Committee on neighborhood tour with Planning Department staff.



Glenmorrioe Neighborhood Plan Implementation Committee members working to develop their neighborhood overlay.

Establish Ground Rules

Develop and agree upon a set of procedures. This important initial step not only builds trust but also sets expectations for the group. Ground rules attempt to make each committee member's contribution valuable and, at the same time, move the group toward its goal. Ground rules should be simple, friendly and brief. It is best to create ground rules together at an early meeting of the group.

Set a Schedule

Establish a consistent meeting time and place in the beginning to avoid confusion later. Meetings should be accessible to all members of the committee (within walking distance or on a bus route).

Keep Good Records

Appoint a dependable record keeper to keep accurate records of attendance, decisions and discussions. You may even want to audio record meetings.

Choose a Leader

Select someone to chair the committee. Pick someone who can demonstrate appropriate leadership skills and can keep the committee on task. It should be someone who has the time, good leadership skills and is a good negotiator and mediator if possible.

Agree on How to Make Decisions

Decide whether to use a consensus or voting model when difficult decisions arise. When it is time to make those decisions, abide by ground rules and the decision making process. Document this approach, along with your goals for the planning process in a simple charge statement.

Accept Conflict

Sometimes conflict can tell you something very important about the work you are doing. It might mean that there is a disagreement that needs to be worked through. If it is not addressed right away, it could fester and eventually erode the process. When conflict arises, don't shy away, instead explore the conflict and identify its source. Ask these questions:

- Identify what the disagreement is about.
- Ask if there areas where you can find agreement.
- Work towards reaching a mutually acceptable solution.

If resolution is not possible, ask if the neighborhood can still have a workable plan. Can we defer resolution of the area of conflict in our plan, and still have it workable? If not, ask the City for assistance.

Step 3: Work with City staff to create a work plan

Just like in any big project, the first step is to set goals and create a work plan. Staff has developed a process and sample timeline for creating neighborhood plans and can work with you to create a work plan tailored to your neighborhood planning process. Some tasks require staff assistance, therefore creating the work plan and schedule with staff is critical to the success of the planning process.

When your neighborhood association applies to the City for Neighborhood Planning Assistance, it should provide a rough idea of which tasks the neighborhood can assist with. This will help staff and the Planning Commission to determine the level of staff assistance required to complete your plan.

The neighborhood may want to rely on staff for specific tasks such as developing a demographic analysis of the neighborhood as well as maps to produce for the neighborhood. Such tasks may require the assistance of staff across department lines and need to be anticipated and arranged ahead of time. Additionally, staff can assist in a range of ways such as helping the planning committee advertise and run public meetings and providing materials, identifying potential partners and funding sources, sharing City and regional information, etc. This requires staff time and resources, therefore it is critical for the neighborhood to work with staff to develop and agree upon a work plan.

The committee must also identify the expertise and time available from members of the Committee and neighborhood-at-large. For example, there may be an architect on the committee who can help analyze neighborhood character, or a photographer who can document the neighborhood to assist with this process.

It is also very important to establish a timeframe for completing each step in the process. This is important for the neighborhood, the neighborhood action planning committee, and City staff so everyone has a clear understanding of the commitment involved, and reassurance that the plan can be developed within a reasonable timeframe.

Anticipated Outcomes?

Before the Neighborhood Planning Committee meets with staff to develop the work plan, make sure the neighborhood association has discussed the goals for the process. In addition to the plan itself, your neighborhood association may wish to achieve soft outcomes. It is always good to identify these before you get started.

For example...

The neighborhood would like to:

- Get more residents involved in our neighborhood association by identifying new opportunities for communicating and gathering and building community.
- Foster new leadership within the association.
- Build relationships with schools, businesses and other organizations within the neighborhood.

Organizing is what you do before you do something so that when you do it, it is not all mixed up.

- A.A. Milne

PHASE TWO: VISION DEVELOPMENT

The following information provides an idea of the planning and neighborhood outreach steps involved in gathering ideas and developing a vision for the future of your neighborhood. The steps below should be flexible, and your neighborhood will determine the exact sequence and process when you develop your work plan (Phase One, Step 2).

Step 1: Distribute a Neighborhood Survey

To learn how your neighbors feel about the quality of life in the neighborhood and to inform the development of the action plan, the neighborhood association should distribute a neighborhood survey to all property owners, including business and absentee owners, and renters in the neighborhood.

The neighborhood survey will provide the information that will be the baseline information used in the “neighborhood profile” section of the action plan.

A survey template and examples are available from your Neighborhood Planner, who can also help to develop questions that are unique to your neighborhood, will be useful, and are unbiased.

Staff can prepare the mailing labels and depending on the assigned budget resources can assist with printing and mailing. In addition to a printed survey, the survey could be posted on the web. Survey Monkey <http://www.surveymonkey.com/> is a very easy to use, inexpensive on-line survey tool.

“Would you tell me which way I ought to go from here?” asked Alice. “That depends a good deal on where you want to get,” said the Cat. “I really don’t care where” replied Alice. “Then it doesn’t much matter which way you go,” said the Cat.

Regional and National Trends:

It is not only important to understand what is happening in your neighborhood today, it is also important to understand the demographic trends that are predicted for the future. For example, we all know that the baby boom generation is quickly reaching the 65 plus age and living longer than previous generations. How will this impact your neighborhood? How can you plan for a future that meets the needs of a variety of ages and lifestyle choices? Your neighborhood planner can provide a brief synopsis of regional and national trends that may impact Lake Oswego.

Step 2: Conduct a Demographic Analysis

It is important to understand the characteristics of people who live in the neighborhood. A basic demographic profile should be created that describes the number of residents, their ethnicity, age, education, income, and whether they are owners or renters. This information can be used to think about what type of amenities or facilities are required by different populations, where the neighborhood has deficiencies and if and how the plan should address these. For example, if the majority of people are over 60 years old are all living in single family homes, can they age in place? If not, is there alternative housing available in the neighborhood or near-by?

Staff assistance is available for completing this task if identified as such in the work plan, or one of the committee members may want to complete this task.

Step 3: Hold a Neighborhood Planning Kick-off Event

You've made some progress, so now it's time to share what you've learned with the entire neighborhood and get people excited about the planning process. This can be accomplished through a kick-off event, which gives the committee an opportunity to:

- Explain what a neighborhood plan is and the process and timeline for creating one for your neighborhood.
- Outline the neighborhood planning framework, including the City and regional context for planning and regional and national trends.
- Exhibit the purpose statement and questions to consider outlined in this kit.
- Share the results of the neighborhood survey and demographic analysis.
- Explain that before the next event is held the association needs volunteers to conduct a neighborhood character analysis – ask for volunteers.
- Enlist the neighborhood to take photos to document the neighborhood as they perceive it. What are the assets and liabilities of the neighborhood? Ask everyone to bring printed copies of the photos to the next workshop.
- Ask everyone to save the date for the workshop.

Step 4: Conduct a Neighborhood Character Analysis

The first step in analyzing the neighborhood character is to ask specific questions in the neighborhood survey about the general nature of the neighborhood. The second step is to analyze the character of the existing structures in the neighborhood. This will help to identify the predominant features of neighborhood development. Maybe the neighborhood has streets that were developed with basement ranches, or maybe most of the houses in the neighborhood are one and a half stories, or maybe the houses are so different that there isn't a defining style. Maybe the neighborhood is defined by large Douglas Fir trees or lush vegetation, or has a grid pattern of development with alleyway's running behind the houses. The neighborhood character analysis can help you identify these characteristics.

This requires volunteers to walk the neighborhood, look at each structure, take a photo, and check off the visual features of each, such as height, garage location, roof form, landscaping, etc. The size of the neighborhood will determine whether every street and house can be analyzed or if there should be a random selection of areas to study. Your Neighborhood Planner can assist with identification of design typologies, and a template to use for your character assessment.

The neighborhood character analysis will be used to study what the neighborhood would like to preserve and where there are potential opportunities for change.

Lake Oswego Character



Step 5: Hold a Neighborhood Workshop to Identify Neighborhood Strengths & Weaknesses

Maps

City Neighborhood Maps you'll need for the workshop:

- Aerial photo – Google maps
- Comprehensive Plan/Zoning Map
- Transportation Plan
- Public transportation (bus stops)
- Trails and Pathways Plan
- Sensitive Lands Map
- Buildable Lands Map
- Parks and Recreation Plan
- Historic Sites (Registered and inventoried)

Other large format posters

- Purpose of Neighborhood Action Plans
- Guiding Principles
- Purpose Statement and Questions to Consider for each potential chapter

Maps that could be created at the workshop, depending on the focus of your plan. These could also be created at future meetings.

- Proposed transportation map to identify gaps in the networks and improvements to facilities.
- Proposed land use map to note any desired changes to the type and location or opportunities for new development in the neighborhood.
- If new zoning is being explored, alternative zoning maps could be developed at the workshop.

The purpose of this workshop is to share all the information you've gathered about the neighborhood, discuss the strengths and weakness of the neighborhood, gather descriptive information for the character statement, and brainstorm the topics for inclusion in the action plan. Staff will assist in organizing the format of the meeting in conjunction with the planning committee but here is an example of what this meeting might entail.

Task 1: Share information

Ask neighbors to post neighborhood photos on boards labeled "assets" and "liabilities" as they arrive.

Share the results of the neighborhood survey, neighborhood character survey and demographic analysis.

Take a break and have everyone look at the photos on the boards.

Task 2: Map the Neighborhood

Provide a simple, large scale map of the neighborhood and engage workshop attendees in drawing on the key features that define their neighborhood. Ask people to identify the paths (travel patterns), edges (perceived boundaries), nodes (focal points or intersections), landmarks (objects or places that serve as reference points) and any additional features such as significant trees and natural features that are important or special to the neighborhood. This map will help to understand how people use the neighborhood, and can be included in your final plan document.

Task 3: Provide Framework for Analysis

Take a break and have everyone read the "purpose statements" and "questions to consider" posed for each of the plan chapters to frame the SWOT analysis (see next step). These should be printed on large poster boards.

Step 5: continued

Task 4: Conduct a SWOT analysis

Break into small groups if there are enough people and conduct a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. A SWOT analysis focuses on the strengths (i.e. beautiful old trees, active citizens, good schools) and weaknesses (i.e. inadequate park space, lack of services within walking distance, lack of bike paths) in your neighborhood. A SWOT analysis also examines the opportunities (i.e. new grant opportunities, a new business) and threats to its future success (i.e. a cut through traffic, landslide areas, failing septic systems). The method is comprehensive and assures a healthy balance of negative and positive discussion during this early phase of plan development.

Strengths	Weaknesses	Opportunities	Threats
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Have each group report back to the larger group for feedback on each of the topics.

Wrap up the meeting and announce the next meeting date where the neighborhood will be presented with the synthesized information and work to draft a vision statement and decide upon the proposed topics to include in the plan.

SWOT Analysis



Involve youth

You might choose to invite the young residents from the neighborhood to attend the neighborhood-wide meeting and have a board member lead them through a process in a separate room. Ask them to draw a map of the neighborhood as it is now, noting important landmarks and how they travel to get places. Or, ask them to draw the neighborhood that they envision in the future. What would the neighborhood look like if they were to come back in 20 years? (Be sure to ask them how old they will be then.) Ask them what things they would like to see happen in the neighborhood. Provide disposable cameras for older children and teens and ask them to take photographs of the things they like in their neighborhood and things they would like to see change. These ideas, maps and photos are a great addition to your plan.

Step 6: Synthesize Information Gathered at the Workshop

In combination with the information gathered from the SWOT analysis and neighborhood character survey, the planning committee can now meet to formulate a draft neighborhood character statement. The character statement should describe what is unique and special about the neighborhood as it exists today. Think of describing your neighborhood to someone who is considering moving there.

Example Character Statement from the Evergreen Neighborhood Plan:

The Evergreen Neighborhood, 98 acres in total, encompasses the area between State Street on the east and 10th Street and Berwick Road on the west. "A" Street is the north boundary. Lakewood Bay forms the boundary on the south. The east end of the neighborhood is primarily commercial, as is "A" Avenue from State Street to 7th Street. Adjoining the east end commercial district is several blocks zoned high density residential, including occupant-owned townhouses and apartments. Predominantly, however, the neighborhood is single family residential, dominated by many trees and with a variety of housing styles.

Evergreen is a complete, integrated community, with shopping, dining, churches, recreation and regional transit, all within easy walking distance, making it feel like a safe, convenient, friendly small town. It is a unique and desirable place to live, work and visit.

Commercial areas are alive and well, with businesses offering a wealth of quality, affordable goods and services. Supermarkets and restaurants complete the "mix" for a self-sufficient community. New development architecture is high-quality, and public art is displayed on downtown streets. Having the Lake Oswego City Hall and Police Station located in the Neighborhood is a great convenience. The community Post Office is only a block away.

Recreation opportunities abound. The Lakewood Bay Easement provides swimming, boating and other water-oriented opportunities for many neighbors. Family picnics are held at a small green space on 3rd Street. Millennium Park Plaza is the focal point for a Farmers' Market, outdoor concerts, and other special events. The City Library and Adult Community Center are close by; a cinema and wonderful live theater are only a few blocks to the South.

The community's residential areas are quiet and restful. Contributing to the quality of life are: a diversity of housing styles, a village atmosphere, pedestrian-friendly narrow streets with canopies of trees, lake front access, green spaces and safe access to public transit and commercial areas.

Step 7: Draft a Vision Statement with the Neighborhood

The neighborhood has arrived at the final step in Phase Two. All of the data and information that's been collected about the neighborhood provides a baseline understanding of the make-up of the neighborhood, the trends that might impact the neighborhood in the future, the perceived strengths and weakness of the neighborhood, and the existing character of the neighborhood. Now it's time to hold a third meeting with the entire neighborhood to discuss the draft neighborhood character statement, develop a vision statement and determine which plan chapters to address in the action plan. Your neighborhood planners will help plan and/or facilitate this meeting, but the following is an example of what this meeting might entail.

Task 1: Present the draft neighborhood character statement for feedback

Step six required the planning committee to develop a character statement based on all the information gathered from the neighborhood. Now it is time to share that character statement with the neighborhood and make revisions if necessary based on feedback. After completing task 1, move to task 2.

Task 2: Develop the vision statement

Developing a vision statement is a critical task in the planning process because it articulates a shared goal for the future of the neighborhood. The rest of the plan document will work back from this vision to develop the topic-specific goals, objectives and actions that are necessary to achieve the vision. Residents should think far into the future and envision what they want the neighborhood to look like in 20 years.

This is the time to think out of the box and get creative. Try to focus your efforts on imaging a future that respects the past while acknowledging that change occurs and articulating what that change might look like. Analyze the strengths and weakness and determine what exists today that should exist in the future and what should change. For example:

- Imagine a place where you, your elderly parents and your recently graduated from college kids all want to live. Are there different housing choices for different size families and ages with varying incomes in your neighborhood, or at least nearby? If no, how could your neighborhood help to provide appropriate housing for different household types?

The Oregon Visioning Model

The Oregon APA developed a model guide for community visioning, which is organized around four central questions:

1. Where are we now?

Your neighborhood will answer this question with your neighborhood inventory and analysis, steps 4-6 of vision development.

2. Where are we going?

This question is answered by the demographic and trend analysis, steps 1-2 of vision development.

3. Where do we want to be?

This is your Neighborhood Vision Statement. It should describe a shared, big picture image of what your neighborhood wants to be and look like in 20 years.

4. How do we get there?

This is the next step in your plan (Phase 3 of the planning process), and outlines the steps needed to achieve your neighborhood's vision.

*You can never plan for the future by the past.
-Edmund Burke*

Step 7: continued

Select Plan Chapters

After developing the vision statement, the neighborhood should decide which chapters to include in the plan based.

The neighborhood has the option of selecting some or all of these chapter topics. The topics the neighborhood selects should be a reflection of the vision and character statements.

- Land Use and Neighborhood Character
- Transportation
- Housing
- Open Space and Recreation
- Natural Systems
- Neighborhood Involvement
- Economic Development

Make not little plans; they have no magic to stir men's blood and probably themselves will not be realized. Make big plans; aim high in hope and work, remembering that a noble, logical diagram once recorded will never die, but long after we are gone will a living thing, asserting itself with ever-growing insistency.

- Daniel H. Burnham,

Start the visioning process with the information collected during your community assessment (neighborhood survey, character analysis and SWOT analysis). Present the meeting attendees with a summary of the neighborhood's existing conditions and values to answer the question: "Where are we now?" Next quickly review the major trends affecting the community's future, which were discussed at the kickoff meeting. This will help the neighborhood to answer the question "Where are we going in the next 20 years?"

Based on this information, ask the neighborhood to describe where the neighborhood will likely be in 20 years if it continues on this current course. This is your probable scenario for the future of the neighborhood.

Now it's time to ask the questions "Is that where we want to be? If not, where DO we want to be as a neighborhood in 20 years?" Ask meeting attendees to throw out big ideas about the future of the neighborhood. Don't limit the comments to existing logistical constraints, but rather imagine a neighborhood that would provide a high quality of life for generations to come.

Organize this discussion as an open brainstorm, and record everyone's ideas at the front of the room. Then categorize the ideas in different columns to pull together common themes. Next turn to the surveys and SWOT analysis, and add to your brainstormed list the words or ideas used most often by residents to describe the neighborhood today and its opportunities for the future.

Now think of an image or statement which summarizes the ideas contained in each category. Use these, and see if you can create a few sentences that incorporate those ideas and encompass a basic vision that you think everyone would agree with.

Make your vision statement:

1. Comprehensive
2. Realistic
3. Easy to understand
4. Succinct

Good vision statements often use a strong, futuristic, idealistic language. Try to create an image for your readers of everything you want your neighborhood to be. Identifying the important words and ideas that express your vision will help convey your message to readers clearly.

PHASE THREE: DEVELOP THE PLAN CHAPTERS

The neighborhood has completed a lot of the leg work. Congratulations! Now it is time to develop the nuts and bolts of the plan. In order for all neighborhood plans to be consistent in content and structure, a recommended table of contents is included here as well as some required text.

The content development should occur in three phases. At the end of each phase the draft content should be presented to the neighborhood and shared with the Planning Commission. Using this process, the plan content will be developed from least to most specific – from a broad vision statement, to detailed actions, to an implementation strategy for those actions. Checking in with the neighborhood and decision-makers after each phase of plan development will help to ensure support for broad ideas before the planning committee and staff moves those ideas into more detailed actions.

The following pages outline the recommended table of contents and explains what each chapter should include. You will notice that there is a * by some of the sections in the table of contents. This content is required to be included in all actions plans. This content is not specific to individual neighborhoods, (that's the part you will develop) but intended to provide guidance and clarity to the purpose and intent of neighborhood action plans.

Neighborhood Plan Contents

BACKGROUND

- What is a Neighborhood Plan
- Purpose of Neighborhood Plans
- How This Plan Was Developed
- Guiding Principles
- Relationship to Other City Plans
- Commitment to Sustainability

THE NEIGHBORHOOD PROFILE

- Context within the City
- History
- Demographics
- Neighborhood Character
- Vision Statement

PLAN TOPICS

- Purpose Statement
- Inventory and Analysis
- Objectives
- Comprehensive Plan Policies
- Action Steps
 - Community Development Code
 - Capital Improvements
 - Programs/Projects

NEIGHBORHOOD ACTION PLAN CHART

- Partner(s)
- Time Frame
- Estimated Cost
- Potential Funding Strategy

Growth is inevitable and desirable, but destruction of community character is not. The question is not whether your part of the world is going to change. The question is how.

*- Edward T. McMahon,
The Conservation Fund*

Step 1: Draft the BACKGROUND Chapter

CHAPTER CONTENTS:

What is a Neighborhood Action Plan?

(See pages 1-2 of Kit to develop this content)

How This Plan Was Created

Each plan should include a paragraph or two describing the planning process, including all outreach activities such as events, newsletter articles, surveys, photo essays, etc.

Action Plans Relationship to Other City Plans*

This section should reference the planning context including other relevant City plans and components of the Comprehensive Plan.

Compile this subject matter into a draft form.

History Resources

Lake Oswego Heritage Council

<http://www.oswegoheritage.org/>

Lake Oswego Library

<http://www.ci.oswego.or.us/Library/>

Lake Oswego Historic Resource Advisory Board

http://www.ci.oswego.or.us/plan/Historic_Resources_Advisory_Board/hrab.htm

Step 2: Draft the NEIGHBORHOOD PROFILE

PROFILE CONTENTS:

Context Within the City

Request a map from the City that shows the entire city, including the urban services boundary, neighborhood boundaries, and adjacent neighborhood associations. Describe the general context of your neighborhood.

History

Develop a brief history of the neighborhood to include in the action plan. If the neighborhood wants to include a longer history, please place the longer version in the appendix of the document.

Demographics

This section should summarize the demographic analysis that was conducted in the pre-planning phase and include an overview of demographic trends that might impact the neighborhood in the future, and influence elements of the plan.

Neighborhood Character/Unique Neighborhood Features

Include the neighborhood character analysis that was created in the pre-planning phase.

Vision Statement

Include the vision statement developed by the neighborhood in the pre-planning phase.

Once the Background and Neighborhood Profile chapters have been drafted, work with your neighborhood planner to present these sections of your neighborhood action plan to the Planning Commission for feedback.

Step 3: Develop PLAN CHAPTERS

At this point the neighborhood will have a shared understanding of the valued amenities, character, and demographics of the neighborhood, and an articulated vision of how the neighborhood should look and feel in the future. Now it's time to outline exactly what steps need to be taken to implement the vision.

Each neighborhood should develop content that identifies and addresses the unique character of the neighborhood, and responds to City plans, policies and priorities as they relate to the specific neighborhood. Each neighborhood will identify the topic areas below that are most pertinent to their particular neighborhood. Not all plans must address all topic areas, although the City may require that plans address certain topics depending on the neighborhood's circumstance.

Our Neighborhood Form: Land Use and Character

How We Get Around: Transportation

Where We Call Home: Housing

Where We Play: Open Space and Recreation

Nature in Our Neighborhood: Natural Systems

Building Community: Neighborhood Involvement

Where We Work, Shop and Do Business: Economic Development

Once the neighborhood decides which chapters to include, the chapters should be structured as outlined:

Purpose Statement

In order to provide direction and intent for the content of neighborhood action plans, the City developed a purpose statement for each of the potential chapters listed to the left as well as questions to consider while planning for the future of Lake Oswego's neighborhoods. This information is presented in the next section of this Kit. Some sample text is also provided to illustrate what might be included as well as resources that might be helpful in developing neighborhood-specific content for your plan.

Following the purpose statement, each chapter of the plan should include the following information.

Inventory and Analysis

This requires an assessment of the existing conditions in the neighborhood and identification of the strengths and weakness of the neighborhood.

Neighborhood Objectives

These are statements pertaining to the strengths and weaknesses and how to enhance the strengths and mitigate the weaknesses.

Neighborhood Comprehensive Plan Policies

These are policies that express unique neighborhood needs that are different from the rest of the city, and that would be recommended for adoption into the City's Comprehensive Plan.

Once this information is in draft form, it is time present the vision and plan chapters to the neighborhood and Planning Commission for feedback.

Step 3: Develop NEIGHBORHOOD ACTION STEPS

Actions steps are developed to identify specific tasks that implement the shared vision and objectives of the neighborhood over time. Actions steps should be broken down into the three categories listed below, although having actions identified in each category isn't required. For example, the neighborhood may not need new community development code provisions to implement the objectives stated in the Neighborhood Involvement chapter. That chapter might just be a number of action steps related to programs/projects.

Community Development Code

The Community Development Code regulates development in the city. New development is not required to comply with the objectives, policies, or vision articulated in neighborhood plans. If property owners agree that development should be regulated differently in your neighborhood, the desired changes must be placed into the development code in order to serve as decision-making criteria.

Some neighborhoods in Lake Oswego have identified development characteristics unique to their neighborhood and have created neighborhood overlay zones (Evergreen, Glenmorrie, Lake Grove). Overlay zones modify the underlying zoning code or contain new codes intended to guide development within a limited area.

In the past, neighborhood plans described their unique neighborhood character, but waited until after the plan was approved by the City before developing an overlay zone. Now, if the neighborhood wants to develop an overlay zone, the code provisions should be identified during the neighborhood planning process, so the code can be considered for adoption and inclusion in the community development code when the plan is accepted by the City. Your neighborhood planner can explain this further.

Capital Improvements

Capital improvements are infrastructure projects which are significant physical improvements such as roadways, pathways, parks, utilities, etc. These types of projects are usually expensive and need a clear funding source. One possible funding source is the City's Capital Improvement Plan (CIP), which is a five year plan/budget that is re-evaluated each year to determine projects city-wide that will receive City funding based on available resources. The CIP includes hundreds of projects that have been ranked based on a set of criteria. As you will see in the document, many of the projects are listed as unfunded. Therefore, it is important to note that just because the neighborhood identifies the project for inclusion in the CIP, it does not guarantee that the project will get funded. Consequently, alternative funding sources should be identified if possible. Grants may be available from local, regional, state or even national organizations. Or local improvement districts (LID's) could be formed, in which property owners collectively pay for the project. The neighborhood should work with a neighborhood planner to develop realistic expectations about project funding. Funding sources are discussed further in the appendix under "Potential Funding Sources."

Programs/Projects

These action steps should capture neighborhood programs and projects that would not be included in the Comprehensive Plan, Community Development Code or Capital Improvement Plan. For instance, one of the neighborhood action steps might be to have at least 20 people in the neighborhood trained as Community Emergency Response Team (CERT) members. This would be an action step calling for the neighborhood association to work with the Fire Department to organize the training.

Check in: Present the Neighborhood Action Steps to the neighborhood, Planning Commission for feedback.

Step 4: Develop NEIGHBORHOOD ACTION CHART

After the neighborhood develops all of the action steps required to implement the neighborhood vision, it is time to identify who can help implement each action step (partners); whether it is a high, medium or low priority (time frame) for the neighborhood; how much each action item will cost (estimated cost); and how it might be paid for (potential funding strategy).

Partner(s)

Identify who will assist the neighborhood with implementing the task. Who is responsible will depend on the action item, although the neighborhood will most likely be responsible for shepherding the task.

Time Frame

Identify the time frame for implementing each action item, keeping in mind that implementation will occur over 15 to 20 years. The neighborhood will need to categorize each item as a high, medium or low priority. There should be an even distribution in each category.

Estimated Cost

Staff will work to develop cost estimates for capital projects based on costs at the time of plan adoption.

Potential Funding Strategy

As mentioned earlier in the Capital Improvement Program section, it is critical for neighborhoods to identify potential funding sources for projects. The City does not have a fund dedicated to implementing neighborhood action items, therefore it is imperative that the neighborhood work with staff to identify different funding sources for implementation.

Our Neighborhood Form: Land Use and Character

Purpose Statement*

This chapter describes the existing land uses and character within the neighborhood boundaries. Based on this analysis along with neighborhood ideas and City plans and policies, recommendations are made to strengthen, maintain, or alter neighborhood land uses and character. The plan includes a statement that captures and describes the unique features and characteristics of the neighborhood and identifies ways to encourage development that respects the neighborhood scale and character.

Describe the land use and character of the neighborhood. Consider the questions in the column on the right, the purpose statement and the results of the Strength, Weaknesses, Opportunities and Threats (SWOT) analysis. Is the land use pattern the desired pattern for the future or should changes be made? What about the character? Is there a unique character that should be preserved or should the character change in some way?

Inventory and Analysis Example:

Low density residential development is the primary land use and zoning designation within the Palisades neighborhood. The Palisades Neighborhood Zoning Map above shows single family residential zoning accounting for 694 acres or 81 percent of the neighborhood land area. Twelve percent of the neighborhood land area is zoned for natural areas and parks (106 acres) and seven percent for public functions such as schools (57 acres). Approximately 1540 tax lots are zoned and developed as single family residences with zone designations requiring minimum lot areas of 7,500 (R-7.5), 10,000 (R-10) and 15,000 (R-15) square feet. Residential uses permitted within the established context of detached single family homes include secondary dwelling units, group care homes, and conditional uses as congregate and residential care housing.

Questions to Consider:

LAND USE

- Think about the different types of land uses in the neighborhood. Is the neighborhood primarily single family housing? Is it a mix of commercial and residential?
- Is it the right mix? Should there be more or less of a particular use?
- Are there lots in the neighborhood with houses that will likely be torn down and redeveloped?
- Are there lots that could be divided and one or more houses added? If so, what pattern will lot divisions likely take (flag lots, subdivisions, side-by-side partitions)?
- What features would make new homes compatible with the existing homes in neighborhood?
- Are there secondary dwelling units? How many? How would these best fit into the neighborhood?
- Was all of the neighborhood developed during the same time period? Do buildings have similar architectural character, or is there architectural diversity?

Our Neighborhood Form:

QUESTIONS TO CONSIDER

NEIGHBORHOOD CHARACTER

Use the data you collected in the neighborhood character survey to help describe the character of the development in the neighborhood.

- Does your neighborhood have a unique character that should be preserved/enhanced/complemented?
- Are there predominant architectural or natural features that define the neighborhood or parts of the neighborhood? For example, in the Glenmorrie neighborhood there are several streets that were developed during the same time frame and are all "ranch style" houses that have a similar character. Do homes in your neighborhood share a character that should be preserved?
- Is there a commercial area in your neighborhood? What is the character of the development? Is it a character that should be preserved or should the character of future development be different? If so, how?
- How do natural and historic features contribute to the character of your neighborhood?
- Or maybe your neighborhood wants to create a character that doesn't exist now? What should the new character be?



Neighborhood Character Statement Example:

Primary character-defining features for the Palisades neighborhood are stunning views, mature evergreen trees and wildlife habitat, adjacent rural land, detached, single-family homes, and the lake. These features contribute to the area's private, quiet ambiance and the quality of life for Palisades family-oriented neighborhoods. Character distinctions between areas within the Palisades neighborhood are closely associated with dates of single family home subdivision development. Most homes in Palisades were built approximately 20 to 40 years ago.

Neighborhood Objectives Example:

Ensure that the landscaping is maintained or replaced when redevelopment occurs in order to preserve the vegetated character of the neighborhood.

Neighborhood Comprehensive Plan Policies Example:

Refer to the Neighborhood Character section of this plan when reviewing Conditional Use Residential Infill Design and Major Development applications to identify design features and issues important for ensuring compatibility of new development with the surrounding neighborhood.

Neighborhood Action Steps Example:

Community Development Code Amendments

- LU 1: Develop a pilot lakefront zone or lakefront overlay zone for Area 1 of that Palisades neighborhood that would address the unique aspects of lakrfront properties and properties with lake views.

Programs/Projects

- LU 13: Develop a self guided walking tour pamphlet for historic Liberty Street.

- LU 14: Establish guidelines and incentives for planting native trees and vegetation to enhance neighborhood character and strenthen green corridors in the neighborhood.

How We Get Around:

Questions to consider:

- What are the traffic patterns in the neighborhood, i.e. how do people get in, out and through the neighborhood?
- Is it safe for people to walk or ride their bikes in the neighborhood?
- Is it safe for children in the neighborhood to walk or ride their bikes to school?
- If not, what changes need to occur?
- Are there particular streets with heavy traffic volumes or speeds that may need traffic calming strategies?
- Are future transportation improvements identified in the Transportation System Plan?
- Does the neighborhood primarily consist of curbs, gutters and sidewalks or are there no curbs and sidewalks? Which style does the neighborhood prefer?
- Are there public transportation options in the neighborhood? Where can neighbors catch transit in or near the neighborhood? How could use of public transportation be increased in the neighborhood?
- What impacts might future development have on traffic. How should impacts be mitigated?
- How does the neighborhood manage parking? Are there opportunities for shared parking areas?

Purpose Statement*

This chapter outlines the existing transportation and infrastructure conditions within the neighborhood, and based on this analysis and the framework of the citywide Transportation System Plan, recommends ways to strengthen, maintain, or alter the transportation choices within the neighborhood. One of the key goals of these recommendations is to coordinate vehicular, bicycle and pedestrian needs, taking into account the neighborhood's context within the city's overall transportation network, and the relationship between neighborhood land use and transportation patterns. Particular importance is placed on creating safe pedestrian and bicycle routes to schools and commercial areas. Additionally, consider how the neighborhood connects to and through other parts of the city.

Neighborhood recommendations follow traffic engineering standards that set parameters for the city's transportation system based on industry-wide safety criteria, and must be consistent throughout the city.

Inventory and Analysis

Describe the mobility (automobile, bicycle, foot) patterns in, out and through the neighborhood. Consider the questions on the left, the purpose statement and the results of the Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis. Are the mobility choices sufficient to meet the current and future needs of the neighborhood? If not, where are the gaps?

Inventory and Analysis Example:

The transportation system within the Glenmorrie Neighborhood consists entirely of local residential streets except for State Highway 43, which bisects the neighborhood. These streets and Highway 43, a major regional arterial, are integral to the character and quality of the neighborhood.

Especially important to the Glenmorrie Neighborhood is the management of cut-through traffic and driving on Old River Road and Glenmorrie Drive. This is critical on Old River Road due to the large number of recreational walkers who must share the street with cars. Along the northwest boundary of the neighborhood, drivers also tend to cut through on Cherry Lane to Hallinan Street and on to McVey Avenue to avoid back-ups that occur on Highway 43. This is a dangerous practice because of the difficulty of making northbound left turns from Highway 43 to Cherry Lane.

Transportation

Highway 43 poses dangers to neighborhood residents and others which need to be addressed. The road is exceedingly difficult to cross, especially during peak travel times. Not only are drivers imperiled but so are school children walking, biking or riding the bus to Hallinan Elementary School. This situation also makes public transit use dangerous. The current bus stop is in an unsafe location because of the danger pedestrians are exposed to getting across the highway. The bike path on Highway 43 is also unsafe, because of the tendency of drivers to use it to pass on the right when cars are attempting to turn left onto Glenmorrie Drive and Cherry Lane.

Neighborhood Objective Example:

Create a sufficient and safe network of pedestrian and bicycle routes throughout the neighborhood to connect people to schools, parks and businesses.

Comprehensive Plan Policy Example:

Based on the analysis conducted by the Engineering Department, change the classification of Lab Street from local street to neighborhood collector.

Neighborhood Action Steps Example:

Capital Improvements

- TR 4: Complete the pathway along Thurber Road.
- TR 5: Construct a pathway on Lewis Lane between 11th and 22nd.

Programs/Projects

- TR 8: Work with TriMet to analyze the possibility of moving the bus stop to Allison and Childs.
- TR 14: Organize bike tours of the neighborhood and adjacent neighborhoods to demonstrate the bicycle network within the neighborhood and City.

Potential maps to analyze and/or include:

- Transportation System Plan
- Trails and Paths Master Plan
- Capital Improvements Plan

Where We Call Home:

Questions to consider:

- What is the range of housing types (i.e. detached single-family, rowhouses, condos, apartments), costs, and sizes in the neighborhood? What is the age of the housing stock?
- Can young adults just out of college find housing in the neighborhood that they can afford? Seniors?
- Can teachers, public employees and nonprofessional people afford to live in the neighborhood?
- Can people age in place? (i.e. when people do not have to move from their present residence or neighborhood in response to changing needs.)
- Secondary dwelling units may be a way to offer smaller, more affordable housing choices. How many does the neighborhood have? How do/would they best fit into the neighborhood? Are they part of the main structure or detached? How might these units be encouraged?

Purpose Statement*

This chapter describes existing housing types in the neighborhood and identifies opportunities for providing a variety of housing options that can accommodate diverse financial capabilities, transportation needs, and housing preferences. Options provide for a range of household compositions, including housing for Lake Oswego's workforce, families with school-age children, and aging in place. Housing opportunities meet the needs of present and future residents while respecting the character of the neighborhood. Housing uses land and public facilities as efficiently as possible, while respecting environmentally sensitive areas. The neighborhood plan does not serve as a barrier to attainable housing options.

Inventory and Analysis

Describe the different types of housing choices in the neighborhood. Consider the questions on the left of the page, the purpose statement and the results of the Strength, Weaknesses, Opportunities and Threats (SWOT) analysis. Are the housing choices sufficient to meet the current and future needs of the neighborhood? If not, where are the gaps?

Inventory and Analysis Example:

According to the 2010 U.S. Census data, there were 502 dwelling units within the Clifton Heights study area, an increase from 472 dwelling units in 2000. Approximately 80.2 percent of the available housing stock is made up of single-family dwellings, compared to the rest of Luckyville's at 82.03 percent. In terms of owner occupancy, approximately 72 percent of the dwelling units are owner occupied. This is on par with the rest of Luckyville (80 percent). Of the 502 dwelling units, approximately 2.3 percent of the units are vacant.

There are approximately 150 multi-family units within the neighborhood. However, data does not differentiate rental apartments and owner-occupied condominiums: both are considered multi-family units. The Census data reflects structure type and not the form of ownership, therefore the percentage of renters compared to owners isn't known. The city-wide vacancy rate is the same as the Clifton Heights rate (8.8%). Vacant non-condominium units which are "for sale only" comprised only 1.3 percent of the housing stock in Clifton Heights in 2010 compared to 10.7 percent for the entire county and 8.4 percent in the City of Luckyville alone. This is a very positive sign of the neighborhood's desirability.



Town homes in Evergreen

Housing

Clifton Heights exhibits a range of owner occupied dwelling unit values from \$275,000 to \$950,000 range (2010 prices). There is also an increase in the value of dwelling units proceeding from west to east across the study area. The average 2000 value of owner occupied dwelling units in Clifton Heights was \$350,000. The rent for renter occupied units in Clifton Heights is on average higher than the Luckyville. The 2010 mean gross rent in Clifton Heights was \$973 while Luckyville's was \$647 and the county's gross rent was \$578. The median gross rent was \$571, which helps show a consistency in rent prices throughout Clifton Heights.

Although there is a larger range of single-family housing values because the median is \$550,000 there are very few units that are affordable for younger families, seniors, singles, and others whose income levels are lower than the average Luckyvillian. Additionally, there are very few rental units, small housing units and secondary dwelling units, so aging-in-place may not be feasible for the residents who are entering their 70's.

Neighborhood Objective Examples:

1. Provide housing that meets the needs of the neighborhood's aging population.
2. Encourage green building practices in new housing construction and remodels.

Comprehensive Plan Policy Example:

Allow the development of cottage housing in the area between Sunshine Road, Blue Sky Lane, Daffodil Alley, and Luminous Lane in order to allow for small homes where neighborhood residents could downsize.

Neighborhood Action Steps Example:

Community Development Code

HO 1: Encourage the City to develop a cottage housing ordinance that could be applied in specified locations.

Program/Projects

HO 13: Organize a neighborhood tour and education fair about "green" remodeling practices.

HO 14: Help to provide resources to seniors who need assistance in order to remain in their homes as they age.

Potential maps to analyze and/or include:

Comprehensive Plan Map

Buildable Lands Inventory

Inventory of housing by type, #units, price range, owners, renters, building to land value, year built



Where We Play:

Questions to consider:

- Review the Parks Plan 2025 to identify the recreation services that are available, or deficient in your neighborhood:
- Are there parks in the neighborhood that provide opportunities for exercise and sports, play for children, and experiencing nature? Are there deficiencies in any of these opportunities?
- Are there geographic gaps: Is it possible for everyone in the neighborhood to reach a park within a 15 minute walk? If desirable, is there any vacant or undeveloped land that could be purchased to create a new park?
- Are the parks developed (playing fields, skatepark, etc.), natural (open space with trails), or a hybrid of the two? Is there an unfilled need for more active or passive parks?
- Do the neighborhood parks accommodate different ages?
- Which park projects or needs identified in the Parks Plan 2025 are most important to your neighborhood?

Purpose Statement*

This chapter identifies all existing active and passive parks and open spaces in the neighborhood, including outdoor school facilities that are accessible to the public. The chapter describes any unmet neighborhood recreational needs and identifies opportunities and strategies to address those needs; including increasing the accessibility to parks and meeting the needs of different park users. The neighborhood consulted the Parks and Recreation Master Plan to identify proposed projects that are slated to occur in the neighborhood.

Inventory and Analysis

Describe the park and open space amenities in the neighborhood and nearby parks in adjacent neighborhoods if applicable. Consider the questions on the left, the purpose statement and the results of the Strength, Weaknesses, Opportunities and Threats (SWOT) analysis. Are the open space and recreation choices sufficient to meet the current and future needs of the neighborhood? If not, where are the gaps?

Inventory and Analysis Example:

In total, there are 88.4 acres of City-zoned park lands inside the Palisades neighborhood (see map Figure 4-1). These lands are part of the City's Park and Natural Area Zone (PNA) and include active and passive parks and natural areas. The City's standards for the availability of park land call for 14 acres per 1,000 residents. Using this standard, 49 acres of park land are needed to meet the needs of Palisades neighborhood residents. While the total acreage of PNA-zoned land exceeds this standard, the recreational uses are limited by the current type of facilities in Palisades. In addition to the Municipal Golf Course, park lands in and near Palisades are predominantly natural or undeveloped areas. Cook's Butte Park and Stevens Meadows are available for passive recreational use, while South Shore Natural Area, and Greentree and Lost Dog Creek natural areas, are not accessible for recreational use. School properties add additional recreational facilities that are available for public use when school is not in session and facilities are not scheduled for school-sponsored activities.



Waluga Park

Open Space and Recreation

Palisades Neighborhood Plan Example

There is neighborhood desire for more pocket parks in the Palisades neighborhood that would provide active recreational opportunities within walking distance for the community. The Palisades neighborhood has only one small 0.4-acre pocket park (Greentree Park), while the City's standards would call for 23 acres of developed park to serve Palisades residents.

A 2004 Facility Study conducted by the City's Parks and Recreation Division also confirmed a city-wide need for trail enhancements, land acquisition and athletic fields.

Neighborhood Objectives Examples:

1. Participate in the planning and operation of Palisades neighborhood parks.
2. Develop additional pocket park facilities in Palisades.
3. Support the recreational needs of diverse age groups in Palisades.

Neighborhood Action Steps Example:

Programs/Projects

- OSR 1: Work with the City to develop a master plan for a park on the Rassekh property.
- OSR 2. Advocate for additional pocket park facilities. Priorities include play equipment and picnic facilities for Palisades residents and guests.

Potential maps to analyze and/or include:

Existing and proposed Parks and Recreation and Natural areas maps.

Resources:

Parks and Recreation Advisory Board
<http://www.ci.oswego.or.us/parksrec/prab.htm>

Parks Planning Documents: <http://www.ci.oswego.or.us/parksrec/parkproj.htm>



Nature in Our Neighborhood:

Questions to consider:

- What is our neighborhood watershed(s)? How does surface water quality in these watershed(s) compare to others in Lake Oswego?
- What wildlife is present in our neighborhood? Is this an amenity?
- Does the neighborhood have specific environmental issues that need to be addressed such as poorly-managed stormwater runoff or a lack of trees?
- Is there an ample amount of pervious surface to assist with stormwater runoff? Are there other opportunities for better managing stormwater?
- Are certain streets subject to flooding?
- Are there natural areas that the neighborhood helps to restore?
- What is the tree canopy in the neighborhood (percent canopy cover, dominant species, age)?
- Are there young trees to replace mature trees as they reach the end of their lifespan?
- Are there areas (example: busy streets) where additional vegetation would mitigate visual or noise impacts?
- What is the street tree stocking rate (the amount of available planting space within the ROW that is planted. Derived by dividing the total number of street trees by the available planting spaces)? Are there any streets that would benefit from new street trees?

Purpose Statement*

This chapter identifies the natural resources within the neighborhood boundaries including trees and vegetation, streams and wetlands, and outlines opportunities to preserve and improve their condition for future generations. The impacts of development (increased runoff, loss of trees and wildlife, hardening of the landscape) on the neighborhood's ecosystem are identified along with opportunities to invest in the built environment in ways that promote functional natural systems and utilize best management practices for stormwater infiltration. Consideration is also given to natural resources within the city and region that are impacted by the natural and manmade systems in the neighborhood. Neighborhoods in Lake Oswego have diverse topography and natural resources within their boundaries, therefore each neighborhood will have varying degrees of opportunity and concern.

An important note: Please keep in mind that the Tree Code is not part of the Community Development Code, but a separate chapter in the municipal code (just like fire protection, sign code, etc...). Neighborhood Plans should not include proposed changes to the Tree Code. If changes are desired there should be a separate process that engages citizens throughout the entire City.

Inventory and Analysis

Describe the natural resources in the neighborhood along with their conditions and pertinent issues. Consider the questions on the left, the purpose statement and the results of the Strength, Weaknesses, Opportunities and Threats (SWOT) analysis.

Inventory and Analysis Example:

The Branchwood neighborhood is located in the Clear Creek watershed. The City monitors water quality along Clear Creek in Branchwood Park. Water quality in this watershed is good for a suburban area. Branchwood has a 54% tree canopy cover, which is also higher than the city average. The most important natural features in Branchwood are Clear Creek and its Leaf Street tributary, which run through the park, and the large tree grove adjacent Twig Elementary. There are also some smaller tree groves along residential streets in the north portion of Branchwood. The street tree stocking rates in Branchwood exceed 75% on residential streets, but is only 40% on Clearcut Ave, our busiest street.

Deer and coyotes are occasionally seen in the north part of Branchwood. Songbirds and smaller mammals are seen throughout the neighborhood. The geese at the Twig Elementary playing field are a nuisance.

Natural Systems

Residents value the character that the tree provide and enjoy observing nature in the neighborhood, especially songbirds. Many yards in the neighborhood are not intensely manicured and have a natural appearance. Baker Street, at the bottom of Slope Street, experiences flooding in the winter months.

Neighborhood Objective Example:

Increase street tree stocking on Clearcut Avenue to 85%.

Comprehensive Plan Policy Example:

Create a pilot zone to allow for a neighborhood energy district project. The zone allows for the installation of local electrical generation facilities.

Neighborhood Action Steps Examples:

Community Development Code

ES 1: Two street trees are required for every 50 feet of development along Leaf Street. Trees will be selected from the City's approved street tree list. Additionally, the "Urban Forest" report should be consulted to determine which trees provide the most benefit and are most needed throughout the City.

Capital Improvements

ES 2: Baker Street will be under construction in 2016 for sewer replacement. When reconstructed the street should treat stormwater using low impact development identified in the the Stormwater Design Manual. Replacement trees should be selected to enhance the diversity of street trees in the neighborhood.

Programs/Projects

- ES 5: Create a "Friends of Bird Natural Area" group to help remove invasive species on a quarterly basis.
- ES 6: Encourage neighbors with significant trees to participate in the City's Heritage Tree Program.
- ES 7: Promote Energy Audits for homes in the neighborhood.

Potential maps to analyze and/or include:

Sensitive Lands Atlas

Surface Water Atlas

Topography and all limitations to development such as flood plains, steep slopes, etc...

Resources:

Lake Oswego Natural Resources Board

Lake Oswego Community Forestry Plan

Lake Oswego's State of Urban Forestry Report

Native Plants List

Lake Oswego's Water Conservation Specialist

Southeast Uplift Neighborhood Climate Action Planning Handbook



Communication with our Neighbors:

Questions to consider:

- What types of activities are held by the neighborhood association? What are the association's goals and areas of focus for these activities?
- How many neighbors typically attend neighborhood meetings and events? When compared to the neighborhood demographic analysis, are these participants representative of the neighborhood? If not, who is missing, and what efforts could be made to increase their involvement? Does the neighborhood association board share this composition?
- What communication tools does the neighborhood association currently use to inform the neighborhood about meetings, events and neighborhood news?
- What neighborhood activities have been the most successful in involving neighbors? Have different activities attracted different people?
- In the neighborhood survey and SWOT analysis, did neighbors raise concerns about personal safety in the public realm? If so, what are the concerns?
- Does your neighborhood have any established neighborhood watch groups? Has the Lake Oswego Police Department ever attended a neighborhood association meeting to talk about this program and/or other personal safety topics?
- Have any neighbors been through the CERT (Community Emergency Response Training) program through the Lake Oswego Fire Department?
- Do any areas within the neighborhood have block clubs or block captains to facilitate neighborhood communication?
- Does the neighborhood have subcommittees for areas that are of particular interest, such as sustainability, transportation, etc.

Purpose Statement*

This chapter recognizes the challenges of citizen involvement and identifies strategies for including all interested neighbors in future neighborhood planning and implementation processes. The plan summarizes the demographics as detailed in the neighborhood profile, and identifies ways to communicate and involve residents who represent this demographic mix, as well as those who represent diverse interests and come from all geographic areas of the neighborhood represent. This chapter also addresses how neighbors can work together to build safe communities. It describes the neighborhood's unique public safety needs, and focuses on opportunities for the neighborhood to support the City's public safety services through neighborhood communication, education and other programs. This chapter may include strategies to address personal safety within the public realm, as well as neighborhood preparedness for emergency situations such as natural disasters.

Inventory and Analysis

Using the questions above, outline the neighborhood's activities and type and level of involvement in those activities. Use the demographic analysis from the neighborhood profile to assess the level of neighborhood representation in these activities. Summarize strengths, weaknesses, opportunities and threats identified by neighbors and use these to develop objectives, policies and action steps.

Inventory and Analysis Example:

The neighborhood was officially recognized by the City in 1995. Since that time there have been varying levels of citizen involvement with the association. The core focus of the association is primarily land use, neighborhood character and natural resource management. The neighborhood association board composition is slightly older than the median neighborhood age and represents fewer households with children than are present in the neighborhood. The association board meets monthly and holds general membership meetings twice annually, along with an annual neighborhood ice cream social. Newsletters are mailed twice annually to announce the general membership meetings, and the association has recently started a blog to share more frequent updates. During the last several years the association's activity has focused primarily on responding to issues and seeking solutions. While this will always be a core mission of the association, the board would like to be more proactive in enhancing neighborhood amenities and diversifying its activities to involve a greater cross-section of stakeholders.

Citizen Involvement

Neighbors who participated in the neighborhood survey and planning meetings noted safety as one of their neighborhood assets. There is one board member who has been trained in the CERT program, and the neighborhood sees participation in this program as an opportunity to build stronger ties between neighbors.

Neighborhood Objectives Examples:

Increase opportunities for neighbors of all ages to connect with one another and with the place they live.

Improve the neighborhood's awareness of emergency procedures and educate neighbors about emergency preparedness.

Comprehensive Plan Policies Examples:

Not applicable.

Neighborhood Action Steps Examples:

Community Development Code

Not applicable.

Capital Improvements

Not applicable.

Programs/Projects

- CI 1: Develop a "Welcome to the Neighborhood Kit" for distribution to new neighbors, including businesses.
- C2: Develop a "Stay at Home Parents" monthly luncheon at Darla's Diner to reach out to busy parents who aren't always able to attend neighborhood meetings.
- C3: Organize yearly summer block parties for the entire neighborhood to build community.
- C4: Identify neighbors who have gone through the CERT training or who wish to become trained. Work with these neighbors to hold an emergency preparedness education event for the neighborhood.

Resources:

City of Lake Oswego Citizen Involvement Guidelines

SOLV, Combating the Same Six People Syndrome

Lake Oswego Monthly Crime Statistics by Neighborhood

Lake Oswego Community Emergency Response (CERT) Program



Neighborhood Pathway Clean-up

Where We Work, Shop and Do Business:

Questions to Consider:

- If your neighborhood has commercial zoning:
What types of businesses are located in your neighborhood?
- Do these businesses serve primarily local or regional needs? Do your neighbors work at or patronize these businesses?
- Are there any businesses or services that your neighborhood would like to add in the future? If so, consider recommended locations, and how to help recruit desired new businesses.

Purpose Statement*

This chapter identifies opportunities for economic development in the neighborhood. When the neighborhood has commercial zones, the plan identifies any deficiencies in the type of services offered as a means to inform the City's economic development planning. When the neighborhood does not include zoning that allows for commercial uses, the neighborhood has considered whether or not it would like to have commercial goods and services within the neighborhood in the future, and if so, makes recommendations on the uses and context within the neighborhood. *

Inventory and Analysis

Describe the businesses and jobs located in your neighborhood. Consider the questions on the left, the purpose statement and the results of the Strength, Weaknesses, Opportunities and Threats (SWOT) analysis.

Inventory and Analysis Example:

Most of the businesses in Sunnyside are small neighborhood serving establishments although some have clientele from all parts of the city. Many are very old, and are interspersed throughout the neighborhood.

The traffic patterns and market conditions are not conducive for high-volume business, and as a consequence, many are struggling or have gone out of business. Technical assistance is needed to help strengthen and retain existing businesses. In many cases there is also a need for streetscape and façade improvements.

Neighborhood Objectives Examples:

Help businesses/commercial property owners to maintain storefronts that positively contribute to the neighborhood's character.

Support local businesses within the neighborhood to help them stay viable.

Support safe walking and biking routes between neighborhood businesses and homes.

Economic Development

Programs/Projects

- ED 1: Work with business owners to form a Sunnyside Business Association that would help to promote local businesses.
- ED 2: Appoint a member of the neighborhood association to serve as the liaison to local businesses.



Resources

Lake Oswego Comprehensive Plan Goal 9

Oregon Statewide Planning Goal 9:
Economic Development:
<http://www.oregon.gov/LCD/docs/goals/goal9.pdf>

City of Lake Oswego Economic Opportunity Analysis (2009)?

Lake Oswego Chamber of Commerce:
<http://www.lake-oswego.com/>

PHASE FOUR: PLAN ADOPTION, ACCEPTANCE

So let's go back to the diagram shown page 5, the Neighborhood Action Plans Relationship to the Comprehensive Plan.

Step 1: Neighborhood association board accepts plan

Once each phase of the plan is complete, including review by the neighborhood and the Planning Commission/City Council advisory group, it is time for the neighborhood association board to review the complete document and vote to accept/revise the plan. Make sure to allow your board ample time to review the plan before a vote is held.

Step 2: Neighborhood votes on adopting the plan

After the board accepts the plan, the planning committee should present it to the general membership for a broader vote of the neighborhood. This presentation and vote may correspond with the timing for a regularly scheduled general membership meeting, or a special meeting may need to be held.

Make sure to notify the neighborhood well in advance of the meeting, and make a copy of the plan available for neighbors to read ahead of time. In addition to providing a mailed meeting notice, get creative about how to notify neighbors about the plan, make it accessible to read and vote on, and celebrate the hard work and collaboration completed by your neighbors!

Step 3: Plan presented to the Planning Commission

Once the neighborhood votes to adopt the plan as a representation of their neighborhood's desires for the future, the Neighborhood Planning Committee will work with staff to present the final plan to the Planning Commission. First, a work session will be held to brief the commission on the final plan. Second, a public hearing will be held where neighbors can testify and the Commission will make a formal recommendation on the action plan.

The Planning Commission will be asked to make a recommendation to City Council on the following:

- Adoption of the Neighborhood Profile and Vision Statement, Neighborhood Objectives, and Neighborhood Policies into the City's Comprehensive Plan.
- Adoption of any neighborhood-specific code amendments into the City's Community Development Code.
- Acceptance by resolution of any Capital Improvements and Programs the neighborhood has identified to implement the action plan.



Have a plan. Follow the plan, and you'll be surprised how successful you can be. Most people don't have a plan. That's why it's is easy to beat most folks.

- Paul "Bear" Bryant, football coach, University of Alabama's Crimson Tide.

Plan Adoption and Acceptance continued

Celebrate!



Step 4: Plan presented to City Council, who revises and/or adopts

Once the Planning Commission has approved the findings from the public hearing (usually 1-2 meetings following the hearing), their recommendation will be forwarded to the City Council. In order for the Comprehensive Plan and Community Development Code amendments to be put into effect, the City Council must adopt the changes by ordinance following a public hearing. Similar to the steps for the Planning Commission, a study session will first be held to brief the Council on the Planning Commission's recommendation. Then a Public Hearing will be held where neighbors can again testify. If the City Council agrees with the Planning Commission recommendation, they will then move to adopt Comprehensive Plan and Code changes by ordinance, and accept Capital Improvements and Programs by resolution. If there are any outstanding questions from the Planning Commission hearing, the City Council may adopt/accept the plan elements with certain changes.

Once the ordinance has been adopted, there is a 30-day waiting period before any Community Development Code amendments or Comprehensive Plan policies become effective.

Step 5: Celebrate your neighborhood's accomplishment!

Congratulations – your hard work has paid off! Your dedicated Neighborhood Planning Committee and neighbors have successfully articulated a vision and plan to enhance your neighborhood for years into the future.

Don't forget to celebrate your accomplishments! Your neighborhood association board may want to throw a party to thank everyone who has been involved, or have a celebration and recognition during an upcoming neighborhood meeting. Remember, there is still a lot of work to do in implementing your action plan and thanks and recognition go a long way in keeping volunteers enthusiastic and involved.

PHASE FIVE: PLAN IMPLEMENTATION

Now that your plan has been completed and adopted/accepted by the neighborhood and City, it's time to start implementing your high priority actions. While the new projects and programs you've identified may take a lot of time and persistence, this is also an opportunity to see tangible results!

Neighborhood Volunteers

The key to successful implementation is a set of dedicated neighborhood volunteers. Remember – while the neighborhood will involve various partners, such as the City, it will be the responsibility of the neighborhood association to coordinate with those partners in order to move the actions forward.

Plan implementation is also a great opportunity to involve neighbors that have specific skill sets or areas of interest. Neighbors who may not want to sit on the association board may still be excited to help throw a one-time event, work on a tree-planting program or show up throughout the year to help remove invasive plants. Delegate tasks and offer opportunities for small, limited commitments as a way to get new people involved. Remember to thank your volunteers and celebrate your accomplishments to encourage continuing participation!

Tracking Your Progress

In addition to recruiting volunteers for specific tasks, it is important to delegate people to oversee the progress of your action items. The association may want to form an implementation committee, perhaps with members of the Neighborhood Planning Committee or a subset of the association board, to move action items forward and report back to the City and neighborhood. Plan to report progress back to the association at each general membership meeting, and provide a progress report to the City annually. Your Action Chart is designed to be a working document that can be updated to note project status and be used as a reporting tool.

Understand Your Resources

Having completed your Neighborhood Action Plan, you've gained an immense understanding of your neighborhood as well as how the City and region work. As you move forward with plan implementation, it's important to continually assess the resources you have available to complete your tasks – from the amount of time and energy your neighborhood has to contribute toward projects, to the availability of staff time and City funds, to the activities of organizations and businesses within your neighborhood. Be strategic about timing your work to take advantage of projects within partner organizations like the City or your neighborhood school, and also understand that time and financial resources may be limited at times and necessitate changes to your preferred timeline. Good luck!

Boost Participation!



Don't underestimate the immense resources that are available when you're able to work together with your neighborhood!



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