



## MEMORANDUM CITY OF TUALATIN

**TO:** Honorable Mayor and Members of the City Council

**FROM:** Sherilyn Lombos, City Manager

**DATE:** April 28, 2014

**SUBJECT:** Work Session for April 28, 2014

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**5:00 p.m. (30 min) – Metro Councilor Dirksen.** Metro Councilor Craig Dirksen will be present to update the City Council on happenings of interest at Metro.

**5:30 p.m. (30 min) – Basalt Creek Concept Plan Project Update.** The City Council will receive an update on the Basalt Creek Concept Plan project and will be asked to review and provide feedback on the Partnering Agreement and the Public Involvement Plan. Attached is information that will be used for the discussion.

**6:00 p.m. (30 min) – Economic Development Strategic Plan Update.** Over the last several months, the City has been in the process of updating the Economic Development Strategic Plan (last updated in 2001). Tonight, staff will brief the Council on how the draft plan was crafted and present draft language for Council's input and feedback. Attached is a presentation along with the draft plan.

**6:30 p.m. (10 min) – Community Enhancement Award Recommendation.** Representatives from the Arts Committee will present information to the City Council regarding a recommendation for presentation of the Community Enhancement Award.

**6:40 p.m. (10 min) – Neighbors Nourishing Community Program.** At the April 14 work session, the Council asked staff to put this item on the agenda for a briefing of this program. A representative of the program will be present to share information with Council.

**6:50 p.m. (5 min) – Council Meeting Agenda Review, Communications & Roundtable.** Council will review the agenda for the April 28<sup>th</sup> City Council meeting and brief the Council on issues of mutual interest.



# STAFF REPORT

## CITY OF TUALATIN

**City Council Work Session**

**Meeting Date:** 04/28/2014

**Subject:** Metro Update

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PowerPoint

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MAKING A  
GREAT  
PLACE



# Metro update

## Tualatin City Council

Councilor Craig Dirksen

April 28<sup>th</sup>, 2014

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# Land use and transportation



- Southwest Corridor
- Urban growth report
- Regional Transportation Plan update
- Draft Active Transportation Plan

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# RTP update—adopted by July 2014



- Project solicitation through coordinating committees completed (Fall 2013)



- Public Comment Period (March 21 – May 5)

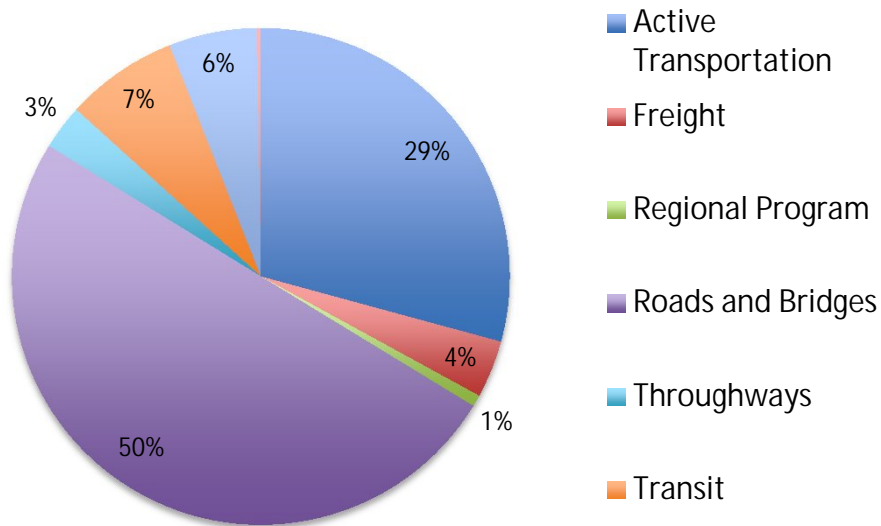


- Final Action by JPACT & Metro Council (July)

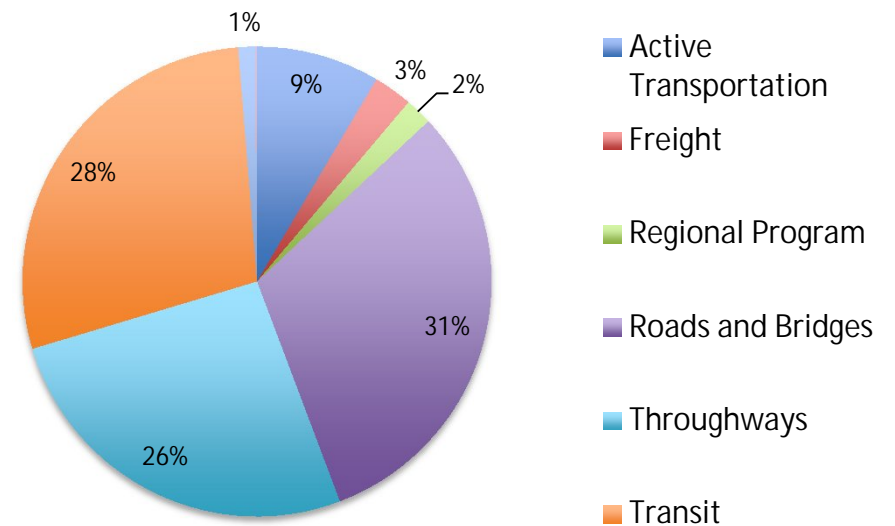
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# Composition of 2014 RTP Draft project list

## By Number of Projects



## By Cost of Projects



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# Active Transportation Plan



- Knits together local actions for efficient, consistent, comprehensive implementation of regional network and programs
- Represents a set of policies and actions to help achieve local and regional plans, desired outcomes, goals and targets.

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# Climate Smart Communities



- State required region to reduce carbon emissions from cars and small trucks by 20% by 2035



- Reach the state target by investing in existing adopted local and regional plans



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# Moving toward a preferred approach



- Stakeholder interviews, focus groups, other engagement on strategies to address state mandate
- Second joint MPAC/JPACT meeting (May 30<sup>th</sup>) to discuss strategies and recommend draft preferred approach

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# Public comment period—March 21 to May 5



- Opportunity to provide input on Climate Smart Communities, RTP update and the MTIP
- [www.makeagreatplace.org](http://www.makeagreatplace.org) for an interactive questionnaire
- April community forums

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# Natural areas update



- 2013 levy funds put to work
- Seeking restoration grant applications

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# Visitor venues



- Convention Center hotel project
- Oregon Zoo improvements
- Cirque du Soleil TOTEM at Expo Center

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# Your questions...

Craig Dirksen

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[www.oregonmetro.gov/connect](http://www.oregonmetro.gov/connect)



# MEMORANDUM

## CITY OF TUALATIN

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos

**FROM:** Cindy Hahn, Associate Planner  
Aquilla Hurd-Ravich, Planning Manager

**DATE:** 04/28/2014

**SUBJECT:** Basalt Creek Concept Plan Project - Update and Presentation of Partnering Agreement and Public Involvement Plan

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### **ISSUE BEFORE THE COUNCIL:**

City Council will receive an update on the Basalt Creek Concept Plan project, and will be asked to review and provide feedback on the Partnering Agreement and Public Involvement Plan.

### **EXECUTIVE SUMMARY:**

Staff from Tualatin and Wilsonville have been working with the Basalt Creek consultant team led by Fregonese Associates (FA) to develop a Public Involvement Plan and a calendar of milestones. The Public Involvement Plan will guide community engagement throughout the course of the project. The FA Team includes sub-consultants CH2M Hill, Leland Consulting Group, and DKS Associates.

Staff will present the updated Partnering Agreement, which City Council last reviewed in January, identifying the roles and responsibilities of the Basalt Creek Concept Plan project partners. In addition, staff will present the Public Involvement Plan for City Council's review.

### **NEXT STEPS**

Next steps in the planning process include completing a detailed calendar of milestones for the project, inventorying and mapping existing conditions in the study area, and developing guiding principles and evaluation measures to be used in assessing alternative land use scenarios. A Joint Council meeting to review progress to date is anticipated for summer 2014. Planning Commissions and City Councils of both Tualatin and Wilsonville will receive regular updates throughout the concept planning process.



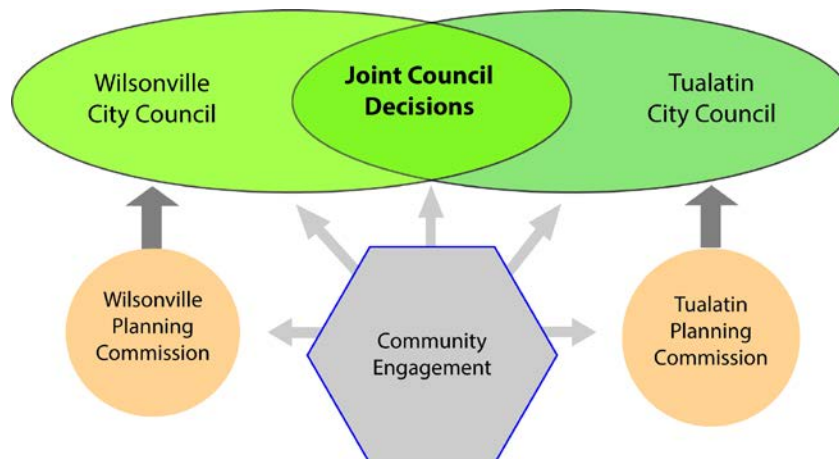


## **Basalt Creek Concept Plan Project Partnering Agreement**

### **Purpose**

The purpose of this agreement is to identify the roles and responsibilities of the Basalt Creek Concept Plan project partners. Specifically, it highlights the duties of the multiple stakeholder groups and the two City Councils. In July 2010, the Cities of Tualatin and Wilsonville entered into a Memorandum of Understanding which outlined their commitment to work collaboratively to create a land use concept plan. This document furthers that agreement with additional detail regarding the process to finalize the Basalt Creek Concept Plan.

### **Decision-making Structure**



The cities will undertake the planning process both through meetings of existing public bodies and through specially-scheduled meetings and workshops with the public and stakeholders. In notice and conduct of all public meetings for the project, staff members will follow Oregon Public Meetings Law (ORS 192.610 -192.690).

### **Roles & Responsibilities:**

*Council Subcommittee* – Two elected officials for each city will serve on this subcommittee to outline and further refine the process for this project. This group will be charged with two primary tasks: 1) establish a decision making framework; and 2) identify community engagement techniques to be used throughout the project. It is envisioned that the subcommittee will meet on a limited basis at the beginning of the project to accomplish these tasks.

*Joint City Councils*<sup>j</sup> – The Tualatin and Wilsonville City Councils will be the ultimate decision-making body for the final Basalt Creek Concept Plan. Both City Councils will be tasked with approving the guiding principles, selecting the preferred land use scenario which will also include the provision of public services, identifying future jurisdictional boundaries, and approving the final Basalt Creek Concept Plan.



*Tualatin City Council*<sup>ii</sup> – While the final plan will be approved jointly by both City Councils, it is recognized that there will be some issues that require greater input from the City of Tualatin. Specifically, measures, ordinances, and resolutions to amend the Tualatin Development Code to implement the final plan will be made by the Tualatin City Council. The Tualatin City Council will receive periodic check-ins from staff throughout the planning process.

*Wilsonville City Council*<sup>iii</sup> – While the final plan will be approved jointly by both City Councils, it is recognized that there will be some issues that require greater input from the City of Wilsonville. Specifically, measures, ordinances, and resolutions to amend the Wilsonville Development Code and Comprehensive Plan to implement the final plan will be made by the Wilsonville City Council. The Wilsonville City Council will receive periodic check-ins from staff throughout the planning process.

*Tualatin Planning Commission*<sup>iv</sup> – The role of the Tualatin Planning Commission will be to consider input gathered through community engagement and from the Agency Review Team to further recommendations to the Tualatin and Wilsonville City Councils. In addition, they will serve in their advisory capacity to amend the Tualatin Community Plan Map to implement the final Basalt Creek Concept Plan.

*Wilsonville Planning Commission*<sup>v</sup> – The role of the Wilsonville Planning Commission will be to consider input gathered through community engagement and from the Agency Review Team to further recommendations to the Tualatin and Wilsonville City Councils. In addition, they will serve in their advisory capacity to amend the Wilsonville Development Code and Comprehensive Plan to implement the final Basalt Creek Concept Plan.

*Community Engagement*<sup>vi</sup> – Throughout the process, development of the Basalt Creek Concept Plan will be informed through a variety of community engagement opportunities that will be described in detail in the Public Involvement Plan (PIP) for the project. Engagement opportunities are expected to include interviews, focus groups, public workshops, and online survey and comment opportunities. Input gathered through community engagement will be shared with the two Planning Commissions and City Councils.

*Agency Review Team*<sup>vii</sup> – In addition to being informed through community engagement, the Basalt Creek Concept Plan process will be assisted by the Agency Review Team, whose primary role will be to advise staff members of both cities about regulatory and planning compliance. Input gathered from this group will be included in regular updates to the Planning Commissions and City Councils. Involvement in this group will be essential for some key agencies that need to approve or agree with the concept plan, while other agencies will be invited to participate in the planning process when their advice is needed on specific issues. The Agency Review Team will include members from the following organizations:

- Essential Agencies
  - Metro
  - ODOT
  - Tualatin Valley Fire & Rescue
  - Washington County
  - Bonneville Power Administration
- Invited Agencies
  - City of Sherwood
  - City of Tualatin (Departments other than Community Development/Planning)
  - City of Wilsonville (Departments other than Community Development/Planning)
  - Clackamas County
  - Clean Water Services
  - Portland General Electric

- Northwest Natural
- Sherwood School District
- SMART
- Tigard/Tualatin School District
- Tri-Met
- Tualatin Valley Water District
- Wilsonville / West-Linn School District

Major agreements will be discussed at meetings, but some elements or decisions for moving forward with technical work may be made outside of meetings. As appropriate, the Agency Review Team will be consulted with and informed. As requested, additional staff from each agency will be copied on communications for meetings, review of materials, and general coordination where other related area projects may be involved.

*Tualatin and Wilsonville Staff Members<sup>viii</sup>* – Staff members from the cities will keep others informed during this process and coordinate information that is distributed to the community. Any information that will be distributed publicly for the Basalt Creek Concept Plan will be reviewed by one key staff member from each of the cities. This will ensure the cities are prepared to field questions that may be raised by the public.

### **Process Schedule**

The process diagram in Attachment A outlines key milestones and deliverables in the project.

### **Process and Protocols/Communications/Commitments**

*Meeting Ground Rules (all meetings):*

- Notify staff if not able to attend a meeting or will be late.
- Read materials in advance.
- Provide comments on draft meeting materials that are distributed in advance of meetings for comment.
- Treat everyone with respect.
- Listen carefully with the intent of understanding.
- Let others finish before speaking.
- Share the air– let others speak once before speaking twice.
- Raise issues honestly, clearly and early in the process.
- Express concerns or issues; silence on an issue will be understood to mean agreement.
- Focus questions and comments on the subject at hand and stick to the agenda.
- When discussing events or issues of the past, apply them productively to the present discussion.
- Collaborate with other group members – seek to find common ground.
- Put cell phones on silent mode.
- Participate!

End meetings on time. If agenda items cannot be completed on time, groups members will decide if the meeting should be extended, if an additional meeting should be scheduled, or if the issue will be dealt with in another way (subgroup, email, etc.).

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<sup>i</sup> Staff members will follow Oregon Public Meetings Law (ORS 192.610 -192.690) in notice and conduct of public meetings for the project.

<sup>ii</sup> Ibid.

<sup>iii</sup> Ibid.

<sup>iv</sup> Ibid.

<sup>v</sup> Ibid.

<sup>vi</sup> Ibid.

<sup>vii</sup> Ibid.

<sup>viii</sup> Ibid.

**Public Involvement Plan**  
**Basalt Creek Concept Plan**  
**April 2014**

## OVERVIEW

This document outlines the Public Involvement Plan for the Basalt Creek Concept Plan and includes in detail the outreach, education and communication services that the project team, comprised of the Fregonese Associates Team (FA Team) and staff from Tualatin and Wilsonville, will use to engage the public and stakeholders in development of the Concept Plan. The FA team will work closely with cities of Tualatin and Wilsonville Project Management Team (PMT) to coordinate and develop a transparent planning process based on the best available data, including meaningful public engagement strategies to prioritize critical issues. The FA Team will communicate clear and realistic growth scenarios and ultimately develop consensus around an achievable preferred land use strategy.

This memo is organized around four **major tasks**:

- I. Engagement Materials
- II. Targeted Stakeholder Outreach
- III. Public Events and Online Surveys
- IV. Informational Updates & Announcements

Within each of the major tasks, **task deliverables** from the detailed scope of work are included and outlined in detail. For each **task deliverable**, the Public Involvement Strategy includes the following information:

- **Description and Purpose**  
Describes the purpose of the deliverable to provide context for the activity and its relationship to the overall project
- **Materials**  
Each task deliverable may contain one or more than one set of materials, which will be identified in this section
- **Roles**  
Anticipated roles are identified for the PMT and FA Team within each task

### Roles and Responsibilities Framework

- The **Fregonese Associates Team** (FA Team) refers to the prime project consultant, Fregonese Associates, and includes the sub-consultants CH2M Hill (CH2M), Leland Consulting Group (LCG),

and DKS Associates (DKS), collectively referred to in this document as the FA Team. As the prime consultant, Fregonese Associates staff will lead the consultant team, working as the point of contact for the PMT, identifying methods and analysis approach, developing the outreach strategy, and managing the project timeline based on the agreed-upon work program.

- **Project Management Team (PMT)** consists of the project managers from the Cities of Tualatin and Wilsonville. The project managers from each city will make decisions as a team and communicate with the FA Team as one decision-making entity. To streamline the revision process throughout the project, the FA Team requests that all feedback is consolidated through the PMT. Once established, the agreed-upon deadlines for review must be met to keep the project on schedule. The PMT will manage the process of keeping staff from their respective individual cities informed during plan development. The PMT will also coordinate information distributed to the community. Any information distributed publicly for the Basalt Creek Concept Plan will be reviewed in advance by the PMT.
- The **Agency Review Team (ART)** is tasked with the primary role of advising staff members of both cities about regulatory and planning compliance. Input gathered from the ART will be included in regular staff updates to the Planning Commissions and City Councils. Involvement in this group will be required for some key agencies that need to approve or agree with the concept plan, while other agencies will be invited to participate in the planning process when their advice is needed on specific issues. The ART will include members from the following organizations:
  - Essential Agencies
    - Metro
    - ODOT
    - Tualatin Valley Fire & Rescue
    - Washington County
    - Bonneville Power Administration
  - Invited Agencies
    - City of Sherwood
    - City of Tualatin (Departments other than Community Development/Planning)
    - City of Wilsonville (Departments other than Community Development/Planning)
    - Clackamas County
    - Clean Water Services
    - Northwest Natural
    - Portland General Electric
    - Sherwood School District
    - SMART
    - Tigard/Tualatin School District
    - Tri-Met
    - Wilsonville/West-Linn School District

Major agreements will be discussed at meetings, but some elements or decisions for moving forward with technical work may be made outside of team meetings. As appropriate, the ART

will be consulted with and informed. As requested, additional staff from each agency will be copied on communications for meetings, review of materials, and general coordination.

- **Joint Council** refers to Council Meetings involving Councils from both the City of Tualatin and the City of Wilsonville. The Tualatin and Wilsonville City Councils will be the ultimate decision-making body for the final Basalt Creek Concept Plan. Both City Councils are tasked with approving the guiding principles, selecting the preferred land use scenario (which will also include the provision of public services), identifying future jurisdictional boundaries, and approving the Final Basalt Creek Concept Plan.
- The **Tualatin City Council** and the **Wilsonville City Council** will convene independently to review and discuss issues that require greater input from their respective City Councils. Specifically, measures, ordinances, and resolutions to amend the individual Cities' Codes will be needed to implement the final plan. The Tualatin City Council and the Wilsonville City Council will receive regular briefings from their respective staff throughout the planning process.
- The role of the **Tualatin Planning Commission** and the role of the **Wilsonville Planning Commission** will be to consider input gathered through community engagement and from the ART and make recommendations to their respective City Councils. In addition, they will serve in their advisory capacity to respectively amend the Tualatin Community Plan Map and the Wilsonville Development Code and Comprehensive Plan to implement the final Basalt Creek Concept Plan.

## Revision Process

For all deliverables there will generally be two rounds of review and document editing, with approximately one week for each round (one week for the PMT to review an initial draft, and another week for the consultant to make revisions and submit to PMT for final comments and edits). This timeframe, however, is general. The exact timeframe for the revision process of each deliverable will be determined on a case-by-case basis according to the level of complexity and lead time necessitated by respective public meeting laws of each City. For example, materials for use at Individual and Joint Council meetings must be submitted to city recorders' offices at least one week in advance of the meeting date. In some cases, the PMT may need more than one week to submit comments to the consultant, as they will be coordinating and consolidating comments between the Cities of Wilsonville and Tualatin.

## Public Involvement Strategy Goals

The Cities of Tualatin and Wilsonville are committed to public involvement that:

- Provides early and ongoing opportunities for stakeholders to raise issues and concerns
- Facilitates equitable and constructive communication between the public and project team
- Empowers residents to become involved with the project
- Encourages participation with other planning efforts in both cities
- Provides the public with balanced and objective information to help them understand the problem, alternatives, opportunities and solutions

- Offers alternative accommodations to encourage participation of all stakeholders regardless of race, ethnicity, age, disability, income, or primary language
- Builds on existing communication networks and resources of both cities

## Types of Involvement

The following categories can be used to group public participation activities by depth of engagement. A table below organizes these activities by stakeholder group, while the “Communication Methods” section presents the same information, organized by milestones. It is important to note that many outreach activities can achieve multiple levels of engagement, depending on the activity objective, design, and contextual factors.

### **Informing**

This level of participation will focus on educating and informing all interested parties (even those who are just peripherally interested) about the project background, status updates, public events and participation opportunities and major milestones and decision points. The level of technical detail about a given topic will be tailored to be audience-appropriate. For example, the level of detail about environmental constraints analysis methodology will be greater at an ART meeting than at a public open house, because ART members are staff or regulating and enforcing agencies. However, more detailed information will often be made available to the public should a reasonable request for it be made. Informing is the most broadly used level of engagement in many cases because it is a precursor to higher levels of engagement and must reach a large number of stakeholders.

### **Consultation**

Consultation with stakeholders entails asking them to provide input on the goals, alternatives and plan. This level of engagement is critical for identifying major issues and concerns among particular stakeholder groups as well as the general public. Different opportunities for providing input will be designed to be appropriate for a range of stakeholders. In essence, this level involves “checking in” with stakeholders to say, “did we get it right?” Surveys and open houses can achieve this level of engagement, among others.

### **Participation**

Participation requires that stakeholders are helping to define and shape project goals, evaluating options and alternatives, and possibly helping to shape recommendations to be included in the plan. Public meetings, workshops, or work sessions can achieve this level of engagement.

### **Collaboration**

Stakeholders help to craft alternatives in collaborative engagement activities. It involves a high level of project detail and usually long-term commitment to reviewing background documents. Technical experts as well as elected officials and decision-makers are commonly leaned upon to perform these duties, though citizen advisory committees and stakeholder group representatives may also contribute substantial efforts. The audience for this level of engagement includes stakeholders who have a higher

level of interest in the project and those who will be interested and impacted by the outcomes of the project.

### **Partnership**

The most engaged level of participation, partnership entails shared responsibility for developing and implementing solutions, as well as decision-making authority. This level of engagement frequently occurs at the institutional level, with public agencies and elected bodies, as well as private-sector representatives, cooperating to agree upon and apply solutions to realize the best possible outcomes for the public interest. The City Councils of Tualatin and Wilsonville will have the final decision making authority for the project. Informed by the input from the public workshop and staff, the City Councils will review information and make their recommendations.

### **Communication Methods**

The project team will utilize online and print communication methods to inform stakeholders about public events and opportunities to participate in the development of the plan. The following list identifies public activities and the expected communication methods which will be used to advertise these activities and events.

Council meetings for either City:

- Community calendars for individual cities
- Basalt Creek project website

Public workshop and open house announcements, including online surveys:

- Community Calendars for both Cities
- City of Tualatin and City of Wilsonville Facebook pages
- Basalt Creek Twitter feed
- Basalt Creek project website
- Press releases to local media

Release of draft plan document for review:

- City of Tualatin and City of Wilsonville Facebook pages
- Basalt Creek Twitter feed
- Basalt Creek project website
- Press releases to local media

Release of final plan document for review:

- City of Tualatin and City of Wilsonville Facebook pages
- Basalt Creek Twitter feed
- Basalt Creek project website
- Press releases to local media



STAKEHOLDER GROUP	OUTREACH ACTIVITY	PROJECT TOPICS	PARTICIPATION LEVEL				
			Partner	Collaborate	Involve	Consult	Inform
<b>Property Owners</b>	1. Focus group	Project background, Existing conditions, Guiding principles, Alternative scenarios			X		X
	2. One-on-one interviews	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	X
	3. Online Survey	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	X
<b>Business Owners</b>	1. One-on-one interviews	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	
	2. Online Survey	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	X
<b>Developers</b>	1. Focus group	Project background, Existing Conditions, Development opportunities & barriers				X	X
<b>Residents</b>	1. One-on-one interviews	Existing conditions, Guiding principles, Alternative Scenarios				X	X
	2. Online Survey	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	X
<b>General Public</b>	1. Project website	Project background, Project Calendar, Project FAQ, Public event announcements/reminders, Online survey link, Comment form					X
	2. Posted flyers	Workshop & open house announcements/reminders					X
	3. Email	Project updates, Public event announcements/reminders, Online survey link, Link to comment form, Results of public events, results of Elected Officials and Agency decision points, Link to Concept Plan draft, Link to final Concept Plan					X
	4. Facebook/Twitter	Link to project website, Brief project updates, Link to Online Survey, Link to online comment form, Public event announcements/reminders, Results of open houses & Workshops, Results of elected officials' and public agency decision points, Link to draft Concept Plan, Link to final Concept Plan					X
	5. Newsletters	Project background, Project updates, Public event announcements/reminders, Results of public events, Results of Elected officials and public agency decision points					X
	6. Online Survey	Project background, Existing conditions, Guiding principles, Alternative Scenarios				X	
	7. Online Comment form	All				X	
<b>Informed Public</b>	1. Open House	Alternative scenarios, Draft preferred scenario		X			
	2. Workshop	Project background, Existing conditions, Guiding principles, Alternative scenarios		X			
	3. Draft Review	Draft preferred scenario		X			
	4. Public Hearings	Final preferred scenario, Jurisdictional boundary			X		
<b>Hard-to-reach Groups</b>	1. Phone calls	Project background, Public event announcements/reminders					X
	2. Mailers	Project background, Public event announcements/reminders					X
	3. Multi-lingual materials	Project background, Public event announcements/reminders					X
<b>Elected Officials</b>	1. Informational briefings	Project updates, Public feedback, Major milestones (existing conditions, draft and preferred scenarios), Preparation for decision points				X	
	2. Work sessions	Concept plan discussion, Jurisdictional boundary discussion		X			
	3. Draft review	Jurisdictional boundary, Finalconcept plan		X			
	4. Plan acceptance	Jurisdictional boundary, Finalconcept plan	X				
<b>Non-profits, schools, religious and advocacy groups</b>	1. Email	Project updates, Public event announcements/reminders, Online survey link, Link to comment form, Results of public events, results of Elected Officials and Agency decision points, Link to Concept Plan draft, Link to final Concept Plan					X
	2. One-on-one interview	Existing conditions, Guiding principles, Alternative scenarios				X	
	3. Open House	Alternative scenarios, Draft preferred scenario			X		
	4. Workshop	Project background, Existing conditions, Guiding principles, Alternative scenarios			X		
<b>Media</b>	1. Press releases	Project updates, Public event announcements/reminders, Online survey link, Link to comment form, Results of public events, results of Elected Officials and Agency decision points, Link to Concept Plan draft, Link to final Concept Plan					X

# I. OUTREACH MATERIALS

## Deliverables

1. General Milestone Calendar
2. Project Branding (Logo)
3. Stakeholder Contact List
4. Periodic Email Updates
5. Press Releases
6. Newsletter Articles
7. Materials for Project Website
8. Social Media

## 1. General Milestone Calendar

### Description and Purpose

A milestone calendar will be created to communicate an overview of the project process and timeline to the general public, key stakeholders and decision makers. The General Milestone Calendar will be an attractive, easy-to-understand flow diagram communicating the timing and sequence of major project milestones, public engagement opportunities and decision points. This graphic will be utilized in print, online and in presentations.

The purpose of a general milestone calendar is to:

- a) Facilitate public understanding of the general flow and sequencing of project tasks
- b) Alert the public, key stakeholders and decision makers in advance of critical junctures where their input is needed, including but not limited to:
  - a. Public meetings and events
  - b. Review/comment periods for draft concepts and documents
- c) Communicate updates in the timing or sequencing of key milestones

### Materials

*Key dates to show on the General Milestone Calendar will include but not be limited to the following:*

- ART meetings
- Joint Council Meetings
- Planning Commission Meetings
- Development of Guiding Principles
- Existing Conditions Report
- Public Workshop
- Development of Alternative Scenarios
- Public Open House

- Development of Final Plan
- Plan Acceptance Decision
- Availability of draft jurisdictional boundary memo for public review (review/comment period)

## Roles

### Project Management Team

- Review and provide feedback on General Milestone Calendar
- Distribute the final General Milestone Calendar to agency leads and other decision makers

### FA Team

- Design the Draft General Milestone Calendar
- Integrate comments and feedback
- Deliver final Calendar (electronic format) to the PMT and upload to project webpage

## 2. Project Branding

### Description & Purpose

The FA Team will develop a project logo which will be used on all outreach materials, reports and the website to create and reinforce the project identity. The purpose of branding is to establish a recognizable identity for the project. The FA Team will provide web and print-ready formats of the final logo to the PMT. File formats will include JPEG, Adobe Illustrator and PNG.

### Materials

A project logo and associated graphics will include attractive, easy-to-understand visual elements that reinforce agreed-upon guiding principles and project priorities.

## Roles

### PMT

- Provide feedback on the project logo

### FA Team

- Design project logo
- Distribute a web- and print-ready version of the logo for use by the PMT; upload and incorporate into project website
- Incorporate the project logo in PowerPoint presentations, outreach materials, reports and the project website materials

## 3. Interested Persons Contact List

### Description & Purpose

The FA Team will collaborate with the City of Tualatin and City of Wilsonville to effectively utilize the existing contact list of interested persons. Stakeholders on the contact list will receive periodic email updates corresponding to major project milestones, including notices of public events. The stakeholder contact list will be managed by the City of Tualatin and used to send project update messages via email.

### Materials

The master contact list will include names, email addresses, phone numbers, and addresses of stakeholders. This contact list should also track stakeholder types (i.e. property owner, business owner, resident) and organizational affiliations. The contact list can be used to track additional stakeholder information, such as identifying interview candidates, focus group members, or workshop attendees.

The contact list should include but not be limited to the following:

- Property Owners and Neighbors
- Other residents and tenants
- Tualatin Community Representatives (CIOs)
- Wilsonville Community Representatives
- Tualatin Business Representatives
- Wilsonville Business Representatives
- Westside Economic Alliance Representatives
- Horizon School Representatives
- Agency Review Team
- Stakeholder Interviewees

### Roles

#### PMT

- Collect new contact information from stakeholders by providing and collecting sign-in sheets at the public workshop and open house
- Manage and update master email distribution list
- Reach out to community groups to request permission to add their members to the outreach contact list
- Protect the addresses and privacy of individuals on the contact list
- Provide the FA Team with existing project email distribution lists. May necessitate merging of lists between organizations

#### FA Team

- Protect the addresses and privacy of individuals on the contact list
- Provide PMT with access to contact information collected through online surveys

## 4. Email Updates

### Description & Purpose

The purpose of on-going communications via email (using the Interested Persons contact list described above) is to highlight positive momentum toward achieving community goals. Email updates will be sent to the email distribution list described above to communicate project milestones and to notify stakeholders of the public workshop, open house, online surveys, online public draft documents, etc, as needed.

### Materials

General project updates may include, but not be limited to the following information:

- Status of the project in relation to the General Milestone Calendar
- Upcoming opportunities for public engagement
- Links to results and images from recent outreach activities
- Links to the online surveys
- Links to the project webpage
- Public availability of draft or final documents
- Outcomes of Joint Council meetings or major decision points
- Contact information for project management

### Roles

#### PMT

- Establish a PMT strategy for review of email content
- Review and approve a template for email updates
- Review and approve content for email updates
- Establish a project email address and contact for email blasts

#### FA Team

- Prepare an email template in Mailchimp (or similar service) to manage messaging to email distribution list
- Prepare content for email updates in consultation with the PMT
- Send email blasts prior to public meetings and at key milestones, once content is approved by PMT

## 5. Press Releases

### Description & Purpose

Project press releases will be issued jointly by the City of Tualatin and the City of Wilsonville on project-branded letterhead to reach local and regional media contacts at key milestones. The City of Tualatin, City of Wilsonville and the FA Team will jointly prepare and review press releases prior to issuing them.

Each City will send the releases to their local media contacts and they will also be shared with regional media contacts via the FlashAlert Newswire ([www.flashalert.net](http://www.flashalert.net)). Press releases will also be shared via the project's Twitter account, each City's Facebook page, and each City's website. Each press release will have two contacts—one from the City of Tualatin and the other from the City of Wilsonville. The FA Team will post the press releases on the project website.

## Materials

Press releases will be posted on each City's websites, Facebook pages, project-specific Twitter feed, and on the Basalt Creek project website.

## Roles

### PMT

- Draft press releases at key project milestones
- Review, edit and approve content
- Issue press releases to local and regional media contacts
- Post press releases to project Twitter feed, City Facebook pages, City websites, and the project website.
- The project contacts for each City will respond to media inquiries in a timely manner and report back to the PMT
- Media coverage will be shared on the project-specific Twitter feed

### FA Team

- In coordination with the PMT, draft and edit press releases and post press releases and media coverage to project website

## 6. Newsletter Articles

### Description & Purpose

Both the City of Tualatin and the City of Wilsonville have monthly newsletters that are mailed to their residents. Each City will be independently responsible for drafting and running articles in their newsletter at key milestones throughout the project. These articles may be based on the project press releases, but also may include information about upcoming meetings and other related content.

## Materials

Newsletter articles will be run in each City's newsletter at key milestones throughout the project.

## Roles

### PMT

- Draft articles at key milestones based on press releases or other content
- Review, edit and approve articles
- Run and distribute articles in each City's monthly newsletter and on the project website

## FA Team

- In coordination with the PMT draft and edit articles and post to project website

## 7. Materials for Project Website

### Description & Purpose

The existing project website will be utilized to provide project information such as background, objectives, milestones, and key engagement opportunities, as well as a venue to post draft and final documents for public review.

The overarching goals of the project website are distributing information to the public and key stakeholders and gathering their feedback at decision making points. The website should include the following:

- Project background and timeline
- Updates on milestones and key decision points
- Announcements of public involvement opportunities
- Results of outreach efforts
- Downloadable PDFs of website content and other engagement materials including project background and timeline, event announcements, etc.
- Links to the project's Facebook page and Twitter feed, as well as other relevant projects such as the SW Tualatin Concept Plan, Coffee Creek, 124<sup>th</sup>, Boones Ferry Road, etc.

### Materials

The FA Team will update, manage and provide text and images for website updates to the PMT corresponding to key milestones and decision points, public involvement opportunities, and draft and final documents as identified in this Public Involvement Plan. These updates will be tracked on a detailed (internal) Project Team Timeline and coordinated on an as needed basis.

### Roles

#### PMT

- Review, edit and approve website content
- Provide and host website URL
- Prepare and update a FAQ about the project

#### FA Team

- Provide initial review of the website structure and content and implement any changes or additions with PMT oversight
- Establish an RSS feed on the project website
- Provide draft and finalized content updates including PDFs, text and graphics to the PMT for approval

- Coordinate email blasts and website updates
- Manage and upload new materials for the website that are included as part of the Public Involvement Plan

## 8. Social Media

### Description & Purpose

Facebook page and Twitter feeds will provide another means for stakeholders to stay connected with the project progress. The Cities of Tualatin and Wilsonville will utilize their existing Facebook pages and Twitter feeds to provide Basalt Creek Plan updates and links to the Basalt Creek webpage including notices of public events and when new material is posted to the Basalt Creek project website. Posts will be added throughout the project at major milestones and as there are noteworthy updates to report. The City of Wilsonville will also develop a twitter feed specific to the Basalt Creek project which will help further advance public information and guide interested parties to the Basalt Creek Website.

### Materials

Facebook and Twitter content posted to City sites and a Basalt Creek specific Twitter feed.

### Roles

#### PMT

- Create brief, periodic Facebook and Twitter posts
- Review, edit and approve content
- Post content to Facebook and Twitter
- Content for updates will be generated by the PMT in collaboration with the FA Team.

#### FA Team

- In coordination with the PMT generate content and provide advice for Facebook and Twitter posts

## II. TARGETED STAKEHOLDER OUTREACH

### Task Deliverables

1. Interviews
2. Stakeholder Groups
3. Agency Review Team (ART)
4. Planning Commission Briefings
5. Individual Council Information Sessions
6. Joint Council Decision Information Sessions



# 1. Interviews

## Description & Purpose

The purpose of stakeholder interviews is to gain a better understanding of stakeholder goals and interests. These meetings will serve to highlight key issues of concern within the planning area, and other issues that relate to development and implementation of a project vision for the concept plan. These interviews will likely take place within the first six months of the project.

The FA Team will interview a selection of four community members, property, and business owners and other stakeholders identified by the PMT, selected from the following community groups:

- Property and business owners in Basalt Creek
- Community representatives from both Cities
- Residents of Basalt Creek
- Business owners/ representatives from both cities
- Westside Economic Alliance
- Horizon Church

## Materials

Materials will include an interview guide with general interview questions and topic areas for discussion.

## Roles

### PMT

- Identify interview candidates
- Make initial contact with interview candidates, assess willingness to participate
- Identify priority questions and topic areas to discuss with interviewees
- Help identify and secure locations for interviews

### FA Team

- Identify interview candidates in partnership with the PMT
- Review list of interview candidates with PMT
- Lead and facilitate the stakeholder interview discussions
- Create and print maps to guide interview conversations
- Keep a written record of interview conversations
- Provide notes of interview findings to the PMT

# 2. Focus Group Meetings

## Description & Purpose

Focus group meetings will be conducted with 6-7 participants and will be based on an open discussion format facilitated by the FA Team. These meetings will serve to highlight key issues of concern within the planning area, and other issues that relate to development and implementation of a project vision

for the concept plan. These meetings should take place within the first six months of the project. The FA Team proposes to conduct two focus groups meetings, one with developers and one with key property owners. Focus group member candidates will be identified through collaborative efforts between the FA Team and the PMT.

### Focus Group #1: Developer Roundtable

The Developer Roundtable is a forum which will be used to gather valuable information related to general and specific development opportunities and barriers in Basalt Creek. Involving developers at the local and regional level will help characterize and contextualize development potential and constraints in the area.

### Focus Group #2: Property Owner Meeting

The Property Owner Meeting is a stakeholder meeting for a small group with 6-7 property owners from the area (preferably a mix of both commercial and residential property owners). This meeting will provide a forum to learn about property owner priorities, concerns and suggestions for the future of Basalt Creek.

## Materials

A short presentation will be made to both groups on the overall project. Materials will include a facilitator's guide including questions and topic areas for discussion.

## Roles

### PMT

- Identify stakeholder group candidates
- Work with the FA Team to expand and revise list
- Make initial contact with candidates, assess willingness to participate
- Identify priority questions and topic areas to discuss
- Identify and reserve meeting locations
- Track responses and confirm attendance of invitees

### FA Team

- Identify stakeholder group candidates, advise on developers to include
- Work with the PMT to expand and revise list
- Develop a facilitators guide
- Lead and facilitate the stakeholder group discussions
- Create and print maps to guide conversations
- Keep a written record of group discussions
- Provide meeting notes to PMT

## 3. Agency Review Team (ART)

### Description & Purpose

An Agency Review Team (ART) will be formed to guide the development of the Concept Plan. The primary role of the ART is to advise the project team about regulatory and planning compliance. The ART will consist of representatives from regulatory agencies identified in the “Roles and Responsibilities Framework” section at the beginning of this document. They will meet preceding major project milestones to provide technical input for Concept Plan development.

### Materials

For all ART meetings:

- Meeting agenda
- Materials/documents for review
- PowerPoint presentations
- Presentation technology (projector, screen, etc.)

### Roles

#### ART members

- Provide guidance to project team on specific technical questions and issues
- Act as liaisons to their own agencies
- Review and provide feedback on draft concept plan

#### PMT

- Identify and invite individuals to join the ART
- Distribute meeting agenda and meeting materials to ART members prior to meetings
- Keep the official written record of meetings including attendees, notes, comments, outcomes and next steps
- Write and distribute meeting summaries to ART members
- Provide space and printed materials for meetings
- Provide periodic updates on feedback from the ART to the Planning Commission and City Councils

#### FA Team

- Create meeting agendas
- Facilitate meeting discussions, which may include short presentations
- Create meeting materials to support agenda
- Provide PMT with FA team notes to support the development of the official written record

## 4. Planning Commission Briefings

### Description & Purpose

Planning Commission Briefings are intended to provide project updates to the Cities individual Planning Commissions prior to major decision points to identify any issues and gather feedback from the Commissions. These briefings will include, at a minimum:

- Project Updates
- Concept Plan Discussion
- Jurisdictional Boundary Discussion
- Concept Plan Acceptance

Briefings to the Planning Commissions will take place prior to Individual Council briefings. The Planning Commission engagement is important to set the stage for future comprehensive plan amendments and other planning actions that will happen within each jurisdiction as a result of the concept plan acceptance.

### Materials

Meeting agendas will be developed to focus on gathering feedback and information from the Planning Commissions including:

1. Jurisdictional Boundaries Recommendation
2. Draft Preferred Scenario
3. Draft Concept Plan

### Roles

#### PMT

- Schedule briefings
- Create meeting agendas
- Keep written record of meetings and provide FA Team with meeting notes

#### FA Team

- Provide feedback on meeting agenda

## 5. Individual Council Information Briefings

### Description & Purpose

Individual Council briefings are intended to provide project updates at key points throughout the planning process. Briefings will include:

- Project updates
- Discussions about major milestones (Existing Conditions, draft and preferred scenarios)
- Identification of Council concerns and gathering feedback to inform the concept planning process

- Preparation of Council members for upcoming Joint Council decisions points

The FA Team assumes that PMT staff will brief their Councils as the project progresses. Individual Council update sessions with the FA Team will focus on building the capacity of each Council to make informed decisions when Joint Council action is required. The staff of each City will present materials to the Individual Councils.

## Materials

Meeting agendas will mirror major project elements that require a more detailed level of understanding among the Councils. Detailed briefings will allow Councils to validate project direction and provide guidance to the PMT and FA Team. Following are the suggested meeting topics for the FA Team to present to each Council for their input:

1. Draft Existing Conditions
2. Draft Alternative Scenarios
3. Draft Preferred Scenarios

## Roles

### PMT

- Schedule informational briefings (3 presentations to each Council with FA present; 6 meetings total)
- Keep written record of meetings and provide FA Team with meeting notes

### FA Team

- Attend meetings and present to Councils (or provide materials for PMT staff to present)
- Provide PowerPoint presentation or other written materials in advance, consistent with the individual cities' requirements

## 6. Joint Council Decision Information Sessions

### Description & Purpose

The Joint Council meetings will include informational presentations, facilitated discussions, and action regarding key decision points. There are four key decision points:

- Adoption of Guiding Principles and Review of Existing Conditions
- Decision on a Preferred Scenario
- Decision on Jurisdictional Boundaries
- Approval of Concept Plan

These meetings will be critical for Joint Council decision-making. The FA Team will collaborate with the PMT to determine which content to present. The FA Team will develop presentations to illustrate the evolution of the project process and provide key data and information critical to relevant decision

points. The Individual Council briefings will be coordinated with Joint Council meetings to deliver information in an efficient manner conducive to informed and effective decision-making.

In addition to meetings focused on the four key decision points, the FA Team will participate and lead a discussion with the Joint Council to elicit feedback for the development of the final concept plan and jurisdictional boundaries. These meetings will serve as informative discussion sessions to guide concept plan development, as well as a decision on a jurisdictional boundary. These sessions will cover:

- Alternative scenarios. The FA Team will present findings from the alternative scenarios, organized by relationship to Guiding Principles. The FA Team will facilitate a discussion of alternatives and solicit feedback. This feedback will be used to craft a preferred scenario oriented toward adoption by the Joint Council.
- Draft Preferred Scenario. The FA Team will present the draft preferred scenario. The Joint Council will have the opportunity to provide feedback on the direction of the preferred scenario. This will build on previous efforts to ensure key issues and concerns related to the concept plan are addressed.

The FA Team will collaborate with the PMT to determine the most effective methods for gathering Joint Council feedback. Methods may include instant polling questions and/or facilitated discussions.

## Materials

For each Joint Council meeting:

- Meeting agenda
- PowerPoint presentation
- Background documents
- Key discussion questions and instant polling (if used)

## Roles

### PMT

- Schedule Joint Council meetings (up to 6)
- Keep a written record of the meetings and provide FA Team with meeting notes

### FA Team

- Draft and revise presentations for meetings
- Present key materials and facilitate discussions, as needed
- Integrate Joint Council feedback into preferred scenario and subsequent revisions

## V. PUBLIC EVENTS & ONLINE SURVEYS

### Deliverables

1. Public Workshop
2. Public Open House
3. Online Surveys

### 1. Public Workshop

#### Description & Purpose

The FA Team will work with the PMT to design and run a public workshop that will inform the creation of a range of scenarios. We will understand stakeholder priorities through instant polling and a mapping exercise. The workshop will also inform stakeholders about the project objectives and background (through the brief presentation at the outset). Subsequent activities will be aimed at eliciting feedback about the community's vision for the Basalt Creek area. This feedback will help clarify priorities for the concept plan and inform the development of alternative scenarios.

#### Workshop Format

##### Group Presentation

The meeting will start with a brief PowerPoint Presentation from the PMT and the FA Team. The presentation will cover the planning process from start to finish, and include a description of project goals, activities and guiding principles. A project timeline with key public involvement dates will be shared with participants.

##### Instant Polling

The group presentation will transition into a set of 10 – 20 instant polling questions, which will ask stakeholders to respond to multiple choice questions about their priorities for the project. The polling results will be collected using clickers – remote devices that send instant polling results to the computer of the presenter. The tallied results can be shown immediately on the screen for all the audience to see. The FA Team will work with the PMT to develop the instant polling questions.

Example questions may include:

- Of these listed ideas, which is the most important for the future of Basalt Creek?
- Which is the least important?

To what extent do you agree or disagree with the following statements? (Scale of 1-5)

- Conservation is the top priority
- Economic development is the top priority
- Balance between conservation and development is the top priority

## Mapping Exercise

The FA Team will utilize a custom map-based exercise to gather information on community aspirations for future land uses, multimodal transportation network, employment, parks and open spaces. Following the group presentation and instant polling exercise participants will divide into small groups to perform a collaborative mapping exercise. Each group will be facilitated by a FA Team/PMT member, with assistance from other project team staff. Participants will work together in small groups using maps and icons representing future development and transportation investments. The FA Team will use the Envision Tomorrow (ET) suite of planning tools to digitize and analyze maps and comments from the public workshop to uncover themes and unique solutions to guide the scenario development and the development of a final concept plan and vision for the planning area.

## Materials

- PowerPoint presentation, including project background, objectives and timeline
- Instant Polling questions – responding to suggested guiding principles, prioritizing future policies and actions for Basalt Creek area
- Basemap – Basalt Creek project area chipsets for mapping activity
- Additional materials on boards in the meeting room as defined by FA Team and PMT
- Event flyer
- Event email announcement
- Agenda
- Sign in sheet
- Instant polling clickers and TurningPoint software
- Facilitator instructions
- Scissors, markers, and pens

## Roles

### PMT

- Identify and reserve a venue for the workshop
- Advertise workshop; print and distribute flyers announcing workshop
- Review workshop materials (workshop flyer and email announcement, agenda, presentation, instant polling questions, maps, chips)
- Assist and organize volunteers to serve as facilitators for the event
- Provide light refreshments

### FA Team

- Produce agenda for workshop
- Produce marketing materials to advertise public open house approximately one month in advance of the event. Materials include email announcements, project website announcements, announcement flyer or postcard.
- Prepare workshop agenda



- Develop and revise presentation, including instant polling questions
- Present at workshop
- Facilitate workshop activities, including instant polling and mapping exercise

## 2. Public Open House

### Description & Purpose

The public open house will provide participants with a comprehensive look at how each of the alternative scenarios performs, as measured against the project's evaluative criteria and guiding principles. General performance categories include transportation, housing choice, employment and infrastructure. In the brief Summary Presentation the FA Team will describe the project's public outreach and stakeholder engagement process and how public feedback was used to inform the development of the alternative scenarios.

The presentation will also briefly cover project background and objectives followed by a presentation of the alternative scenarios, accompanied by descriptions of how they each performed in different evaluative areas and indicators. The presentation will be followed by instant polling questions to understand people's preferences for different elements of each scenario, and the degree to which they support or do not support alternatives in the context of performance measures.

The FA Team will process and analyze results of the open house. Results will be communicated at ART meetings and informational Council meetings, as well as through email and website updates. Results will also be integrated into the Summary Presentation to be delivered at ART and Joint Council meetings.

### Materials

- PowerPoint Presentation, including a brief description of the project background, description of each scenario and its outcomes relative to project guiding principles and projected impacts on transportation, housing choice, employment and infrastructure indicators.
- Instant Polling questions – responding questions about support or lack of support for different elements of different scenarios (the results of which will feed into the development of the preferred scenario)
- Event flyer
- Event email announcement
- Agenda
- Sign in sheet
- Instant Polling clickers & TurningPoint software

### Roles

#### PMT

- Discuss open house approach
- Identify and secure location for open house

- Review open house content
- Provide staff to assist at open house
- Provide light refreshments
- Provide open house related updates to the Planning Commission and City Council
- Integrate workshop results into Summary Presentation on public outreach

#### FA Team

- Produce agenda for public open house
- Produce maps and other print materials for one public open house
- Produce marketing materials to advertise public open house approximately one month in advance of the event. Materials include email announcements, project website announcements, announcement flyer or postcard.
- Provide summaries of feedback (instant polling) from the open house event in PowerPoint

### 3. Online Surveys

#### Description & Purpose

The purpose of the online surveys will be to electronically replicate the engagement opportunity of the public workshops and in-person outreach events in order to engage a broader group of stakeholders. To the extent possible, the online survey will follow the presentation and include instant polling questions from the public workshop and open house. The online format will allow participants to click through the presentation at their own pace, and then to answer the same instant polling questions asked at the workshop and open house.

The analysis of the survey results will be integrated with the feedback from the public workshop and other outreach opportunities, and used as a guide both to develop scenarios and then to select or create a preferred scenario.

The online surveys will be designed to be user-friendly and straightforward. Each survey will be open for approximately two weeks following the public events. The FA Team will process and analyze results of the survey. Survey results will be communicated at ART meetings and informational Council meetings, as well as through email and website updates.

#### Materials

The FA Team will develop, conduct, and analyze the results from two online surveys. Links to the online surveys will be distributed to the stakeholder contact list via email as well as posted on the project website. Materials will include an online version of the workshop presentation, a survey posted to the project website, and a summary of survey results in PowerPoint presentation slide format.

## Roles

### PMT

- Provide a list of initial ideas for survey content
- Review, edit and approve website content

### FA Team

- Draft survey
- Incorporate edits from PMT
- Convert the survey into an online format and include on the project website
- Email survey link to stakeholder contact list
- Collect survey results
- Organize survey results into a summary
- Provide survey results summary to City Staff and present results to the ART; staff will present at individual Council sessions



*City of Tualatin*

City of

**WILSONVILLE**

OREGON



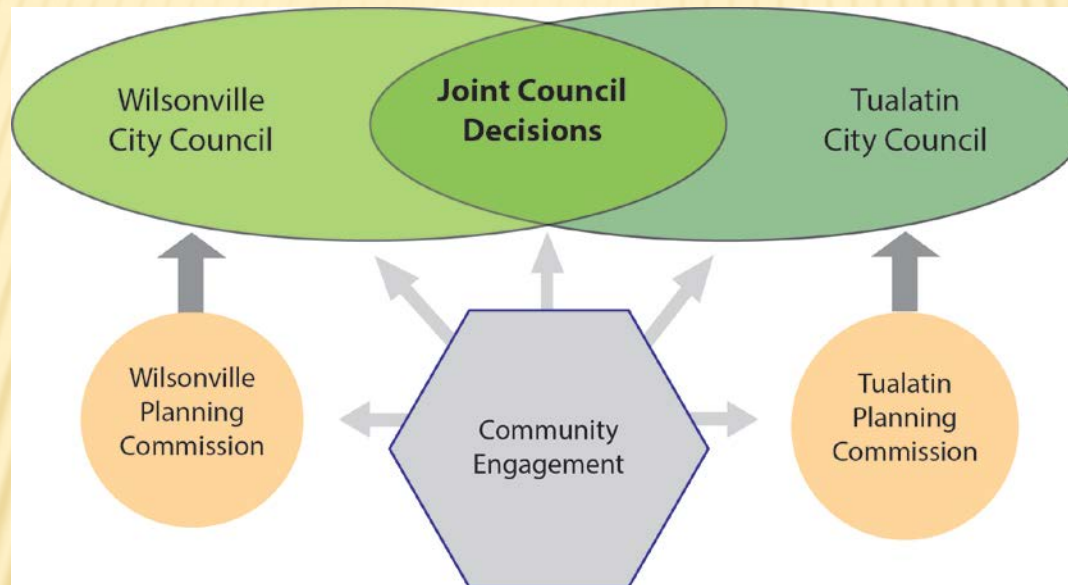
City Council Work Session

April 28, 2014

# **BASALT CREEK CONCEPT PLAN PROJECT UPDATE**

# PARTNERING AGREEMENT

## ✘ Decision-making Structure



- ✘ Included statement about compliance with Oregon Public Meetings Law

# PUBLIC INVOLVEMENT PLAN

## × Four Techniques:

- + Engagement materials
- + Targeted stakeholder outreach
- + Public events & online surveys
- + Informational updates & announcements



How do I get involved?

## × Five Levels of Involvement:


- + Informing
- + Consultation
- + Participation
- + Collaboration
- + Partnership

# PUBLIC INVOLVEMENT PLAN

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## ✘ Key Stakeholders:

- + Property Owners
- + Business Owners
- + Developers
- + Residents
- + Hard-to-Reach Groups
- + General Public
- + Elected Officials
- + Non-profits, Schools, Religious & Advocacy Groups
- + Media



Who will be involved?

# PUBLIC INVOLVEMENT PLAN

## ✘ Variety of Outreach and Engagement:

- + Project website redesign
- + Social & print media
- + Interviews & focus groups
- + Public workshop & open house
- + Agency Review Team (ART)
- + City Council & Planning Commission briefings
- + Joint City Council work sessions





# WORK PRODUCTS

- ✘ Existing Conditions Report
- ✘ Public Workshop & Open House
- ✘ Final Alternative Scenarios
- ✘ Preferred Scenario
- ✘ Final Boundary Map
- ✘ Title 11 Compliance Memo



# DIRECTION REQUESTED BY STAFF

- ✘ **City Council review and feedback on:**
  - + Public Involvement Plan
  - + Partnering Agreement
- ✘ **Next Steps:**
  - + Calendar of Milestones
  - + Guiding Principles and Evaluation Measures



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# **DISCUSSION & QUESTIONS**



# MEMORANDUM

## CITY OF TUALATIN

**TO:** Honorable Mayor and Members of the City Council

**THROUGH:** Sherilyn Lombos

**FROM:** Ben Bryant, Management Analyst

**DATE:** 04/28/2014

**SUBJECT:** Economic Development Strategic Plan

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### **ISSUE BEFORE THE COUNCIL:**

Provide input on the Economic Development Strategic Plan

### **EXECUTIVE SUMMARY:**

#### **Background**

Throughout the last several months, the City of Tualatin has been in the process of updating the Economic Development Strategic Plan. Every strategy included in the draft plan originated from comments provided by the Economic Development Strategy Committee. Below is an overview of the process for creating the draft plan and a synopsis of the draft language.

#### **Economic Development Strategy Committee Process**

Since January, the Economic Development Strategy Committee gathered four times to provide their insights into how Tualatin can best focus efforts to facilitate a stronger economy. Each of the four meetings were designed to garner the feedback of the committee members and create the draft plan that is attached to this staff report.

#### *Meeting 1: Overview of 2001 Plan; Vacant & Redevelopable Land; Strengths & Weaknesses*

At the first meeting, the committee discussed the prior Economic Development Plan from 2001 and what has been accomplished since that time. In addition, there was a significant discussion regarding the vacant and redevelopable land in Tualatin. Currently, there are over 400 acres of vacant and redevelopable land within the city boundaries, and approximately 400 additional acres outside the city limits, but inside the Planning Area. Given that a vast majority (90%) is in the manufacturing planning districts, the committee felt the focus for the draft plan should be on Tualatin's industrial growth.

Finally, there was a robust discussion regarding the strengths and weaknesses in Tualatin. Several themes emerged which would later become the basis for many of the proposed

strategies.

### *Meeting 2: Industry Clusters; Developing & Prioritizing Strategies*

During the second meeting, the committee discussed the industry cluster analysis and the importance of targeting high-wage jobs in Tualatin. Secondly, there was an interactive exercise for members to prioritize specific areas where the city should focus efforts regarding economic development. The priorities were set based on a collection of the themes that emerged from the prior gathering.

### *Meeting 3: Turning Committee Comments into Draft Strategies*

Throughout the third meeting, the committee consolidated comments from previous meetings into specific strategies to include in the draft plan. Every strategy listed in the draft plan came directly from a set of comments from the committee members.

### *Meeting 4: Reorganizing, Rewording, & Recommending a Draft Plan to City Council*

Finally, the last meeting provided an opportunity for the committee to make final edits to the format and content of the draft plan they wanted to send to the City Council.

## **Synopsis of the Draft Plan**

### *Key Assumptions*

In developing strategies specific to the economic development program, the committee recognized the City of Tualatin already has master plans relating to infrastructure development and quality of life, two key elements of economic development. Therefore, these are listed as key assumptions of this plan.

- Infrastructure
  - Alleviate Congestion
  - Improve Freight Mobility
  - Increase Access to Transit
  - Expand Water, sewer, storm, etc.
- Quality of Life
  - Create Vibrant City Center
  - Improve Schools
  - Expand Park & Trails
  - Support Unique Events (i.e. Crawfish Festival, Pumpkin Regatta)

### *Industry Clusters*

As a result of the location of the vacant and redevelopable land, as well as the findings from the industry cluster analysis, the committee thought it was important to target the existing industry clusters. However, there is a recognition that the City will need to continually evaluate industry clusters as the economy evolves.

### *Strategies*

The strategies are centered under the following objectives and actions:

- Strategy 1: Business Retention, Expansion, & Recruitment
  - Retain and Expand Existing Businesses
  - Focus on Filling Existing Buildings
  - Target Key Industries
  - Assist with Site Readiness
  - Market Tualatin's Assets
- Strategy 2: Business Climate / Competitive Positioning
  - Identify Code and Process Changes
  - Collaborate Regionally
  - Assist Business Startups and Entrepreneurship

## **Next Steps**

At the suggestion of the committee, staff members are developing a cover page which will set the context for the plan and how it relates to the various other visioning and planning documents. The full plan will be shared with City Council this spring.

In addition, the City of Tualatin will continue sharing the plan development with the Chamber of Commerce and Commercial CIO to further refine the plan. Once a draft plan is complete in May/June it will be brought to the City Council for additional feedback.

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**Attachments:**    [Attachment A: Presentation](#)  
                          [Attachment B: Draft Economic Development Plan](#)



# Economic Development Strategic Plan

Tualatin City Council  
Work Session  
4/28/2014



100  
YEARS



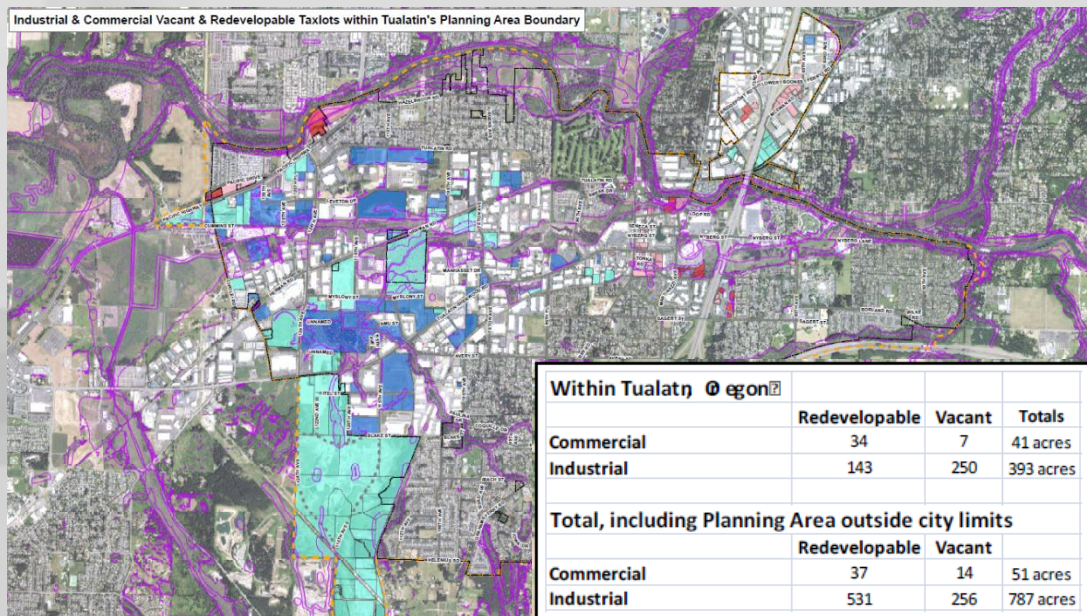
CITY of TUALATIN

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# Strategy Committee Process

## Meeting 1

- Overview of 2001 Plan
- Vacant & Redevelopable Land
- Strengths & Weaknesses

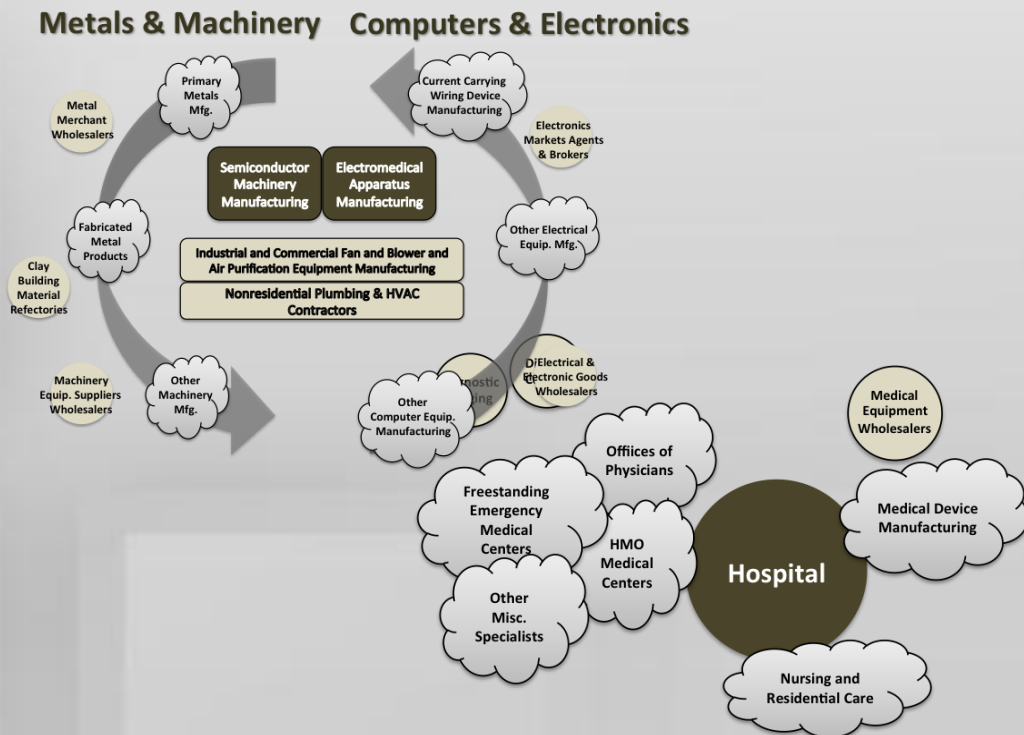




# Strategy Committee Process

## Meeting 2

- Industry Clusters
- Developing & Prioritizing Strategies



# Strategy Committee Process

## Meeting 3

- Overview Committee Comments
- Draft Strategies

### Example

#### A -1. Code Related:

##### Committee Comments:

- Major disadvantage of Tualatin is it's antiquated industrial zoning code. It has caused a number of companies to locate someplace else. Wilsonville is a good example of a code which works well. CCIO is looking at improving the code and permitting processes.
- Update the Planning Code so that it addresses today's businesses and Tualatin's industry clusters (see Wilsonville example).
- Create a simple process to accept situations when the intent of the zoning code is met but not the letter of the code.

##### Suggestions:

Determine the most significant Code related issues which cause Tualatin to be less competitive than other jurisdictions (either real or perceived); prioritize and make changes; publicize the changes.

Create predictable, competitive business costs and processes.

# Strategy Committee Process

## Meeting 4

- Reorganizing
- Rewording
- Recommending

**OVERALL GOAL**

*Continue a leadership role as one of the premier economic activity centers in the greater Portland metropolitan region. Focus on growing family wage jobs in targeted business clusters while emphasizing high standards and excellence in urban design.*

**Foundational Element | INFRASTRUCTURE**

Tualatin is at the center of trade and commerce located along Interstate-5 and Interstate-205, 20 minutes from downtown. In the past decades, Tualatin has made important strategic investments in infrastructure to support industrial growth. However, congestion and freight mobility remain challenges into the future.

Continuing to prioritize key infrastructure investments, within the current Urban Growth Boundary and UGB expansion areas will be critical to supporting future economic growth. The City of Tualatin will need to make targeted investments for business growth and community livability, specifically relating to transportation and public transit improvements focused on business access.

**Foundational Element | QUALITY OF LIFE**

Tualatin is an attractive place to live, work, play and visit. The City of Tualatin will build on past successes, including: enhancing efforts to create a visible, strong City center, capitalizing on strong schools and sports; continuing investing in the strong parks and trails system for a growing community; and emphasizing new locations for community gatherings.

**CLUSTER INDUSTRIES: TARGETED INDUSTRIES**

Five business clusters provide the majority of employment in the City of Tualatin and represent the highest average wages. Targeting growth in these clusters will provide the greatest return for the City's investment in order to increase the number of family wage jobs and wealth in the community.



Health Care & Related



Corporate & Business Services



Advanced Manufacturing



Food Processing, Distribution, Wholesale



Wood, Paper, Printing & Related

**OBJECTIVE 1:  
BUSINESS CLIMATE/ COMPETITIVE POSITIONING**

Creating and maintaining a positive climate for business is an effort which takes continual attention. These strategies are designed to ensure the City is actively refining its procedures and codes to encourage job creation.

**Work with City Hall:**

- Determine the most significant Development Code related issues which create barriers to development; prioritize and make changes; and publicize the changes with the goal of creating a predictable process that keeps Tualatin cost and time competitive. In addition, find opportunities to reward exceptional sustainable practices.
- Focus on providing clear and relevant information and superb customer assistance to the business community. Continue efforts to create a culture which values economic development throughout the organization; solicit regular feedback from the business community on working with the City, and implement improvements as needed.
- Consider an ombudsman role for projects which need special assistance, including small and startup businesses.

**Collaborate Regionally:**

- Build on Tualatin's strong partnerships with neighboring cities and other agencies to explore additional opportunities to collaborate for economic development success. Engage and be visible in the region and the State.

**Assist Business Startups & Entrepreneurship**

- Explore opportunities to actively assist with new business startups, particularly within the Targeted Business Clusters.
- Facilitate an environment which eliminates obstacles to new business formation in Tualatin.

**OBJECTIVE 2:  
BUSINESS RETENTION, EXPANSION AND RECRUITMENT**

The economic health of the City includes both cultivating the maintenance and growth of existing businesses, as well as creating an effective program for attracting new employers to the City.

**Focus on Targeted Industries**

- Create an outreach program to companies in the targeted business clusters which complement Tualatin's business mix through independent efforts, as well as collaborative work with regional and state representatives.
- Respond to State and Regional recruitment leads with submission of available land or buildings.
- Provide an incentive toolkit for attraction of targeted business cluster companies.

**Retain and Expand Existing Businesses**

- Establish an active Business Retention program, focusing first on Targeted Clusters. Assist existing businesses with City issues, connect them to available resources as appropriate, and reinforce their value to the City.

**Focus on Filling Existing Buildings**

- Maintain a working knowledge of key vacant industrial space, in collaboration with the brokerage community.
- Contact property owners to gain an understanding of obstacles keeping buildings vacant, and determine assistance which might be appropriate from City.
- Place as high a priority on tenant improvements for existing space as for new construction.

**Assist with Site Readiness**

- Work proactively to encourage sites for development which provide certainty to developers and allow for rapid transition for projects to market (e.g. obtain state industrial site certification for appropriate Tualatin industrial properties, assist interested property owners to get sites "development-ready" to build on within 6 months).
- Seek a variety of methods to fund certification and/or installation of infrastructure needed for development.
- Maintain an up-to-date list of available industrial properties on the State's Oregon Prospector and private sector real estate website through partnerships with property owners and brokers.

**Market Tualatin's Assets**

- Cultivate an awareness that existing companies are the best opportunity for growth of the local economy, and the best marketing tool of the City when they are positive about their own experiences.
- Articulate and market Tualatin's many strengths for business growth and ensure these are available on the City's website and clear to both site selectors and companies.

**OBJECTIVE 3:  
WORKFORCE / TALENT**

Talented workers are important to existing companies in Tualatin and to the creation of new companies. The City can facilitate and collaborate with other organizations to help attract and create a talented workforce.

**Attract Workforce Talent**

- Evaluate actions the City could take to attract an educated workforce that complements targeted clusters of businesses, both to benefit existing companies and to encourage new business creation. Evaluate the amenities that such individuals look for in a community and work to create such amenities.

**Develop Workforce with Existing Businesses**

- Seek to understand whether businesses have enough workers with the right skill sets to meet their needs; work with agencies which can help address the needs; facilitate resources for Tualatin businesses.

**Enhance Workforce Readiness**

- Participate actively with other agencies to expand connections between businesses and educational institutions to benefit local companies.
- Support and participate in efforts to increase the knowledge about jobs in Tualatin's Targeted Clusters especially among Tualatin youth.
- Enhance awareness of the value of family wage jobs in Targeted Clusters to help create pipelines of interested workers.



**ECONOMIC DEVELOPMENT ACTION PLAN**  
City of Tualatin | 2014 Update

# Synopsis of Draft Plan

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## Overall Goal

Continue a leadership role as one of the premier economic activity centers in the greater Portland metropolitan region. Focus on growing family wage jobs in targeted business clusters while encouraging high standards and excellence in urban design.

# Synopsis of Draft Plan

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## Key Assumptions

- Infrastructure
  - Alleviate Congestion
  - Improve Freight Mobility
  - Increase Access to Transit
  - Water, sewer, storm, etc.
- Quality of Life
  - Create Vibrant City Center
  - Improve Schools
  - Expand Park & Trails
  - Support Unique Events (i.e. Crawfish Festival, Pumpkin Regatta)

# Synopsis of Draft Plan

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## Strategies

- Strategy 1: Business Retention, Expansion, & Recruitment
  - Retain and Expand Existing Businesses
  - Focus on Filling Existing Buildings
  - Target Key Industries
  - Assist with Site Readiness
  - Market Tualatin's Assets
- Strategy 2: Business Climate / Competitive Positioning
  - Identify Code and Process Changes
  - Collaborate Regionally
  - Assist Business Startups and Entrepreneurship

# Action Plan Update Process

**Gather Data To Inform**

November - January



**Establish Goals & Kickoff Economic Strategy Committee**

January - February



**Develop Actions & Share with Community**

March - April



**Review Draft Plan & Share with Community**

April - May



**Adopt Plan**

Late Spring 2014

**We are  
here**

## OVERALL GOAL

*Continue a leadership role as one of the premier economic activity centers in the greater Portland metropolitan region. Focus on growing family wage jobs in targeted business clusters while encouraging high standards and excellence in urban design.*

## Key Assumption | INFRASTRUCTURE

Tualatin is at the center of trade and commerce located along Interstate-5 and Interstate-205, 20 minutes from downtown Portland. In past decades, Tualatin made important strategic investments in infrastructure to support industrial growth.

Continuing to prioritize key infrastructure investments within the current Urban Growth Boundary and UGB expansion areas will be critical to encouraging future economic growth. The City of Tualatin will need to make targeted investments for business growth and community livability, specifically relating to alleviating congestion on Tualatin-Sherwood Road, improving freight mobility, and increasing access to public transit for businesses in Tualatin.

## Key Assumption | QUALITY OF LIFE

Tualatin is an attractive place to live, work, play, and visit. Downtown Tualatin is anchored by the Tualatin Commons Lake which is a lively center surrounded by restaurants, offices, and residences. Bridgeport Village is a destination retail shopping center drawing people from all over the region. Tualatin enjoys an educated workforce, first rate schools, over 200 acres of community parks and trails, and award winning events like the Crawfish Festival and Giant Pumpkin Regatta.

The City of Tualatin will build on past successes, including: enhancing efforts to create a vibrant City center; capitalizing on strong schools and sports; providing new locations for community gatherings, and continuing investments in the extensive parks and trails system for a growing community; and emphasizing new locations for community gatherings. The City will continue to create an environment attractive for a skilled and educated workforce, particularly in skills which complement and benefit targeted business clusters.

## CLUSTER INDUSTRIES: TARGETED INDUSTRIES

The City of Tualatin needs to continually evaluate targeted industry clusters as the economy evolves and new industries emerge. Currently, five business clusters representing a broad range of businesses provide the majority of employment in the City of Tualatin and represent the highest average wages. Promoting growth in these industry clusters will provide the greatest return for the City's investment in order to increase the number of family wage jobs and wealth in the community.



Health Care & Related Business



Corporate & Business Services



Advanced Manufacturing



Food Processing, Distribution, Wholesale



Wood, Paper, Printing & Related Business

## STRATEGY 1:

### BUSINESS RETENTION, EXPANSION & RECRUITMENT

Retaining and cultivating the growth of existing businesses, as well as attracting new employers, is central to the health of Tualatin. These strategies are designed to strategically focus the City's efforts and resources.

#### Retain & Expand Existing Businesses

- Establish an active Business Retention program, focusing first on Targeted Clusters. Assist existing businesses with City issues, connect them to available resources as appropriate, and affirm their value to the City.
- Seek to understand whether businesses have enough workers with the right skills to meet their needs, and connect businesses to agencies or resources which can help address their needs.
- Enhance awareness of the value of family wage jobs in targeted business clusters to help create pipelines of interested workers.

#### Assist With Site Readiness

- Work proactively to encourage sites for development which provide certainty to developers and allow for rapid transition for projects to market (e.g. obtain state industrial site certification for appropriate Tualatin industrial properties, assist interested property owners to get sites "development-ready" to build on within 6 months).
- Seek a variety of methods to fund certification and/or installation of infrastructure needed for development.

- Maintain an up-to-date list of available industrial properties on the State's Oregon Prospector and private sector real estate websites through partnerships with property owners and brokers.

#### Focus on Filling Existing Buildings

- Maintain a working knowledge of key vacant industrial space appropriate for targeted business clusters, in collaboration with the brokerage community.
- Contact property owners to gain an understanding of obstacles keeping buildings vacant, and determine assistance which might be appropriate from City.
- Prioritize tenant improvement projects in existing space as high as new construction.

#### Target Key Industries

- Create an outreach program to companies in the targeted business clusters through independent efforts as well as collaborative work with local, regional, and state representatives.
- Submit available land and buildings in response to State and Regional recruitment leads.
- Provide an incentive toolkit for attraction of targeted business cluster companies.

#### Market Tualatin's Assets

- Cultivate awareness that existing companies are the best opportunity for growth of the local economy, and the best marketing tool of the City when they are positive about their own experiences.
- Articulate and market Tualatin's many strengths for business growth and ensure these are available on the City's website and clear to both site selectors and companies.

## STRATEGY 2:

### BUSINESS CLIMATE/ COMPETITIVE POSITIONING

Creating and maintaining a positive climate for business is an effort which takes continual attention. These strategies are designed to ensure the City is actively refining its procedures and codes to encourage business development and job creation.

#### Identify Code & Process Changes

- Identify the most significant Development Code related issues which create barriers to development and find opportunities to incentivize exceptional sustainable practices.
- Create a predictable permitting process that is customer service oriented, timely, and respectful of cost.
- Provide assistance through the development review and permitting process to small businesses and those private development projects which are particularly complex.
- Provide clear and relevant information and superb customer assistance to the business community. Continue efforts to create a culture which values economic development throughout the organization and is an integral part of the team for private development projects, solicit regular feedback from the business community on working with the City, and implement improvements as needed.

#### Collaborate Regionally

- Build on Tualatin's strong partnerships with neighboring cities and other agencies to identify additional opportunities to collaborate for economic development success.
- Engage and be visible in the region and the State, both to represent Tualatin externally and to create partnerships valuable to bringing information back to Tualatin staff and businesses.
- Participate actively with educational institutions to expand connections between businesses and education to benefit local companies.
- Actively work with agencies whose mission is to help create a skilled, educated workforce to benefit targeted business clusters.

#### Assist Business Startups & Entrepreneurship

- Explore opportunities to actively assist with new business startups, particularly within the Targeted Business Clusters, and implement programs as appropriate.
- Identify obstacles to new business formation in Tualatin and work to eliminate them.

