

The City of Milwaukie's Neighborhood District Association Program: 1994-2010

Summary:

This report provides an overview of Milwaukie's Neighborhood District Association (NDA) program since its creation in the 1990s and also analyzes the staffing and funding provided Milwaukie NDAs as compared to others cities in Clackamas County and the region. The report seeks to frame this in the larger context of public involvement. This history has been reconstructed through records and files retained at the City and through interviewing the original coordinator, Linda Mullen, who was tasked with organizing the NDAs at the creation of the program.

Milwaukie's NDA program has been successful while experiencing challenges that are common within many communities. Since the program's inception residents and staff have observed cyclical waves of activity and interest and cyclical requests by NDA members for clarity in purpose, role and influence. Likewise, even the most active and organized neighborhood groups struggle to gain and retain membership and involve the full diversity of people in the Milwaukie community. The NDAs represent a small number of predominantly white homeowners. Historically the NDAs have also struggled with how to work together, communicate with each other and resolve differences in opinion between themselves.

Milwaukie's NDA activists continue to put in hundreds of volunteer hours doing good work on community projects and neighborhood cleanups, volunteering at the community booth, providing enriching activities and engaging with city government on a range of city projects and policies. Milwaukie's ongoing funding through the NDA Grant Program has been part of the City's longtime commitment to public involvement and funded many worthwhile community building efforts including concert series, a reading program, emergency preparedness activities, support for local festivals and events, help for local schools and non-profits serving people in need and partial funding of several neighborhood parks. The NDA program has also been effective in inspiring new leaders—as many neighborhood leaders have gone on to serve on City Council or become involved with City boards and commissions.

A recent study in Portland, Oregon titled "Community Connect" determined that not everyone defines community by their physical surroundings. Many people find their primary

community by joining with people having a common identity (as in cultural and ethnic-based groups) or common interests (as through churches, PTAs, environmental groups, social justice groups, and so on). An engagement system that relies solely on geographic neighborhood associations likely will miss engaging many people in the community. Viewing the neighborhood association system as an important foundation but not the full structure needed is something City Council, City staff, and the community will need to work together to clarify and refine.

In Clackamas County four of eleven cities, not including Milwaukie, have active neighborhood associations. West Linn, Lake Oswego, Canby and Oregon City all have neighborhood associations with variation in how active they are and how much staffing and funding is provided to them. The cities of Gladstone, Sandy, Estacada, Molalla and Wilsonville do not have active associations nor staffing or funding for their creation or support. Happy Valley does not have neighborhood associations but has a part-time staff person trying to get neighborhood associations started. The City of Damascus initiated a process to recruit neighborhood leaders in 2008 but the initiative was put on hold this year due to limited interest at several workshops they coordinated.

Of the four other cities in Clackamas County that do have neighborhood associations none of them have staff dedicated solely to assisting and supporting the neighborhood associations. For example, the City of Oregon City has 12 neighborhood associations and one administrative staff person that works at the Police Department who dedicates about 20% of her time to supporting the neighborhoods. Lake Oswego has 22 neighborhood associations and currently has one Planning staff person who works with the neighborhoods about half time. Canby has four active neighborhood associations but no staffing or monetary support for them. West Linn has 11 active neighborhood associations and one administrative staff person that manages their grant program and one Planner who assists the neighborhoods periodically with land use issues.

As the following table (Table 1) illustrates, the City of Milwaukie stands out for staff time dedicated to NDAs through the Community Services Department and for the grant funding provided. The City of Milwaukie has three Community Services staff each dedicated part-time to assisting and supporting the NDAs which is the equivalent of about .75 full-time employee. Milwaukie also provides funding support to our NDAs at a higher level (both in lump sum and per capita) than any other jurisdiction in Clackamas County. West Linn has 11

neighborhood associations and provides their NDAs with \$1,000 per year in funding. The City of Oregon City has 12 neighborhood associations and does not provide them with grant funding but does have an allocation for each association to do mailers based on the number of households in each association. Lake Oswego has a competitive grant program which allocates \$25,000 a year (actually \$50,000 every two years since they budget bi-yearly) for the 22 neighborhood associations to apply for to do “community building” activities. Canby does not provide any grant funding to their four active neighborhood associations.

City & Population*	Number of associations	Staff time dedicated	Funding dedicated
Canby 13,000	4	0	0
Damascus 10,000	0	0	0
Estacada 2,500	0	0	0
Happy Valley 4,500	0	.5	0
Lake Oswego 35,000	22	.4	Competitive grant program at \$25,000 per year
Milwaukie 20,500	7	.75	\$4,500 each (\$30,000 total annually)
Oregon City 26,000	12	.20	Funding for mailers based on # of households per association
West Linn	11	.25	\$1,500 each
Wilsonville 14,000	0	0	0

Table 1: Neighborhood association staffing and funding in Clackamas County Cities

*Rounded to nearest 500 and based on 2000 Census except for Damascus based on 2005 survey.

Formation and Structure:

Boundary Establishment:

- Boundaries were established in April 1994 by Resolution 6-1994 and based on the school district catchment zones.
- Nine zones were established— seven neighborhood zones and two industrial business zones. (See attachment A.)

- The NDA boundaries no longer align with the school boundaries since the North Clackamas School District has changed the school boundaries several times since 1994. This has created some confusion over the years for Milwaukie residents.
- After the NDA boundaries were created in 1994, the City requested that NDAs seeking official recognition establish officers and apply for official recognition. The seven NDAs incorporated separately between 1994-1996.

Bylaw Creation:

The NDA Bylaws were adopted by City Council in June of 1994 by Resolution 16-1994. The Bylaws were developed by staff after reviewing and incorporating elements of bylaws from multiple jurisdictions in the area.

The NDA Bylaws outline the purpose of the NDAs, the requirements for recognition, voting privileges and procedures, duties of officers, officer elections and terms, duties of the land use committee, ad-hoc committees, finance rules, open public meeting and notification requirements and the process for changing the bylaws. (See attachment B.)

NDA Grant Program Establishment and Policy:

- Established in 1998 by Resolution 9-1998
- Four goal areas: Neighborhood Organizing/Organization Development; Neighborhood Physical Improvements; Neighborhood Preservation; Neighborhood Cultural, Social and Recreational Initiatives.
- NDAs originally received \$5,000 annually. For a few years it went up to \$8,000 then was cut to \$4,000. Has been at \$4,000 for last 6-7 years.
- The City also pays for each NDA to have liability insurance at \$500 per NDA per year.
- NDAs are allowed to carry over funds from year to year. Some NDAs have consistently spent most of their funds annually on projects and some NDAs have carried over funds from year to year, resulting in wide variations between NDAs in fund balances at times.

Until recently, NDA Treasurers were asked to submit grant requests quarterly for each project their NDA wished to fund. They were also asked to submit quarterly reports and receipts showing how funds were spent. The paperwork and time required to review the grant requests and receipts was cumbersome and inefficient for both staff and the NDAs. As such, a new yearly reporting system was established along with the changes that follow.

In fiscal year 2010-11 the City decided to start depositing the \$4,000 in grant funds for each NDA directly into their respective bank accounts. Hence, as of June 1, 2010 the \$4,000 allocation plus the accumulated funds that the City was holding for each NDA was dispersed to them. The new Policy requires that instead of quarterly reports an annual report in which the NDAs summarize their major projects and expenses and how the projects fulfilled one or more of the four goal areas established for the grant program. Receipts can still be asked for at any time. The new annual reporting procedure also requires the NDAs to explain any carry over funds and their goals for using those funds. For increased accountability, the Grant Policy requires that each NDA provide Community Services Program Coordinator online access to their bank account for monitoring.

The following table shows the grant funds accumulated between 1998 and 2010 by the NDAs and then dispersed at the beginning of the fiscal year 2010-11 for direct deposited in their bank accounts (Table 2):

NDA	Amount accumulated & dispersed
Ardenwald-Johnson Creek	\$5,300
Hector-Campbell	\$16,051
Historic Milwaukie	\$6,562
Island Station	\$22,212
Lake Road	\$12,806
Lewelling	\$7,716
Linwood	\$10,962

Table 2: NDA Grant Funds accumulated 1998-2010 and dispersed on June 1, 2010

The NDA Grant Program has funded numerous worthwhile and enriching projects throughout the Milwaukie community. Last year over 50,000 volunteers hours were associated with the NDA grant program. In addition to funding NDA activities and projects, many of the NDAs elect to donate funds to other organizations such as local schools and Meals on

Wheels. Some NDA leaders have noted that because they are often generous with their funds it has created a situation where they frequently get asked for money by other community groups. A discussion with the NDA Leadership group determined that the majority of the NDAs would like to retain the ability to donate to other groups. Several NDAs have developed their own policies about how much they can and will give out to other groups along with special voting procedures for determining who to give money to. Staff has supported the right for the NDAs to determine the use of their own grant money provided it complies with the NDA Grant Policy and the four goal areas the policy establishes.

Another nuance of the NDA grant program is that some NDAs are more active than others and hence spend most of their money annually. Conversely, some NDAs have not spent their money and accumulated large sums. Leaders from the associations that spend their money consistently have expressed the desire to be rewarded for being so active—perhaps getting more money than the other NDAs or perhaps an additional grant program could be developed to fund annual activities sponsored by NDAs such as concert series. On the other hand, some of the NDAs that have accumulated money assert that they are saving their funds for larger future projects or for a ‘rainy day’ fund. The new annual reporting procedures will require all the NDAs to explain any carry-over funds and require them to state their goals for future spending.

Purpose and Role:

Comprehensive Plan and Land Use Referral System:

In addition to the NDAs Bylaws, chapter one of the City’s Comprehensive Plan outlines the City’s citizen involvement goals including the formation and support of neighborhood associations. The Comprehensive Plan states: “The City shall notify NDAs of proposed land use actions and legislative changes as required by ordinances. Elected representatives will receive information regarding land use issues.” For many years Planning Staff has referred land use cases to the NDAs for comment but the policy was never put into code. Currently, Planning Staff is engaged in a code update project that will clarify and codify the land use referral system.

Per the Bylaws, each NDA is required to have a Land Use committee to review referrals which are mailed to the individual homes of the land use committee members. However, Planning staff has reported that they rarely hear back from the NDAs with comments. Since most of the NDAs only have one or two referrals a year staff theorizes that their infrequency may contribute to low interest. Likewise, the referrals may be confusing since they are written in legal language. Staff has committed to offer an annual training on the land use referral system so the NDAs feel properly prepared to use this tool they have been empowered to use.

The City's code currently has very few requirements for NDA notification. The Comprehensive Plan has more stringent NDA notice and coordination language and Planning Staff has followed most of the policies listed in Chapter 1 and 2. Planning is currently working on revisions to the review and notification procedures in the code, and nearly all of our current practices NDA referral and notice practices will be codified. A summary of the currently proposed land use referral changes follows:

- Building permits: No NDA referral. Staff has in some unusual circumstances let the NDA know that we have plans on file that they can look at (e.g. Balfour house).
- Type I (low level administrative decisions): No NDA referral. If staff anticipates it will be a decision the NDA might care about, they may be copied on the notice of decision for the application. This has not been done for a Type I application in the last couple of years.
- Type II (administrative review with public notice): Referral of the application materials to the NDA Chair and LUC. Any comments by the NDA Chair and LUC are, at a minimum, summarized in the decision. Comments that directly affect approval criteria or standards may be incorporated into the findings and conditions of approval for the proposal.
- Type III (Planning Commission review) and Type IV (Major quasi-judicial – changes to the zoning and/or comprehensive plan map, heard by PC and CC): Referral of the

application materials to the NDA Chair and LUC. Comments from the Chair and LUC are summarized in the findings and staff report and are forwarded to the Planning Commission as attachments to the staff report. As with Type II applications, staff includes comments that relate to standards and approval criteria in the recommended findings and conditions of approval.

- Legislative Applications (changes to the text of the comp plan and/or zoning, sign, or land division code): Legislative proposals shall include several steps where the NDAs are involved. Early in the development of the new regulations staff we will seek input from the NDAs through the NDA Leadership meetings, individual NDA meetings, public workshops, etc. Staff will include the NDAs on the referral that is sent out prior to writing the PC staff report, but the NDAs will have been involved in a more meaningful manner prior to this step.

It is anticipated that Planning Staff will incorporate the practices described above into code this winter with final adoption in the spring of 2011.

Neighborhood Coordinator History and Role:

According to several long-time residents, the City of Milwaukie had neighborhood associations in the 1970s which dissolved some time in the 1980s. They were then restarted in the 1990s as follows: In 1994 Linda Mullen was hired to help start up the City's neighborhood associations. In this role she acted as both the neighborhood coordinator and the public information officer. She spent much of her time in the community encouraging the various NDAs to incorporate and elect officers. She provided training for the NDAs on meeting facilitation and the City's organizational structure. She worked with the City Manager and the Community Development and Planning Director along with a hired consultant to engage the NDAs in community visioning and to develop the workings of the land use referral system. She assigned staff liaisons to attend each NDA's monthly meetings. The years of 1996 and 1997 were very turbulent in Milwaukie in response to TriMet's plans for a Light Rail line through downtown along Monroe Street. As a result, NDA Leaders and other community

leaders organized a campaign which resulted in the recall of the Mayor and two City Councilors.

Linda left in 1997 and Michelle Gregory was hired as her replacement. Michelle worked as the coordinator from approximately 1997-2000. Michelle created the NDA grant program in 1998. In 2000, the Neighborhood Services Manager position was created and Michelle stepped up into that role and then hired Jason Wachs as the Neighborhood Services Coordinator which he served as from 2000 to 2005. Michelle served as the Neighborhood Services Manager from 2000-2003. In that role she worked with the NDAs to develop consensus on big issues such as helping the NDAs draft the “Fourteen Points”—the conditions under which the NDAs would accept Light Rail. Michelle facilitated quarterly Leadership Meetings with the NDAs. After Michelle left, Jason Wachs and the Public Information Coordinator, Grady Wheeler, facilitated the meetings. (At some point in that time period the NDA Leadership group started meeting bi-monthly and not just quarterly.) Michelle and Jason also worked with the NDAs on community visioning, on a sign topper pilot program, and created slow down banners for the NDAs to use.

JoAnn Herrigel was hired in 1994 as the City’s Recycling Coordinator. She became the Community Services Manager in 2004. Beth Ragel has been serving as the program coordinator since 2005.

The Neighborhood Services Department is now called the “Community Services Department” which reflects its expanding and changing role over the years. The Department is managed by the Community Services Director and houses the Community Services Program Coordinator, the Public Information Coordinator and two Code Enforcement Officers. The duties of the program coordinator now include assisting and supporting the NDAs along with other job duties such as administering the Community Booth, coordinating community events, managing the temporary event permit program and serving as the staff liaison to the Milwaukie Arts Committee.

Neighborhood Liaisons and Additional Staff Support:

The City has seven neighborhood associations and seven staff liaisons that attend each monthly NDA meeting. Each liaison spends about 3 hours per month attending NDA meetings and typing up notes—totaling 21 hours of staff time monthly. Currently five of the

seven NDA liaisons are Department Managers and do not get paid overtime for attending these meetings nor do they generally flex their time to attend these meetings (so they are working more than 40 hours a week). The other two staff liaisons flex their time to avoid overtime.

In addition to liaison time, other staff persons in the organization attend NDA meetings to present information to the NDA Officers—adding up to another 20 hours a month on average. Staff persons also attend NDA Leadership Meetings. Currently the role of the Leadership Meetings is evolving and may result in more staff time spent on the Leadership Meetings and less time spent in the separate NDA meetings. Approximately 40-50 hours of staff time is dedicated to attending NDA meetings or Leadership Meetings per month. This is in addition to other community meetings attended or coordinated by staff such as board and commission meetings, light rail monthly meetings and so forth.

NDA Leadership Meetings:

The Community Services Program Coordinator, Beth Ragel, has been responsible for coordinating bi-monthly Leadership Meetings with the NDA Officers since she started in 2005. In that time she has worked with the group to develop their mission statement with them and has provided several trainings including recruitment and retention and meeting facilitation. She has worked to develop agendas and facilitate these meetings. For several years the NDA Officers provided the Program Coordinator with little or no feedback on proposed Leadership Meeting agendas—even when asked—and likewise have rarely requested items be added to the Leadership Meeting agendas. City staff persons from other departments have routinely asked for and been provided time on the NDA Leadership agendas to attend and provide the Officers with project updates. The meetings have also provided a venue for the various Officers to get together and share ideas and concerns and to collaborate.

Recently the NDA Chairs have been working together and advocating for more direct and open communication with City Council. They have expressed a concern that City staff does not relay their concerns adequately or accurately to City Council. They have requested that NDA Leadership Meetings be monthly—increased from every other month— and expressed a desire for these meetings to be a place where staff can more fully vet projects. They would like Council to provide them with clarification on their role in City decision

making. Per the September, 2010 NDA Meeting notes the group has agreed to try and develop a proposal of how they would like to interact with Council and what the purpose and agenda forming process for the NDA Leadership meetings will be.

Future Considerations and Key Questions:

City Council will need to work with staff and the community to articulate and define a comprehensive public involvement strategy that includes and empowers the NDAs while also engaging the broader community. What is the role of the NDAs in decision making? How should the NDA grant program function? Shall staff engage in more City-wide surveys, focus groups or other means to ascertain public opinion within and beyond the NDAs? Should staff and Council work more directly with organizations such as churches and non-profits or other groups that attract large numbers of citizens and provide a venue for social and community engagement? Further, should specific resources be allocated to working with populations currently not involved with the NDAs such as non-English speaking groups, renters or other under-served populations? If so, what is the mechanism to try and connect those people with the NDAs?

These questions and challenges are the kind that all communities face and are not unique to Milwaukie. However, Milwaukie is a unique place with a long history of active and passionate neighborhood leaders. That history and the future of Milwaukie's NDAs deserve consideration and respect.