

Lake Oswego  
Neighborhood  
Association  
Resource Guide



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Notes

## Introduction

### Greetings Lake Oswego Neighborhood Associations!

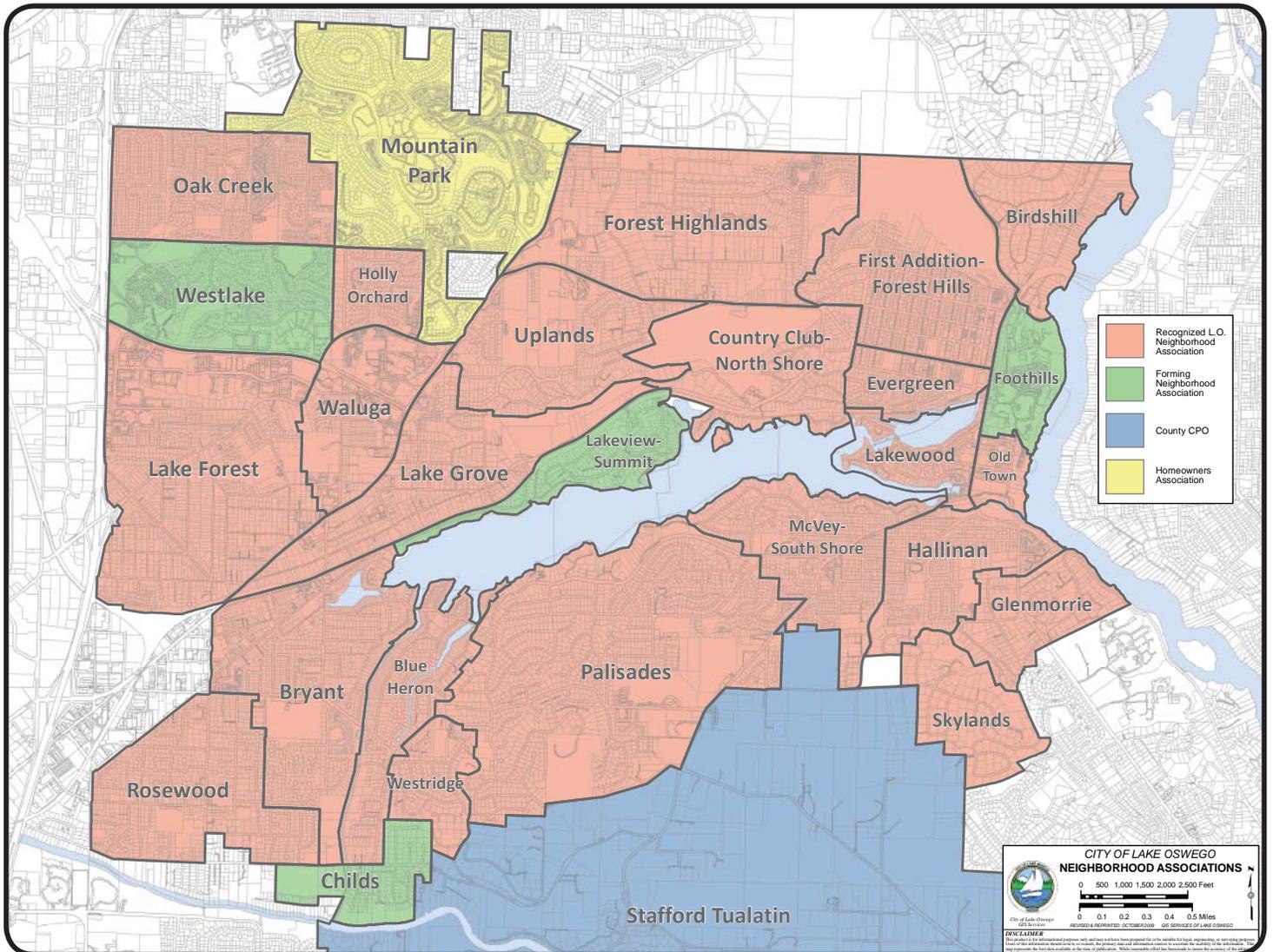
We're excited to present you with this expanded Neighborhood Association Resource Guide. We have aimed to consolidate a variety of information that we think will be helpful for the work your association does in the community. We encourage all board members to read through the information, and intend for the binder to be passed down as a resource for current board chairs.

We hope this guide will help orient new board members to association processes, as well as provide some ideas and inspiration to enhance your organizations and build community within your neighborhoods.

A special thank you to the staff of Portland's Southeast Uplift Neighborhood Coalition, which allowed us to use the contents of their Neighborhood Resource Binder as the foundation for this guide!



# Lake Oswego's Neighborhood Association System



# Lake Oswego's Neighborhood Association System

## Lake Oswego Neighborhood Associations

### What is a Lake Oswego Neighborhood Association?

Neighborhood associations are one of the officially recognized channels for citizen participation in Lake Oswego. Twenty-two formally recognized neighborhood associations offer an opportunity for citizens to participate in decision-making in the geographic area in which they live. These volunteer organizations bring neighbors together to improve the livability of Lake Oswego's neighborhoods. Participation in a neighborhood association is voluntary and open to all citizens who live, own property or a business within its boundary.

Most neighborhood associations are concerned with issues that affect the quality of life in the community. Neighborhoods often discuss and make recommendations on zoning regulations, traffic improvements, and public facilities and services. Neighborhood associations also sponsor social events that strengthen neighborhoods on a person-to-person basis. Sponsoring neighborhood festivals, block parties, crime prevention activities and upgrading neighborhood parks are important projects for neighborhood associations.

### What do Neighborhood Associations have to do with the City of Lake Oswego?

Neighborhood Associations are advisory groups chartered by the City to act on issues affecting neighborhoods. Lake Oswego chartered neighborhood associations in the belief that it is desirable for citizens to be involved in the decisions that affect the health and quality of their neighborhoods.

### What does a Neighborhood Association do?

Neighborhood Associations provide a forum for members to discuss common concerns about livability, land use, traffic, zoning, etc. Neighborhood members elect boards to represent their views before the Planning Commission, City Council and other public bodies and to maintain ongoing communications with City government.

Neighborhood associations also play an important role in building a sense of community within their geographic area. This involves building positive relationships amongst neighbors and working together for the common good of

the neighborhood. Holding block parties, bake sales, ivy removals, cleanups, or helping elderly or disabled residents are all part of this role.

### Why organize a Neighborhood Association?

Only recognized Neighborhood Associations receive these support services and benefits from the City:

- Receives information from the City on all issues (transportation, development, etc.) that may occur in the neighborhood.
- Land use appeal fees may be waived upon request.
- Can be selected to develop a neighborhood plan.
- Neighborhood becomes part of the City network of 22 recognized neighborhood associations that work together to create the type of community it wants.
- Recognized associations may testify at public hearings with additional time limits not given to individuals.
- The City can help with mailings to inform your members about upcoming meetings.



# Lake Oswego's Neighborhood Association System

## Neighborhood Programs and Services

### Neighborhood Plan Development and Implementation

Neighborhood Planning is one of the core functions of the City's neighborhood program. Eight neighborhood plans have been adopted since 1996, for First Addition/Forest Hills, Old Town, Lake Grove, Glenmorrie, Waluga, Lake Forest, Evergreen and Palisades. These plans describe the neighborhood's unique characteristics within the City, and serve to articulate a neighborhood's collective vision for its future and outline the policies and actions desired to achieve that vision. All neighborhood plans have been adopted as part of the City's Comprehensive Plan, and four of these plans have resulted in neighborhood-specific development regulations adopted into the Community Development Code. Neighborhood planning staff work with recognized neighborhood associations to develop new plans and implement previously adopted plans.

### Pre-application Conference Training

In October 2004, the City began inviting up to two neighborhood association representatives to attend pre-application conferences for projects occurring in their neighborhood. Before attending a conference, representatives must complete a brief training session with Neighborhood Planning staff. Sessions are typically scheduled quarterly, and on an as-needed basis by contacting a neighborhood planner.

### Neighborhood Coalition of Lake Oswego (NCLC) Insurance

The Neighborhood Coalition of Lake Oswego (NCLC) is a not for profit entity that provides liability insurance at no cost to recognized Lake Oswego neighborhood associations for meetings and events. The NCLC is run by a board of neighborhood association representatives that meets annually to review the program. Insurance is available to all recognized neighborhood associations within the City of Lake Oswego. An application must be completed and approved for meetings and events to be covered by the insurance policy. An application form can be downloaded from the City's web site at:

<http://www.ci.oswego.or.us/plan/NCLC.htm>



## Uplands Neighborhood Association

October 28, 2010

### Important News and Information About Your Uplands Neighborhood

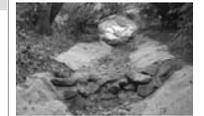
**SEMI-ANNUAL MEETING**  
**October 28, 2010**  
**Thursday, 7 – 9 PM**  
**Uplands Library. Please Attend!**

**AGENDA TOPICS:**  
Election of officers and board members to replace expiring terms. If you have an interest in joining the Board, let us know. Updates on activities in our neighborhood including a neighborhood plan, tree cutting permits, watershed issues, and more.

**PRESTWICK PARK:**  
For the second time since Prestwick Park was created in 2006, Uplands residents have generously opened their wallets to provide funds for upkeep at the tiny park on the corner of Prestwick and Wembley. Recently, Walt Hodges canvassed the immediate neighborhood and collected just under \$600 to pay for needed pruning, cleaning and weeding. Thanks Walt!

**WATER SAVING TOILETS:**  
City of Lake Oswego has a rebate program to help residents cover the cost of swapping out old water-hog toilets for new high-efficiency ones. Depending on the option you choose, you can receive a rebate of up to \$125. Replacing your old 5-GPF fixture for a new H.E. or Dual-Flush unit can save a family of four nearly 30,000 gallons per year. Visit the City's website at: [www.ci.oswego.or.us/wtr/conservation.htm](http://www.ci.oswego.or.us/wtr/conservation.htm)

**WATERSHED RESTORATION:**  
Improving water quality is a shared responsibility in the 23-acre watershed that feeds Springbrook Creek into Lake Oswego. A pilot project by four Uplands residents is helping restore the health and function of a degraded stream section. City approved the project along with Uplands Neighborhood. The project is privately funded. Project access is at 2929 Glen Eagles Rd. home of Audrey Mattison.



**NEW NEIGHBORS:**  
Please welcome new families into our neighborhood: Joanna and Ken Bucchi at 1950 Wembley Park Rd with son Noah attending LOJH, and son Jack who will finish his last year at Forest Hills this Fall. And, April and Brian Baker at 2109 Wembley Park Rd with son Ethan four and daughter Amelia eight months. Welcome!

**LOUIS CROSS COUNTRY:**  
On August 31, the Lake Oswego High School Cross Country Team volunteered in Springbrook Park to repair trails. More than 70 students armed with gloves, wheelbarrows, rakes, and shovels moved two large piles of gravel to repair 400 feet of Trail E-1 that often turns into a mud-pit during the rainy season. "The trails in Springbrook Park provide the best workout for the team," said Coach Eric Luder, an Uplands resident. "And they are out in nature." Thanks and have a great season!



**OUR SPRINGBROOK PARK:**  
Springbrook Park is our 52-acre urban nature area dedicated to all Lake Oswego residents and visitors with outreach programs at our nearby schools.

**The View from Springbrook Park - An Illustrated Natural History** was originally published in 1994 by Ed Chinn, an Uplands resident. With permission, 100 copies of the book have been printed and are available at cost: \$7.50. Contact Tom Bland for a copy. **Please consider becoming a member of Friends of Springbrook Park** a 501(c)(3) non-profit educational foundation. Your annual Family Membership of \$25, \$50 or \$100 will support cooperative educational activities with surrounding schools. To date, over 1,200 children have participated and learned about native plants in the Park.

Contributions are tax deductible to the fullest extent of the law. Please seek advice on all deductions.

**Friends of Springbrook Park**  
3360 Fir Ridge Road  
Lake Oswego, OR 97035

### WEBSITES OF INTEREST

[www.uplandsneighborhood.org](http://www.uplandsneighborhood.org)  
[www.springbrookpark.net](http://www.springbrookpark.net)  
[www.ci.oswego.or.us](http://www.ci.oswego.or.us)

### Newsletter Services

One of the roles of neighborhood associations is to provide two-way communication between neighborhood members and the City. The City also requires neighborhoods to provide notice of its annual meeting to all members of the association. In order to promote open communication and encourage citizen involvement, the City provides recognized neighborhood associations the following assistance in mailing newsletters, flyers and postcards to their members:

- Photocopies newsletters, flyers or postcards (camera-ready copy provided by the neighborhood association).
- Provides envelopes.
- Provides printed mailing labels of neighborhood association members.
- Provides postage and mail assembled items.

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## Lake Oswego's Neighborhood Association System



### **Neighborhood Enhancement Program**

The Neighborhood Enhancement Program supports partnerships between the City of Lake Oswego and its neighborhoods by providing opportunities for neighborhood organizations to propose projects that will provide a public benefit to the neighborhood and community. Through an application process, qualifying neighborhoods and organizations are awarded funds every two years for specific projects that otherwise may not be done by the City.

### **Neighborhood Drop Box Program**

Through the City of Lake Oswego's franchise agreement with Allied Waste Services, 15 drop boxes are available each year for community cleanup efforts. Some of these drop boxes are used for citywide community service programs such as Neighbors Helping Neighbors, and the remainder are available for community organizations through a simple application process. Neighborhoods read more about the program and download an application form from the City's web site at:

<http://www.ci.oswego.or.us/plan/neighbor.htm>

# Lake Oswego's Neighborhood Association System



City of Lake  
Oswego  
OREGON

## Neighborhood Drop Box Application

Planning Department  
P.O. Box 369, Lake Oswego, OR 97034  
Phone: 503-635-0270, Fax: 503-635-0269

As specified in its contract with the City, Allied Waste Services of Lake Oswego will provide up to 15 donated drop boxes per year to be used for neighborhood cleanups or other special events with a neighborhood/community benefit. Please use this form to apply for a free drop box through the City, and do not contact Allied Waste directly.

*NOTE: Application must be filled out completely.*

Date:	_____	Applicant Phone:	_____
Applicant:	_____	Alternate Phone:	_____
Applicant address:	_____		
Email:	_____		
Is this for a neighborhood association?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If so, which one?	_____
Date(s) and time needed:	_____	Will discarded materials be recyclable?	<input type="checkbox"/> Yes <input type="checkbox"/> No _____
Address for drop box delivery:	_____		
Need/purpose for drop box:	_____		
_____			

*Please allow up to two weeks for review, approval and processing.*

### FOR INTERNAL USE ONLY

Date received: \_\_\_\_\_ Approved:  Yes  No Initials/date: \_\_\_\_\_

*Revised 04/09/07, M:\Special projects\Allied Waste*

# Neighborhood Leadership

## Responsibilities of Neighborhood Associations

Neighborhood associations play an important communications role within the City. Members of the association (anyone who lives, owns property, or operates a business or nonprofit within the neighborhood's boundaries) elect a board to represent their views before decision-making bodies including the City Council, and City boards and commissions. In order to make informed recommendations on issues impacting the neighborhood, association boards are responsible for providing channels to share this information with its members in a timely manner.

The City's adopted Citizen Involvement Guidelines outline the specific requirements for recognized neighborhood associations. Following is a summary of those requirements:

- ✓ **Hold Annual Meetings** that are noticed through a mailing to all association members. The City needs your announcements at least 3 weeks before the event to assist with your mailing (see page X for mailing guidelines).
- ✓ **Elect Board Members at Each Annual Meeting** and provide the City with an updated list of their contact information including a mailing address. The City uses this information to provide information to your board, and developers also use this information to invite board members to neighborhood meetings for certain types of development applications (this is required by City code). Whatever you provide becomes public and will be displayed on the City's web site.
- ✓ **Hold Board Meetings at Least Twice Annually** to discuss information that's pertinent to your neighborhood. Board meetings can be used to discuss land use applications, planned infrastructure improvements and neighborhood issues; plan neighborhood events; receive updates from board committees; plan and review neighborhood projects; coordinate your annual meetings, etc. Board meetings are required to be open to the public, must be advertised in a local newspaper and indicated with at least two signs posted in prominent places in the neighborhood. The City has signs that you can use for this purpose.
- ✓ **Provide Copies of Meeting Minutes to the City's Neighborhood Planners.** Minutes from the past year will be posted to the City's web site at <http://www.ci.oswego.or.us/plan/Neighborhoods/default.htm>, and all other minutes will be stored in the City's electronic files. Please e-mail your minutes to a Neighborhood Planner once they are approved.
- ✓ **Welcome the Viewpoints of All Neighborhood Members** to be shared at association meetings, and record all majority and minority positions in the meeting minutes. When presenting your association's views or recommendations before City decision-makers, present both majority and minority perspectives (along with vote if taken at association meeting).
- ✓ **Provide the City's Mailing Guidelines** to the person who produces your newsletter or meeting announcement. Every year small mistakes cost hours of staff time and can delay your mailing. Following these rules will save everyone time.
- ✓ **Update Your Neighborhood Association's Bylaws.** Changes in 2004 to the Citizen Involvement Guidelines necessitated neighborhood associations to comply with new rules. If you have not approved new bylaws since 2004 by a vote of the entire association, you need to do that as soon as possible. Your neighborhood planners can assist you with these updates.

## Meeting Notification Requirements

### Written Notice

The City requires written notification to all association members for the annual meeting with election of board members. To support this requirement, the City will print and mail two mailings every year for each recognized association. Specific mailing guidelines and tips can be found in the Neighborhood Communications section of this Resource Guide.

# Neighborhood Leadership

- **Official Neighborhood Association Meeting Sign**  
Only official *Neighborhood Association Meeting* signs provided by the City may be used for the purposes of publicizing board meetings. Contact a Neighborhood Planner and they will assemble signs for you to pick up. These signs may also be used for publicizing the annual meeting, however, they may not be used for other association functions or events, or for any other purposes. Signs other than those provided by the City may be removed if placed in the public right-of-way without a permit. For details, review LOC 47.08, Regulation of Temporary Signs.



The image shows a template for an official Neighborhood Association Meeting sign. It features a black header with the City of Lake Oswego logo on the left and the text "NEIGHBORHOOD ASSOCIATION MEETING" in white. Below the header is a white form with fields for "Neighborhood:", "Date:", "Time:", "Place:", and "For more information call:". At the bottom right of the form, there is a small note: "Public sign provided by the City of Lake Oswego."

- **Post the Official Sign in the Ground**  
The Neighborhood Association Meeting signs must be posted in the ground using the stakes provided. No other materials, such as balloons, streamers, other signs, etc., may be attached to the signs. You can not put this sign onto a sandwich board.
- **How long to post the official sign?**  
Neighborhood Association Meeting signs may be posted a maximum of one week prior to the meeting

date, and must be removed the morning following the meeting, at the latest.

- **General Location of Signs**  
The Neighborhood Association Meeting signs are to be posted in at least two prominent locations in the neighborhood. As long as the guidelines below are followed, the general locations of sign posting are at the neighborhood association's discretion. However, placing the signs in consistent locations is a good idea so neighbors will learn to look for them.
- **Specific Location of Signs**  
Neighborhood Association Meeting signs must be posted in accordance with the following guidelines:
  - ❖ Signs must be posted as follows:
    - ✓ In the public right-of-way behind the sidewalk (i.e. do not place signs in the "planting strip" between the sidewalk and street);
    - ✓ In the public right-of-way at least five feet from the edge of pavement if there is no sidewalk; or
    - ✓ On private property with the owner's permission.
  - ❖ In order to provide full vision clearance, signs placed in the public right-of-way along a street must be located:
    - ✓ More than 60 feet from the intersection of two streets or the street and an alley; and
    - ✓ More than 10 feet from the intersection of the street and a driveway.
    - ✓ Signs may not block sidewalks or street signs.

## Newspaper Notice

Neighborhood associations are required to publicize board meetings with a meeting notice or announcement published in a local newspaper.

- Announcements for the Lake Oswego Review's What's Happening section can be emailed two weeks in advance to: Linda Hundhammer at [lhundhammer@lakeoswegoreview.com](mailto:lhundhammer@lakeoswegoreview.com).
- Announcements for SW Edition of the Oregonian can be sent to: [southwest@news.oregonian.com](mailto:southwest@news.oregonian.com).

# Neighborhood Leadership

## City's Online Community Calendar

When the City prints a newsletter or meeting notice for a neighborhood association, we add the meeting information to the Community Calendar on the City's web site.

## Optional Methods

Neighborhoods may wish to expand their meeting notification strategies to include posting on the association web site, blog or Facebook page; emails to a neighborhood email list; or door-to-door flyers. And don't forget personal communication! Inviting your friends and neighbors when you see them in the community, sending a personal e-mail or picking up the phone can be the most effective way to get people to your meetings!

## Neighborhood Association Committees

Committees can save time and energy by allowing smaller groups to dedicate time to specific issues, events or tasks. Committees are often able to accomplish more outside of the larger neighborhood association meetings. Neighborhood association bylaws can be used to specify the way committees are structured.

## Task Oriented or Advisory Committees

Neighborhood associations can have standing committees and also form ad-hoc committees as needed. These committees typically exist to focus on a specific task, issue or event. Members meet outside of regularly scheduled meetings to plan or discussion matters at hand. These committees typically conduct business and determine logistics and then bring recommendations to the neighborhood association for an official vote.

## Committees with Executive Authority

Neighborhood associations may grant any standing committees executive authority, as outlined in their bylaws. Such committees have the authority to make decisions on behalf of the association, outside of the standard meeting process. Neighborhood associations may grant this authority to a land use committee or outline provisions for the formation of a "rapid response committee" to make decisions on land use issues, which may need to be acted upon quickly in order to meet pressing deadlines.

## Committee Reports

While you are not required to submit committee meeting minutes to the City (as you are for board and general membership meetings) or have minutes approved by the membership, it is a good idea to formally document the activities of committees. Reports will help to keep the group on track and provide a permanent historical record for future neighborhood leaders. When reporting back to the neighborhood association at a meeting, keep the information brief and to the point. Recommend action with clearly stated proposals. Present any financial information with written reports for all in attendance. Always be sure to announce the time and location of the next committee meeting time, encouraging newcomers to participate.

## NCLO Insurance

The Neighborhood Coalition of Lake Oswego (NCLO) is a not for profit entity that provides liability insurance at no cost to recognized Lake Oswego neighborhood associations for meetings and events. The NCLO is run by a board of neighborhood association representatives that meets annually to review the program.

The insurance premium is paid by the City in order to help facilitate neighborhood associations to hold meetings to exchange information with their members and citizens; and to enhance citizen participation in Lake Oswego community government and its decision-making process.

## Application Filing Guidelines

The insurance liability coverage is available to cover recognized neighborhood associations in the event of a claim against the association. The NCLO must have detailed information on record in advance of neighborhood association meetings and events in order to fully support any claim against the association within the policy's scope of coverage.

The **time, date, place and type of meeting or event** need to be on record in order to provide coverage in the event of a claim. For example, if a claim was filed noting an injury at a

## Neighborhood Leadership

specific location and that location was not the location on file, the meeting location recorded on the application could support the neighborhood association.

The NCLO asks that neighborhood associations make a concerted effort to provide this detailed information, in order to prevent complications in the event of a claim. Following are some ideas of how to provide complete information on NCLO application forms:

- Recommend that your neighborhood association board develop a calendar of meetings and events on an annual basis. This would provide an easy way to fill out the insurance form. Note on the insurance form that your neighborhood association calendar of board and annual meetings is attached.
- Fill out expected dates, times and locations for your meetings and make adjustments if necessary. Stop in to City Hall to make a change to your form and initial it, or write up and sign a note with the necessary change for us to attach to your original application.
- Application forms or amendments can also be submitted via fax. The NCLO must have the information on record in the event of a claim, but an original signature is not crucial.

While the insurance policy runs from September 1st–September 1st each year, applications may be turned in by neighborhood associations at any time. Some applications contain specific dates that fall in both the two policy years. Other forms contain general dates such as “the second Monday of each month.” In these cases, the insurance applications will be applied to both policy years.

Applications can be downloaded from the City’s web site at: <http://www.ci.oswego.or.us/plan/NCLO.htm>

### **Once completed, application forms can be returned to:**

*Sarah Selden  
City of Lake Oswego  
P.O. Box 369  
Lake Oswego, OR 97034  
OR  
Fax to: 503-635-0269*

### **Scope of Insurance Coverage**

The NCLO insurance will protect NCLO or its member Neighborhood Associations from claims that may arise in the use of the site. This is not, however, general insurance which extends to the site owner. Insurance protects against claims of the negligence of the *insured*, and thus if an injury occurred because of the acts or omissions of the *neighborhood association itself* (pursuant to action authorized by the Board of Directors), then insurance would protect against a claim against the NCLO, and the neighborhood association.

If an injury arose as a result of a site condition, neither the NCLO nor the neighborhood association would likely have any control over the condition premises and thus the injury would not likely arise from an act or omission of the NCLO or the neighborhood association. Rather, presumably the claim would be the result of the site condition, and would thus likely be a claim of negligence against the site owner.

People are liable for consequences of their own negligence. NCLO insurance only insures against the negligence of the neighborhood association. If the injury arises due to the negligence of the owner, or the attendee, NCLO insurance will either seek to avoid liability, or may seek reimbursement from the negligent party (if they have homeowners insurance, they may be able to have their own insurance cover the claim for their negligence).

The NCLO general liability insurance policy (for which the City pays the premium) includes \$300,000 coverage for damages to premises rented by NCLO or its additional insureds (member Neighborhood Associations). It also provides \$1 million general liability insurance and \$2 million completed operations insurance to NCLO or its additional insureds (member Neighborhood Associations) for the events covered. (See attached declaration page for Policy Year 08-09.)

# Neighborhood Leadership

## How to Develop an Annual Work Plan

### Annual Work Plan

Work plans allow neighborhood associations to review past successes, develop a shared set of values as a group, plan activities for the upcoming year, and discuss ways to improve any challenges the group may be facing. Achieving goals, planning events and recruiting volunteers will be easier if you take some time to outline your expectations and objectives in advance, and establish a plan to accomplish them. A little planning can go a long way to help your association stay strong and successful!

If you recently elected new board members, this is also a good time to discuss everyone's interests in serving on the board.

Here are some questions to help guide your discussion and the development of your work plan:

Start with discussing general interests and reviewing the situation:

- Why did you become a board member?
- What have been the association's biggest successes? What are the biggest challenges?
- What could be done to improve the association and overcome these challenges?

Then discuss your overall mission:

- What is the neighborhood's purpose, role and obligation to the neighborhood? (You may have additional role's outside of the responsibilities outlined in the City's Citizen Involvement Guidelines.)

And move on to the specific ways that you'll carry out this mission:

- What are the core projects and activities the association would like to pursue this year?
- For each project or activity, answer the following questions:
  - What is the purpose of this activity?
  - Is there a need for it in the community?
  - What are the tasks involved?
  - How much time is needed to plan and accomplish the tasks?

- Is money is required?
- What resources are available to help the association accomplish the tasks?
- Are enough volunteers available and willing to do the work?

Once you have your final list of activities or goals, look at the calendar and note the key dates for each item. This should include your general membership and board meetings, and the draft meeting topics and decisions for each. (See Sample on next Page)

# Neighborhood Leadership

## Sample Neighborhood Association Annual Work Plan:

### Association Goals for 2010:

1. Recruit 3 new board members at next year's elections
2. Increase attendance at general membership meetings to 30 people
3. Hold one neighborhood social event
4. Hold one invasive species removal party at local natural area
5. Apply for a Neighborhood Enhancement Grant to get 2 neighborhood signs
6. Create a Good Neighbor Guide to distribute to all neighbors
7. Provide public comment for key City decisions on behalf of the association

### Activities

#### Hold two general membership meetings:

##### April 14 Meeting

Now:

- Reserve meeting space

2 months ahead:

- Finalize meeting agenda
- Invite City Councilor to come speak on timely topic (do any Councilors live in the neighborhood? They might be interested in speaking! Otherwise, contact a neighborhood planner with the topics you'd like discussed and they'll help to find a Councilor to attend)
- Start drafting meeting notice

1 month ahead:

- Get meeting notice to neighborhood planner for review
- Determine who will label and/or stuff the notice for mailing
- Coordinate refreshments and handouts/visuals

##### October 14 Meeting with Annual Elections

Now:

- Reserve meeting space

4 months ahead:

- Review election procedure
- Nominating committee makes plan for recruiting new board members and begins outreach

2 months ahead:

- Finalize meeting agenda and speakers. Invite speakers
- (See above for remaining items)

#### Hold a National Night Out Ice Cream Social

Now:

- Set date and location. Fill out reservation form for location if necessary (City picnic shelter use), or identify a quiet street and apply for a block party permit with the City's Engineering Department. <http://www.ci.oswego.or.us/engineer/trans/BlockParty.pdf>

4 months ahead:

- Invite a police officer to attend
- Make publicity plan and assign responsibility (LO Review, meeting signs, web site, hand delivered flyers, etc.)
- Assign responsibility for refreshments, materials, etc.

Day of event:

- Socialize with your neighbors and generate interest in becoming involved with the association!

#### Hold an Invasive Species Removal Party

Now:

- Assign board responsibility
- Contact the Parks Department to discuss idea and timing
- Set date

4 months ahead:

- Develop a plan for volunteer recruitment. In addition to neighbors, are there students from a neighborhood school, boy or girl scout troop, or churches who may want to help?
- Invite organizations to participate
- Set specific time and apply for drop box if necessary
- Start to get the word out

2 months ahead:

- Coordinate refreshments (would a nearby business donate?)

1 month ahead:

- Publicize event (flyers to nearby residents, announcement in LO Review, City web site)

Week of event:

- Check in with volunteer groups
- Ask the City to provide the association with volunteer waivers for all volunteers to sign

## Neighborhood Leadership

- *Make sure drop box and refreshments are lined up*

### **Apply for Neighborhood Enhancement Grant for Neighborhood Signs**

Now:

- Assign board member to work on project

Next board meeting:

- Discuss possible locations for signs, and what you'd like on the signs (use the existing neighborhood signs throughout the City as a guide)

Once the City has opened grant application process:

- Meet with City staff to review the proposal, location, etc.
- Check in with board and get signoff on location and sign content.
- Contact sign manufacturer for bid and complete remaining application requirements.

### **Create a Good Neighbor Guide to distribute to all neighbors**

- *Brainstorm ideas to share with you neighbors, such as:*
  - ❖ *Promote planting native species, include a list of native plants*
  - ❖ *Ask neighbors to think about the ultimate height of trees that they are planting and take into consideration the views of others*
  - ❖ *Encourage neighbors to talk to next door neighbors about major remodels to discuss opportunities that could mitigate impacts on privacy (ex. window placement)*
- *Develop a timeline to produce the guide*
- *Recruit a few people to draft and design the guide*
- *Present the draft to the board and neighborhood association for approval*
- *Ask neighborhood planning staff to review before publishing*

### **Provide Public Comment on Key City Decisions**

- Assign different board member to track projects/issues/decisions that they're interested in
- Ask for updates from those board members at your board meetings, or via e-mail if more pressing
- Ask the neighborhood planner for City materials that provide tips for giving public testimony and responding to land use applications
- If association board wants to take a specific position

on an issue, make a vote at your meeting and record the majority and minority opinions and votes in your minutes to present to the City

# Neighborhood Leadership

## Evaluating the Effectiveness of Your Board

As board roles and priorities change over time, it's important to check in and evaluate your effectiveness as a group. Evaluation of your board's effectiveness needs to be based on both your understanding of legal regulations and on the specific roles of each board member. Your evaluation should focus on the specific needs of your neighborhood board, not in comparison with other neighborhood associations.

Time devoted to board cultivation, support and evaluation can build the strong roots your neighborhood association needs to achieve its purpose and sustain its efforts.

Board members should be encouraged and provided with opportunities to provide feedback on how the board is working during the course of the year. Members should feel free to express both pride in accomplishment and frustration with process. An open dialogue where questions can be asked honestly is of the utmost importance.

In addition to the creation of a supportive, open board atmosphere, you may consider setting aside time for a board retreat each year. This is an opportunity for the board to get to know one another and focus on successes and challenges. You can use the retreat as an opportunity to reach new agreements about board roles and develop realistic plans about how goals will be achieved that year.

### Assessing Your Board's Health

This sample questionnaire was developed to help you analyze how your board operates and potentially find areas for improvement. Answer the questions below, truthfully.

1. *Who attends your neighborhood association meetings?*
  - New people each month*
  - The same group of people each month*
2. *Do you feel comfortable offering ideas to the board for discussion and consideration?*
  - Yes*
  - No*
3. *When an event or project is suggested, do people:*
  - Volunteer enthusiastically*
  - Only agree to help out of a sense of obligation*
4. *Do you think people would describe your neighborhood association as:*
  - Open and friendly*
  - Cliquish and cold*
5. *Your board has defined:*
  - Shared values*
  - Goals & strategies*
  - Both*
  - Neither*
6. *Is there a forum for dialogue outside of meetings to engage community members?*
  - Yes*
  - No*
7. *Do members get together and celebrate accomplishments outside of meetings?*
  - Yes*
  - No*
8. *Do board members work well together and communicate in a respectful manner?*
  - Yes*
  - No*
9. *Remember your first experiences with the neighborhood association, did you feel welcomed by the group?*
  - Yes*
  - No*
10. *During your initial interactions with the board, were you given information about the neighborhood association's purpose, core values and goals?*
  - Yes*
  - No*
11. *Did someone engage you at the meeting or follow up to see if you had any questions or concerns?*
  - Yes*
  - No*

## Neighborhood Leadership

12. Did you feel comfortable sharing ideas and input with the group?

Yes

No

### Ways to Improve Board Dynamics

- ***Celebrate Successes and Recognize Accomplishments***  
When you get a victory – be thankful and give thanks where they are due. And if you don't win – still acknowledge that the work was done with the best intentions and that no effort is without honor. It's important that board members support one another on a regular basis. Mix it up! People like to be recognized in different ways. Vary your efforts to ensure that recognition is meaningful for your members.
- ***Different Ways to Recognize Members***
  - ❖ Personal recognition: verbal thank you's or personal notes.
  - ❖ Formal or organizational recognition: a card signed by each board member, an article in the neighborhood newsletter or certificates or awards presented at an association meeting.
  - ❖ Multi-volunteer recognition: annual volunteer recognition event to celebrate the accomplishments of several individuals as well as the neighborhood association as a whole.
- ***Social Time Outside of Meetings***  
Coffee, cocktails or snacks after a board meeting is a great way to get to know one another and build camaraderie. A better understanding of one another is what usually comes out of the social time spent away from meetings. Bottom line – just because you are working for the neighborhood does not mean you can't have fun!

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## Neighborhood Leadership

# Running Effective Meetings

## Agenda Tips

### Tips for Preparing Effective Meeting Agendas

You've just been elected chair of your neighborhood association and all of a sudden your e-mail box is filled with requests from City bureaus, neighbors and developers wanting to come and share their issue, proposal, ideas and concerns with your members. How do you sort through all of the requests and decide on the agenda for this month's meeting? How do you make sure that there's enough time to fully discuss an issue, especially when people don't agree?

### Always Prepare

Plan out your agenda at least two weeks in advance, asking board members for agenda items and sorting through any requests for time on the agenda that you may have had. Review minutes from the previous meeting to see if there are any items that were tabled or left unresolved. Were tasks assigned that must be reported? Be reasonable about the time that will be needed for each agenda item and discussion that will follow. Be sure to note the time for each agenda item and any action that will be needed. Also, set a predetermined ending time for the meeting.

If possible, send the final agenda out in advance. This will both help your presenters mentally prepare for the time allotted for their item and generate interest from the public to attend your meeting.

### Points to Consider when Preparing an Agenda:

- Honor everyone's time! Keep the agenda as short as possible. People begin to get tired and may leave the meeting after about 90 minutes. It's a great idea to appoint a timekeeper to stay on time and assist the chair with interrupting or directing someone to wrap up a comment or presentation.
- When drawing up the agenda, you must first determine the time needed for each topic. You likely will know which topics will need more time than others. Be sure to take into consideration the time that will be needed for discussion and any action needed. Place "time allocated" right next to each agenda item.

- Mix it up! Plan the agenda so that important items, big decisions and votes are mixed in with informational presentations and other elements. Don't save big decisions until the end of the meeting, as people will likely be tired or have left the meeting.
- Never let the same person present two topics in a row. Presenters will likely extend the time allocated and your audience may lose interest.
- Ask for additions at the opening of the meeting, before the agenda is approved.

## Ground Rules

### Meeting Ground Rules

Every person has experiences at meetings and in work settings that create expectations about "the ways things should be done." In order to create a more successful meeting environment and productive group in general, it's helpful to create a set of guidelines or ground rules. Ground rules have proven a successful tool in many group settings, including neighborhood association meetings.

It's important for the entire board, not just the chair who facilitates the meeting, to develop the ground rules. The list of ground rules can be developed at a regularly scheduled board meeting. Brainstorm a list of ground rules and when reviewing each rule, make sure everyone in the group understands what is meant by the proposed rule. Once the list of ground rules is developed and there is full acceptance by the group, write the list up on a large piece of display board paper. Post the ground rules at every neighborhood association meeting and read the list out loud so that everyone in attendance knows that they will be held accountable to the group's rules.

It's important to establish ground rules before a conflict arises. Be proactive and develop ground rules as a tool to ensure that the group functions in a healthy and effective manner.

# Running Effective Meetings

## **Sample Ground Rules**

*Here's a list of suggested ground rules to build upon. Rules will have the most impact and buy-in when they are developed out of a group process.*

- *Treat everyone with courtesy and respect.*
- *Listen actively – respect others when they are talking.*
- *Listen to others with an open mind.*
- *No side conversations and no cross talk - one person speaks at a time.*
- *Be aware of your own and other's participation – step up and step back!*
- *Share your own experiences and opinions with "I" statements, rather than generalizing with "We" or "They" comments.*
- *Respectfully challenge an idea, not a person.*
- *Speak to the topic at hand.*
- *Respect the groups' time and keep comments brief and to the point.*

## **Making Your Meetings Welcoming**

For better or worse, neighborhood associations have meetings, sometimes lots of them! As many of you know meetings can sometimes be rigid and boring. Good news! There are several easy ways that you can make your meetings more appealing to members.

### **Here are a few simple tips:**

- ✓ ***Provide Signage at the Meeting Site***  
Neighborhood associations often forget to provide signs directing members to their meeting room, making people feel confused and unwelcome. It's a good idea to have a sign on the door where people would be entering the building to let them know they're in the right place and a sign or two in the hallways directing people to the appropriate room.

It's also a nice touch to have a sign on the door outside of the meeting room. For example, "Old Town

Neighborhood Association Meeting Here! Welcome Neighbors!" This will make members feel welcome right away.

- ✓ ***Have a Greeter***  
Seek volunteers from your board who will make a point of introducing themselves to new members, provide them with some brochures about your group and check in to answer any questions about the discussion at the meeting.
- ✓ ***Provide Welcome Packets or Neighborhood Info Sheets***  
These are a great way to instantly make a new person feel welcome when they walk in the door. These can equip new members with all the basic information about your neighborhood association's meetings, board members, committees and upcoming events. This is especially handy at meetings when you may not have the time to spend sharing all this information. Packets can be tailored to the needs of your association to offer a combination of information and warmth to members. This will not only save a lot of time for both you and the new member but also increase the chances of helping them become an involved member for the long run!
- ✓ ***Do Introductions at EVERY Meeting***  
Welcome new members at the beginning of each meeting. Make introductions a standard agenda item at the beginning of the meeting so that everyone will be more comfortable.
- ✓ ***Be Considerate of New Members***  
Don't assume that everyone in the room knows how the meeting will run. Go over the agenda, explain ground rules and allow time for questions to ensure that everyone understands the process. Be sure to give background information to bring members up to speed on pertinent issues.
- ✓ ***Allow Social Time***  
Provide 10-15 minutes in the beginning of the meeting or halfway through the agenda to allow an opportunity for members to network and get to know one another. Getting everyone to know your neighbors and board members is the key to working smoothly and with respect.

# Running Effective Meetings

## ✓ **Provide Refreshments**

Have board members provide potluck snacks or get donations from local coffee shops or restaurants for your meetings.

## ✓ **Follow-up with New Members**

Use the information gathered in the sign-in sheet to call or e-mail new members. Check in to see how their first meeting experience went, find out particular issues or interests of new members and potentially generate involvement in the board, committees or an upcoming event. Ask if they have any questions about the welcome packet they received!

## ✓ **Relocate Meetings**

Change your meeting location permanently or during the summer to reach new members. Have meetings in coffee shops, restaurants or neighborhood parks to change up the atmosphere and make your meetings more welcoming!

## **Make Meetings Accessible to ALL Members**

Meetings must comply with Oregon Public Meeting Law, and can not be held in locations where any person attending the meetings would face discrimination on the basis of race, religion, color, sexual orientation, gender identity, age, disability, legal citizenship, national origin, income, or political affiliation. More information on the public meetings law can be found in Appendix B of the Lake Oswego Citizen Involvement Guidelines (locations in the appendix of this resource binder).

## Meeting Facilitation

### **Meeting Facilitation**

The key to meeting facilitation is keeping people on time, on task and onboard as a group. Meeting facilitation takes time and practice in order to find your best leadership style. Don't worry if you have little experience facilitating meetings. Your fellow board members are there to help. Ask for feedback and suggestions on ways to improve your meetings. Ultimately, running on-time and effective meetings will help your neighborhood association make

decisions and also show that you respect the time and energy of your volunteers.

### **Tips to Make Facilitating a Meeting Easier**

#### ✓ **Be Prepared**

Plan out your agenda and make sure notice has gone out at least one week prior to your meeting. Contact presenters to make sure they will be in attendance. Be prepared to discuss any items that were tabled from last month's meeting.

#### ✓ **Do Introductions**

Introduce yourself at the beginning of each meeting. Don't assume people know who you are. Also, be sure to have everyone at the meeting introduce themselves to build a sense of trust among the group. Also, consider incorporating icebreakers or appreciations of volunteers as part of their opening activity.

#### ✓ **Review the Agenda and Ground Rules**

Get buy-in from the group on both items and make sure everyone understands the way the meeting will be run.

#### ✓ **Be Organized and Stay on Time**

It is often helpful to assign the role of timekeeper to another board member so that time will be better monitored and conversation can be ended more easily. Respect everyone's time and end the meeting at the time planned.

#### ✓ **Direct the Discussion and Keep People on Topic**

Remind the group that there will be time for new business at the end of the meeting. If people are being repetitive, recap information for the group. If a decision needs to be made, call for a motion from the group.

#### ✓ **Facilitate Voting and Decision-Making**

Never assume an agreement has been reached without a vote. Encourage all members to participate and minimize long-winded conversations.

#### ✓ **Always Maintain your Role as Chair**

Facilitate the group's discussion, making sure all are being heard. Do not abuse your position and monopolize the floor. Limit your own opinions and stay neutral.

# Running Effective Meetings

✓ **Mediate Arguments**

Give each side the chance to state their point of view.  
Remain impartial and fair.

✓ **Wrap-up at the End of the Meeting**

Review all discussions, decisions to be made and tasks to be assigned. Make sure there is clarity by the end of the meeting.

✓ **Follow Up After the Meeting**

Offer help to other board members as needed and contact new members.

✓ **Basics of Robert's Rules for Small Group Meetings**

In meetings of 12 people or less, only four motions are typically used. One person moves to (introduce, adopt, etc) a motion, and another person seconds that motion before the meeting chair calls for a vote. Basic motions are:

- ❖ To Introduce (a motion)
- ❖ To Change a Motion (amend)
- ❖ To Adopt (accept a report without discussion)
- ❖ To Adjourn (end the meeting)

**Ways to Make Sure Everyone Feels Heard and Participates**

- Minimize cross talk and consider the needs of different personalities and cultures in your meetings.
- Have discussions that mix large and small groups when appropriate.
- Be flexible and allow time for questions to ensure understanding.
- Control the flow of discussion and guide your group to making decisions and reaching consensus.
- Summarize the discussion, so far, so that others have a sense of conclusion, i.e. *"So far, what I've heard you say is...? Is that accurate?"*
- Address disruptive influences and make meetings more accessible, welcoming and productive for all in attendance.
- Don't allow others to take over the meeting through intimidation, anger or outrageous behavior.
- Set boundaries, but validate participants' contributions. *"I see that you are frustrated that this issue is not on the agenda and that it is important to you. Perhaps a few of us would be willing to stay after the meeting and set a good time for having this discussion."*
- Offer solutions and ask the group for support.



# Running Effective Meetings

## Active Listening Techniques

When facilitating a meeting, the following techniques can go a long way toward encouraging a positive and productive discussion. You may want to keep this chart in front of you during meetings for easy reference.

APPROACH	WHY USE	HOW TO USE	EXAMPLES
Involving	To convey interest. To encourage a party to keep talking.  To get more information.	Use non-judgmental words.  Suspend judgment.  Don't agree or disagree.	"So, tell me a little more about..."  "So, tell me what you think about..."
Clarifying	To help test your understanding of what is said.  To establish that a previous contribution has been understood.	Ask questions.	"Was that yesterday or the day before?"  "So, are you saying that...?"  "Did you mean that...?"
Restating	To show you are listening and understanding what is being said.  To check your meaning and interpretation.	Restate basic ideas and facts.	"So, you would like _____ to trust you more, is that right?"  "Both of you are interested in resolving this situation. Is that correct?"
Reflecting Feelings	To test your understanding of how the other person feels.  To illustrate that you are aware of how the other person feels.	Reflect the speaker's basic feelings.	"You seem quite concerned."  "You haven't said this, but you seem frustrated."  Am I reading that right?"
Summarizing	To review progress To pull together important ideas and facts.  To establish a basis for further discussion.	Restate major ideas expressed concisely.	"These seem to be the key ideas you're expressed: a, b..."  "Let me stop here and make sure I have the main points."
Validating Feelings	To acknowledge the worthiness of the other person.	Acknowledge the value of their issues and feeling.  Show appreciation for their efforts and actions.	"I appreciate your willingness to resolve this matter."  "I appreciate the time and energy that all of you have spent on this."

# Running Effective Meetings

## Things To Remember When Dealing With Challenging People

### Be Prepared

- Always have an agenda for each meeting with topics and time limits. This will help to keep the meeting focused and on track.
- Have ground rules posted and refer to them both at the beginning of each meeting and as needed throughout meetings.
- Anticipate possible challenging situations. Plan ahead for how you will handle them. Practice how you would react to particular situations. Arrange for support from fellow board members to control the meeting.

### It's Not Your Fault – Don't Take it Personally

- People display challenging behavior because of who they are personally, not because of you.
- It's not personal; so don't react as if it's a personal attack. Remember your role to run the meeting and protect everyone at the table.

### Control Your Reaction to Conflict

- Really listen to the person speaking.
- Agree when possible and ask questions to help you to understand their perspective.
- Think about what you are going to say first, before speaking.
- Speak slowly and evenly, without raising your voice.
- Address the person by name, if possible and look them in the eye.
- Express your perspective firmly, but not confrontationally.
- Confront the issue at hand, not the person.
- Stay on topic and remember not to lose your temper.

### What Causes People to Be Difficult?

- Negative feelings from previous interactions or situations
- Inaccurate or incomplete information
- Seemingly incompatible goals
- Different styles of communication

## Decision-Making Tools

### Decision by Consensus

- Assumption that unanimity is essential and can be achieved.
- Iterative process that must continue until all agree (see 5 finger tool below for assistance).
- May take a long time to reach decision, or agreement may not be possible.

### Decision by Consent

- Unanimity should be sought but not at the expense of timely and relevant decision-making.
- Every member must manage some individual disappointment to achieve a robust and mutually supportable outcome.
- Members are expected to suggest well-reasoned alternatives to support the objectives of the decision.
- Key questions are: "What alternatives can you propose?" And "Can you live with this?"

### Voting by Majority

- This approach uses a simple majority voting model
- The advantage is in quickly reaching a decision
- A disadvantage is ending up with winners and losers

# Running Effective Meetings

## The Five Finger Consensus Tool

The following tool can be used to gauge the level of support amongst your neighborhood members. If you are working to reach consensus, you can take an interim poll to assess how your decision is progressing, and then continue discussion as needed. Your association can decide what level of support is necessary to move forward.



- 1 finger:** I can say an unqualified yes to the decision. I am satisfied that the decision is an expression of the wisdom of the group.
- 2 fingers:** I find the decision perfectly acceptable.
- 3 fingers:** I can live with the decision even though I'm not especially enthusiastic about it.
- 4 fingers:** I do not fully agree with the decision and need to register my view about why. More discussion is needed.
- 5 fingers:** I do not agree with the decision and feel the need to stand in the way of this decision being accepted.

## Meeting Minutes

Minutes must be recorded at all board, general, special and emergency meetings where a quorum (number outlined in your bylaws) exists to deliberate and make decisions on behalf of the neighborhood association. This is a requirement of the City's Citizen Involvement Guidelines.

Minutes serve as the official record of neighborhood association meetings, creating a common record and institutional memory that everyone can access. The secretary's role is not to create a verbatim transcript of each word spoken at the meeting, but to summarize

discussions and actions (i.e. votes relating to the association's position on City issues, or notes related to who will work on different projects). Notes for board meetings should also include a list of board members in attendance.

Minutes shall be put in writing and made available to the public (except for minutes from a board's executive session).

It is advised to have draft minutes available for review prior to the next meeting. Encourage board members and others to submit changes to the minutes several days before the meeting via e-mail. This will expedite the process at the meeting. At the next scheduled meeting, make hard copies of the previous month's minutes available to all in attendance. Allow time for review and ask for any edits/additions prior to calling for a motion to approve the minutes.

Neighborhood associations are required by the Citizen Involvement Guidelines to forward copies of their meeting minutes to the City. If your board meets monthly, please forward your board meeting minutes once they are approved. If your minutes will not be approved for several months (i.e. once-annual general membership meeting), please forward them in draft form. Please send your minutes via e-mail to your neighborhood planner, who will save them in the City's records, and post the minutes from the past year on the City's web site.

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## Running Effective Meetings

# Neighborhood Communications

## Communication Tools

Neighborhood associations have noted that one of their greatest organizational challenges is getting the word out about neighborhood news, events and issues using limited resources.

The City currently provides printing and mailing for up to two neighborhood newsletters or announcements each year. To supplement this and the information posted on the City's Neighborhood Associations web page, many neighborhoods have set up web sites, listservs, or e-mail lists to share information on an ongoing basis.

Below is some information and tips for establishing and using online communication tools:

### Newsletters

- **How it Works:**  
Neighborhood associations often mail newsletters to their members to update them on news, projects, and upcoming meetings. Newsletters may range from 1-10 pages (up to 5 sheets, double-sided), and follow a variety of different formats. Typically the association assigns one person to be the newsletter editor. This person then solicits articles from different people in the neighborhood, edits them, and lays out the document. Please see the City newsletter guidelines in this Guide for more information.
- **Advantages:**  
Mailed newsletters reach all member of your neighborhood, including those who may not have a computer or e-mail. The format allows space to write up news of importance to neighbors.
- **Disadvantages:**  
Most associations have limited funds, and the City budget can only provide two mailings per association per year. This limits the frequency of communication. Newsletters typically take longer to develop than postcards or information posted to an online source.

### Postcards

- **How it Works:**  
The City can print ½ page or ¼ page postcards on

cardstock as part of the printing and mailing services provided to neighborhood associations. Please see the City newsletter guidelines in this Guide for more information on the layout requirements.

- **Advantages:**  
The information you wish to share is accessible; recipients do not have to open an envelope or unfold the newsletter, which may increase the chances of being read. Postcards are a great tool for announcing events and only involves adhering address labels to the card.
- **Disadvantages:**  
Postcards have limited space; if you want to share in-depth information, or information on multiple topics, a longer format will be needed.

### Tips:

- ✓ Make sure the font is big enough to read, especially for aging eyes (no less than 11 point).
- ✓ Highlight the most important information in larger, bold fonts.
- ✓ Don't try and cram too much information on the postcard – keeping the postcard simple and allowing adequate white space makes information easier to read.

### Web Site

- **How it Works:**  
There are varying levels of complexity when it comes to web sites. On the simple end is Neighborhood Link, which hosts neighborhood association information for free using a set template. On the more complex end, the possibilities are endless. At a minimum, a custom web site would require a neighbor to set up a template (design), and a neighbor to serve as the "webmaster" and update the web page on an ongoing basis.
- **Advantages:**  
Neighbors can visit the web site to find a variety of information about their neighborhood and neighborhood association. Content can be updated as needed to provide neighbors with information between meetings and mailings. Documents may be posted to the web site for neighborhood review.

# Neighborhood Communications

- **Disadvantages:**

Requires a dedicated webmaster to provide ongoing maintenance of the site. Neighborhood association would need to advertise the web site to direct neighbors to look there for information.

**Resources:**

The following are some web site hosting tools used by Lake Oswego neighborhood associations.

- ❖ Go Daddy, [www.godaddy.com](http://www.godaddy.com), hosts web sites starting at \$6/month for a three year plan.
- ❖ Neighborhood Link, [www.neighborhoodlink.com](http://www.neighborhoodlink.com), provides free web pages for associations. A set template provides links to content that is updated by the association.
- ❖ Blue Host, [www.bluehost.com](http://www.bluehost.com), hosts web sites starting at \$6.95/month and provides free web site design templates.

**Blog**

- **How it Works:**

“Blog” is short for “web log,” a periodic log of information posted online. Blogs offer a combination of web site and listserv approaches. You sign up for a unique blog address (like a web site address), which provides a customizable page to post information about your neighborhood. You can choose from a variety of page layouts and designs to meet your neighborhood’s information needs. Typically, there is a small group of people who are considered blog editors, and can post new information. Other people in your neighborhood can read their entries and publicly post their comments (after they are accepted by the editors).

- **Advantages:**

The biggest advantages are its price (FREE!), and ease of use, even for those with limited computer experience. You are able to post information as frequently or infrequently as you like, and can add photos, and links to web sites or other blogs. Information could include seasonal photos of your neighborhood, local events, reports on new businesses opening, or special place or experience in the neighborhood.

- **Disadvantages:**

While you can use a blog to post static information, such as a list of board members and neighborhood

boundaries, blogs typically serve as forums for timely topical information – which requires a dedication to posting information about your neighborhood on a regular basis.

**Resources:**

WordPress: <http://wordpress.com/>

Blogger: <https://www.blogger.com/>

**Facebook**

- **How it Works:**

Facebook is one example of social media, a term used to describe the type of media that is based on conversation and interaction between people online. At least one Lake Oswego Neighborhood Association has established a Facebook page to connect neighbors and share information about local happenings. Associations can set up a page on Facebook that includes general information about the organization. The association can then post information about neighborhood news and events, links to news stories, videos of neighborhood projects, photos, etc. A Facebook page can be set as public, so that people can view your information without having a personal Facebook account. People who do have Facebook accounts can “Like” (aka become a fan of) your association, to view updates posted to your association’s Facebook page when they log in. Facebook users can also post comments to your posts. These comments cannot be made anonymously, and your association could delete comments if they were inappropriate. In order to gain momentum, your association should try and post information regularly.

- **Advantages:**

Facebook is the most visited site on the Internet today, and you may be surprised how many people in your neighborhood already have Facebook accounts. If they become a fan of your association’s page they can keep updated on a regular basis. Facebook allows you to post different types of information (photos, links to other web sites, videos) without a high level of technical expertise.

- **Disadvantages:**

Similar to a blog or web site, the page needs to be publicized to gain awareness amongst your neighbors. It

# Neighborhood Communications

may be difficult to get people not already on Facebook to visit your page.

**Resources:** Facebook: [www.facebook.com](http://www.facebook.com)

## Listserv

- **How it Works:**  
A listserv, such as Yahoo! Groups, is a way for people to opt-in to an e-mail discussion group on a particular topic. A neighborhood association would set up an account and let people know how to sign up and view the discussion. Neighbors can e-mail the group with information about meetings and events, neighborhood issues, or questions. Other members can respond to their e-mail by replying to the group or individual. Typically, anyone can view the e-mail discussions online, but you must become a member in order to send communications to the group.
- **Advantages:**  
Allows people to view or participate in neighborhood discussions when they're interested. If neighbors want to keep up to date in a timely manner, they can sign up to have all listserv messages e-mailed to them immediately. Other options include getting a daily e-mail with all listserv communications, or just logging in to review the discussion. Yahoo! Groups is free, and establishing an account does not require any graphic design skills. You can add information and photos to the top of the home page if desired, and there are places to post files, links and additional photos.
- **Disadvantages:**  
Regular posting of messages is needed in order to generate momentum and sustain interest in the listserv. While the listserv moderator is in charge of reviewing and accepting new members, there is no review of messages before they are posted. This may be an advantage or disadvantage depending on your neighborhood's goal for the listserv.

**Resources:** Yahoo! Groups: <http://groups.yahoo.com/>

## Printing & Mailing Guidelines

Citizens of Lake Oswego and the City benefit when neighborhood associations are active in the community. For this reason, the City provides recognized neighborhood associations the following assistance in mailing newsletters, flyers and postcards to their members:

1. The City will print newsletters, flyers or postcards provided by the neighborhood association.
2. The City will provide envelopes.
3. The City will provide printed mailing labels of neighborhood association members.
4. The City will provide postage.

The Postal Service has guidelines and requirements for bulk mail that must be followed in order to avoid potential delays.

## Newsletter Standards

- **Neighborhood association contact.** To facilitate communication with staff, please select one neighborhood association member to serve as editor and contact person.
- **All documents**, regardless of format, will be reviewed by the City to help assure accuracy and that guidelines for City Bulk Mailing Permit are met. We may suggest edits to the newsletter text or formatting that we think would clarify or improve your document. ***Please include an editorial box in your newsletter that includes the association name and editor's name and phone number or e-mail address.***

All pieces must be identical. Paper color may be requested and if available will be used, otherwise, we will select whatever is in stock.

**Newsletter formats.** The City has experienced delays in postal delivery due to postal processing equipment that does not work well with pieces that are not in envelopes. While the City offers several different format options, newsletters inserted into envelopes is the preferred method. All multi-page newsletters are printed double sided.

## Neighborhood Communications

### **Newsletters (tri-folded & inserted into envelopes)**

- If you have a **multi-sheet newsletter**, you must specify whether you would like stapled, collated sets (to be folded by you) **OR** single folded sheets (to be collated and stapled by you). We can do one or the other, but not both. Mailings are limited to five sheets of paper.
- Label placement on envelopes should be straight and at least 1/2" and not more than 2" from the bottom of the envelope to the bottom of the label. All pieces must be identical.
- Fold the flaps of the envelopes down individually; do not nest the flaps together.
- **Separate pieces by zip code** into four categories: 97034, 97035, "all other zips" and "out of country".
- You do not need to seal them, but fold flaps down individually.
- Mailings in envelopes do not need to be counted.

### **Newsletters (tri-folded or folded in half - without envelopes)**

- The folded edge **must be at the bottom**, and all three sides must be taped. It is the responsibility of the neighborhood association to provide their own tape or tabs.
- Label placement on the folded newsletter should be straight and at least 1/2" and not more than 2" from the bottom of the newsletter to the bottom of the label.
- **Separate pieces by zip code** into four categories: 97034, 97035, "all other zips" and "out of country".
- **Piece count.** An accurate count of total pieces **must** be provided.

### **Postcard mailings (2 or 4 postcards per 8.5x11 page)**

- Mailing must be a minimum of 200 pieces.
- Options for postcard size are:  
Four to a page – Landscape 5.5" (width) x 4.25" (height)  
Two to a page – Landscape 8.5" (width) x 5.5" (height)
- On the smaller postcard the return address and postage imprint should be placed 1/4" from the corners of the

postcard. On the larger postcard the return address and postage imprint should be placed 1/2" from the corners of the postcard.

- Label placement should be straight and at least 3/4" and not more than 2" from the bottom of the postcard to the bottom of the label.
- The bottom 3/4" of the postcard should be free of text and graphics (all the way across) to leave room for the barcode applied by the Postal Service when sorting.
- **Separate pieces by zip code** into four categories: 97034, 97035, "all other zips" and "out of country".
- **Piece count.** An accurate count of total pieces **must** be provided.
- **Return address and postage imprint must be included on postcards and newsletters without envelopes.** The following return address should be used:  
Neighborhood Associations  
PO Box 369  
Lake Oswego, OR 97034

## Newsletter Procedures

1. **Neighborhood develops newsletter/postcard.** Make sure you have a final draft *before* you submit it to us for review. If you are announcing an event or meeting, **allow a minimum of 3 weeks** from the date you deliver your master (hardcopy or electronic via e-mail) to the Planning Division at City Hall (Iris or Sarah), to the date of your event. If you are not announcing an event or the information is not time-sensitive, expect that copying and mailing may take up to two weeks.
2. **Neighborhood emails final document to City staff.** Send a Word, Publisher or PDF file to Iris and Sarah at the e-mail addresses listed below. You may alternately provide us with your file on a CD.  
Sarah Selden: [sselden@ci.oswego.or.us](mailto:sselden@ci.oswego.or.us)  
Iris McCaleb: [imccaleb@ci.oswego.or.us](mailto:imccaleb@ci.oswego.or.us)

## Neighborhood Communications

3. **City staff reviews your newsletter and adds postage imprint information if needed.** Staff will contact you if they have any suggested changes.
4. **City prints the newsletters and mailing labels.** This may take up to two weeks, depending on the size of your mailing, other print jobs in the queue, and time sensitivity of your announcement.
5. **Neighborhood picks up the copied pieces, envelopes and labels from the 3<sup>rd</sup> floor reception desk at City Hall.** Staff will call you when the newsletters, labels and envelopes are ready.
6. **Neighborhood assembles the mailing.** To avoid delays in processing and mailing, it is important to carefully follow to the instructions provided to you with your mailing materials.
7. **Neighborhood returns mailing, in its entirety, (sorted by zip code) to be mailed by the City.** All mailings (including pieces with pre-printed postage) must be returned to City Hall for processing. The City is required to complete certain forms when using its postal permit. Items received prior to 12 p.m. will usually be in the mail on the same. Those that arrive after 12 p.m. will typically be mailed on the following business day. Please recognize that neighborhoods with larger mailing lists will take longer to process.

**Number of mailings.** The number of mailings is limited to two each calendar year per association. Please be aware that if these guidelines are not followed, you will be asked to correct the problem.

If you have corrections to labels or additions (as a result of new construction), please let us know so that your mailing labels/list can be updated. If your neighborhood association is maintaining their mailing labels/list, please forward an electronic copy after updating.

If you have any questions, please call Sarah Selden at 503/697-6524 or Iris McCaleb at 503/697-6591. We appreciate the time and effort of volunteers who help make their neighborhood associations' successful partners in the community.

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## Neighborhood Communications

# Neighborhood Land Use

## What is Land Use Planning

Land use planning is essentially what the name implies: It is the decision-making process for how we use land. This includes what types of development (housing of different types, schools, parks, businesses, etc.) go where and what it looks like, how we provide transportation connections between these uses, and how we protect the undeveloped areas that make up our natural environment.

Good planning meets a community's needs for the short-term without compromising its well-being in the long-term.

Lake Oswego makes its land use decisions within a system that was established by the State of Oregon to ensure individual communities make thoughtful choices about land use that help to preserve productive farmland, protect our ecosystem, foster economic opportunity, and create livable communities for all citizens. These strongly-held values create a framework for land use planning that translates to regional and city policies and regulations.



## Lake Oswego's Land Use Processes and the Neighborhood Associations's Role

Part of a neighborhood association's role is to advise the City regarding land use decisions within or impacting the neighborhood.

There are many different levels of land use decisions, and a neighborhood association's opportunity to respond varies accordingly. All land use decisions are made based on the criteria outlined in the City Code and Comprehensive Plan.



### Ministerial Development (No discretion):

Applications are reviewed against a checklist of measurable criteria from the City Code. If an applicant meets the requirements of the applicable codes, he or she will be issued a permit. There is no notice provided to neighbors for this type of permit.

**Examples:** Building permits, lot line adjustments, most single family home construction.

### Minor Development (Limited discretion):

Staff makes these types of decisions. Public notices are provided to the neighborhood association (and adjacent association), and property owners within 300 foot radius/ or 50 properties whichever is greater. Public input invited during the 14-day public comment period prior to staff issuing a decision. There is opportunity for a hearing on appeal.

**Examples:** Variances, partitions, subdivisions, secondary dwelling units

### Major Development (Considerable discretion):

Decisions are made on the use or development of individual properties based on facts and evidence presented in a public hearing similar to judicial hearings in a courtroom. Staff prepares a report with a recommendation to the Development Review Commission (DRC). The DRC holds a public hearing and issues the decision.

**Examples:** Planned development, Conditional use permits, Zone changes

## Neighborhood Land Use

**Policy Decisions (a.k.a. Legislative decisions. Considerable discretion):** Decisions are made by the City Council on proposals that have broad implications for the whole community, involving the creation of new laws or policies. Approval requires compliance with the City's Comprehensive Plan, and local and state planning rules.

*Examples: Neighborhood plans, Comprehensive Plan or Map changes, Community Development Code changes*

### **Opportunities for Neighborhood Input**

#### **Pre-application Conferences**

These are meetings between land use applicants and staff at the "rough draft" stage of a development application. The purpose of the meeting is for staff to review the application process and requirements, and the applicable criteria against which their application will be evaluated. Since 2003, the City has invited up to two trained neighborhood representatives to attend each of these meetings. The neighborhood representative's role is to listen and bring information back to the association, constructively raise any neighborhood concerns, and start building a positive relationship with the applicant. For information about pre-application conference training, see [http://www.ci.oswego.or.us/plan/Pre-application\\_Training/Pre-application\\_Neighborhood\\_Training.htm](http://www.ci.oswego.or.us/plan/Pre-application_Training/Pre-application_Neighborhood_Training.htm).

#### **Neighborhood Meetings**

City Code requires that applicants for partitions, subdivisions, and major development hold a meeting for adjacent neighbors (within 300 feet/or 50 owners whichever is greater), neighborhood association and adjacent neighborhood associations. The meeting is held to inform the community about the proposed project and take comments and questions. Meeting minutes must be submitted with the application, and a copy provided to the neighborhood association for review within 14 days of the meeting. The neighborhood association may submit their own version of meeting minutes to the City planner in charge of reviewing the application. Specific requirements for the neighborhood meeting can be found in the City Code under LOC 50.77.025.

#### **Opportunities to Respond in Writing to Staff**

For all minor and major development applications, there is a 14-day public comment period between the time at which

the public is given notice of the complete application, and when the staff report is written. Neighborhood associations may provide their comments to be considered in the staff report/ decision or recommendation and become part of the official record. See page X for tips on writing effective comment letters.

#### **Opportunities to Give Public Testimony**

Your neighborhood association may select representatives to give comments to the public body (Development Review Commission, Planning Commission, or City Council) during the public hearing. Recognized associations are given up to 10 minutes to testify. Remember to state the level of support for your testimony, i.e. the neighborhood association held a board meeting and voted 8-2 to support this position. Both majority and minority reports are required by the Citizen Involvement Guidelines.

### **Written Testimony (to Staff or Public Hearing Body)**

#### **Tips on responding to development proposals: written comment and public testimony.**

Staff and members of the City Council, Development Review Commission (DRC) and the Planning Commission emphasize that letters are very important to them as they make decisions. A well-written letter can be as influential as the staff report.

#### **Preparation**

- ✓ Read the staff report and other background materials (for public hearings, staff report is available online 10 days before the hearing).
- ✓ Confer with your neighbors.
- ✓ Know the decision-making criteria (for public hearings, staff report will include a full list of the applicable criteria; for staff decisions, contact the staff person).
- ✓ Brainstorm a list of the points you wish to make. If you represent a group, ask other people for ideas and add their input to the list.

# Neighborhood Land Use

## Writing Your Letter

### **Basic Information to Include:**

- ✓ Include your name, address and phone number and/or e-mail.
- ✓ State the case you are writing about, including a land use (LU) number if applicable.
- ✓ State your interest in the case and whom you represent (if you're writing on behalf of your neighborhood association, say that; if you are speaking for yourself, state that as well).
- ✓ Briefly state early in the letter whether you'd like staff or the hearing body to approve, deny, or approve the application with specific conditions.

### **Making Your Case**

- ✓ Make your arguments around the facts and applicable criteria stated in the staff report. While you may have personal concerns about the project, the hearing body or staff is required to make their decisions based on whether or not the application meets the criteria.
- ✓ Provide information, if you can, that reveals gaps or errors in the application material or the analysis, or introduce new information.
- ✓ Cite specific, measurable impacts.
- ✓ Avoid emotional language and remain objective. Remember that your letter will remain a permanent part of the public record.
- ✓ Do not use unfounded information or worst case scenario statements; use facts.
- ✓ Cite the broadest base of support you have for your position, such as a petition or letter signed by neighbors, an approved neighborhood plan, or an annual neighborhood opinion survey.
- ✓ Specifically request notice of receipt if you expect it and provide contact information.

### **General Tips on Letter Organization**

- ✓ In the heading, identify the subject and state if you are in favor, opposed or neutral.
- ✓ Provide reference to page numbers in the staff report, and/or sections of the code.
- ✓ Use bullet points or numbered lists to outline your points.
- ✓ Keep it short (one or two pages).

## **Common Mistakes**

- ✓ Suggesting substantial modifications at the time of the public hearing without discussing them in advance with the applicant or staff. It's difficult for the hearing body to incorporate substantial modifications without time to review them in advance.
- ✓ Straying from the facts in the case or addressing issues that are not related to the decision at hand.
- ✓ Addressing issues that are outside the influence/responsibility of the hearing body or staff.
- ✓ Stating inaccurate facts, or relying on rumors.
- ✓ Making assumptions.
- ✓ Using too much emotional or personal language. (Be personal without letting your emotions drive the letter. Remember this is part of the public record).
- ✓ Not acknowledging whom you represent.
- ✓ Writing too much.
- ✓ Making threats.
- ✓ Name-calling.
- ✓ Forgetting to include your name, address or phone number.
- ✓ Illegible handwriting.
- ✓ Spelling errors.
- ✓ Disorganized information.
- ✓ Requests for large amounts of information to be included in the record without reviewing it for relevancy. The larger the record is, the more difficult it is for the reviewing body to effectively consider all information. If you want information to be added to the record, be sure you have reviewed it beforehand and select documents pertinent to the issues you are raising.

## Neighborhood Land Use

### Advice from those who have written before:

#### From citizens:

“Write the letter and put it away for a few days. Reread it, and if you still feel the same way, send it.”

“Don’t save the letter writing only for objections. Praise helps city staff know what they are doing right as well.”

#### From a City Council Person:

“It is especially helpful if the writer has information that is unique or has a point that is unlikely to be covered by others.”

#### From Staff:

“Multiple form e-mails may make the point that there is substantial support or opposition, but may also overwhelm the process. Your most valuable contribution would be your unique analysis.”

If you have sent in written comments for a staff decision, you will receive a copy of the staff report in the mail.

### Making Your Case

Your case will be conveyed most powerfully if you can make it in one short and succinct statement. Most of us can’t write a great statement like this the first time. Try this technique for developing one:

1. Write down everything in your head. Focus on “what” you want the reviewing body to understand (you will address the “why” later).
2. Set that aside.
3. With a new sheet of paper, write down your main point again.
4. Examine what you have written and identify the most important point. Eliminate repetition.

## Testifying at a Public Hearing

### Decision-making Criteria:

These are the applicable standards and criteria that staff or the hearing body must use when they make a decision. The criteria are listed in the staff report at the beginning and then are explained in more detail in each section. If you can’t find the criteria or have questions, call the staff person who wrote the report and ask for help. The specific code sections listed in the staff report are available at the City’s web site.

### Where to Find the Staff Report?

Case files for planning applications can be found on the City’s web site. Staff reports for public hearings are posted to the case file page 10 days before the public hearing. Staff reports for administrative decisions by staff are posted on the day of the decision: <http://www.ci.oswego.or.us/plan/land.htm>

You can also request a staff report for the Development Review Commission (DRC) or for the Planning Commission at City Hall or by calling the Planning Department at (503) 235-0290 (supply is limited, and there may be a \$0.25/page copy fee). City Council staff reports are also available at City Hall; contact the City Recorder’s Office at (503) 635-0213.

### Testifying at a Public Hearing

Your presence at a public hearing can be a powerful statement. Use the following techniques to organize your thoughts so that your words will make a powerful statement too.

### Preparing for Your Testimony

1. Make sure you understand the issue that is before the hearing body (Is it a development proposal, annexation, or a rezoning?)
2. Bring a written statement of your comments to organize your thoughts (See the “Letters to a Public Hearing Body” handout).
  - a. Review the staff report.
  - b. Understand the decision-making criteria.
  - c. Create a short (one to two sentences) statement that summarizes what you are asking the hearing body to do.
4. Use facts and make sure your facts are right. Avoid assumptions or reliance on rumors.
5. Make a bulleted list of your main points. It will be easier to read.
6. Practice your testimony before you arrive.

## Neighborhood Land Use

7. Time yourself. Testimony is limited to 5 minutes for an individual or 10 minutes if you are representing a recognized neighborhood association.
8. If attending with others, limit repetitive testimony by assigning different topics to each like-minded individual planning to testify.

### When you Arrive at a Hearing

You will usually find testimony cards at the front table near the agendas. Fill out a card (don't forget to include your address!) and hand it to the clerk or staff person. Then wait for your name to be called during the hearing.

Prior to opening a public hearing, the chair of the hearing body will read the procedures. First staff will present the staff report, then testimony will be taken from the applicant and the public, and then the hearing body will deliberate on the information presented. Within this general framework, procedures differ slightly depending on the type of decision being made; more specific detail on the procedures will be explained at the hearing. Please note that for Development Review Commission hearings, before the Commission closes the hearing to begin deliberations, parties who have testified may request a continuance of the hearing in order to leave the record open to present new evidence.

### Giving Testimony

At the Microphone: The purpose of your testimony is to focus the hearing body's attention on the connection between your testimony and their decision-making criteria.

1. State your name and where you live first, followed by your position (For Against, or Neutral) and whom you represent (yourself or a group).
2. Address the issue that is before the hearing body, such as a proposed ordinance or land use (LU) case file. Refer to it by name and case file number.
3. Keep it short and to the point. Observe time limits.
4. Provide examples if you can of the points you make.
5. Provide new information or evidence of which the hearing body might not be aware. If you have substantial modifications to propose, bring these to the applicant or staff in advance of the hearing.
6. Provide realistic alternatives for the hearing body to consider. Focus on suggestions for new conditions or modifications to conditions being proposed by staff or the hearing body.

7. Be aware of what your body language is saying.

### Other Advice

1. Avoid repetition. There is nothing wrong with simply saying "I agree with the testimony of Mrs..." In the interest of time management, the hearing body chair may ask you to step down if the same testimony is being repeated multiple times.
2. Avoid threatening language, no matter how emotionally charged the topic.
3. Be respectful and professional. Don't get personal or overly emotional.
4. Stick to the topic and try not to ramble. Be respectful of the length of the meeting and all the other people who may wish to speak.
5. Use facts; not rumors, fears or speculation.
6. As a member of the audience, do not clap or shout out from the room. This takes from other people's time and is disrespectful.
7. Only those people that testify either orally or in writing prior to the decision by the hearing body will have standing to appeal the decision.

# Neighborhood Land Use

## Specific Advice from those who have spoken before:

### From Citizens:

- ❖ “Be prepared with paper and pencil to inject new thoughts into your speech based on what you may have heard from the opposition.”
- ❖ “Have your thoughts written down. Simply read your written testimony if necessary. Many times this is much more effective. You don’t lose your train of thought or forget important details.”
- ❖ “Body language is important. When you are called to testify, hand the clerk a copy of your written testimony. Bring your testimony in a manila folder. Once you are comfortably seated, open it slowly. When you are finished, place your testimony back into the folder to make it clear you have finished.”
- ❖ “Avoid bringing up background or peripheral matters. If the Council wants more detail they will ask questions before you turn to leave.”
- ❖ “End your testimony by saying, ‘We urge Council to support (or reject) this measure.’ Say, ‘thank you for this opportunity to speak,’ before you stand up to leave.”
- ❖ “Do your homework! What codes are in place that support your position?”
- ❖ “Don’t be afraid or intimidated. Many of our appointed and elected officials are volunteers who want to hear what you have to say. If you are upset about the issue, it is all right to convey that, but without personal attacks and accusatory language. Remember that the people you are addressing are your neighbors, and they may already be on your side.”

### From Planning Commission:

- ❖ “Stop and take a deep breath. Then begin your testimony.”

- Q: What are you looking for as you take testimony from the public?
- A: “What’s this person’s interest in the issue and why? What’s the source of their information? Is it accurate? Is their concern something that’s unique to them, or is it something that would be of concern to many?”

## Neighborhood Action Plans

### What is a Neighborhood Action Plan?

Recognized neighborhood associations may benefit from developing a neighborhood action plan to strategically plan for future change in their area. These plans are developed by neighborhoods in cooperation with City staff, and involve thoughtful consideration of conditions and trends, public outreach, and require strong neighborhood dedication over many months.

The following information provides a very brief overview of neighborhood action plans. Detailed information on the planning context, process and content can be found in the City’s Neighborhood Planning Kit. You can request a copy from your Neighborhood Planner or view a copy online at: <http://www.ci.oswego.or.us/neighborhoodplanningkit.htm>.

A neighborhood action plan (NAP) is a document that describes a detailed vision for the future of a neighborhood and outlines a course of action to implement that vision over time. NAP’s are not simply a way to freeze the neighborhood in time; they are way to accommodate our changing demographics and additional population, impact global warming, identify opportunities to accommodate different types of housing choices for different types of families, maintain or alter neighborhood character, build community, and provide quality life-style choices for all types of people. Creating a Neighborhood Action Plan provides the opportunity for neighbors to look into the future and describe what the neighborhood should look like in 20 years. How should it change? How should it stay the same? How is the region changing? How can our neighborhood play a positive role in making our region a fantastic place to live, work and play?

# Neighborhood Land Use

## **Neighborhood Action Plans include:**

- Neighborhood Profile
  - \* Context within the City
  - \* History
  - \* Demographics
  - \* Character/Unique Features
- 20 year **vision** statement
- **Inventory and analysis** of existing conditions in the neighborhood, including strengths and weakness.
- **Neighborhood objectives:** statements pertaining to the strengths and weaknesses and strategies to enhance the strengths and mitigate the weaknesses.
- **Neighborhood comprehensive plan policies** that express unique neighborhood needs that are different from the rest of the City.
- **Neighborhood Action Steps**
  - \* Community Development Code
  - \* Capital Improvement Projects
  - \* Other project and programs
- Neighborhood Action Chart, which identifies;
  - \* **Partners** who can help implement each action step
  - \* **Time frame** for accomplishing each action step
  - \* Estimated **cost** for each action step
  - \* Possible source of **funding** for action step

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

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

- To tailor the citywide concepts of the Comprehensive Plan to the unique fabric of Lake Oswego's neighborhoods.
- To articulate a neighborhood's shared 20-year vision for the future of their area, within the context of the City's Comprehensive Plan and Metro regional plans.
- To provide a framework for neighbors, elected officials, boards and commissions, and staff to guide their planning efforts and decisions, and track progress on achieving the neighborhood's vision.
- To develop strategies to guide future neighborhood change while respecting the character and culture of the neighborhood and recognizing the role the neighborhood plays within the City and the region.

- To evaluate the assets and deficiencies of the neighborhood and develop policies and action steps to address them.
- To identify neighborhood policies, programs, development standards, and prioritized projects that may be requested for inclusion in the Comprehensive Plan, Community Development Code, Capital Improvement Plan and the City's budget process, or identified for the neighborhood's own work program.
- To promote collaboration between the City and the neighborhood in order to create and achieve mutual goals and a shared sense of responsibility.

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

## Land Use Information Available on the City's Website

### **Land Use Information Available on the Planning Department Web Page**

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

### **Active and Approved Land Use Cases**

<http://www.ci.oswego.or.us/plan/casef.htm>

- ❖ A table lists land use cases by number from most to least recent. Also included is:
  - General status (approved (by City Council), approved by Planning Commission, or DRC hearing date)
  - Owner/applicant name
  - Address and neighborhood location
  - Link to additional information including staff report

# Neighborhood Land Use

## Annexation Cases

<http://www.ci.oswego.or.us/plan/Annexations/AnnexationCases.htm>

- ❖ This page includes the same information as the land use page listed above, but is specific to annexation information.

## Development Review Project List

[http://www.ci.oswego.or.us/plan/Land\\_Use\\_Application\\_Status\\_Report/New\\_DRC\\_Hearing\\_Schedule.pdf](http://www.ci.oswego.or.us/plan/Land_Use_Application_Status_Report/New_DRC_Hearing_Schedule.pdf)

- ❖ Document that lists active land use cases
- ❖ Categorized by the decision-making classification (i.e. Development Review Commission, Administrative staff decision)
- ❖ Includes land use cases where an application has been submitted, but the information is incomplete (meaning the application process and timeline has not yet started). These cases are not listed on the case file web page listed above.
- ❖ This document is updated approximately twice monthly

## Planning Handouts and Forms Page

Link from Planning main web page under “Quick Links” at top right corner of page, OR

[http://www.ci.oswego.or.us/plan/New\\_Codes\\_Forms\\_Page/Newformsandhandouts.htm](http://www.ci.oswego.or.us/plan/New_Codes_Forms_Page/Newformsandhandouts.htm)

- ❖ Summary handouts explaining various land use review processes
- ❖ Land use application forms
- ❖ Information about Sensitive Lands, including associated land use review process summaries
- ❖ Sign information and application
- ❖ Tree-related procedures including removal application forms, and other tree guidelines and tips

## Common Land Use Processes

### Conditional Use

A Conditional Use is an activity that requires a Conditional Use Permit (CUP) in order to operate. Conditional uses cannot be permitted outright in a zone because of some characteristics that are not entirely compatible with other uses allowed in the zone. A hearing body reviews the conditional use and, if necessary, imposes conditions to insure that the proposed use will be as compatible as practical with surrounding uses and meets all applicable code criteria. Conditional uses common in residential zones include schools and churches.

### Development Review

Development Review is a formal application process to review building and site designs for certain types of development. It is generally required for exterior modifications to, or new construction of, commercial, industrial, institutional, public and multi-family residential structures, attached single-family residential development with three or more units, and construction of any type of structure that is located in a special design district.

### Lot Line Adjustment

A Lot Line Adjustment (LLA) is a minor adjustment to one or more existing common lot lines between abutting lots of record.<sup>1</sup> A LLA does not result in the creation of a new lot.

### Partition

A partition is the division of a tract of land into two or three parcels within a calendar year. If the proposal includes the creation of a street, it is classified as a Major Partition and is considered a Major Development for the purpose of applying the Development Standards [LOC 50.79.025(2)]. If the proposal does not include the creation of a street, it is a Minor Partition and the Development Standards for Minor Developments are applied.

### RID Review

Residential Infill Design (RID) Review is a form of discretionary review that provides applicants an alternative to the clear and objective standards of the zone or special standards established as a part of a Planned Development

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## Neighborhood Land Use

(PD). The principal benefit of RID review is to provide a regulatory path for approval of dwelling and accessory structure designs that do not meet zone standards, but would meet their intent in a way that is different from, but equal to or better than what the Code requires. This path is suitable for projects where the zone standards conflict with or prevent a design that may otherwise be compatible with the character of the neighborhood and surrounding development.

### **Secondary Dwelling Unit**

A Secondary Dwelling Unit (SDU) is one additional dwelling unit located on a lot already containing a primary dwelling. An SDU may be in a detached structure or may be located within or attached to the primary dwelling.

### **Subdivision**

A subdivision is the division of an area or tract of land into four (4) or more lots within one calendar year. A subdivision can be processed with or without a Planned Development Overlay, which is a site-specific zoning overlay that encourages variety in development patterns, conservation of natural resources, and creative approaches to aesthetics in exchange for exceptions to certain zoning standards.

### **Variance**

A Variance is an exception granted to a property owner to provide relief from certain zoning regulations when a property has unique physical constraints or circumstances. There are two types of variances – a Class 1 variance is a small change from the Code requirements which will have little or no effect on adjacent property or users; a Class 2 variance is a significant change from the Code requirements which is likely to create impacts on adjacent property or users. The types of variances that qualify as Class 1 or Class 2 and the approval criteria for each are listed in LOC 50.68.015.

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## Neighborhood Land Use

# Neighborhood Sustainability

## Sustainability

### Understanding Sustainability

Lake Oswego's City Council has adopted sustainability goals each year since 2002, and in November 2007 the Council adopted a Sustainability Plan for City operations. The Plan defines a sustainable community as follows:

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

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

Neighborhood sustainability is really about maintaining and improving the quality of life for future generations, and can be a great way to bring neighbors together around common goals and positive change.

## Neighborhood Projects

There are many actions your neighborhood can take to educate your neighbors about sustainability and make a positive contribution to individuals and the community at-large. A few ideas are listed below, and more detailed how-to information can be found in the Southeast Uplift Neighborhood Climate Action Planning Handbook

(developed for SE Portland, but applicable to any neighborhood group):

<http://southeastuplift.org/files/neighborhoodclimateactionplanninghandbook.pdf>

- Host a neighborhood walk or bike ride to encourage neighbors to get around without using a car.
- Bring in a local expert to talk about a sustainability topic at your annual meeting
- Host a workshop on home weatherization or landscaping for water conservation
- Organize a storm drain marking event. People of all ages can participate in adhering the markers. The City of Lake Oswego will provide materials, instructions and maps.
- Develop a climate action plan for your neighborhood. Southeast Uplift provides an excellent example, which also includes great ideas on activities your neighborhood can take on to encourage sustainability.

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## Neighborhood Sustainability

## Special Events & Fundraising

### Organizing Special Events

#### Organizing a Neighborhood Party, Picnic, Ice Cream Social, etc.

Neighborhood parties are a great way to get to know your neighbors, relax in the public space of your neighborhood and most importantly, have fun! The activities and scope of your event will vary based on your interests.

Neighborhood parties are relatively simple to organize but do involve a little pre-planning.

1. Pick a date, location and type of party.
2. Decide if it's going to be a potluck, light snacks, catered.
3. Tell your neighbors and recruit some co-planners – it'll be easier and more fun!
4. If you plan on closing one or more streets, you'll need a temporary street closure permit (see below).
5. If you plan on having the party at a local shelter, you'll need to reserve it (see below).
6. If you plan on serving beer or wine at a park, you'll need a permit (see below).



#### Temporary Street Closure Permits

You may apply to close down your street to cars, and create a party right in the middle of your block! The City prefers to close streets that have low traffic volumes, so look for a quiet or dead-end street in your neighborhood. You'll

need to submit a simple permit and to the City's Traffic Engineering division. As part of the permit, you'll need the signatures of adjoining residents, and you'll need to pick up the street closure barricades from the City. The permit can be found on the city's web site at: <http://www.ci.oswego.or.us/engineer/trans/BlockParty.pdf>

#### National Night Out

National Night Out is a unique community event, celebrated in the United States and Canada that focuses on prevention of crime and drug activity, and is held the first Tuesday of August every year. This can be a great occasion to hold a neighborhood event that gets people out into the neighborhood to meet and talk with one another.

#### Organizing a neighborhood picnic or other event in a Lake Oswego Park

Picnic shelters can be reserved at the following parks between March 1 and October 31:

- George Rogers Park – Upper
- George Rogers Park - Lower
- Waluga Park – East
- Waluga Park – West
- Westlake Park
- Rossman Park

For more information about park reservations and beer and wine permits, visit the Parks and Recreation Department web site at: <http://www.ci.oswego.or.us/parksrec/parkameneties.htm>

#### Organizing a Neighborhood Cleanup

The City Lake Oswego has a contract with Allied Waste to provide 15 dumpsters each year for cleanup events that benefit the community. Neighborhood associations can request a 30-yard dumpster to collect yard debris or other recyclable items. Here are some popular uses for the dumpsters:

- Collect bulky yard debris from neighboring households and offer pickup services for those who are unable to haul material themselves.
- Remove invasive plants (ivy, blackberries, holly) from a public open space in the neighborhood. Ivy is one of the greatest threats to the city's trees, and there are simply not enough City staff resources to tackle the hundred of acres of open space in Lake Oswego.

## Special Events & Fundraising

- Collect recycled items that cannot be recycled at your curb, such as bulky plastics or old electronics.

The events are a great way to meet neighbors, and an opportunity to provide information about initiatives the neighborhood association is working on, or ask people to fill out questionnaires to get feedback from your neighbors. Contact your neighborhood planner for more information including what can be collected, and then download a drop box application from the City web site: [http://www.ci.oswego.or.us/plan/Neighborhoods/Drop\\_Box\\_Application.pdf](http://www.ci.oswego.or.us/plan/Neighborhoods/Drop_Box_Application.pdf)



### Reuse and Recycle

Since one person's garbage is another person's treasure you could hold a useful goods exchange right onsite at your cleanup. There are many recycling organizations that can help reduce the amount of waste at your cleanup. It is important to contact these organizations in advance to find out what materials they can accept and make arrangements for pick up or drop off. There may also be a fee involved, so you will want to have that information as soon as you can to assist with budgeting.

### **NCLO Insurance**

When organizing a neighborhood event, remember to fill out an application for Neighborhood Coalition of Lake Oswego (NCLO) general liability insurance coverage. If held on school or church property, a certificate of insurance may be requested of you. The insurance policy will cover social events, but will not cover activities like dunk tanks and bouncy tents. For more information about NCLO coverage or to get a certificate of insurance, contact your neighborhood planner. More information can also be found

on the City web site at: <http://www.ci.oswego.or.us/plan/NCLO.htm>

## Fundraising Ideas

Neighborhood Cleanups: Some neighborhood associations have used neighborhood cleanups as a fundraiser for their organization. You can establish a cost or suggested donation per item or load that is collected. Please note, however, that free drop boxes from the City are not available for fundraising purposes, and your association will need to pay for the drop box fees and recuperate the costs through collection fees or donations.

Bake Sales: The Old Town Neighborhood Association has a long tradition of holding a bake sale on Saturday during the Lake Oswego Festival of the Arts at the corner of Ladd and Durham Streets. The money raised goes to support neighborhood activities such as maintaining the neighborhood kiosk, communications between neighbors, buying materials for the annual picnic and the holiday party, and for renting spaces for their general meeting. Most importantly, according to one neighbor, it's a great opportunity to meet and talk together!



Hold a picnic, carnival or other "party" type event. Your association could either ask for donations for food to be sold at a neighborhood gathering, or sell it for a profit. This could be as simple as reserving park or school location, and selling grilled hamburgers and sodas.

Partner with a Neighborhood Business/es. You may be able to get donations from businesses in or near your

## Special Events & Fundraising

neighborhood, such as products needed to hold an event, or donating a percentage of sales for a day.

document:

<http://www.irs.gov/pub/irs-pdf/p557.pdf>

Lake Oswego neighborhood associations do not

### How to Become a Recognized Non-profit Organization

automatically gain nonprofit status through the IRS when they become recognized by the City of Lake Oswego as a neighborhood association.

Neighborhood associations would fall within the **501 (c) (4)** category for the IRS, which applies to civic leagues and social welfare organizations that do not work exclusively for charitable, educational or recreational purposes (these would qualify as 501 (c)(3)). Becoming recognized as a 501 (c)(4) organization would exempt your NA from paying taxes on your earnings, but donations to 501 (c)(4) organizations are not tax deductible.

Description the 501 (c)(4) section of tax exemption:

*“If your organization is not organized for profit and will be operated only to promote social welfare to benefit the community, your organization should file the Form 1024 to apply for recognition of exemption from federal income tax under section 501(c)(4).*

*To qualify for exemption under section 501(c)(4), the organization’s net earnings must be devoted only to charitable, educational, or recreational purposes. In addition, no part of the organization’s net earnings can inure to the benefit of any private shareholder or individual. If the organization provides an excess benefit to certain persons, an excise tax may be imposed”*

#### **Organizations that would qualify as a social welfare organization:**

“A community association devoted to preserving the community’s traditions, architecture, and appearance by representing it before the local legislature and administrative agencies in zoning, traffic, and parking matters.”

For more information, see p. 45-6 of this online IRS

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## Special Events & Fundraising