

TESTIMONY SIGN-UP FOR

35789

617 - Adopt Option #2 re Planning Bur. ^{organ-} ization

IF YOU WISH TO SPEAK TO THE CITY COUNCIL,
PLEASE PRINT YOUR NAME AND ADDRESS BELOW

NAME

ADDRESS & ZIP CODE

✓ 1	Paul Leister	City Club of Portland 317 SW Alder St Ste 1050 Portland OR 97204
✓ 2	Phil Kalberer	APP 1330 S.W. 3rd P-12 97201
✓ 3	Coranne Paulson	League of Women Voters 10th Morrison Suite 410 97205
✓ 4	Lilli Mandel	1511 SW Park Ave 97201
✓ 5	Gary Pappas	AIA
6	Bruce Stevenson	AIA
7	Lilli Mandel	1511 SW Park Ave 97201
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Date: 5/12/94

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EVENING SUPPORT

The Lents Neighborhood Association supports evening public meetings being held by city council We need to have the ability to work with the city in order to address relevant issues that affect us There are many people who work during the day and are not able to attend regular sessions, this change of schedule will provide a better chance that they can

Thank You

Lents Neighborhood Association

Chair *Judy Welch*

Land Use Delegate *Ed L. Lopez*

Minor Amendments to Council Agenda Item 617:

Adopt Option #2, "Maintaining the Planning Bureau and Increasing the Responsibility of the Planning Director" in the Advisory Team's Report to the Mayor (Exhibit A), as the organizational structure of the Bureau of Planning (Resolution)

"WHEREAS, the Council supports the establishment of a Planning Coordination Team to convene on a regular basis for the purpose of coordinating and integrating policy development and implementation, with this team to be chaired by the Planning Director and to include, but not be limited to, the bureau managers of the following agencies Portland Development Commission, Office of Transportation, Office of Finance and Administration, the Bureau of Housing and Community Development, the Office of Neighborhood Involvement, the Bureau of Parks and Recreation, the Bureau of Environmental Services, the Water Bureau, the Energy Office, and the Office of Planning and Development Review, and"

and

"BE IT FURTHER RESOLVED that the Planning Coordination Team is established to convene on a regular basis for the purpose of coordinating and integrating policy development and implementation, and"



The League of Women Voters

OF PORTLAND OREGON

921 SW MORRISON SUITE 410 PORTLAND OREGON 97205 (503) 228-1675

May 12, 1999

My name is Corinne Paulson and I represent the League of Women Voters of Portland, 921 SW Morrison, suite 410

The league supports the reorganization of the planning bureau so that there is better coordination of all planning functions in Portland. Integration of policies and plans with the decisions that are made about specific development proposals is critical. We also support a planning process that more effectively involves the citizens of Portland.

We have reviewed the Mayor's resolution and would like to make a few comments and suggestions.

1. It is absolutely imperative that the Planning Bureau have the authority to lead all planning done for the City. The City needs to end its reliance on unwieldy steering committees and private entities and stop the disconnect that is occurring because planning functions are spread throughout so many bureaus. The Planning Director needs the authority to do more than chair the Coordinating Team and monitor the planning done by other bureaus. We recommend giving the Director authority over planning functions throughout the city.

2 We are very concerned about the separation of the policy and implementation functions. We are not convinced that interagency agreements and cross-function teams will achieve the desired coordination unless final authority rests somewhere. It only makes sense to us that such authority over planning policy and implementation should rest with the Planning Bureau.

3 The decision about which council member will be in charge of the Planning Bureau should be made now - before the organizational structure and functions of the bureau are decided and the search for the new Planning Director begins. That council member should be involved in the organization of the bureau and the search for a new Director. The council member in charge and the new Director must be able to work well together, and therefore, selection of a Director with a compatible management style and vision is essential.

4 We recommend that in order to establish the credibility and stature of the new Planning Bureau and Director, that they be placed initially under the control of the Mayor's office.

In a time of rapid growth, public confidence and trust in planning must be regained. We need a strong Planning Director and bureau that can educate and inspire the public about the benefits of good planning, the skills to develop good urban design solutions, and most importantly the authority to carry them out.

30 APRIL 1999

To Mayor Vera Katz & Members of Portland City Council
1221 SW Fourth Avenue, Portland Oregon 97204
From AIA/Portland Chapter - Urban Design Committee
Re COMMENTS ON PLANNING RECOMMENDATIONS



The Urban Design Committee of the Portland AIA Chapter has reviewed the 31 March 99 Cogan Owens Cogan Report and the revealing and helpful report from the Advisory Team on Long Range Planning, dated 9 April 99. We want to especially emphasize one sentence from that report: "THE COUNCIL NEEDS THE ADVOCACY OF A PLANNING DIRECTOR AND STAFF WHO HAVE THE RESPONSIBILITY TO FORMULATE (A) VISION AND THE AUTHORITY (we would add AND SKILLS) TO CARRY IT OUT." We strongly urge you to include the following qualifications to the Advisory Team's Recommendation:

1) FUNCTIONS OF THE LONG RANGE PLANNING BUREAU must include all those listed on pages 5-8, but with highest priority- as demonstrated by conclusions from both reports- on COORDINATION, URBAN DESIGN & PHYSICAL PLANNING, and PUBLIC RELATIONSHIPS. Many bureaus and outside entities are planning significant parts of our city with little or no BOP involvement. Public confidence and trust in planning must be regained. The city has adequate visions, comp plans, and macro policies, the crying need is for consistent, effective IMPLEMENTATION of those policies, via a bureau which conducts (or hires) physical planning, and produces clear, useful, agreed upon, and binding urban design solutions for specific site conditions.

2) OPTION 2 IS PREFERABLE, BUT REQUIRES MAJOR PROVISOS. The complete and strengthened planning Bureau (which we recommend be called Bureau of Planning and Urban Design =BPUD) is accountable to the full council, much as the OFA is now. To address the urgency and importance of this new bureau, it should initially (1-2 years) be in the Mayor's Office, yet it should not be just "the mayor's hire." BOP already has many competent managers, legal councils and policy writers, the new BPUD Director must be free of responsibility for day to day management, and must have adequate authority to coordinate all city planning functions (the proposed inter bureau Coordination Team is likely an ineffective solution). Coordination with OPDR is already occurring and should remain adequate.

3) CITIZENS & COUNCIL SIMPLY MUST PROVIDE ADEQUATE BUDGET AND SUPPORT. Planning, Livability and land use decisions are paramount at this time in the region's history, and are emerging as national/federal agendas. Budgets and staff must be linked to specific projects which implement the adopted visions.

4) OTHER SUGGESTIONS. Director qualifications must emphasize physical planning and urban design skills and/or performance, and public leadership and advocacy. We need someone who can educate and inspire the population about the value and success of good planning. The new bureau should LEAD crucial district master plans, not cumbersome steering committees or private entities, thus, additional new staff should be trained in physical planning/urban design, and hire consultants as needed.

We have observed first hand over the last 10 years, the decreasing effectiveness of Portland's long range planning functions, poor coordination of various city planning efforts, and the slow demoralization of planning staff. This is unfortunate and ironic in a city nationally touted for progressive and model planning. Now is the time to restore the crucial purpose, authority and leadership of our city planning bureau, and create a planning platform for the future. We will support you in this critical effort.

Sincerely,

A handwritten signature in black ink, appearing to read "Garry Papers".

Garry Papers, AIA
Chair

cc: Steve Thomson AIA, Portland Chapter President
Saundra Stevens, Hon AIA, Executive Director

Report to the Mayor
from the
Mayor's Advisory Team on Long Range Planning

April 9, 1999

The Advisory Team has completed the first phase of its work. Based upon our experience and our review of the ideas generated by citizens with professional and civic interests in planning, we have developed recommendations regarding the scope of the City's planning function and how it should be organized. This report conveys those recommendations to you, together with a Public Outreach Report. We recommend that you ask interested citizens for comments on this report prior to making a formal proposal to City Council.

Preface

Portland and planning These words are spoken or written together so often that they are almost synonymous. National news articles and feature stories almost always describe Portland's planning success story. Portland is the envy of cities across the country.

Planning in Portland is built upon a strong foundation. Since the early seventies, the City has developed and implemented a series of policies and plans that have shaped the community and preserved our livability: the 1972 Downtown Plan, design standards for downtown and other areas, protection of environmental resources, the Albina Community Plan, the River District Plan, and numerous neighborhood plans. The City has also demonstrated an unwavering commitment to regional planning. The City has survived and preserved its livability in the face of five years of rapid regional growth, in large part because the Metro 2040 plan recognizes the importance of keeping the City of Portland a strong and vital center of the region's economy, retail market and cultural attractions. The City of Portland worked hard to develop standards for the region that leveled the playing field with the suburbs. The results of that effort are little known because our success lies in what has not happened.

Planning is different here than in many other places. Many cities use planning to promote growth and change. Their primary concern is that growth is orderly, and properly served by public services. Portland is not so opportunistic. Yes, we use planning to promote change, but not for the sake of change. Instead, we plan for change to help breathe new life into once vital retail streets in Northeast Portland or abandoned rail yards in downtown. We plan to strengthen communities. We also plan to preserve the built and natural environment that is our community heritage. In Portland, we believe good planning is the way to preserve and enhance the elements of community we value the most.

Planning is also about thinking ahead, preparing ourselves for a rapidly changing world. As a location for high technology and creative service companies, the City is increasingly tied to a global marketplace. We are influenced by national demographic trends and the changes that are the result of a strong economy. Not many Portlanders wake up in the morning thinking about these changes, we expect city government to do that thinking and work with citizens to preserve community values in the face of change.

Portland's citizens want a visionary city government that is thinking about the future as it helps preserve the best values of the past and present. Vision planning should provide the blueprint for the community and City staff to follow in its key decisions. Citizens don't see that vision now, or they see many, sometimes conflicting visions at the Council and Bureau level.

To be fair, the City Council is actively engaged in some of the elements of vision planning. Ten years ago, the Council participated in Future Focus, a strategic planning effort that did identify a long list of policies and implementing actions. Since then, the Council has used an annual community survey to identify community priorities. The information is used in setting Council goals that are, in turn, used to craft the budget. The Council has also strongly supported benchmarks as a way to measure the effectiveness and efficiency of City services and programs. Other elements of vision planning, especially those outside the reach of city government such as technology and demographics, are not being adequately addressed—but should be.

Even if the City had a well articulated vision for its future, the Advisory Team is concerned that the City lacks the ability to deliver upon it. Communication and coordination are a challenge in any organization. This is particularly true in the Commission form of government, where formal accountability and central authority is largely absent. Our form of government fosters "silo" approaches to policy making and problem solving. Seven different City bureaus often work independently on seven different planning tasks. In this organizational context, the Bureau of Planning and Planning Commission have worked hard to encourage cross-organization thinking about planning problems, but they lack authority to ensure that the City's multiple planning efforts are well coordinated.

As we face a new century, city government has a unique opportunity to invigorate planning and build upon the City's planning successes. The Blueprint 2000 process has resulted in a shift of development review responsibilities to the Office of Planning and Development Review (OPDR). This shift means the Planning Director is now free of responsibility for review of proposed development for compliance with zoning rules and can focus on other planning tasks. This is a major change in organization and makes this a good time to evaluate how the City's planning activities should be organized.

Background

In January, the City Council, with Commissioner Hales' leadership, adopted the recommendations of a citizen committee appointed to help streamline the City's development review process. Known as Blueprint 2000, these reforms will significantly improve services for all of the City's stakeholders and customers—homeowners, developers and neighborhoods. In February, Council passed an ordinance effective on March 19, implementing a key recommendation of the committee, the creation of a new Office of Planning and Development Review (OPDR).

One of the recommendations of the Blueprint 2000 citizen committee was to incorporate the City's long range planning function into OPDR and to make the Planning Director a subordinate of the Director of OPDR. This recommendation caused concern for citizens and some Council members. Mayor Vera Katz and Commissioner Jim Francesconi proposed an amendment to the resolution accepting the Blueprint 2000 Phase II Stakeholder Report and directing the Mayor to return to the Council by May 12 with a recommendation on the placement and organization of long range planning functions of the City of Portland and its bureaus.

Today, the Bureau of Planning consists of approximately 60 staff persons dedicated to land use policy development including neighborhood plans, environmental protection policies, zoning code changes and similar comprehensive planning activities. Planners who carry out development review functions have been transferred to OPDR.

Process

To assist in preparing a response to the Council's directive, the Mayor appointed an Advisory Team consisting of some of the region's top planners: Ethan Seltzer (Portland State University), Brian Scott (Livable Oregon), John Fregonese (Fregonese Calthorpe) and David Knowles (Director of Planning), together with Felicia Trader (Director, Portland Development Commission) and Tim Grewe (Director, Office of Finance and Administration).

The assessment began with a set of interviews by David Knowles with each of the Council members and the managers of City bureaus with planning or infrastructure responsibilities. The purpose of the interviews was to understand how the City's managers and elected officials view planning and how the City's planning function could be improved.

The next step was to ask Portland's citizens to help define what planning the City needs to do and how it should be organized. To frame and stimulate that discussion, the Advisory Team developed an "issues list" and set of questions to ask a variety of stakeholder groups.

These issues and questions were used in a series of stakeholder group discussions. Elaine Cogan, of the consulting firm Cogan Owens Cogan, facilitated the group discussions. The discussion groups included representatives from a wide variety of stakeholders:

- Representatives of Neighborhood Organizations (3 sessions)
- City Club Growth Management and Density Committees
- American Institute of Architects (Portland Chapter)
- American Planning Association (Oregon Chapter)
- Portland Planning Commission
- Portland Landmarks Commission
- Portland Design Commission
- Bureau of Planning Staff
- Planning staff in the Bureaus of Water, Parks and Environmental Services, the Office of Transportation, the Office of Finance and Administration, and the Office of Planning and Development Review

Public Outreach

While stakeholder group participants expressed a wide range of ideas and suggestions about the future function, priorities and organization of long range planning for the City, there was a general consensus on some key issues. The Outreach Report includes this summary of areas of consensus:

- *“Coordination among all bureaus is essential. There was general agreement that the scope of long range planning should be broadened to be more than the City’s current long range land use planning responsibilities. It should include the efforts of nearly every bureau, as well as the Portland Development Commission. Coordinating long range planning efforts, avoiding duplication and assigning clear lines of authority should be priorities.”*
- *“A separate office, whose director has bureau-head status, should be created. The Director should be responsible to the Mayor who serves as the Commissioner in Charge. There was also discussion of whether the office and director could be responsible to the entire Council. Most concluded that in our commission form of government, this was not a possibility. It must have adequate status and authority to conduct the above coordination of planning efforts among all bureaus, including long range land use planning.”*
- *“Work toward a coherent, cohesive vision. City programs and policies suffer from the lack of a vision that is well articulated to the various bureaus and the public. Leading the development of this vision and implementation actions should be a priority for the new director.”*

- *“Coordination between policy development and policy implementation decisions needs to be strengthened* It is very important to provide strong, formal linkages between policy development, long range planning and current planning decisions This includes neighborhood and community plans, and the policies and development actions of other bureaus ”
- *“Hire a strong director* The director of the new office or bureau must have exceptional leadership capabilities and the confidence of the City Council to effectively carry out the functions noted above S/he should be a good manager, with the ability to communicate with and inspire a wide variety of people and interests in the greater community as well as among City bureaus ”

The stakeholder discussions demonstrated the deep commitment of our citizens to a strong planning program Portlanders expect a lot from planning In fact, most stakeholders said we were not doing enough planning Stakeholders want planners to help the City create a cohesive vision, coordinate planning and implementation, and ensure high quality urban design The stakeholder comments reflected frustration with Portland’s unique, but unwieldy form of government There is much to be said in favor of the Commission form of government—but coordination and common vision are more difficult to achieve and maintain than in other forms of governance

It is up to the City Council to develop a vision for the city and coordinate the implementation of that vision through planning However, the Council needs the advocacy of a Planning Director and staff who have the responsibility to formulate this vision and the authority to carry it out Now is an opportune time to expand the responsibility of the City’s planning organization and grant it the authority and the resources to be successful

Discussion

The threshold issue is what planning the City needs to do The stakeholders used a number of different terms to answer this question For example, participants in the stakeholder groups agreed that there is a basic difference between long range and strategic planning, though some disagreed over which is the “umbrella” or overarching function and which one is concerned primarily with implementation The Advisory Team believes a more useful way to respond to the question is to define the functions the City’s planners should perform instead of trying to define terms

The Advisory Team believes the City must be much more encompassing in its planning and vigorously carry out the following responsibilities

- *Vision Planning* The uniform message from stakeholders was that City government lacked a cohesive vision Planners can help Council members ask the community where we as a city need to be heading We need planning that looks to the future and gets us, as a community, ready for changes in such areas as demographics and technology that are beyond the reach of city government Any vision must be based on the needs of a broad range of “stakeholders”, including those not actively involved in the process and those not yet born

Vision planning, the over-arching planning function, should provide the blueprint for the City. The resulting plan and its strategic goals should guide Council's key decision making processes as well as bureau planning and operations.

Vision planning can also help define a community's most fundamental values. For example, quality K through 12 education appears to be an important value. But the City of Portland lacks guideposts for how it should respond to the funding crisis in our public schools. It has given millions of dollars to schools in the last four years, but there is no cohesive rationale for the transfer of City funds to the city's school districts. A more strategic approach, based upon a definition of community values, would be to strengthen our schools because good schools are the cornerstones of healthy and safe neighborhoods and provide a workforce that will attract and retain those companies that provide living wage jobs. This "big picture" planning is inadequate in the City today.

- *Comprehensive Planning* For the past 20 years, this has been the domain of the Bureau of Planning. Prior to the division of the Bureau as part of Blueprint 2000, the Bureau's responsibility included development of Comprehensive Plan policies and maps and the implementation of those policies through the Zoning Code and the review of proposed development. Blueprint 2000 assigned the development review responsibilities to the new Office of Planning and Development Review, leaving a staff of approximately 60 FTE responsible for policy development, code writing and other planning activities of a legislative nature.

The Portland Comprehensive Plan reflects the community's values—affordable housing, jobs, green spaces, clean water, clean air, diverse and vital neighborhoods. Yet, the Comprehensive Plan is infrequently used to evaluate the success or failure of City policies and programs. Why? Because no one person or agency is accountable for those policies. The responsibility for the development and implementation of those policies is dispersed throughout city government. The Advisory Team believes it is time to re-establish the City's Comprehensive Plan as a living document that has the status and credibility to drive development and actions within the City. It needs to serve as a guidepost for City programs and services. New City policies should be evaluated for consistency against the Comprehensive Plan.

- *The 2040 Plan* Portland has demonstrated its commitment to the region's growth management plans. The Planning Director is the City's primary connection with our regional partners and is responsible for local implementation of the functional plan performance standards through code amendments and Comprehensive Plan policy changes.
- *Coordination* Communication and coordination are a challenge in the City's unique form of government. There are two aspects to the problem. The first centers around the "silo" nature of planning in the City of Portland. No one is fully responsible and in charge of planning in Portland. For example, a major problem for City planners working with the community during the last five years of rapid growth has been the lack of connection between community planning and the planning of infrastructure to serve those communities. Regardless of organizational structure, "service" delivery must appear seamless to the public.

Transportation, land use, environment, economic development, and other City agencies, programs and projects must be coordinated and integrated—from problem definition, policy, budget and outreach to implementation

The Planning Director must have the authority to get agencies together at the planning table and to review the proposals of other bureaus for consistency with adopted policies. Similarly, the biennial budget process should be strategically used to coordinate bureau budgets and work programs for upcoming years, all in alignment with a common vision.

The other aspect of coordination involves implementation of plans. Plans don't mean much unless they are implemented correctly. Comprehensive Plan policies are primarily implemented through private development and investments in infrastructure and other public services or programs. Until now, the Planning Bureau has had direct responsibility for the review of proposed development for compliance with the Comprehensive Plan and the Zoning Code. The Bureau has not had formal review responsibilities for the provision of infrastructure or other City services. Planners should not be solely responsible for implementation, but someone with authority must monitor the implementation of plans and advise Council about the consistency of services and programs with adopted policy.

Finally, the City benefits from collaboration, not just coordination, between staff charged with formulating policy and regulations and staff charged with implementing them. It will be critical for the City's long range planners to maintain close ties with OPDR staff to ensure that any new policies or regulations can and will be effectively administered. And, a formal feedback mechanism between implementers and long range planners can ensure that regulations are serving their intended purpose.

- *Quality Urban Design* Portland is a planning success story in large part because we plan as if people matter. Nowhere is that more true than in the City's urban design standards. The City's insistence on a high standard of performance for public and private projects demonstrates its commitment to protect the public realm. The City must have an advocate and a watchdog for quality urban design.
- *Data Collection and Emerging Issues* A number of different bureaus collect data for their own business purposes, but no agency takes responsibility for evaluating this information and using it to tell us where we have been as a community and where we are going. This type of "think tank" function is very important if the City is going to maintain its edge. This function will be enhanced by the increasing sophistication of the City's GIS system. In addition, planning in different bureaus has, at times, been based upon different assumptions about future growth and current trends.
- *Review Budget and Policy Proposals* Presently there is no review of the City budget or proposed ordinances and resolutions for consistency with existing City policy. There should be an evaluation, similar to OFA's budget impact statements, that informs the Council about the relationship of its actions to the policies in the Comprehensive Plan and other City policies.

- *Relationships with the Citizenry* Planners and other City staff need to build long-term relationships with citizens and citizen groups, not just request input on a particular project once it's underway

These are the planning functions the City must perform. The constraints of Portland's decentralized government structure present a challenge in deciding how these functions should be organized.

Organizational Options

The Advisory Team has reviewed the stakeholder discussions and evaluated a number of different options. We measured the options primarily for success in performing each of the functions listed above. Because we are convinced that the City's planning functions, and the people who perform them, require more authority than they have now, this criterion was also influential in our thinking.

There are two critical components of any organizational option. The first is the creation of a Planning Coordination Team, chaired by the Planning Director. The team should include the Executive Director of the Portland Development Commission and the bureau managers of the following agencies: the Portland Office of Transportation, the Office of Finance and Administration, the Bureau of Housing and Community Development, the Office of Neighborhood Involvement, the Bureau of Parks and Recreation, the Bureau of Environmental Services, the Water Bureau, and the Office of Planning and Development Review.

The Planning Coordination Team should convene on a regular basis for the purpose of jointly coordinating and integrating policy development and implementation. The meetings would provide a forum to enhance communication and cooperation among City bureaus as well as federal, state and regional agencies. A particular priority for the team should be coordinating and evaluating the City's efforts to implement the region's growth management objectives. The team should also develop the City's Public Facilities Plan and review the City's annual capital improvement program for consistency with adopted City policies.

The second essential component is the staff necessary to perform the key functions outlined above. It is not possible to perform these functions within existing staff levels. Existing staff is primarily dedicated to land use and infrastructure planning. The demand on the City's planners already exceeds their capacity. Council must be willing to make funding for additional staff a priority to enable the organization to take on an expanded role in city-wide visioning, coordination and corporate strategic planning.

Precise calculation of the number of staff, and the funding needed, is a matter best left to the City's managers and the City Council. However, it appears, based upon our experience, that somewhere between three and six positions need to be added to existing staff levels to adequately perform all of these functions.

These two components are fundamental to the success of any of the options described below. These options appear to us to be the best, though the second one, a renewed Bureau of Planning, is superior to the others. These options are consistent with the ideas most commonly expressed by the stakeholder groups.

Option 1: Create a City Planning Office in the Office of the Mayor

The office would be responsible for the City's vision planning and for the central coordination of the City's planning activities. The City Planning Director would head the office and have authority over a broad range of planning and coordination activities. The staff would be small. The functions now performed by the Bureau of Planning would be incorporated into OPDR, in accordance with the recommendations of the Blueprint 2000 stakeholders.

An advantage of this option is that the Planning Director would not be saddled with management responsibilities and could more easily fulfill the role of visionary planner for the City. The assignment to the Mayor's office is important to give the position status if not actual authority over the planning activities of other agencies and fulfill the coordinating responsibilities. This office could also track emerging issues and prepare policy impact statements for the Council.

The small size of the office is a disadvantage. There is the ever-present danger of budget cuts—more damaging to a small operation than a bigger bureau with more flexibility. Of greater concern is that the Planning Director would not have direct authority over the comprehensive planning staff that would be in OPDR. These staff planners are responsible for the City's comprehensive land use planning, including neighborhood plans, Zoning Code provisions and design guidelines. These projects make up the bulk of the work of the Planning Commission. Under this organizational model, the Planning Director might, in effect, be disconnected from the Planning Commission, the City's primary policy making group.

An advantage of this option is that reuniting long range and development review staff would create intra-bureau opportunities for collaboration between policy and implementation, easier to facilitate than inter-bureau relationships. However, the Advisory Team is concerned that despite the best of intentions, comprehensive planning would not be the priority of OPDR because of its focus on development review activities.

Option 2: Maintain the Planning Bureau and Increase the Responsibility of the Planning Director

This model takes the City's existing Planning organization and increases its responsibility and authority. The Bureau of Planning now consists of approximately 60 staff, all of whom are engaged in comprehensive planning or the support of those activities. (All development review staff has been assigned to OPDR). The Bureau would be assigned additional responsibility to perform all the functions identified above—vision planning, coordination, comprehensive planning, urban design, emerging issues and the preparation of policy impact statements. The Director would have the legal authority attached to comprehensive planning activities.

This option creates a complete planning organization for the City, providing formal and informal authority for a full range of planning functions. It keeps the Planning Bureau intact and retains the status of the Planning Director as a Bureau Manager reporting to the Commissioner in Charge and accountable to the City Council. A major improvement over Option 1 is that the Planning Director continues to staff the Planning Commission. The Commission is a valuable component of the City's planning function. By having a broader set of responsibilities, the Planning Director can work with the Commission to make vision planning a high priority in its work program.

Like the other options, this model presumes that the Council would create a planning coordination team and provide additional staff. If this happens, coordination will dramatically improve, even though the Planning Director will not manage every planner in the City or formally manage every work program.

The larger size of the organization under this option presents both advantages and disadvantages. A larger staff provides a greater range of expertise and flexibility in the event of budget reductions. Yet, the Advisory Team believes the Planning Director should, to the maximum extent possible, be free of the responsibility for the operations of a large bureau. This is harder to do in a larger organization. However, the current Bureau's executive team consists of managers who are very competent managers as well as planners. If this model is chosen, this team should be delegated maximum authority for administrative matters in order to free up the Planning Director for planning.

A disadvantage of this option is that coordination of policy development and implementation is more difficult than under the first model because the comprehensive land use planners would not be within the same organization as the development review planners. This disadvantage can be mitigated by ensuring that the cross function teams created by the Bureau of Planning remain in place and serve as the forum for good communication between planners making policy and planners implementing policy through development review. Over the last five years, the Bureau's managers and staff have created an organizational culture that encourages and rewards good communication. We are confident this tradition will continue even when planners are in two different organizations.

Option 3: Consolidate all Planning Activities in the City into a New Bureau of Planning

This is similar to the second option except staff in planning positions now located in the Office of Transportation and the Bureaus of Water, Environmental Services and Parks and Recreation—a total of approximately 25 additional staff—would be transferred to the Bureau of Planning. The Bureau would have complete responsibility for direction or coordination of all the City's long range planning functions. The Bureau Director would report to the Commissioner in Charge as assigned by the Mayor.

The principal advantage of this option is that it would give the Director of Planning direct authority for vision planning, comprehensive planning, infrastructure planning and all other City long range planning activities. This model would work best in fulfilling the need for coordination and communication because it consolidates the full array of long range planning functions within one organization.

A major disadvantage of this option is that it would disconnect planners from the operations of important City services. The Advisory Team believes the presence of planners in PDOT and other bureaus has helped to make those organizations more innovative, more concerned about urban design and more responsive to the needs identified through neighborhood and community planning projects.

Planning Director Qualifications

The public outreach process also produced ideas on the qualifications for the City's new Planning Director. The Advisory Team recommends that no action be taken on hiring a Planning Director until the City Council adopts an organizational structure for the City's long range planning program. At that time, we would be pleased to provide you with our recommendations on qualifications for the position.

Recommendation

The Advisory Team recommends selection of Option 2. Clearly, each option has advantages and disadvantages, and each responds to issues and concerns raised by the public in the focus group discussions. Option 2 is recommended because, on balance, it would best achieve the following:

- Creating a planning organization with enhanced responsibility and adequate staff to perform the City's planning functions,
- Enabling better coordination between bureaus by enhancing the authority of the Planning Director to monitor the implementation of plans and advise city Council about the consistency of services and programs with adopted policy,
- Providing the Planning Director with status and influence by maintaining a direct reporting relationship between the Director and the Mayor or Commissioner in Charge,
- Providing the Planning Director with the responsibility of working with the community to develop a coherent, cohesive, city-wide vision,
- Creating a large enough organization to provide operational flexibility and greater ability to weather budget fluctuations, and
- Allowing for critical collaboration and coordination between long range planners and other City staff responsible for implementation, through interagency agreements and continuation of operating systems that are well established between long range and development review planning staff.

Conclusion

The organizational choice is important because it will help facilitate achievement of the City's goals. In the end, however, the test of any of the options will be the commitment of the Council to adequately fund and fully support a complete planning program for the City—a program that encompasses vision, coordination, urban design and all of the other elements of a well planned city.

Thank you for the opportunity to assist you in evaluating the City's long range planning needs. We look forward to reviewing public comments on this proposal.

35789

**Long Range/ Strategic Planning
Focus Groups
Analysis and Report**

**Submitted to the
City of Portland**

by

Cogan Owens Cogan

March 31, 1999

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ENVIRONMENTAL STUDIES

**CITY OF PORTLAND
LONG RANGE/STRATEGIC PLANNING FOCUS GROUPS
ANALYSIS AND REPORT
Cogan Owens Cogan
March 31, 1999**

SUMMARY

Introduction

Over the past two and a half years, the *Blueprint 2000* initiative has been led by Commissioner Charlie Hales. Its purpose was to redesign how the City should approach development review functions, with the desire to "create a system that presents a predictable, seamless delivery of City development review functions and review responsibilities." The City Council has accepted the reports and the majority of recommendations of the *Blueprint 2000* Stakeholders Team. Many of the recommended system and organizational changes are well underway, including the formation of the new Office of Planning and Development Review consisting of the former Bureau of Buildings and the Permit Center and Development Review functions and staff of the Bureau of Planning.

Although the City Council supported nearly all of the *Blueprint 2000* Stakeholders' recommendations, Mayor Vera Katz, Commissioner Jim Francesconi, and other City Council members expressed concern about the organizational placement of the Planning Director and long range planning functions within the combined Office of Planning and Development Review. In a resolution accepting the Phase II Stakeholder Report adopted in January, 1999, the City Council directed the Mayor to return by May 12 with recommendations for the placement and organization of long range planning functions of the City of Portland and its bureaus.

In response, Mayor Katz established a process to develop recommendations to bring to Council. To receive input from various interested parties, Cogan Owens Cogan was hired to facilitate focus group meetings with community groups and City boards, commissions and planners, all of whom have a strong interest in this issue. Given the May 12 deadline and a desire to allow for review of draft recommendations by the public, this outreach process was on a fast track, with all the focus groups held between March 3 and March 12.

Terminology

Participants in the focus groups used a variety of words to describe different aspects of planning. All participants agree that there is a basic difference between long range and strategic planning, though some disagree over which is the "umbrella" or overarching function and which one is concerned primarily with implementation. It is the consultant's recommendation that the City Council consider the following definitions as most likely to be generally understood and supported by the public and most easily incorporated into current City activities.

Long range planning encompasses a vision and goals for the City as a whole over time, no less than five years and as long as twenty. It is based on citizens' values and is not constricted by financial, functional or other considerations. It is evaluated and updated regularly. The City's Comprehensive Plan is a long range plan.

Strategic planning consists of policies and programs that carry out, or implement the vision created during the long range planning process. For example, while one element of Portland's vision may be for a "city where people feel comfortable and safe where they live and work", strategic plans are focused on specific, implementable ways to achieve that vision. They may include activities as diverse as an expanded parks program, traffic calming and community policing. Strategic plans are carried out by the various City bureaus and are accompanied by a clear understanding of needed staff, financial and other resources.

Process

Cogan Owens Cogan conducted ten focus group discussions with the following. One each

- Planning Commission
- City Landmarks and Design Review Commissions (together)
- Planning Staff (two sessions -- long range and current planning staff)
- Architects and urban designers organized by the Portland Chapter, American Institute of Architects
- Public and private planners organized by the Oregon Chapter of the American Planning Association
- City Club committees on Growth Management and the Environment and the Density Study
- Three with neighborhood association and coalition chairs and committee members, representing neighborhoods in every area of the City

Elaine Cogan facilitated all the discussions except for the City Club which was led by Arnold Cogan. Each group discussed these questions

- 1 *What comes to mind when you think of "strategic planning" and "long range planning" Are they the same? Different? How?*
- 2 *How can the City's strategic planning/ long range planning help you?*
- 3 *When the City reorganizes its strategic/ long range planning, what should be its priorities?*
- 4 *What attributes should the City look for in hiring the right person for the job?*
- 5 *Wrap up/other ideas*

This report summarizes areas of agreement among all participants as well each group's response to the questions. Detailed minutes of each meeting are presented in the appendix.

Areas of Agreement

While focus group participants expressed a wide range of ideas and suggestions about the future function, priorities and organization of long range/ strategic planning for the City, there was a general consensus on these key issues:

- **Coordination among all bureaus is essential.** There was general agreement that the scope of long range planning should be broadened to be more than the City's current comprehensive land use planning. It should include the efforts of nearly every bureau, as well as the Portland Development Commission. Coordinating long range planning efforts, avoiding duplication and assigning clear lines of authority should be priorities.
- **A separate office, whose director has bureau-head status, should be created.** The Director should be responsible to the Mayor as Commissioner in charge. There was also discussion of whether the office and director could be responsible to the entire Council. Most concluded that in our commission form of government, this was not a possibility. It must have adequate status and authority to conduct the above coordination of planning efforts among all bureaus, including long range land use planning.
- **Work towards a coherent, cohesive vision.** City programs and policies suffer from the lack of a vision that is well-articulated to the various bureaus and the public. Leading the development of this vision and implementation actions should be a priority for the new director.
- **Coordination between policy development, long range planning and current planning decisions needs to be strengthened.** It is very important to provide strong, formal linkages between policy development, long range planning and current

planning decisions This includes neighborhood and community plans and those of other bureaus, policies and current development actions

- **Hire a strong director** The director of the new office or bureau must have exceptional leadership capabilities and the confidence of the City Council to effectively carry out the functions noted above S/he should be a good manager, with the ability to communicate with and inspire a wide variety of people and interests in the greater community as well as among City bureaus

FOCUS GROUP RESULTS (organized by question)

1 Self Introductions/background/experiences with city planning function

Neighborhoods

A total of 32 people attended three sessions for neighborhood representatives Representing southeast, southwest, northeast, northwest and north Portland neighborhoods, their experiences range from less than a year of involvement with neighborhood planning projects to several decades Many participants have extensive experience serving on one or more transportation, community plan, greenway, watershed council, or other advisory committees convened by the City A number also serve on neighborhood coalition groups

Planning Staff

Over seventy of the City's planning staff participated Many work in or have worked in long range planning and development review for the Bureau of Planning Others included the Bureau of Environmental Services on wastewater and watershed issues, Bureau of Water Works, Parks and Recreation, and the Office of Transportation

City Club

Nine members of the organization's committees on Growth Management and the Environment and the Density Study attended this session Participants represent a range of professional backgrounds including the legal, planning, architecture, marketing and homebuilding All participants expressed a strong interest in the future of long range planning for the City

Architects

Ten members of the American Institute of Architects Urban Design Committee participated in this session Though not all architects by training, all have extensive experience in city and regional planning, many incorporating urban design with city planning functions

Landmarks/ Design Commissions

Five members of the City's Landmarks Commission and six members of the Design Commission attended this session Most participants have served on one of the

commissions for four or more years. Most have a professional background in architecture or urban design, with additional representation from the arts, development and legal professions.

Planning Consultants/Public Planners in Other Jurisdictions

Two planning consultants and two public agency planners attended this session. Each participant has served an active role in planning organizations such as the Oregon Chapter of the American Planning Association and other groups.

Planning Commission

Six members of the Portland Planning Commission participated in this session. They represent a variety of interests in Portland, including neighborhood, downtown business and urban development.

2. *What comes to mind when you think of "strategic planning" and "long range planning"? Are they the same? Different? How?*

Participants in most sessions say that long range planning focuses on developing a long term vision and that although the term historically has been associated with land use planning, it should be used in a broader context by the City. Strategic planning, they say, is oriented to a set of short term or long term actions needed to accomplish a vision, goals or objectives and may apply to a wide range of issues. It also includes details about the schedule and cost of implementation. A smaller number of participants see little difference between the two terms. Most participants agree that both long range and strategic planning should be coordinated among all City bureaus.

Neighborhoods

Most participants see a distinct difference between long range and strategic planning. Strategic planning is considered by some to be a subset of long range planning, while others say that the function of long range planning is to develop a vision for a long period (e.g., 10 or 20 years), while strategic planning is a method to arrive at/implement the vision and includes more detailed information about necessary resources or issues associated with implementing the vision. Some also consider long range planning broader or less detail-oriented.

Planning Staff

Participants say long range planning is the vision and is broadly-based, strategic planning is the strategy for achieving the vision and is more focused. Long range plans can be viewed as road maps for the future. Participants do not see long range and strategic planning as separate.

City Club

Most participants agree that strategic planning is more action-oriented, with a focus on how to prioritize and pay for implementation through capital improvements or other means. Some participants also feel that strategic planning can be a means to integrate individual plans, based on an overall vision or set of goals or objectives. Some note that long range planning historically has been associated with land use planning and implemented through zoning. Others say that long range planning is done by a variety of City bureaus and is not necessarily strategic.

Architects

Participants say that strategic planning is much broader than long range planning and implementation, including developing a broad long term vision for the City, strategies to achieve the vision and agency priorities and strategic public investments to implement the vision. Details of the strategic planning function include population forecasting and annual review of goals and policy direction from all City bureaus, functions and budgeting. Long range planning is more limited in scope yet distinct from current planning. Functions include developing and implementing urban design principles, physical planning, and allocation of financial resources.

Landmarks/ Design Commissions

Several participants say that there is little difference between the two terms. Others note that strategic planning more typically is oriented to implementation of a vision while long range planning focuses on developing the vision. Participants also say that strategic planning can be long or short range while long range planning generally applies to longer time periods (e.g., ten or more years). One person notes that both long term and strategic planning should include coordination among all City bureaus, something that currently appears to be lacking.

Planning Consultants/Public Planners in Other Jurisdictions

Most participants agree that strategic planning can apply to a broad range of issues (not just land use) and that it typically includes a schedule and financing plan to implement a series of actions to meet a vision, goals or objectives (e.g., an action and funding plan to manage and pay for growth). It is likely to be broader than long range planning and include some items beyond the control of the planning director. One participant used an example of a strategic plan created for Gresham. Initially, a vision was developed, it was the basis for the City's strategic plan and office of strategic planning, followed by an internal management plan and series of action plans. The management plan was used to evaluate performance and develop priorities. Participants say that long range planning generally is associated with land use planning and focuses on developing a vision or objectives to meet state and local planning laws and other mandates.

Planning Commission

Members of the Planning Commission deliberated on the organizational structure of a possible office of strategic planning, regardless of the name, and agreed that its most important function is setting a long term (25 year) vision, implementation actions, and goals for the City, processes that are above election cycles. Several Commissioners say strategic planning should be superior to long range planning, that it is global and should include "big picture" planning for long term, e.g. 10-year cycles. Long range planning, they concurred, should be applied more specifically to implement the vision and strategic plans. One person suggested long range planning should be where focused public involvement should take place within the context of the overarching goals and vision. It should also be a link to the City's permit center and incorporate infrastructure planning, regional planning, national trends and phenomenon and be flexible enough to take timely advantage of opportunities and constraints. Shorter term capital improvement plans should then be developed to implement the vision, goals and objectives through the various bureaus and the Mayor's office. One Commissioner said Portland's "weak mayor" form of government should be re-examined.

3 *How can the City's strategic planning/ long range planning help you?*

Given their many interests and relationships to long range planning for the City, participants in all the focus groups have a variety of opinions about this subject, though almost all say that a new entity can help by providing leadership and coordinating the strategic planning efforts of all bureaus and developing a long term vision for the City. Other generally accepted suggestions include:

- The City should be proactive in supporting revitalized neighborhood/community planning by resolving differences, providing resources and supporting neighborhood planning within the context of City-wide policies resolving differences
- Conduct research to evaluate the potential or current effectiveness of planning policies and tools
- Give consideration to design principles in all parts of the City
- Provide a link between long range and current planning, supporting developers and others when their plans are consistent with long range planning policies. Communicate the rationale for long range planning policies to the public

Neighborhoods

Most participants say that the City should renew its commitment to neighborhood/community planning and involve neighborhoods earlier in both the long range planning and strategic planning processes. This involvement should be a requirement and be institutionalized in the City's planning process. Some feel that developers should be required to visit the neighborhood associations before application.

to the City for design review and that design review standards should be equally strong in all neighborhoods. Others recommend that the City take a more collaborative, flexible approach to working with the neighborhoods, provide needed resources, support neighborhood plans that are consistent with City policies and clearly explain why they cannot support or implement plans. Participants in one group believe that neighborhood coalitions can play a coordinating role in this process, particularly if involved early, by providing information and bringing other interests to the table. The Planning Commission could act as a bridge between long range and current planning, playing its historical role as a citizen review body. Participants in one group feel plans should anticipate and address potential future problems. Some participants complain that the current system fosters conflicts and lack of uniformity among the coalitions, the neighborhood associations, and the City.

Planning Staff

This group feels strongly about the lack of integration between the City's goals and their implementation. They say bureaus' roles are not articulated in the plans and that staff, resources and funding do not function under clearly defined priorities. Some participants say that the various agencies are not integrated and that they operate out of different commissioners' offices with their own separate goals. Participants also cite examples of conflicting goals, either within the City or between the City and the State or Metro.

Some participants say that too long a time passes between the development of a goal and receiving funding for its implementation, so that by the time a project receives funding, it may no longer be a priority. They feel the link between capital improvement and goals needs to be strengthened. One participant calls for better measures of how the planning system is working and short and long term benefits to increase accountability.

Other participants say that there is a lack of political will to follow through on goals, "politics" may be the reason there is not an overall City vision.

City Club

This group recommends a new long range/strategic planning entity in the City to research and evaluate the effectiveness of proposed or existing long range planning policies and tools, (e.g., growth management techniques). The new office or bureau also could help bring a variety of interests (e.g., environmental advocates, developers, neighborhood groups and others) to the table to participate in the long range process and help match development needs with market opportunities, (i.e., help developers identify sites that meet their needs for specific types of projects consistent with City planning policies).

Architects

Members of the Urban Design Committee stress that urban design should be brought back into the City's vision and implementation strategy. The new office should focus on livability, community and the environment at the broadest level. Processes should engage people and translate ideas into urban form with physical planning and strategic public investments to stimulate private development.

Landmarks/ Design Commissions

Members of both groups say that they could provide more proactive assistance and be more effective resources if they have more staff support from and the opportunity to be involved earlier in the process of developing planning policies or priorities related to design guidelines or historic preservation. Even if they are not directly involved in formulating policy or priorities, commission members believe they would be more effective if they have a better sense of the City's overall vision related to design and landmarks. The new long range planning entity should help develop and communicate this vision. Similar to members of other groups, participants stress that long range planning should play a coordinating role among all bureaus involved in the City's long range/strategic planning.

Planning Consultants/Public Planners in Other Jurisdictions

Participants say the new entity should help coordinate the activities of current and long range planning, in part by supporting public and private actions that are consistent with long range plans and policies. They note that this will be particularly important, and possibly more difficult, if current and long range planning are in separate departments or bureaus. They also feel that long range/strategic planning should help coordinate long range planning among all of the bureaus, playing a similar role as the new Development Review group, mediating policy differences when needed. One person recommends that long range planning facilitate public policy debates about planning goals and objectives to encourage public support and reduce opposition to implementation. Several people note that the new entity will need adequate resources and equal or higher status than other bureaus to accomplish these tasks.

Planning Commission

One Commissioner sketched an organizational structure that would be an improvement on the current system: designation of an office responsible for developing a broad vision, goals, policy objectives and action items with the Office of Planning and Development Review charged with implementation. The Commission members say that urban planning and infrastructure investment strategies should be considered, with frequent reassessment of the City's current comprehensive, community and capital plans. They support development of a vision with a broad perspective including business development, energy, parks, transportation and land use planning.

4 *When the City reorganizes its strategic/ long range planning, what should be its priorities?*

As mentioned previously, nearly every group agrees that coordination among different bureaus should be a top priority of a new strategic planning entity. Most groups also say that it is important to ensure that long range planning and current planning actions are consistent and that the office be responsible for developing and implementing the City's vision. Other suggested priorities include

- Review and update the City's Comprehensive Plan on an ongoing basis
- Conduct research and other activities to evaluate appropriate planning tools and support community planning efforts
- Reconcile differences among neighborhood plans
- Provide adequate support to City boards and commissions
- Coordinate and implement regional and state planning mandates and policies

Neighborhoods

Neighborhood representatives say a new long range planning entity should address both physical and social planning issues, and involve neighborhoods earlier in the process. Coordination among bureaus should be another important role. Other suggestions include conduct, coordinate and evaluate planning studies, implement watershed-based planning, adopt design guidelines for all or most neighborhoods, advocate for low-income housing, coordinate siting of social services facilities, develop long term funding strategies for new infrastructure, and ensure that current planning is consistent with long range goals. Participants recommend that the City have consistent planning guidelines to address competing or conflicting goals of different neighborhoods. All neighborhood plans should be consistent in their visions while maintaining their separate identities.

Planning Staff

This group emphasizes the importance of creating more connection among city bureaus and that there should be clear lines of authority and responsibilities. One participant favors hiring a planning coordinator to oversee a system of integration while others say the problems are more a lack of communication, money and staff time. Other suggestions include hold a planning forum before the budget is planned, a system where staff is assigned as primary contacts in different parts of town.

City Club

According to participants, high priorities should be given to coordinating long range planning conducted by all bureaus in the areas of land use, transportation, infrastructure, parks, housing, employment, and financing, as well as ensuring consistency between long range and current planning. Participants also say the new

entity should help develop a long term vision for the City, focusing on broad issues such as job creation, city form and affordable housing. Other suggested priorities include address state and regional mandates, focusing particularly on medium and large-scale projects to accomplish goals (e.g., a few big infill projects instead of many small ones), support neighborhood planning in the context of overall community needs, possibly using community-based neighborhood planners, identify areas with the potential for new development, and stimulate citizen involvement. Some suggest that long range planning have a significant role in the design of large projects. Similar to members of other groups, participants emphasize that the new director will need a high degree of authority and political support to carry out the proscribed duties.

Architects

This group feels that the City's new office should include talented urban designers to focus on broad issues of urban form and function rather than on the details of specific density requirements at the neighborhood level. The office should elicit support in the community for raising livability standards and regain public confidence and respect for the direction of the City. The office should be flexible and continually coordinate objectives with long range planning, development review, the Office of Finance and Administration and other City bureaus.

Landmarks/ Design Commissions

Members of both commissions say that coordinating the long range planning functions of all bureaus should be a top priority. The long range planning group also should provide adequate support to the commissions, particularly early in the planning process. For landmarks, "doing no harm" to existing landmarks and historic structures should be a high priority. Coordinating with and implementing regional planning goals and policies also is important.

Planning Consultants/Public Planners in Other Jurisdictions

High priority should be given to coordinating the long range planning activities of all bureaus, reconciling conflicting goals as necessary. One participant described a successful example involving planning for light rail to the airport where the City's bureau of planning took the lead in bringing all the affected bureaus into the process and mediating differences where necessary. The process worked because one bureau took the lead in coordinating the process, there was political support for a speedy resolution and participants agreed on a common vision and willingness to work together to develop solutions. Other suggested priorities include identifying, implementing, evaluating and updating long range and comprehensive planning goals and policies, defining the new entity's mission with a strategy to achieve it, and coordinating long range and current planning efforts.

Planning Commission

Members of the Planning Commission agree that the priorities for a new strategic/ long range planning office should be to set the vision, goals, policies, objectives and action items for City bureaus to incorporate in their work plans. The office and/or director should be responsible for coordinating all planning functions in various bureaus in the City as well as the Portland Development Commission.

5 *What attributes should the City look for in hiring the right person for the job?*

Most participants agree that the director of the new office needs to be strong personally and politically to effectively coordinate the actions of the many Bureaus that engage in planning. Most also say that s/he should be a good manager, with the ability to communicate with and inspire a wide variety of people and interests, as well as a strong commitment to planning and how it can benefit Portland. Participants are divided about whether the director should be a professional planner. Some say that it is important that s/he should have an in-depth understanding of planning principles. Others say it is more important to have a strong commitment to planning and a broader background to address issues such as urban design, finance and infrastructure. Some say a nationwide search will be needed to identify someone with all the necessary qualities to fill the position, while others recommend someone with an in-depth knowledge and understanding of Portland. Other recommended qualities include someone open to new ideas, creative, inspirational, a good mediator and problem solver.

Neighborhoods

Several participants say that the director should be an excellent communicator, be able to articulate planning goals, principles and concepts to the general public and a variety of interests. Several also felt that s/he should be a professional planner, while others say it is more important for the director to be a good manager with a strong commitment to planning. Overall, participants are divided about whether the City should conduct a nationwide search. Some feel that an outsider can bring fresh ideas and perspective about successes and failures in other areas. Others say it is essential to hire someone who is familiar with local issues and conditions. Still others say a nationwide search typically is not worth the expense but that candidates from other regions should not be excluded or overlooked. Other suggested qualities include accessible, open-minded, able to identify talented staff, strong leader and friendly. Most participants agree the director should have equal or greater status than other bureau heads. Neighborhood representatives should be included in the screening/hiring committee.

Planning Staff

Most participants say the director should be a high profile position with much latitude to work with the Council. They envision a position similar to a city manager. The director should be politically savvy, able to work well in Portland's government and a strong, articulate advocate. S/he also should be a professional planner skilled in integrating many different planning functions.

City Club

Participants recommend a strong leader with good management and communications skills as well as a vision of planning for the City and a recognition of the political nature of land use planning. They agree that the director does not necessarily have to be a planning professional but should have experience developing public policy and a strong commitment to planning. Creativity and the ability to work with a variety of interests also are important.

Architects

The Urban Design Committee would like to be involved in the hiring process and has given the City a list of qualifications members consider important. They recommend a national search for the most qualified candidate, someone who can be an advocate for the City, communicate to Portland citizenry and rebuild public trust and confidence in the direction of the City. The individual should be able to function effectively in a political environment and have a proven record of implementing broad urban plans from strategic investment strategies to implementation. Some participants say that this person should not be from Oregon as Oregon planners are too bound by legal requirements. Participants agree that the director should be very creative, able to fight for his or her convictions and a visionary comfortable with broad public processes.

Landmarks/ Design Commissions

Some participants recommend that the director either be trained in urban design or in the history of cities and how they function. He/she should be personally and politically powerful, able to work with a variety of interests, a good administrator and long range thinker. Some participants recommend a visionary, inspirational individual who can energize the public while others stress that the director should implement a vision developed by the community and elected officials.

Planning Consultants/Public Planners in Other Jurisdictions

The group disagrees about whether the new director should be a professional planner. Some say that professional planners have the training to bridge the multiple definitions of planning held by different people, while others that broader expertise is needed to address non-planning issues such as finance and infrastructure design. Participants recommend that the individual be a good communicator, mediator and problem solver.

who can work successfully with a variety of different types of people and interests. They also say the director should be open to new ideals, have a good understanding of the role and benefits of planning and adhere to a strong code of ethics.

Planning Commission

Members of the Commission agree that the director of the new entity should be as or more important than those of other bureaus in the City. S/he should be flexible enough to be able to receive input from "the shop floor up" regarding the process of implementing the vision, goals and objectives. The director should have a relatively small staff and work very closely with long range planners and the long range planning manager. S/he should be responsive to citizen input and committed to the democratic process, a good listener, have experience and appropriate credentials, "soul", backbone, political skills and an international perspective. They also recommend that the director understand broad urban design principles and does not necessarily need to have a planning degree. They also agreed with participants in other focus groups that this individual should be a visionary with common sense to strategically implement the vision, goals, objectives and action items that support the vision.

6 Other ideas

Neighborhoods

The new office of strategic/long range planning should do a better job of making citizens feel they are heard. It also needs to address the fact that neighborhood associations do not always represent the existing citizenry, often people make the decisions and then move out of the neighborhood. Many neighborhood associations and their members face limitations in funding, time constraints and lack of administrative support.

City Club

The group notes that separating long range planning from current problems may result in an entity that is too small to have adequate influence with other City bureaus. Long range planning policies should guide the activities of the Planning and Development Review Department. They also say that the director must be supported by the Mayor and should not be inundated with operational issues. They recommend that the Portland Development Commission play a role in implementing long range planning and that the Planning Commission be involved as a representative of the general public.

Landmarks/ Design Commissions

Members of this group suggest two possible alternatives for linking long range planners for different bureaus - either transfer them from their respective bureaus to a new long range planning bureau or institute a high-level coordinating committee of

representatives from each bureau. Some suggest that the community development director model - an individual responsible for overseeing and/or coordinating multiple aspects of long range planning and development - might be appropriate. A city manager also could more effectively coordinate actions of many bureaus but that would require changing our weak Mayor/City Council form of government. Finally, participants note that the Portland Development Commission historically has played a strong role in implementing a long term vision for the City but currently does not engage in long term, city-wide allocation of resources.

Planning Consultants/Public Planners in Other Jurisdictions

The group discussed the organizational framework for the new long range planning entity and its director, suggesting several alternatives:

- A single individual reporting directly to the Mayor
- A single individual reporting directly to the City Council
- Two positions - an administrator reporting to the full Council and a Planning Director with status equal to the other bureaus

Participants also agree that it would be easier to create a strong planning director position if Portland had a city manager form of government.

9914-lrp/draftfinalreport

RESOLUTION**As Amended**

Adopt Option #2, "Maintaining the Planning Bureau and Increasing the Responsibility of the Planning Director" in the Advisory Team's Report to the Mayor as the organizational structure of the Bureau of Planning (Resolution)

WHEREAS, long range planning is a high priority for the City Council as we work to meet the City's housing and employment goals, maintain and improve neighborhood livability, ensure Central City vitality, work in partnership with Metro and the region to meet 2040 goals and state land use requirements, respond to the challenges of the Endangered Species Act, maintain a healthy environment, meet growing transportation demands, and respond to growth pressures and citizen concerns about growth and to increased demand for city services and facilities, and

WHEREAS, the creation of the Office of Planning and Development Review (OPDR) and transfer of the Bureau of Planning's Development Review section to OPDR have taken place, and

WHEREAS, the Council directed the Mayor to return to the Council by May 12 with recommendations for the placement and organization of long range planning functions of the City of Portland and its bureaus, and

WHEREAS, the Mayor set up an Advisory Team to assist her in developing recommendations for the Council, and

WHEREAS, interviews were conducted with bureau managers and City Council members and ten focus groups were conducted with community and city stakeholders to solicit input to use as the basis for the Advisory Team's Report to the Mayor, and

WHEREAS, the Report to the Mayor from the Advisory Team (Exhibit A) and the Long Range/Strategic Planning Focus Groups Analysis and Report (Exhibit B) were widely circulated for public comment, and

WHEREAS, the Mayor received comments and feedback to the report from over 50 individuals and groups, who agreed with all or most of the recommendations, and

WHEREAS, the Council supports the establishment of a Planning Coordination Team to convene on a regular basis for the purpose of coordinating and integrating policy development and implementation, with this team to be chaired by the Planning Director and to include, but not be limited to, the bureau managers of the following agencies: Portland Development Commission, Office of Transportation, Office of Finance and Administration, the Bureau of Housing and Community Development, the Office of Neighborhood Involvement, the Bureau of Parks and Recreation, the Bureau of Environmental Services, the Water Bureau, the Energy Office, and the Office of Planning and Development Review, and

NOW THEREFORE, BE IT RESOLVED that the Council adopts Option #2 (Maintaining the Planning Bureau and Increasing the Responsibility of the Planning Director) in the Advisory Team's Report to the Mayor (Exhibit A) as the organizational structure of the Bureau of Planning, and

BE IT FURTHER RESOLVED, that the core functions of the enhanced Bureau of Planning shall include those outlined in the Advisory Team's Report to the Mayor, and

BE IT FURTHER RESOLVED, that the core functions of the enhanced Bureau of Planning will also include an evaluation and monitoring function, and

BE IT FURTHER RESOLVED that the Planning Coordination Team to convene on a regular basis for the purpose of coordinating and integrating policy development and implementation, and

BE IT FURTHER RESOLVED that the Council directs the Office of Finance and Administration to work with the Bureau of Planning and Office of Planning and Development Review to finalize the transfer of personnel and settle budget issues arising from the transfer of development review staff to OPDR by July 1, 1999, to establish which functions of the Urban Services Program should be transferred to OPDR and to the Bureau of Planning, and with the Commissioner in charge to initiate a hiring process for Planning Director that will include the City Council in the selection of the new Planning Director as well as community and stakeholder input in the process, and

BE IT FURTHER RESOLVED that the Commissioner in charge will return to the City Council with ordinances to codify the functions and authorities of the Bureau of Planning and the Planning Director

Adopted by the Council, **MAY 12 1999**

Mayor Vera Katz
Betsy Ames
May 6, 1999

GARY BLACKMER
Auditor of the City of Portland
By

Britta Olson Deputy

617

Agenda No

RESOLUTION NO

35789

Title

As Amended

Adopt Option #2, "Maintaining the Planning Bureau and Increasing the Responsibility of the Planning Director" in the Advisory Team's Report to the Mayor as the organizational structure of the Bureau of Planning (Resolution)

INTRODUCED BY	Filed MAY 7 1999
Mayor Vera Katz	Gary Blackmer Auditor of the City of Portland
NOTED BY COMMISSIONER	
Affairs	
Finance and Administration <i>UK</i>	By <u><i>Gary Kevorkian</i></u> Deputy
Safety	
Utilities	For Meeting of _____
Works	
BUREAU APPROVAL	ACTION TAKEN
Bureau	
Prepared for By Betsy Ames Dated May 6, 1999	
Budget Impact Review	
<input type="checkbox"/> Completed <input type="checkbox"/> Not Required	
Bureau Head <i>UK</i>	

AGENDA		FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS		
				YEAS	NAYS
Consent	Regular <input checked="" type="checkbox"/>	Francesconi	Francesconi	✓	
NOTED BY		Hales	Hales	✓	
City Attorney		Saltzman	Saltzman	✓	
City Auditor		Sten	Sten	✓	
City Engineer		Katz	Katz	✓	