

# WORK SESSION

# AGENDA

## MILWAUKIE CITY COUNCIL WORK SESSION

MARCH 5, 2013

### MILWAUKIE CITY HALL

10722 SE Main Street

A light dinner will be served

- |    |           |                                   |                |    |
|----|-----------|-----------------------------------|----------------|----|
| 1. | 5:00 p.m. | City Manager's Report             | Bill Monahan   |    |
| 2. | 5:30 p.m. | Transportation System Plan Update | Brett Kelter   | 1  |
| 3. | 6:00 p.m. | Capital Campaign Status Update    | JoAnn Herrigel | 40 |

**6:30 p.m. Executive Session** – The Milwaukie City Council will meet in executive session pursuant to ORS 192.660(2)(f) to consider information or records that are exempt by law from public inspection

4. 6:45 p.m. Adjournment

### Information

Executive Session: The City Council may meet in executive session pursuant to ORS 192.660(2). All discussions are confidential and those present may disclose nothing from the Session. Representatives of the news media are allowed to attend Executive Sessions as provided by ORS 192.660(3) but must not disclose any information discussed. No Executive Session may be held for the purpose of taking any final action or making any final decision. Executive Sessions are closed to the public.

### Public Notice

- The Council may vote in work session on non-legislative issues.
- The time listed for each discussion item is approximate. The actual time at which each item is considered may change due to the length of time devoted to the one previous to it.
- The Council requests that all pagers and cell phones be either set on silent mode or turned off during the meeting.
- The City of Milwaukie is committed to providing equal access to information and public meetings per the Americans with Disabilities (ADA). If you need special accommodations, please call 503.786.7502 or email [ocr@ci.milwaukie.or.us](mailto:ocr@ci.milwaukie.or.us) at least 48 hours prior to the meeting.



Agenda Item: WS. 2.  
Meeting Date: 3/05/13

## **COUNCIL AGENDA ITEM SUMMARY**

**Issue/Agenda Title:** TSP Update

**Prepared By:** Brett Kelter, Associate Planner  
**Dept. Head Approval:** Stephen Butler, Planning Director  
**City Manager Approval:** Bill Monahan, City Manager  
**Reviewed by City Manager:** 2/22/13

### **ISSUE BEFORE THE COUNCIL**

Briefing on status of project to update the City's Transportation System Plan (TSP)

### **STAFF RECOMMENDATION**

Proceed with project scope as minor update to TSP

### **KEY FACTS & INFORMATION SUMMARY**

The City is required to keep the TSP compliant with Metro's Regional Transportation Plan, which was updated in 2010. The last amendment to the TSP was a major overhaul completed in 2007. The current update project does not propose any major policy changes. It would extend the forecasting horizon to 2035, refresh the various existing conditions maps to reflect current conditions, remove completed projects from the master list, and adjust the prioritization of remaining projects. The original deadline for demonstrating compliance was November 2012; Metro has granted an extension to December 31, 2013.

### **OTHER ALTERNATIVES CONSIDERED**

Council could direct staff to complete a more comprehensive update involving policy changes and/or more extensive public involvement, similar to the effort undertaken in 2007 to overhaul the TSP.

### **CITY COUNCIL GOALS**

Goal 6d: Carry out review of the TSP.

### **ATTACHMENT LIST**

1. Informational project handout to NDAs
2. Draft of TSP Chapter 6 (Bicycle Element)
3. Draft of TSP Chapter 13 (Funding and Implementation Plan)

### **FISCAL NOTES**

Expanding the project scope will require additional funding.



**To: Mayor and City Council**

**Through: Bill Monahan, City Manager**

**From: Brett Kelter, Associate Planner**

**Subject: TSP Update**

**Date: February 26, 2013, for March 5, 2013, Work Session**

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### **ACTION REQUESTED**

Affirm the project scope of minor updates to the Transportation System Plan, sufficient to demonstrate consistency with Metro's Regional Transportation Plan. The extent of proposed updates does not include major policy changes, but instead focuses on extending the forecasting horizon to 2035, revising maps and text to reflect current conditions, and reviewing project lists to remove completed projects and add new projects that have evolved since 2007. Project prioritization will also be reconsidered in light of current conditions and City goals, including a process for additional public involvement.

### **HISTORY OF PRIOR ACTIONS AND DISCUSSIONS**

- **December 2007:** Adoption of revised TSP (Ord. #1975, Files CPA-07-01, ZA-07-01)
- **July 1997:** Adoption of first TSP (Ordinance #1820, Land Use File CPA-96-01)

### **BACKGROUND**

The City's Transportation System Plan (TSP) implements the State Transportation Planning Rule requirement for local governments to complete long-range multi-modal transportation plans. The City's TSP is an ancillary document to the City's Comprehensive Plan. It was first adopted in 1997, with an extensive update in 2007.

State law requires the City's TSP to be consistent with Metro's Regional Transportation Plan (RTP), most recently updated by Metro in 2010. The current RTP includes a few new concepts and standards and has a forecasting horizon of 2035 (the current TSP has a forecasting horizon of 2030). The original deadline for demonstrating that the City's TSP is consistent with Metro's 2035 RTP was November 2012; Metro has granted an extension to December 31, 2013.

## **Project Approach**

Planning Department staff has reviewed and assessed the City's TSP and determined that the current version already complies with many of the requirements of the 2035 RTP. There have not been any major development projects in Milwaukie since the 2007 TSP update, and the latest forecast modeling does account for the Portland-Milwaukie Light Rail (PMLR) project currently underway. A few revisions and additions are necessary, but staff is confident that the Metro requirements can be addressed with a "light touch" approach to updating the TSP. The proposed update includes the following tasks:

- Adjust the TSP's forecasting horizon from 2030 to 2035. This includes revising the existing analysis of intersection capacity, evaluation of future conditions and needs, and alternatives analysis for the motor vehicle plan component of the TSP.
- Demonstrate how the master plans and action plans for the various system elements (i.e., pedestrian, bicycle, public transit, etc.) will help the region meet its performance targets for 2035. These regional targets include reducing congestion and the percentage of single-occupancy vehicle (SOV) trips, as well as lowering the number of vehicle-miles traveled per capita while improving safety and freight reliability.
- Emphasize pedestrian and bicycle connectivity to transit stops.
- Update existing maps, tables, and text to reflect current conditions as appropriate.
- Add the known PMLR alignment to master plan maps where relevant.
- Remove completed projects and update project descriptions as appropriate.
- Add new projects that have evolved since 2007.
- Adjust the prioritization of projects where appropriate, to reflect current conditions and goals.

Planning Department staff discussed the TSP Update project with all of the Neighborhood District Associations (NDAs) at their monthly meetings in February 2013. Attachment 1 is an informational flyer that was presented to the NDAs at their various meetings. One of the common questions that arose from the NDA meetings was whether the update would include a review and reshuffling of the priorities of all projects on the TSP master list. Some people were concerned that the prioritization was impacting the implementation of projects. Staff is currently working to develop a process for reviewing and reevaluating the project prioritizations, with opportunity for public involvement; staff will present 1-2 options for engaging the public at the Council worksession on March 5.

The NDA discussions also revealed a need for staff to more fully explain the purpose and function of the TSP. Staff will be prepared to discuss this topic with Council on March 5.

Staff continues to prepare proposed revisions to the various TSP chapters. Two of them are presented with this report as examples of the nature and degree of the proposed

changes. Attachment 2 is the draft Chapter 6 (Bicycle Element) and Attachment 3 is the draft Chapter 13 (Funding and Implementation Plan).

### **Timeline for Upcoming Activities**

- **April/May 2013:** Public Open House (*tentative*)
- **June/July 2013:** Public adoption hearings with Planning Commission and City Council (*tentative*)
- **December 31, 2013:** Deadline for compliance with Metro's 2035 RTP

### **CONCURRENCE**

The Planning and Engineering Departments have been coordinating on the TSP Update project to identify the needed changes. Planning Department staff made informational presentations to all of the various Neighborhood District Associations (NDAs) during the second week of February. The Planning Department also briefed the Planning Commission on the status of the project at its regular meeting on February 12, 2013.

### **FISCAL IMPACT**

As originally proposed, the minor-level TSP update project already includes funds allocated to cover the necessary traffic consultant costs, so there are no additional costs if the project remains at its current scope.

A decision to do a more in-depth update would require additional staff resources and funding. The scale of fiscal impacts would depend on the depth of changes. A more extensive public involvement component would require funding to cover the cost of meeting facilitation, notice mailings, and informational mailings and materials. Additional traffic analysis and forecasting would require additional City funds for a consultant with the relevant expertise.

### **WORK LOAD IMPACTS**

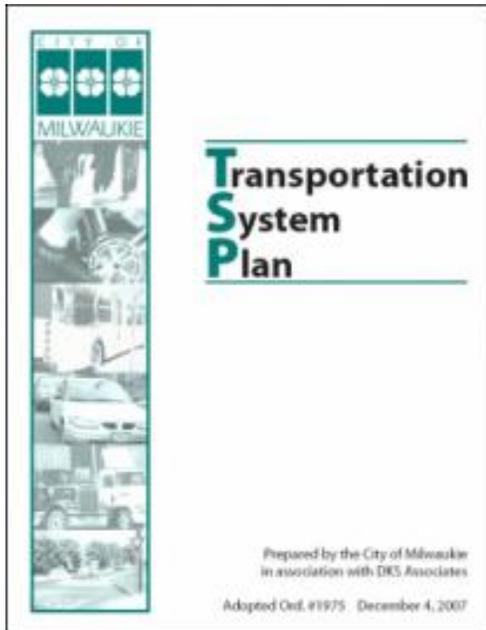
Staff time has been allocated to the project as a minor-level "light-touch" update to the TSP, with a scope that originally assumed a minimal level of public involvement (presentations to the NDAs early in the timeline and an open house event leading into the adoption process). Staff will present 1-2 options for an enhanced public involvement process, which will not negatively impact staff's work plan. Attempting a more in-depth update that involves policy changes and requires a much more extensive public involvement process, however, will have a significant impact on work load within the Planning Department, resulting in a delay for other projects otherwise scheduled for the coming year.

### **ALTERNATIVES**

1. Proceed with the project as proposed
2. Amend project scope to conduct a more intensive update

**ATTACHMENTS**

1. Informational handout distributed to NDAs
2. Draft of TSP Chapter 6 (Bicycle Element)
3. Draft of TSP Chapter 13 (Funding and Implementation Plan)



## 2013 Project to Update the Transportation System Plan (TSP)

The Transportation System Plan (TSP) is the guiding document for making improvements related to transportation in Milwaukee. The TSP identifies needs for the following:

- Pedestrians
- Bicycles
- Public transit
- Freight
- Street network
- Neighborhood traffic management
- Downtown parking

It includes master plans and project lists for each of those elements.

The TSP got a complete overhaul in 2007, with a lot of public involvement. The current plan is still in good shape and does not need another major revision at this time. However, it does need to be updated to remain consistent with Metro's Regional Transportation Plan (RTP). The City has until December 31, 2013 to make the required changes.

### Key Elements of the 2013 Update

- No major policy changes—the existing plan is well organized and sound
- Extend the forecasting horizon to the year 2035—the current TSP only forecasts to 2030
- Update the various TSP maps to show the final light rail alignment & refresh existing conditions
- Remove completed projects from the master list
- Adjust the prioritization of projects where appropriate to reflect current conditions and goals
- Add new projects that have evolved since 2007 (e.g., Kellogg pedestrian bridge and projects anticipated with the Tacoma Station Area Plan)
- Note: Impacts from the light rail project have already been evaluated and are being mitigated. Light rail will become part of the overall transportation system, and assessments of future needs will happen during the next TSP update.

An Open House to share proposed changes is planned for April/May 2013, before beginning the adoption process with the Planning Commission and City Council

The TSP is available online at <http://www.ci.milwaukie.or.us/engineering/transportation-system-plan>. Copies for viewing are available at the Ledding Library, City Hall, and the Public Works office on Johnson Creek Boulevard. Copies can be purchased from the Public Works office (paper or CD-ROM).

**Questions?** Contact **Brett Kelder** in the Planning Department at **503-786-7657** or [kelderb@ci.milwaukie.or.us](mailto:kelderb@ci.milwaukie.or.us).

DRAFT



# 6

## Bicycle Element

The bicycle is a human-powered vehicle that allows people of all ages to move independently, at relatively low cost and with little impact to the environment. Bicycling promotes the well-being of people who live and work in Milwaukie, with the added benefit of reducing auto traffic on city streets. This chapter outlines bicycle needs in Milwaukie over the next 20 years and recommends policy, operational and facility improvements to the city's bicycle system.

### TSP GOAL AND POLICY FRAMEWORK

Milwaukie has developed a set of goals to guide the development of its transportation system (see Chapter 2). Several of these TSP Goals guide the City's policies on bicycle access and connectivity, specifically the following:

- **Goal 1 Livability** calls for convenient bicycling facilities, and removal of barriers that impede capacity.
- **Goal 2 Safety** directs the City to design safe bicycle connections between parks, schools, and other activity centers in Milwaukie.
- **Goal 3 Travel Choices** calls for an integrated citywide network of bikeways.
- **Goal 4 Quality Design** directs the City to integrate bicycle facilities into both public and private street and development projects.
- **Goal 6 Sustainability** calls for the City to increase bicycling as a means of transportation.

### NEEDS

Milwaukie needs a safe and interconnected bicycle system that provides options for all types of cyclists. The deficiencies in Milwaukie's existing bicycle system can be categorized into three areas: Connectivity, Crossings, and Street Designations. Each of these categories is described in this section.

#### Connectivity

The lack of east/west and north/south on-street bicycle facilities creates significant gaps in the bicycle system for travel both in and around the city. There are two east/west roadways that include bike lanes in the city: King Rd and Lake Rd. However, neither of these facilities reaches the downtown area and/or connects with other facilities that could allow for travel to other

destinations. There are also two north/south roadways that have bike lanes: Linwood Ave and 17<sup>th</sup> Ave. Similar to the east/west roadways, these corridors are not continuous.

~~Two~~Three off-street facilities serve Milwaukie (the Springwater Corridor, the Trolley Trail, and the Kellogg Creek Trail), but they also are not continuous. For example, while the connectivity of the Springwater Corridor was ~~recently~~recently upgraded in 2006 with completion of the "Three Bridges" project (three bridges constructed to cross over the Union Pacific Railroad, McLoughlin Blvd, and Johnson Creek), the trail ends just east of 17<sup>th</sup> Ave. Additionally, there are a limited number of connections through the city to the Springwater Corridor. The Trolley Trail, which will be completed in conjunction with the Portland-Milwaukie Light Rail project, ends at Riverfront Park, nearly one mile south of the Springwater Corridor. The Kellogg Creek Trail connects the Milwaukie Riverfront area to the Island Station neighborhood, but does n~~o~~t easily connect to points south.

Major facilities such as McLoughlin Blvd, Highway 224, and the railroads create barriers to cycling through the city. This lack of connectivity (both on-street and off-street) causes significant problems for bicyclists and limits this mode of travel, especially where they make it more difficult for cyclists to access major transit stops downtown.

## Crossings

Throughout the city, there is a need for convenient and safe crossings at arterials and collectors. There are many locations where bicycle routes cross arterials, highways, or railroad tracks, and few of these crossings were designed to accommodate cyclists. Typically, such intersections have limited sight-distance, inadequate pavement space for bicycles, no means for tripping a signal, or no direct, safe connection. The following locations were identified as particular problem crossings:

- 17<sup>th</sup> Ave/Hwy 224
- 17<sup>th</sup> Ave/Harrison St/Hwy 99E
- Railroad crossing of 21<sup>st</sup> Ave at Adams
- Johnson Creek Blvd/Springwater Corridor
- King Rd/Stanley Ave
- Linwood Ave/Springwater Corridor
- King Rd/Linwood Ave
- Monroe St/Linwood Ave
- Linwood Ave/Harmony Rd

## Street Designations

The designation of certain roadways for bicycle travel does not serve all of the needs for bicycle travel in and around the city. Many trips that connect to parks, schools, retail activity centers, etc., occur off of arterial and collector streets. These trips should generally be accommodated on lower volume streets, preferably on designated routes. Such facilities could be considered "shared" facilities or could have a specific designation such as a "bike boulevard," where actual treatments to the roadway are made that enhance the bicycle environment and make additional connections to bicycle destinations.

# BICYCLE FACILITY IMPROVEMENT TOOLBOX

## Types of Cyclists

Bicyclists are a varied group of people with different skill levels, abilities, bicycling experience, and trip types. For example, there are everyday commuters, avid recreational riders, children going to school, and families riding around in their neighborhoods. Their needs and comfort level with the bicycle infrastructure in Milwaukie will vary as a result of these differences. The City needs to accommodate these different types of cyclists by providing adequate facilities for all different types of riders.

Bicycle trips are typically longer than walking trips and shorter than motor vehicle trips, and are attractive at distances up to three miles. Bicycle facilities can generally be categorized as multiuse paths, cycle tracks, bike lanes, shared roadways, and ~~bike boulevards~~ neighborhood greenways. Each of these facilities serves a particular purpose for bicycle travel. Bike lanes, cycle tracks, and multiuse paths ~~both all can accommodate this length of trips of up to three miles~~. However, if the trip is shorter, or if the destination or origin of the trip is not next to a roadway with a bike lane, many bicycle trips can also be made on local streets. Table 6-1 summarizes each of these facilities with a general description of the elements inherent to each facility.

**Table 6-1 Bikeway Types**

Bikeway	Description
Multiuse path	Off-street route, typically recreational-focused, which can be used by several transportation modes, including bicycles, pedestrians, and other nonmotorized modes (i.e., skateboards, roller blades, etc.).
<u>Cycle track</u>	<u>Exclusive bike facility within the roadway, with elements of both a separated path and a bike lane. Separated from motor vehicle traffic by parked cars, bollards, landscaping, or other barriers.</u>
Bike lane	Area within street right-of-way specifically designated for bicycle use.
Shared roadway	Roadways where bicyclists and autos share the same travel lane. May include a wider outside lane and/or bike boulevard treatment (priority given to through bikes on local streets).
<u>Bike Boulevard</u> <u>Neighborhood Greenway</u>	Lower-order, lower-volume streets with various treatments to promote safe and convenient bicycle travel <u>and enhance pedestrian travel as well</u> . Usually accommodate bicyclists and motorists in the same travel lanes, often with no specific vehicle or bicycle lane delineation. Assign higher priority to through bicyclists, with secondary priority assigned to motorists. Also include treatments to slow vehicle traffic to enhance the bicycling environment.

## Bicycle Facility Design Considerations

### Multiuse Paths

As their name implies, multiuse paths are designed accommodate many types of users, and are typically constructed along an independent path such as a stream or greenway. Paths can also be built parallel to a roadway, but are most effective when built independent of a road, separating cyclists from auto traffic. The American Association of State Highway Transportation

## DRAFT

Officials (AASHTO)<sup>1</sup> and the Oregon Department of Transportation (ODOT),<sup>2</sup> state that mixed-use paths can be designed along roadways, provided several design considerations are met:

- A minimum 5-foot buffer should be provided between the path and roadway to protect path users from conflicts with motorists.
- Relatively few vehicle/path user conflict points (e.g., cross-streets or driveways).
- The path can be terminated at each end onto streets with good bicycle/pedestrian facilities or onto another safe, well-designed path.
- The path should not take the place of bicycle/pedestrian facilities (e.g., sidewalks and bicycle lanes) on the parallel street.

### **Cycle Tracks**

Cycle tracks can take a number of forms, depending on the nature of the existing street infrastructure. They combine some elements of a fully separated path with those of a bike lane in the roadway. The key element of a cycle track is that it uses parked cars, bollards, landscaping, curbing, or other barriers to provide some separation from motor vehicle traffic. Cycle tracks may be one-way or two-way, and they may be located at road level, sidewalk level, or an intermediate level. They are distinct from the sidewalk and are designed exclusively as bike facilities. A recommended minimum width is 7 feet, with an additional two-foot "door zone" buffer (where adjacent to parked cars). Pavement markings on the cycle track provide guidance for cyclists, as well as for motorists and pedestrians that may cross the cycle track at driveways or intersections.

There are currently no cycle tracks in Milwaukie, and no potential cycle track routes have been identified to date. However, this type of facility represents an option for future bike improvements that might be most appropriate in certain settings to provide safer bike routes in high-traffic corridors.

### **Bike Lanes**

When possible, bike lanes should be directly adjacent to the curb, rather than adjacent to parked cars or combined with sidewalks. The recommended width of six feet provides sufficient travel space and additional room for bicyclists to steer clear of the curb or parked cars while maintaining a comfortable distance from adjacent moving traffic. Wide bike lanes also enable bicyclists to maneuver around drainage grates, manhole covers, glass and debris. Provision of bike lanes also benefits motor vehicles, which gain greater shy distance/emergency shoulder area, and pedestrians, who gain a buffer between walking areas and moving vehicles. Where right-of-way is limited, the bike lane can be reduced to five feet. Alternatively, widening the curb travel lane (for example, from 12 feet to 14 or 15 feet) can provide better bicycle accommodations and a greater measure of safety as well. However, with higher-volume roadways (e.g., streets with more than 3,000 Average Daily Trips), dedicated bike lanes are much more desirable than wide outside lanes.

The signing and marking of bike lanes should follow the *Manual on Uniform Traffic Control Devices* (MUTCD). Design features in the roadway can improve bicycle safety as well. For example, using curb storm drain inlets rather than catch basins significantly improves bicycle facilities.

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<sup>1</sup> *A Guide for the Development of Bicycle Facilities*, American Association of State Highway and Transportation Officials, 1999.

<sup>2</sup> *Oregon Bicycle and Pedestrian Plan, An Element of the Oregon Transportation Plan*, Oregon Department of Transportation, Adopted June 14, 1995.

## Shared Roadways

Shared roadways can be designed to safely accommodate both bicycle and auto traffic. Figure 6-1 illustrates an example of an appropriate warning sign with a supplemental "Share the Road" plaque that may be used to draw more attention to the fact that slow-moving forms of transportation may be using the roadway. When used, the supplemental plaque must be installed below the warning sign on the same signpost. Directional pavement markings may also be considered on shared roadways to supplement the bicycle warning signs when desired. The pavement markings illustrated in Figure 6-1 below are typically called "Sharrows" or "Shared Lane Markings" and are utilized on bicycle travel routes that have on-street parking but no designated bike lanes. Sharrows are commonly used on streets where dedicated bike lanes are desirable but are not possible for any number of reasons. The marking helps to align bicyclists, to shift their travel pattern out of the direction of a parked car door opening into their travel path.

**Figure 6-1 Bicycle Signs and Markings**



**Bicycle Warning Signs**



**"Share the Road" Plaque**



**Bike Route Signs**



**Bicycle Pavement Markings**

It should be noted, however, that while posting "Bike Route" signage for bicyclists is an acceptable way for the City to demarcate bike routes, such signs should be coupled with pavement markings and/or way finding signage for bicyclists to get the most value out of the City's investment. Although this is an adopted MUTCD sign, it does not provide much information. Adding way-finding information such as distances to various destinations, directional arrows, and estimated travel times makes the sign much more useful. These signs are most effective when placed in useful locations, such as where a bike route makes a turn that is not intuitive to riders.

## **Bike BoulevardsNeighborhood Greenways**

The term "neighborhood greenway" has recently evolved from the "bike boulevard" concept of treatments, which improve the network of safe bicycle routes by Bike boulevards generally utilize streets with lower traffic volumes and vehicle speeds, such as minor collectors or local streets that pass through residential neighborhoods. The bike boulevard treatments also make these routes safer for pedestrians and motorists, at the same time incorporating low-impact stormwater treatment measures such as bioswales and raingardens. The general traffic calming provided by neighborhood greenway improvements adds to neighborhood livability.

Traffic controls along a bike boulevard neighborhood greenway assign priority to bicyclists while encouraging through-vehicle traffic to use alternate parallel routes. Traffic calming and other treatments along the corridor reduce motor vehicle speeds so that motorists and bicyclists generally travel at the same speed, creating a safer and more comfortable environment for all users. Bike boulevards Neighborhood greenways also incorporate treatments to facilitate safe and convenient crossings of major streets. Bike boulevards Neighborhood greenways work best in well-connected street grids, where riders can follow reasonably direct and logical routes. Bike boulevards and where also work best when higher-order, parallel streets exist to serve through vehicle traffic.

## DRAFT

Milwaukie's ~~bike boulevard~~neighborhood greenway network could be developed through a variety of improvements ranging from minor street enhancements (e.g., directional pavement markings) to larger-scale projects (e.g., intersection signalization). The various treatments fall into five major application levels based on their degree of physical intensity, with Level 1 representing the least physically intensive treatments that can be implemented at relatively low cost:

- **Level 1: Signage** (e.g., way-finding and warning signs along and approaching the ~~bike boulevard~~neighborhood greenway)
- **Level 2: Pavement markings** (e.g., directional pavement markings, shared lane markings)
- **Level 3: Intersection treatments** (e.g., signalization, curb extensions, refuge islands)
- **Level 4: Traffic calming** (e.g., speed humps, mini traffic circles)
- **Level 5: Traffic diversion** (e.g., choker entrances, traffic diverters)

Corridors targeted for higher-level applications would also receive relevant lower-level treatments. For instance, a street targeted for Level 3 applications should also include Level 1 and 2 applications as necessary. It should be noted that some applications might not be appropriate on all streets. In other words, it may not be necessary to implement all Level 2 applications on a particular street designated for Level 2 treatment in order to create a functional ~~bike boulevard~~neighborhood greenway.

~~Designating a street as a "bike boulevard" does not suggest that only bicyclists should use it. In fact, the treatments applied to bike boulevards make these routes safer for pedestrians and motorists as well, and the general traffic calming adds to neighborhood livability. With that in mind, using alternative labels for "bike boulevards" might be appropriate to stress the multimodal benefit. Suggestions include "community corridors" and "neighborhood parkways."~~

## Bicycle Parking

Bicycle parking and storage facilities are an important component of an effective bicycle system. Lack of proper storage facilities discourages potential riders from traveling by bicycle. Bike racks should be located at significant activity generators including schools, parks, and commercial areas, as well as at major transit stops. Racks should be placed in highly visible locations and within convenient proximity to main building entrances. Bike racks should be designed to provide two points of contact to the bicycle so the user can lock both the wheel and the frame to the rack. Bike lockers, showers, and caches of repair equipment (patch kits, tire tubes, etc.) would be helpful at locations where long-term parking is expected, such as the future MAX stations downtown, on Park Ave, and at Tacoma St.; downtown bus stops; or major employment centers. The attractiveness of bicycle parking is also improved by providing covered parking and/or secured facilities where bicycles may be locked away.

## RECOMMENDATIONS

### Strategies

Bikeway improvements are aimed at closing the gaps in the bicycle network along arterial and collector roadways, establishing low-traffic routes that parallel arterials and collectors, and providing multimodal links to improve livability. To meet the TSP goals and policies outlined in Chapter 2, and address the needs outlined in this chapter, the City should take the following steps for improving the bicycle system:

- Fill in gaps in the existing bike corridor network (on arterials and collectors).

## DRAFT

- Construct new bike lanes on strategic arterials and collectors.
- Connect key bicycle corridors to schools, parks, ~~and~~ activity centers, and major transit stops.
- Improve crossing safety and connectivity.
- Designate ~~bike boulevards~~ neighborhood greenways on lower-volume streets that connect major bicycle facilities and/or bicycle destinations.
- Maintain bike lanes, off-street paths, signage, and other facility improvements.
- Construct and improve multiuse paths for recreational and commuter use.
- Involve cyclists in the design and planning of bicycle and road facilities.
- Educate cyclists and motorists about bicycle routes, laws, and opportunities.

These strategies will be used to guide and develop projects that address the needs of the bicycling community in Milwaukie as well as those of bicyclists throughout the region. The projects resulting from these strategies fall into three categories: capital, operational, and maintenance. Key projects in each of these categories are described below.

### Capital

These projects are typically large-scale infrastructure projects or projects that require some sort of physical infrastructure to be built. Capital projects also typically require ongoing maintenance that must be programmed into the existing maintenance schedule.

#### *Key projects*

Several potential ~~bike boulevard~~ neighborhood greenway corridors have been identified to enhance Milwaukie's bicycle network. The corridors were identified with respect to major bicycling destinations as well as their proximity to desired bicycle travel routes. The recommended corridors are shown in Figure 6.2 and described below:

- Monroe St between downtown Milwaukie and Linwood Ave
- Stanley Ave between Railroad Ave and Johnson Creek Blvd
- A corridor roughly following 40<sup>th</sup> Ave north from Monroe St and then splitting into two separate corridors at Harvey St. One ~~bike boulevard~~ neighborhood greenway would continue north on 40<sup>th</sup> Ave and follow Olsen St and 42<sup>nd</sup> Ave to connect with Johnson Creek Blvd. The second ~~bike boulevard~~ neighborhood greenway would follow Harvey St west from 40<sup>th</sup> Ave and follow Balfour St, 29<sup>th</sup> Ave, and Van Water St to connect with the Springwater Corridor. If 29<sup>th</sup> Ave is extended to the south, the ~~bike boulevard~~ neighborhood greenway should connect to the south as well (see Figure 8-3a, which shows the future extension of 29<sup>th</sup> Ave).
- 17<sup>th</sup> Ave between Waverly Dr and Harrison St, a key bicycle connection between downtown Milwaukie and the Sellwood neighborhood in Portland. The connection should be improved by constructing bike lanes or a multiuse path.

These ~~bike boulevards~~ neighborhood greenways should be targeted for Level 4 applications, including signage, pavement markings, intersection treatments, and traffic calming. Each corridor currently includes some boulevard components (e.g., speed humps). Due to limited street connectivity, Level 5 bike boulevard applications (traffic diversion) are not recommended for these corridors. To identify and develop additional site-specific treatments, the City should involve the bicycling community, neighborhood groups, and the Public Works Department. Further analysis and engineering work may also be necessary to determine the feasibility of some applications.

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## **Operational**

These projects involve actions that make existing infrastructure more useable. They include upkeep of existing facilities, educational campaigns, or distributing information about the use of the transportation network. They are typically smaller in scale and dollars than capital projects and are implemented more broadly than in one specific location.

### *Key projects*

- Driver and cyclist education, including driver and biker awareness classes, "Share the Road" safety class, bike safety education for kids and adults.
- Encouraging cycling through community events to get new cyclists involved and interested in how to commute by bike.
- Consider applying rumble strips or other treatments to safely define bike lanes in places, such as Johnson Creek Blvd, where vehicles commonly cross into the bike lane.

## **Policy**

These projects do not typically improve the bicycle environment in a physical manner, but rather result in a fundamental change to the way bicycle travel is thought of and treated within the city of Milwaukie.

### *Key projects*

- Enforce traffic laws that protect cyclists.
- Collect and maintain cycling traffic counts to measure the effect of improvements.
- Work with the City of Portland and Clackamas County when implementing bike boulevards, bike lanes, and multiuse paths to ensure good connectivity beyond Milwaukie.
- Consider establishing a committee to advise and advocate for implementation of the projects in this plan.

## **Master Plan**

The Bicycle Master Plan is composed of a list of projects that address the identified needs (see Figure 6-2). Summarized in Table 6-2, the Master Plan represents the "wish list" of bicycle-related projects in Milwaukie. The planning-level cost estimates provided in Tables 6-2 and 6-3 are based on general unit costs for transportation improvements but do not reflect the unique elements that can significantly add to project costs. As projects are pursued, each of these project costs will need further refinement in order to detail right-of-way requirements and costs associated with special design details.



# Transportation System Plan

## FIGURE 6-2

### BICYCLE MASTER PLAN

December 2007

#### LEGEND

Existing Bicycle Facilities	Proposed Improvements
Shared Facility	Bicycle Intersection Safety Improvement
Bicycle Lane	Bicycle Corridor Enhancement
Springwater Trail	Bike Boulevard
Kellogg Creek Trail	Bicycle Lanes
Schools	Trolley Trail
Major Roads	County Line
Streets	Parks
Railroad	Water
10' Contours	City Limits

#### PROPOSED PROJECTS

##### Improve Intersection to Increase Bicycle Safety

- A** Adams St/21st Ave/Railroad Crossing
- B** Johnson Creek Blvd/Springwater Trail
- C** Johnson Creek Blvd/Linwood Ave
- D** Linwood Ave/King Rd
- E** Linwood Ave/Monroe St
- F** Linwood Ave/Harmony Rd
- G** Washington St/Oak St/HWY 224
- H** International Way/Lake Rd

##### Provide Bicycle Lanes Where not Currently Present

- I** Harrison St from HWY 99E to 21st Ave
- J** Lake Rd from Main St to Guilford Dr
- K** Oakfield Rd from Guilford Ct to Lake Rd
- L** Harrison St from HWY 224 to 42nd Ave
- M** 37th Ave from ...
- N** Railroad Ave from ...
- O** 43rd Ave from ...
- P** Linwood Ave from ...
- Q** Linwood Ave from ...
- R** Rusk Rd from ...
- S** Main St from Harrison St to Moores St
- T** 21st Ave from Harrison St to Lake Rd

##### Enhance Existing Bicycle Connection

- U** Install Bike Boulevard treatments at various locations
- V** Construct bicycle overpass from Railroad Ave to International Way
- W** Improve Springwater Trail paving
- X** Improve Kellogg Creek Trail
- Y** Install Trolley Trail signage
- Z** Fill in gaps in existing bike network with bike lanes or multiuse path.
- AA** Improve intersection safety on 17th Ave at HWY 224 and at 99E.
- AB** Complete Springwater Trail along Ochoco St

Add McLoughlin Blvd bike/ped underpass, label as "AD"

Add proposed bike lanes from Hwy 224 to 21st Ave  
Remove shared facility designation

Remove shared facility designation

1) Remove proposed bike lanes  
2) End Lake Rd bike lane at 21st Ave

Add Kellogg Creek Bike/Ped Bridge, label as "AC"

Collapse category to read "See Table 6-1 for U - AD project descriptions"



**Table 6-2 Bicycle Master Plan Projects**

Map ID <sup>3</sup>	Priority	Type	Project Name	Project Description	From	To	Cost(s) \$1,000s <sup>4</sup>
A	Low	C	Intersection Improvements at Adams and 21 <sup>st</sup>	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
B	Low	C	Springwater Corridor Intersection Improvements at 45 <sup>th</sup>	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
C	Low	C	Intersection Improvements at Johnson Creek Blvd and Linwood	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
D	Low	C	Intersection Improvements at Linwood and King	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
E	Low	C	Intersection Improvements at Linwood and Monroe	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
F	Low	C	Intersection Improvements at Linwood and Harmony	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
G	High	C	Hwy 224 Crossing Improvements at Oak and Washington	Improve intersection crossing safety for cyclists at Washington Street and Oak Street.	Location specific	Location specific	\$10
H	Low	C	Intersection Improvements at International Way and Lake Road	Improve safety of crossing at intersection.	Location specific	Location specific	\$10
I	Med	C	Harrison Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes (cost included with Harrison Street road widening project).	Hwy 99E	21 <sup>st</sup> Ave	NA
J	Low	C	Lake Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes (cost included with Lake Road road widening project).	Main St	Guilford Dr	NA
K	Low	C	Oatfield Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Guilford Ct	Lake Rd	\$348
L	Low	C	Harrison Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Hwy 224	42 <sup>nd</sup> Ave	\$13

<sup>3</sup> See Figure 6-2

<sup>4</sup> Project costs are in 2007 dollars. Future costs may be more due to inflation. Costing details can be found in the Technical Appendix. In the case of operational projects, estimated costs are for the entire 22-year planning period.

Map ID <sup>3</sup>	Priority	Type	Project Name	Project Description	From	To	Cost(s) \$1,000s <sup>4</sup>
M	Low	C	37 <sup>th</sup> Avenue Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Harrison St	Hwy 224	\$2,900
N	High	C	Railroad Avenue Bike Lanes/Facilities	Fill in gaps in existing bicycle network with bike lanes, cycle track, multiuse path, or other facilities (cost included with Railroad Avenue road widening project).	37 <sup>th</sup> Ave	Linwood Ave	NA
O	Low	C	43 <sup>rd</sup> Avenue Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	King Rd	Filbert St	\$1,014
P	Low	C	Linwood Avenue Bike Lanes (north)	Fill in gaps in existing bicycle network with bike lanes.	Queen Rd	Johnson Creek Blvd	\$1,692
Q	Low	C	Linwood Avenue Bike Lanes (south)	Fill in gaps in existing bicycle network with bike lanes.	Juniper St	Harmony Rd	\$296
R	Low	C	Rusk Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Lake Rd	North Clackamas Park	\$936
S	Med	C	Main Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Harrison St	Moores St	\$2,131
T	Low	G	<del>21<sup>st</sup> Avenue Bike Lanes</del>	<del>Fill in gaps in existing bicycle network with bike lanes.</del>	<del>Harrison St</del>	<del>Lake Rd</del>	<del>\$50</del>
U	High	C	29 <sup>th</sup> /Harvey/40 <sup>th</sup> Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.	Springwater Trail	Monroe St	\$200
U	High	C	Monroe Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.	21 <sup>st</sup> Ave	Linwood Ave	\$300
U	Med	C	Stanley Avenue Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.	Springwater Trail	Railroad Ave	\$300
U	Med	C	19 <sup>th</sup> and Sparrow Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements. This would connect the south end of Kellogg Creek Trail to River Rd.	Eagle St	River Rd	\$737
V	Low	C	Bicycle and Pedestrian Overpass	Establish a dedicated bicycle and pedestrian connection across Railroad Avenue and the railroad tracks.	Railroad Ave	International Way	\$2,025
W	Med	G	Springwater Trail Paving Project	Improve corridor through repaving existing trail.	29 <sup>th</sup> Ave	Linwood Ave	\$500
X	Low	C	Kellogg Creek Trail Improvements	Resurface trail and provide wayfinding signage to/from trail.	Milwaukie Riverfront	Treatment Plant	\$623
Y	Low	G	Trolley Trail Signage	Design and install Trolley Trail signage.	Milwaukie Riverfront	Southern city limits	\$54
Z	High	C	17 <sup>th</sup> Avenue Bikeway and Intersection Safety Improvements	Fill in gaps in existing bicycle network with bike lanes or multiuse path. Improve intersection safety and eastbound connection at 17 <sup>th</sup> Ave/Hwy 99E. Improve intersection safety at 17 <sup>th</sup> Ave/Hwy 224.	Waverly Dr	Harrison St	\$135

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Map ID <sup>3</sup>	Priority	Type	Project Name	Project Description	From	To	Cost(s) \$1,000s <sup>4</sup>
AA	Low	C	Springwater Trail Ramp Improvement at McLoughlin	Improve ramp at Springwater Trail and McLoughlin Blvd.	Location specific	Location specific	\$15
AB	High	C	Springwater Trail Completion	Contribute to regional project to complete Springwater Trail ("Sellwood Gap") along Ochoco Street.	17 <sup>th</sup> Ave	19 <sup>th</sup> Ave	\$80
NA	Low	C	Kronberg Park Trail	Construct multimodal trail along Kellogg Creek connecting Kronberg Park to downtown Milwaukie.	McLoughlin Blvd	Downtown	\$1,200
<u>AC</u>	<u>High</u>	<u>C</u>	<u>Kellogg Creek Bike-Ped Bridge</u>	<u>Construct bike-ped overpass over Kellogg Creek in conjunction with light rail bridge.</u>	<u>Site specific</u>	<u>Site specific</u>	<u>\$2,500</u>
<u>AD</u>	<u>High</u>	<u>C</u>	<u>Kellogg Creek Dam Removal and Hwy 99E Underpass</u>	<u>Replace 99E bridge over Kellogg Creek, remove dam, restore habitat; construct bike-ped undercrossing between downtown Milwaukie and Riverfront Park.</u>	<u>Site specific</u>	<u>Site specific</u>	<u>\$9,000</u>
NA	High	C	Bike Route Signage	Install neighborhood bike route signage.	Citywide	Citywide	\$150
NA	High	O	Bike Lane Maintenance	Sweep bike lanes to remove debris.	Citywide	Citywide	\$1100
NA	Low	O	Bicycle-friendly Street Grates	Install bicycle-friendly street grates.	Citywide	Citywide	\$50
NA	Low	O	Milwaukie Bike Map	Produce a Milwaukie Bike Map.	Citywide	Citywide	\$50
NA	Low	O	Police Enforcement on Drivers	Enforce laws related to bike lanes and bicycle safety.	Citywide	Citywide	\$10
NA	Low	O	Bike Lane Striping	Re-stripe existing bike lanes and stripe bike lanes on streets where buses and bicyclists share the road.	Citywide	Citywide	\$20
NA	Low	C	Springwater Trail Signage	Install wayfinding signage for Springwater Trail.	Citywide	Citywide	\$15
NA	Low	O	North Clackamas Greenway Corridor Study	Study feasibility of corridor for multiuse path construction (possibly along Kellogg Creek).	Downtown	Clackamas Regional Center	\$50
NA	Med	O	Cyclist Education	Promote cycling through bike use and route selection education.	Citywide	Citywide	\$10
NA	Med	O	Community Bicycle Rides	Coordinate community bike rides to encourage bike use.	Citywide	Citywide	\$5

**Notes:**

C = Capital Project      High = High priority  
 O = Operational Project      Med = Medium priority  
 P = Policy Project      Low = Low priority

## Action Plan

The Bicycle Action Plan identifies projects that are reasonably expected to be funded with City funds by 2030, which meets the requirements of the updated State's Transportation Planning Rule.<sup>5</sup> The Action Plan project list is the result of a citywide project ranking process. All of the modal master plan projects were ranked by the TSP Advisory Committee after consideration of the Working Groups' priorities, other public support for the project, and how well each project implements the TSP goals and policies. The highest-ranking bicycle projects that are reasonably expected to be funded (see Chapter 13) are shown in Table 6-3.

**Table 6-3 Bicycle Action Plan**

Project Name	Project Description	From	To	Direct Funding or Grant Match
29 <sup>th</sup> /Harvey/40 <sup>th</sup> Bicycle Boulevard Neighborhood Greenway	Designate as a Bicycle Boulevard Neighborhood Greenway and install bicycle boulevard improvements.	Springwater Trail	Monroe St	Direct
Bike Route Signage	Install neighborhood bike route signage.	Citywide	Citywide	Direct
Bike Lane Maintenance	Sweep bike lanes to remove debris.	Citywide	Citywide	Direct
Monroe Bicycle Boulevard Neighborhood Greenway	Designate as a Bicycle Boulevard Neighborhood Greenway and install bicycle boulevard improvements.	21 <sup>st</sup> Ave	Linwood Ave	Match
17 <sup>th</sup> Avenue Bikeway and Intersection Safety Improvements	Fill in gaps in existing bicycle network with bike lanes or multiuse path. Improve intersection safety and eastbound connection at 17 <sup>th</sup> Ave/Hwy 99E. Improve intersection safety at 17 <sup>th</sup> Ave/Hwy 224.	Waverly Dr	Harrison St	Match

## REGIONAL TRANSPORTATION PLAN (RTP) COMPLIANCE

The projects identified in the Master Plan list and further refined in the Action Plan list are in line consistent with the Metro 2035 Regional Transportation Plan (RTP). The RTP includes specific goals that can be used to measure the success of regional planning efforts to improve the overall transportation system. Specifically, the Master Plan and Action Plan projects identified in this chapter are in line with Metro's goals for regional mobility and non-single occupant vehicle (non-SOV) modal targets.

Three of the goals in the 2035 RTP relate to the regional bicycle system in particular:

<sup>5</sup> OAR Chapter 660, Department of Land Conservation and Development, Division 012, Transportation Planning, adopted on March 15, 2005, effective April 2005.

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- Reduce the number of bicyclist fatalities plus serious injuries by 50% compared to 2005.
- Triple the biking mode share compared to 2005.
- Increase by 50% the number of essential destinations accessible within 30 minutes by trails and bicycling compared to 2005.

All of the Master Plan and Action Plan projects identified in this chapter will help the region meet these goals. At the community level in Milwaukie, some of these goals are already met. For example, there is no record of bicyclist fatalities or serious injuries in 2012. And given the relatively compact nature of the city, no destination is more than 30 minutes away by bicycle. Certainly, the strategies outlined in this chapter will allow Milwaukie to contribute further to the region meeting those goals. It is the effort to increase the biking mode share where Milwaukie can play a more active role in meeting the regional goal. As more data and tools become available to help measure local biking mode share, it will become easier to gauge the success of the projects identified in this chapter in increasing that share.



# 13 Funding and Implementation Plan

The purpose of this chapter is to describe the funding framework for considering City of Milwaukie transportation improvements between ~~2008 and 2030~~ 2013 and 2035. This chapter outlines the foreseeable funding sources—and their restrictions—for both capital improvements and transportation maintenance projects. This chapter also provides a brief overview of additional funding sources.

## CURRENT FUNDING SOURCES

The City of Milwaukie relies on a variety of funding sources for maintaining and improving its transportation infrastructure. Most of these sources are constrained, meaning that they can only be used for a specific function like expanding the system's capacity, paving the streets, or building bicycle facilities. The funds also flow into Milwaukie from a variety of sources, most of which are tax-based and administered through different levels of government and through different mechanisms. The City has identified 11 transportation funding sources that are currently and potentially available.<sup>1</sup>

### Grant/Competitive Programs

- **Metropolitan Transportation Improvement Program (MTIP)** identifies how all federal transportation money is to be spent in the region in two-year increments. Each time the MTIP is developed, Milwaukie competes with other jurisdictions in the region for federal "regional flexible funds" that can be used for most aspects of the local transportation system.
- **Congressional Appropriations** make federal funds available to Milwaukie through the sponsorship of a U.S. congressperson. Such appropriations are highly sought after and are not easily secured. However, Milwaukie has had some success in receiving appropriations.
- **Statewide Transportation Improvement Program (STIP)** is ODOT's project funding and scheduling document. The STIP makes funds available to cities, through a highly competitive process, for expansion, preservation, safety, and other system enhancements. The STIP programs expenditures from both State revenues and some federal programs.

<sup>1</sup> This list includes federal funds that are not part of the City's regular revenue stream for transportation improvements.

## City Share of State Highway Trust Fund

A portion of the taxes and fees assessed on Oregon motorists and freight haulers is paid to the City annually on a per capita basis. The primary sources are the State motor vehicle fuel tax, a weight-mile charge on heavy trucks, and vehicle registration fees. ODOT requires that cities set aside one percent of the local share of Highway Trust Fund proceeds for the construction and maintenance of bicycle facilities.

## Local Funds—Fees and Taxes

- **Franchise Fees** are paid by each of the City-owned facilities—water, wastewater, and stormwater—to the City's Street Fund for their use of the public right-of-way. The utilities are able to pay the franchise fee with some of the revenue they collect from Milwaukie utility rate-payers.
- **PGE Privilege Tax** is similar to the franchise fees, in that Portland General Electric pays the City for its use of the public right-of-way. As part of the City's Street Surface Maintenance Program, a portion of this fee is dedicated to surface maintenance for the city's most important streets.
- **Local Gas Tax** is separate and apart from the State gasoline tax. Milwaukie gas stations pay a tax on fuel sold in Milwaukie, which is sent to the City for street maintenance use only.
- **Street Surface Maintenance Fee** is similar to a utility bill, in that all Milwaukie properties are charged a monthly fee for use of the street system. These fees are dedicated for street maintenance use only.
- **Local Improvement Districts (LIDs)** are special assessment districts in which property owners benefiting from a transportation improvement pay for that improvement. These have not been frequently used by the City, but are available to interested property owners.

## Local Funds—Development Contributions

- **System Development Charges** are collected from developers when new construction is expected to place heightened demand on the transportation system. The vast majority of these monies can only be used by the City for adding capacity to the system.
- **Fee In Lieu of Construction** is collected when required street frontage improvements, typically associated with residential construction, are impractical to build. These funds are limited in both how and where they can be spent.

The following section provides additional detail about most of these sources, particularly those that the City can rely on regularly. The regular revenue stream projection provides the baseline for the Funding and Implementation Plan in this TSP.

Most of these funding sources can be (and have been) used by the City to leverage one another and additional sources. As transportation improvements are expensive and the competition for transportation dollars is fierce, the City must utilize the funds it regularly receives as "match" for larger awards, which are typically available through federal grant programs. The complete transportation funding picture for the City therefore requires that regular revenues cover maintenance, operations, small projects, and matches for larger capital projects that the City cannot accomplish without an infusion of funds for the specified project. The Funding and Implementation Plan follows this premise throughout.

Table 13-1 summarizes the current, anticipated, and approved funding sources and the estimated revenue available to the City of Milwaukie for transportation-related projects over the next 22 years. Total projected revenues over the next 22 years are approximately \$3.752.2 million for capital projects, \$22.924.9 million for maintenance projects, and \$33.437.2 million for either capital or maintenance projects.

### **System Development Charges and Fee in Lieu of Construction**

A transportation System Development Charge (SDC) is collected from developers when new construction or redevelopment is expected to place new demands on the transportation system. The SDC charge is based on a study-based rate and the number of new vehicle trips the development is expected to generate. The City's current SDC rate is \$1,596.521,676 per new PM-peak hour trip. The transportation SDC consists of a reimbursement charge and an improvement charge. The improvement charge portion is roughly 95% of the total SDC and can only be used to construct transportation projects that add capacity.

Fee in Lieu of Construction (FILOC) is collected from developers in lieu of construction when required frontage improvements would not be practical, efficient, or beneficial to construct. For example, constructing an isolated sidewalk in the middle of a residential block where no sidewalks currently exist has minimal impact. However, pooling fees collected in lieu of required frontage construction enables the City to build improvements where they are most needed in the neighborhood in which they were collected, such as along identified bikeways, walkways, or school routes.

Over the past five fiscal years, SDC and FILOC revenue averaged \$170,000100,000 per year (in 20072012 dollars). The projected revenue from these sources over the next 22 years is estimated to be \$3.752.2 million.

### **Franchise Fees**

Each of the three City-owned public utilities—water, wastewater, and stormwater—pays 8% of its net revenue to the Street Fund for the use of the public right-of-way. For the fiscal year 2006/20072010-11, the Street Fund received \$546,650614,000 from such franchise fees. Franchise Fee projected revenue is \$4214 million over the next 22 years and is not restricted to either capital or maintenance projects.

### **State Gas Tax and Vehicle License Fees**

The State of Oregon collects taxes and fees on motor vehicle fuel, licenses, and permits and then deposits the proceeds into the Highway Trust Fund. A portion of this fund is paid to cities annually on a per capita basis. By statute, the money may be used only for road-related purposes. Like most Oregon cities, Milwaukie uses its share primarily for street department operations and associated maintenance activities. Road maintenance includes a variety of activities such as striping, signage, sweeping, and shoulder maintenance.

Oregon motor vehicle fuel taxes are collected as a fixed amount per gallon of gasoline sold. The Oregon gas tax is currently 31 cents per gallon, increased from 24 cents per gallon on January 1, 2011 and has not increased since 1993. Because it is levied on a per gallon basis, the revenue does not vary with changes in gasoline prices. Since ~~there has been no increases do not keep up with inflation since 1993~~, the value of this revenue has eroded over time as maintenance materials and repair costs have increased. Additionally, increased fuel efficiency in new vehicles has further reduced the total dollars collected relative to total miles driven.

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Oregon vehicle registration fees are collected as a fixed amount at the time a vehicle is registered with the Department of Motor Vehicles. Vehicle registration fees in Oregon have recently increased to about \$43 per year per vehicle from \$15 per vehicle per year to \$27 per vehicle per year for passenger cars, with similar increases for other vehicle types. Vehicle registration fees are not adjusted for inflation.

In fiscal year ~~2006/2007~~2010-11, the City received roughly ~~\$961,000~~1,018,000 from the Oregon Highway Trust Fund. The City's projected share of this fund is approximately ~~\$24.23~~ million over the next 22 years.

These funds are flexible and are available for either capital or maintenance projects.

### **Bike Path Fund**

One percent (1.0%) of the payments from the Highway Trust Fund must be reserved for the maintenance and construction of bicycle facilities. In fiscal year ~~2006/2007~~2010-11, the City received ~~\$9,744,180~~ from this revenue source and expects to receive ~~\$245,000~~223,000 over the next 22 years. Although these monies may only be spent on bicycle facilities, they are classified as unrestricted because they can contribute to capital or maintenance projects.

### **Portland General Electric (PGE) Privilege Tax**

Similar to franchise fees, the PGE Privilege Tax is paid by a utility (in this case PGE) in exchange for the use of the public right-of-way. The rate approved by the Milwaukie City Council is 1.5% of Milwaukie customers' bills. ~~Because PGE payments to the City are based on a calendar year, the City will receive one-half of~~In fiscal year 2010-11, the estimated annual revenue of \$300,000~~312,000 was received in the first program year~~. Revenues for the next 22 years are projected to total nearly ~~\$6.87~~ million. Monies collected from this tax are dedicated to roadway surface preservation, including maintenance, rehabilitation, and reconstruction. They cannot be used to construct capital projects.

### **Street Surface Maintenance Fee**

The street maintenance fee is paid by all City of Milwaukie utility customers (residents, businesses, government units, etc.) through their utility bill and is based on an estimate of daily trips generated by each customer. ~~In fiscal year 2007/2008~~2010-11, revenues ~~are expected to be~~are ~~\$600,000~~620,000, and the fee is expected to generate ~~\$13.4~~13.64 million over the next 22 years. Monies collected from this fee are dedicated to roadway surface preservation, including maintenance, rehabilitation, and reconstruction. They cannot be used to construct capital projects.

### **Local Motor Vehicle Fuel Tax**

The City of Milwaukie local gas tax of two cents per gallon went into effect in April 2007. Revenue generated in fiscal year ~~2007/2008~~2010-11 ~~was is expected to be approximately~~ ~~\$125,000~~197,000. Over the next 22 years, the total revenue from this source will be approximately ~~\$2.84~~3 million. Monies collected from this tax are dedicated to roadway surface preservation, including maintenance, rehabilitation, and reconstruction. They cannot be used to construct capital projects.

**Table 13-1 Projected Transportation Revenue  
for the 22-Year Planning Period (in 2007/2012 dollars)**

Funding Source	Capital	Unrestricted	Maintenance	TOTAL
SDC and FILOC	\$3,756,273	2,200,000		\$ 3,756,273 2,200,000
Franchise Fees		\$ 12,026,300	14,000,000	12,026,300 14,000,000
State Gas Tax		21,151,174	23,000,000	21,151,174 23,000,000
Bike Path Fund		213,642	223,000	213,642 223,000
Street Maintenance Fee			\$13,412,781	13,640,000
PGE Privilege Tax			6,765,000	7,000,000
Local Gas Tax			2,750,000	4,300,000
<b>Projected Revenue (2008/2013 to 2030/2035)<sup>2</sup></b>	<b>\$3,756,273 2,200,000</b>	<b>\$33,391,116 37,223,000</b>	<b>\$22,927,781 24,940,000</b>	<b>\$60,075,170 64,363,000</b>

## CAPITAL AND MAINTENANCE PROJECTS

With limited local funding and many needs, the City will continually strive to allocate investments for projects that best meet the goals as outlined in Chapter 2. Additionally, the City will pursue a strategy that allocates those funds not earmarked for maintenance (as shown in Table 13-2) in the following manner:

- Approximately 20% to local system maintenance
- Approximately 20% to capital and maintenance projects that can be completed with limited City funds
- Approximately 60% to leverage receipt of regional, State, and federal grants

Leveraging limited local funds will allow the City to implement more projects sooner and to undertake larger projects than the City could otherwise afford.

The Prioritized Master Plan project list in Table 13-3 (at the end of this chapter) lists all of the proposed TSP projects that were generated through the TSP planning process. Additionally, it shows how well each project meets City goals and how the citizen working groups ranked them. The mode-specific Action Plans—in Chapters 5, 6, 7, 8, 9, 11, and 12 respectively—contain those projects that the City reasonably expects to fund that ranked high in the Prioritized Master Plan project list. The Action Plans include both capital projects and enhanced or new maintenance programs, such as increased bike lane sweeping. Given current revenue sources and projections, the remaining projects identified in the mode-specific Master Plan project lists are not expected to be funded with local funds within this plan's 22-year planning horizon.

<sup>2</sup> Projections for these funding sources were made based on the most recent year, with the exception of FILOC and SDC revenue. Because FILOC and SDC revenue is more variable, the projection is based on three years of actual revenues.

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Existing operational and maintenance costs total approximately \$5366 million. See Table 13-2 for a detailed breakdown of these costs. As this estimated 22-year figure is about \$1.8 million over the estimated 22-year revenue figure, there are no funds remaining for capital outlay projects over and above the Street Maintenance Program. ~~The second half of this table summarizes how the City plans to spend the remaining \$7 million of the projected \$60 million of total revenue, broken down by mode. More detailed project descriptions and costs can be found in the mode-specific Action Plans.~~

**Table 13-2 Operations, Maintenance, and Action Plan Costs  
for the 22-Year Planning Period (in 2007/2012 dollars)**

Projects	Capital Cost*	Operations Cost*	TOTAL Cost*
<b>Operations &amp; Maintenance Projects</b>			
Traditional Maintenance Activities (sweeping, striping, signage, etc.)		\$ 8,456,250	\$ 8,456,250
Street Lighting		7,225,000	7,225,000
Overhead		4,510,000	4,510,000
Contributions to Support of Administration Indirect, Overhead, and Support to Administration		9,809,250	9,809,250
Street Surface Maintenance Program		22,927,781	22,927,781
<b>Subtotal</b>		<b>\$52,928,281</b>	<b>\$52,928,281</b>
<b>Action Plan Projects</b>			
Motor Vehicle <sup>3</sup> /Freight	\$2,668,000	\$ 375,000	\$ 3,043,000
Bicycle	640,000	1,100,000	1,740,000
Pedestrian	2,239,400		2,239,400
Transit	75,000		75,000
<b>Subtotal</b>	<b>\$5,622,400</b>	<b>\$ 1,475,000</b>	<b>\$ 7,097,400</b>
<b>Total Approximate Costs (2008 to 2030/2013 to 2035)</b>	<b>\$5,622,400</b>	<b>\$54,403,281</b>	<b>\$60,025,681</b>

\*Approximate Costs

Table 13-2 demonstrates how the City can allocate available funds given their restrictions. The combined Action Plan project lists must include a minimum of \$3.75 million in capital projects because SDC and FILOC revenue cannot be used to fund maintenance projects. Table 13-2 shows that approximately \$5.6 million is earmarked for capital projects, which is almost \$2 million more than the minimum requirement. Additionally, the Bicycle Action Plan must either include a minimum of \$215,000 in bicycle projects (capital or maintenance), or forego expending the 1% of Highway Trust Fund revenues devoted to bicycle facilities. Nearly \$1.75 million is earmarked for bicycle facility improvements, which is over eight times the required minimum amount.

## Project Cost Estimates

Order of magnitude cost estimates were developed for all projects identified in the modal master plans using general unit costs for transportation improvements. However, these estimates do not reflect unique project elements that can significantly add to project costs. More detailed project cost estimates will be developed as projects move closer to implementation, including detailed right-of-way requirements and costs associated with special designs. Because multiple modal improvements may occur on the same facility, costs were developed at a project level incorporating all modes, as appropriate. It may be desirable to break project mode elements out separately. However, in most cases, there are greater cost efficiencies in undertaking multiple modal improvements at the same time.

<sup>3</sup> Includes funding for Neighborhood Traffic Management Action Plan.

## POTENTIAL NEW FUNDING SOURCES

The Master Plan project lists in Chapters 5-9, 11, and 12 include a large number of unfunded, but nonetheless high-priority, projects and programs. Absent an increase in funding, the City will be unable to address operational deficiencies identified in Chapter 4. The City may wish to consider new revenue sources to ensure that funding is available for proposed capital projects and other transportation programs.

In addition, the City expects to contribute to the regional share of the Portland-Milwaukie Light Rail project. While the exact allocation of the regional share is still to be determined, the City of Milwaukie's contribution is ~~likely to be around~~ \$5 million. The vast majority of the City's transportation revenues are restricted in ways that would not allow the City to expend them on a light rail "match." SDC revenues, the only significant transportation revenue stream that could contribute to the project, are not projected to be adequate to cover the local match over the next 22 years, let alone in the next 5-8 years, the expected time-frame in which the City would contribute to the light rail project.

The City's approach to planning for any local financial contribution to light rail parallels the region's: the draft financing plan of the Regional Transportation Plan (which is being updated simultaneously with this TSP) includes the sources of local match for upcoming major transit projects separately from the traditional revenue streams. These major capital projects are not included within the baseline funding commitments and are included as conditional upon the identification of additional revenues. Similarly, the Milwaukie share of the Portland-Milwaukie light rail project is not included on the Action Plan list because it will require revenues above and beyond those included in the baseline revenue projection.

Many cities use some combination of the following funding sources to supplement their capital and/or maintenance budgets.

### General Fund Revenues

At the discretion of the City Council, the City can contribute General Fund revenues to transportation projects and programs. (General Fund revenues primarily include property taxes, use taxes, and other miscellaneous taxes and fees imposed by the City.) Competing community priorities set by the City Council limit the funding potential of this approach. General Fund resources can fund any aspect of the system, from capital improvements to operations, maintenance, and administration. Additional revenues available from this source are only available to the extent that either General Fund revenues are increased or City Council diverts funding from other City programs.

### Expanded SDC Rate for Transportation

The City's transportation SDC rate is ~~\$1,596.52~~ \$1,676 per PM-peak hour trip generated. A more typical transportation SDC in the Portland metro area is approximately \$2,000 per single-family residence (or PM-peak trip generated). A regional examination of combined SDC and development fee costs conducted by the City of Portland found that the City of Milwaukie charges less than the majority of other jurisdictions (17<sup>th</sup> out of 21 overall) and has particularly low rates for residential uses.

Given that a large number of needs have been identified, a higher transportation SDC rate is warranted. The projects identified in this TSP will help the City maintain quality of life for its residents and businesses as the City experiences continued growth. It is appropriate to ensure that growth pays a fair and commensurate share of the costs of these new facilities.

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In addition to reevaluating the SDC rate, the City may wish to consider tightening its policy on SDC credits. The City currently allows a credit against SDCs due for any privately funded transportation development that increases capacity. However, the City may wish to change this policy to allow SDC credits for only those privately funded projects that are identified in the City's adopted TSP, i.e., those improvements which have been identified as most important to the overall system. A modification of the City's municipal code would be required to implement this change.

### **Urban Renewal District**

An Urban Renewal District (URD) is a mechanism by which the growth of tax revenues for a specific period of time is "captured" to pay for projects within the district. Typically, the sponsoring agency seeks bond financing of such projects and then repays those bonds with the "tax increment" generated in the area. The "tax increment" is the growth in tax revenue; the "frozen base," i.e., the property tax revenue already being generated, continues to flow to the appropriate taxing jurisdictions. All of the "tax increment" (the amount above the frozen base) goes towards retiring the urban renewal debt. This type of "tax increment" financing has been used in Oregon since 1960 to fund a wide variety of projects including transportation improvements.

### **Local Improvement District Assessment Revenue**

The City may set up Local Improvement Districts (LIDs) to fund specific capital improvement projects within defined geographic areas, or zones of benefit. LIDs impose assessments on properties within its boundaries. LIDs cannot fund ongoing maintenance costs. They require separate accounting processes, and the assessments collected can only be spent on capital projects within the geographic area. Citizens representing 67 percent of the assessment can terminate an LID and overturn the planned projects, except in cases of emergency or sidewalk projects.

### **Direct Appropriations**

The City can seek direct appropriations from the State Legislature and/or U.S. Congress for transportation capital improvements. The City has received this kind of funding for SE Lake Rd improvements in 2006 and will likely continue to pursue these special, one-time appropriations for major City projects.

### **Special Assessments**

Special assessments allow local jurisdictions, with the agreement of property owners, to put into place additional property taxes to pay for specific capital projects or ongoing costs. A variety of special assessments are available in Oregon to fund a variety of improvements, including sidewalks, curbs, gutters, street lighting, parking structures, and downtown or commercial zone transportation improvements. For example, the local share of funding for TriMet's Westside light rail project was paid for by a special assessment with voter approval. These assessments are commonly counted as revenue towards the limitations established by Measure 50.

### **Debt Financing**

While not a direct funding source, debt financing can be used to spread costs over the useful life of a project. Though interest costs are incurred, the use of debt financing can serve not only as a practical means of funding major improvements, but can also be a more equitable funding strategy, spreading the burden of repayment over existing and future customers who will benefit

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from the projects. The obvious caution in relying on debt service is that a funding source must be identified to fulfill annual repayment obligations.

### **Voter-Approved General Obligation Bond Proceeds**

Subject to voter approval, the City can issue General Obligation (GO) bonds to debt finance capital improvement projects. GO bonds are backed by "full faith and credit" of the jurisdiction and provide increased taxing authority with which the City can generate revenues to make principal and interest repayments. For critical projects, the electorate may be willing to accept increased taxation. Proceeds may not be used for ongoing maintenance.

### **Revenue Bonds**

Revenue bonds are debt instruments secured by rate revenue. In order for the City to issue revenue bonds for transportation projects, it would need to identify a stable source of ongoing rate funding. Interest costs for revenue bonds are slightly higher than for general obligation bonds, due to the perceived stability offered by the "full faith and credit" of a jurisdiction.

### **Oregon Transportation Infrastructure Bank Loans**

The Oregon Transportation Infrastructure Bank Loan program is a statewide revolving loan fund designed to promote innovative transportation funding solutions. The Financial Services Branch of ODOT provides State support for the program. In general, eligible projects include highway, transit, bikeway, and pedestrian access projects. Projects are rated on established criteria and recommended based on the rankings. Repayment of loans must begin within five years of project completion and must be complete within 30 years or at the end of the useful life of the project.

## **TSP IMPLEMENTATION AND UPDATE STEPS**

This document requires a series of implementing and on-going update steps to retain its usefulness over the next 22 years. Such steps include refining and updating the affected design standards for streets and trails, implementing the suggested development code and Comprehensive Plan text changes, and periodically updating and reviewing traffic forecasts and project priorities. The State suggests that cities should update local TSPs every five years to keep current on the latest land development trends, capital project funding conditions, and priorities of the community. These activities would typically be funded through a combination of grants, engineering funds, and planning funds, and are not, therefore, included in the financial projections for the modal Action Plans.

**Table 13-3 Prioritized Master Plan Project List**

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
<b>HIGH PRIORITY PROJECTS</b>								
17 <sup>th</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street and improve intersections.	Ochoco St	McLoughlin Blvd	\$920	High	Yes	Capital	Pedestrian
Downtown Transit Center Improvements	Construct new bus layover facility outside of the downtown core. Improve downtown bus stops and shelters consistent with level 3 features and including ample bike parking.	Location specific	Location specific	\$1,250	High	Yes	Capital	Transit
17 <sup>th</sup> Avenue Bikeway and Intersection Safety Improvements	Fill in gaps in existing bicycle network with bike lanes or multiuse path. Improve intersection safety and eastbound connection at 17 <sup>th</sup> Ave/Hwy 99E. Improve intersection safety at 17 <sup>th</sup> Ave/Hwy 224.	Waverly Dr	Harrison St	\$135	High	Yes	Capital	Bicycle
Logus Road Sidewalks	Fill in sidewalk gaps on both sides of street.	43 <sup>rd</sup> Ave	49 <sup>th</sup> Ave	\$771	High	Yes	Capital	Pedestrian
Kellogg Creek Dam Removal and Hwy 99E Underpass	Replace 99E bridge over Kellogg Creek, remove dam, restore habitat; construct pedestrian undercrossing between downtown Milwaukie and Riverfront Park.	Site Specific	Site Specific	\$9,000	High	Yes	Capital	Pedestrian & Bicycle
Springwater Trail Completion	Contribute to regional project to complete Springwater Trail ("Sellwood Gap") along Ochoco Street.	17 <sup>th</sup> Ave	19 <sup>th</sup> Ave	\$80	High	Yes	Capital	Bicycle & Pedestrian
Railroad Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	37 <sup>th</sup> Ave	Harmony Rd	\$1,625	High	Yes	Capital	Pedestrian & Transit
Monroe Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.	21 <sup>st</sup> Ave	Linwood Ave	\$300	High	Yes	Capital	Bicycle
29 <sup>th</sup> /Harvey/40 <sup>th</sup> Bicycle Boulevard/Neighborhood Greenway	Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.	Springwater Trail	Monroe St	\$200	High	Yes	Capital	Bicycle
Bike Lane Maintenance	Sweep bike lanes to remove debris.	Citywide	Citywide	\$1,100	High	Yes	Operational	Bicycle
Monroe Street Sidewalks	Fill in sidewalk gaps on both sides of street.	42 <sup>nd</sup> Ave	City limits	\$1,631	High	Yes	Capital	Pedestrian
Railroad Avenue Capacity Improvements	Widen SE Railroad Avenue to standard three lane cross section. Accommodate future bus service.	37 <sup>th</sup> Ave	Linwood Ave	\$12,990	High	Yes	Capital	Automobile & Transit

<sup>4</sup> In the case of operational projects, estimated costs are for entire 22-year planning period.

<sup>5</sup> Projects are ranked as either high, medium, or low. They are in no particular order within their ranking.

<sup>6</sup> Funded projects are listed on one of the mode-specific Action Plans in the TSP and are expected to be funded within the 22-year planning period through either direct or leveraged City funding.

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Downtown Streetscape Improvements	Install sidewalk bulbouts, lighting, and pedestrian amenities.	Downtown	Downtown	\$6,700	High	Yes	Capital	Parking & Pedestrian
<del>Bike Route Signage</del>	<del>Install neighborhood bike route signage.</del>	Citywide	Citywide	\$150	High	Yes	Operational	Bicycle
Hwy 224 Intersection Improvements at Oak	Add left turn-lanes and protected signal phasing on Oak Street approaches.	Location specific	Location specific	\$20	High	Yes	Capital	Automobile
King Road Boulevard Treatments	Install street boulevard treatments: widen sidewalks and improve crossings.	43 <sup>rd</sup> Ave	Linwood	\$500	High	Yes	Capital	Pedestrian
Neighborhood Pedestrian and Traffic Safety Program	Complete a few small traffic calming and pedestrian safety projects throughout the city each year.	Citywide	Citywide	\$300	High	Yes	Capital	Nbrhd Traffic Management
Hwy 224 & Hwy 99E Refinement Plan	Conduct refinement study that focuses on minimizing barrier effect and improving auto and freight mobility.	Hwy 99E Project Limits: Tacoma St to 17 <sup>th</sup> Ave	Hwy 224 Project Limits: Hwy 99E to Lake Rd Interchange	\$250	High	Yes	Capital	Automobile & Freight
Railroad Crossing Safety and Quiet Zone Project	Construct railroad crossing safety improvements at Oak Street, Harrison Street, and 37 <sup>th</sup> Avenue.	Location specific	Location specific	\$285	High	Yes	Capital	Automobile & Pedestrian
Stanley Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Johnson Creek Blvd	Railroad Ave	\$4,304	High	No	Capital	Pedestrian
Harrison Street Railroad Crossing Separation	Upgrade Harrison crossing of Union Pacific Railroad tracks to grade-separated facility. Assess as part of Hwy 224 & Hwy 99E Refinement Plan.	Location specific	Location specific	\$28,000	High	No	Capital	Freight
Hwy 224 Intersection Improvements at 37 <sup>th</sup>	Consolidate the two northern legs of 37 <sup>th</sup> Avenue and International Way into one leg at Hwy 224.	Location specific	Location specific	\$1,946	High	No	Capital	Automobile & Freight
<del>Railroad Avenue Bike Lanes/Facilities</del>	<del>Fill in gaps in existing bicycle network with bike lanes, cycle track, multiuse path, or other facilities.</del>	37 <sup>th</sup> Ave	Linwood Ave	\$4,364	High	No	Capital	Bicycle
Linwood Avenue Capacity Improvements (north)	Widen to standard three lane cross section. Widen bridge over Johnson Creek.	Johnson Creek Blvd	King Rd	\$8,500	High	No	Capital	Automobile
Linwood Avenue Capacity Improvements (south)	Widen to standard three lane cross section.	King Rd	Harmony Rd	\$11,400	High	No	Capital	Automobile
Hwy 224 Crossing Improvements at Oak and Washington	Improve intersection crossing safety for cyclists at Washington Street and Oak Street.	Location specific	Location specific	\$10	High	No	Capital	Bicycle
<del>Downtown Parking Enforcement/Management</del>	<del>Implement parking management system, including a dedicated parking manager.</del>	Downtown	Downtown	\$40	High	No	Operational	Parking

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
<u>Kellogg Creek Bike-Ped Bridge</u>	<u>Construct bike-ped overpass over Kellogg Creek in conjunction with light rail bridge.</u>	<u>Site specific</u>	<u>Site specific</u>	<u>\$2,500</u>	<u>High</u>		<u>Capital</u>	<u>Pedestrian &amp; Bicycle</u>
<b>MEDIUM PRIORITY PROJECTS</b>								
Lake Road Sidewalks	Fill in sidewalk gaps on both sides of street.	Kuehn Rd	Hwy 224	\$2,049	Medium	No	Capital	Pedestrian
<u>Stanley Avenue Bicycle Boulevard/Neighborhood Greenway</u>	<u>Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements.</u>	Springwater Trail	Railroad Ave	\$300	Medium	No	Capital	Bicycle
<u>19<sup>th</sup> and Sparrow Bicycle Boulevard/Neighborhood Greenway</u>	<u>Designate as a Bicycle Boulevard/Neighborhood Greenway and install bicycle/bike boulevard improvements. This would connect the south end of Kellogg Creek Trail to River Rd.</u>	Eagle St	River Rd	\$737	Medium	No	Capital	Bicycle
Franklin Street Sidewalks	Install sidewalks on both sides of street to connect to Hector Campbell Elementary School.	42 <sup>nd</sup> Ave	45 <sup>th</sup> Ave	\$200	Medium	No	Capital	Pedestrian
Intersection Improvements at Main and Mailwell	Upgrade intersection turning radii to better accommodate freight movements.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
McLoughlin Boulevard Sidewalks	Fill in sidewalk gaps on both sides of street.	Washington St	Southern city limits	\$596	Medium	No	Capital	Pedestrian
Downtown Parking Signage	Install wayfinding and identification signage at McLoughlin Blvd. intersections and around public parking lots.	Downtown	Downtown	\$10	Medium	No	Capital	Parking
Railroad Crossing Improvements at Harrison	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
Railroad Crossing Improvements at 21 <sup>st</sup> and Adams	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
Railroad Crossing Improvements at Monroe	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
Railroad Crossing Improvements at Washington	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
Railroad Crossing Improvements at Oak	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Railroad Crossing Improvements at 37 <sup>th</sup>	Upgrade paving materials to concrete or rubberized material to improve longevity and enhance for alternative modes.	Location specific	Location specific	\$50	Medium	No	Capital	Freight
Pedestrian Walkway Amenities	Install amenities, such as benches, along key walking routes.	Citywide	Citywide	\$50	Medium	No	Capital	Pedestrian
Main Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Harrison St	Moore's St	\$2,131	Medium	No	Capital	Bicycle
McLoughlin Blvd Intersection Improvements at 17 <sup>th</sup>	Prohibit left turn movement from 17 <sup>th</sup> Avenue to northbound McLoughlin Blvd and include in Hwy 224 & Hwy 99E Refinement Plan.	Location specific	Location specific	\$15	Medium	No	Capital	Automobile
Intersection Improvements at 42 <sup>nd</sup> and Harrison	Signalize intersection to facilitate dominant traffic flow.	Location specific	Location specific	\$252	Medium	No	Capital	Automobile
McLoughlin Boulevard Intersection Improvements at River Road	Consolidate a single access point for the area at Bluebird Street with full intersection treatment and signalization or add second northbound left-turn lane at River Road.	Location specific	Location specific	\$898	Medium	No	Capital	Automobile
Harrison and King Connection	Enhance connection between King Road and Harrison Street at 42 <sup>nd</sup> Avenue.	Location specific	Location specific	\$53	Medium	No	Capital	Automobile
37 <sup>th</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Lake Rd	Harrison St	\$794	Medium	No	Capital	Pedestrian
Intersection Improvements at 42 <sup>nd</sup> and King	Enhance intersection function.	Location specific	Location specific	\$15	Medium	No	Capital	Pedestrian
Pedestrian Walkway Signage	Provide maps and wayfinding signage on streets that identify ways to get around the city.	Citywide	Citywide	\$10	Medium	No	Operational	Pedestrian
Downtown Public Parking Lot Improvements	Upgrade and maintain off-street public parking facilities with improved landscaping and lighting.	Downtown	Downtown	\$50	Medium	No	Capital	Parking
Community Bicycle Rides	Coordinate community bike rides to encourage bike use.	Citywide	Citywide	\$5	Medium	No	Operational	Bicycle
Intersection Improvements at Harrison and Hwy 224	Add left turn-lanes and protected signal phasing on Harrison Street approaches.	Location specific	Location specific	\$20	Medium	No	Capital	Automobile
Cyclist Education	Promote cycling through bike use and route selection education.	Citywide	Citywide	\$10	Medium	No	Operational	Bicycle
Railroad Crossing Pedestrian Improvements at Oak	Improve intersection for pedestrians.	Location specific	Location specific	\$15	Medium	No	Capital	Pedestrian
Harrison Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Hwy 99E	21 <sup>st</sup> Ave	\$273	Medium	No	Capital	Bicycle

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Intersection Improvements at Linwood and King	Implement protected/permissive left turn phasing for northbound and southbound approaches.	Location specific	Location specific	\$16	Medium	No	Capital	Automobile
Brookside Drive Sidewalks	Fill in sidewalk gaps on both sides of street.	Johnson Creek Blvd	Regents Dr	\$15	Medium	No	Capital	Pedestrian
<del>Springwater Trail Paving Project</del>	<del>Improve corridor through repaving existing trail.</del>	<del>29<sup>th</sup> Ave</del>	<del>Linwood Ave</del>	<del>\$500</del>	<del>Medium</del>	<del>No</del>	<del>Capital</del>	<del>Bicycle</del>
Lake Road Capacity Improvements	Widen to standard three lane cross section.	21 <sup>st</sup> Ave	Oatfield Rd	\$7,392	Medium	No	Capital	Automobile
Harrison Street Capacity Improvements	Widen to standard three lane cross section.	32 <sup>nd</sup> St	42 <sup>nd</sup> St	\$2,565	Medium	No	Capital	Automobile
Johnson Creek Blvd Intersection Improvements at Linwood	Add eastbound right turn lanes and westbound right turn lanes.	Location specific	Location specific	\$803	Medium	No	Capital	Automobile
Harrison Street Intersection Improvements at Main	Add westbound shared through/right turn lane or eastbound right turn lane.	Location specific	Location specific	\$34	Medium	No	Capital	Automobile
Public Parking Structure	Construct 3 to 4 story public parking structure with retail at ground floor for visitor/employee parking.	Location specific	Location specific	\$10,000	Medium	No	Capital	Parking
<b>LOW PRIORITY PROJECTS</b>								
Ochoco Street Sidewalks	Construct sidewalks on Ochoco Street to connect bus stops to Goodwill.	19 <sup>th</sup> Ave	McLoughlin Blvd	\$\$\$	Low	No	Capital	Pedestrian
Kronberg Park Trail	Construct multimodal trail along Kellogg Creek connecting Kronberg Park to downtown Milwaukie.	McLoughlin Blvd	Downtown	\$1,200	Low	No	Capital	Bicycle
Springwater Corridor Intersection Improvements at 45 <sup>th</sup>	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Johnson Creek Blvd and 42 <sup>nd</sup> Avenue Signalization	Replace 3-way stop with signal when warranted.	Location specific	Location specific	\$250	Low	No	Capital	Automobile
Springwater Trail Ramp Improvement	Improve ramp at Springwater Trail and McLoughlin Blvd.	Location specific	Location specific	\$15	Low	Yes	Capital	Bicycle & Pedestrian
19 <sup>th</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Kellogg Creek Trail	Sparrow St	\$305	Low	No	Capital	Pedestrian
22 <sup>nd</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	McLoughlin Blvd	Sparrow St	\$325	Low	No	Capital	Pedestrian
43 <sup>rd</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Howe St/ 42 <sup>nd</sup> Ave	King Rd/ 43 <sup>rd</sup> Ave	\$550	Low	No	Capital	Pedestrian
Edison Street Sidewalks	Fill in sidewalk gaps on both sides of street.	35 <sup>th</sup> Ave	37 <sup>th</sup> Ave	\$116	Low	No	Capital	Pedestrian
Harmony Road Sidewalks	Fill in sidewalk gaps on both sides of street.	Linwood Ave	City limits	\$38	Low	No	Capital	Pedestrian
Harvey Street Sidewalks	Fill in sidewalk gaps on both sides of street.	32 <sup>nd</sup> Ave	42 <sup>nd</sup> Ave	\$534	Low	No	Capital	Pedestrian

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Home Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Railroad Ave	King Rd	\$756	Low	No	Capital	Pedestrian
International Way Sidewalks	Fill in sidewalk gaps on both sides of street	Criterion Ct	Lake Rd	\$767	Low	No	Capital	Pedestrian
Johnson Creek Boulevard Sidewalks	Fill in sidewalk gaps on both sides of street.	Harney Dr	City limits	\$378	Low	No	Capital	Pedestrian
Linwood Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Johnson Creek Blvd	Railroad Ave	\$2,960	Low	No	Capital	Pedestrian
Mason Lane Sidewalks	Fill in sidewalk gaps on both sides of street.	42 <sup>nd</sup> Ave	Regents Dr	\$671	Low	No	Capital	Pedestrian
Oatfield Road Sidewalks	Fill in sidewalk gaps on both sides of street.	Guilford Ct	City limits	\$132	Low	No	Capital	Pedestrian
Regents Drive Sidewalks	Fill in sidewalk gaps on both sides of street.	Brookside Dr	Winsor Dr	\$494	Low	No	Capital	Pedestrian
River Road Sidewalks	Fill in sidewalk gaps on both sides of street.	McLoughlin Blvd	City limits	\$626	Low	No	Capital	Pedestrian
Roswell Street Sidewalks	Fill in sidewalk gaps on both sides of street.	32 <sup>nd</sup> Ave	36 <sup>th</sup> Ave	\$192	Low	No	Capital	Pedestrian
Rusk Road Sidewalks	Fill in sidewalk gaps on both sides of street.	Lake Rd	North Clackamas Park	\$662	Low	No	Capital	Pedestrian
Olsen Street Sidewalks	Fill in sidewalk gaps on north side of street.	32 <sup>nd</sup> Ave	43 <sup>rd</sup> Ave	\$432	Low	No	Capital	Pedestrian
49 <sup>th</sup> Avenue Sidewalks	Fill in sidewalk gaps on both sides of street.	Logus Rd	King Rd	\$250	Low	No	Capital	Pedestrian
Hwy 224 Sidewalks	Fill in sidewalk gaps on both sides of street.	Oak St	37 <sup>th</sup> Ave	\$420	Low	No	Capital	Pedestrian
Intersection Curb Ramp Improvements	Install curb ramps at all intersections with sidewalks.	Citywide	Citywide	\$5	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at 37 <sup>th</sup>	Improve pedestrian crossing.	Location specific	Location specific	\$20	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at Freeman	Improve pedestrian crossing.	Location specific	Location specific	\$20	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at Harrison	Improve pedestrian crossing.	Location specific	Location specific	\$20	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at Monroe	Improve pedestrian crossing.	Location specific	Location specific	\$15	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at Oak	Improve pedestrian crossing.	Location specific	Location specific	\$20	Low	No	Capital	Pedestrian
Intersection Improvements at Olsen and 42 <sup>nd</sup>	Improve pedestrian crossing.	Location specific	Location specific	\$20	Low	No	Capital	Pedestrian
Intersection Improvements at Harmony and Lake	Improve pedestrian crossing.	Location specific	Location specific	\$15	Low	No	Capital	Pedestrian

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Intersection Improvements at Railroad and 37 <sup>th</sup>	Improve pedestrian crossing.	Location specific	Location specific	\$10	Low	No	Capital	Pedestrian
Intersection Improvements at Stanley and Logus	Improve pedestrian crossing.	Location specific	Location specific	\$15	Low	No	Capital	Pedestrian
Springwater Trail Ramp Improvement at McLoughlin	Improve ramp at Springwater Trail and McLoughlin Blvd.	Location specific	Location specific	\$15	Low	No	Capital	Pedestrian
Pedestrian Connection to North Clackamas Park	Create pedestrian connection between the school and the park.	Rowe Middle School	North Clackamas Park	\$1,284	Low	No	Capital	Pedestrian
Hwy 224 Intersection Improvements at 17 <sup>th</sup>	Upgrade intersection turning radii to better accommodate freight movements.	Location specific	Location specific	\$50	Low	No	Capital	Freight
Intersection Improvements at Mailwell and Omark	Upgrade intersection turning radii to better accommodate freight movements.	Location specific	Location specific	\$50	Low	No	Capital	Freight
Bicycle and Pedestrian Overpass	Establish a dedicated bicycle and pedestrian connection across Railroad Avenue and the railroad tracks.	Railroad Ave	International Way	\$2,025	Low	No	Capital	Bicycle
Bicycle-friendly Street Grates	Install bicycle-friendly street grates.	Citywide	Citywide	\$50	Low	No	Operational	Bicycle
Milwaukie Bike Map	Produce a Milwaukie Bike Map.	Citywide	Citywide	\$50	Low	No	Operational	Bicycle
<del>Trolley Trail Signage</del>	<del>Design and install Trolley Trail signage.</del>	<del>Milwaukie Riverfront</del>	<del>Southern city limits</del>	<del>\$54</del>	<del>Low</del>	<del>No</del>	<del>Capital</del>	<del>Bicycle</del>
Springwater Trail Signage	Install wayfinding signage for Springwater Trail.	Citywide	Citywide	\$15	Low	No	Operational	Bicycle
Intersection Improvements at Johnson Creek Blvd and Linwood	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Intersection Improvements at Linwood and King	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Intersection Improvements at Linwood and Harmony	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Intersection Improvements at Linwood and Monroe	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Intersection Improvements at International Way and Lake Road	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Intersection Improvements at Adams and 21 <sup>st</sup>	Improve safety of crossing at intersection.	Location specific	Location specific	\$10	Low	No	Capital	Bicycle
Lake Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Main St	Guilford Dr	\$3,142	Low	No	Capital	Bicycle

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
Harrison Street Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Hwy 224	42 <sup>nd</sup> Ave	\$13	Low	No	Capital	Bicycle
37 <sup>th</sup> Avenue Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Harrison St	Hwy 224	\$2,900	Low	No	Capital	Bicycle
43 <sup>rd</sup> Avenue Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	King Rd	Filbert St	\$1,014	Low	No	Capital	Bicycle
Oatfield Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Guilford Ct	Lake Rd	\$348	Low	No	Capital	Bicycle
Linwood Avenue Bike Lanes (north)	Fill in gaps in existing bicycle network with bike lanes.	Queen Rd	Johnson Creek Blvd	\$1,692	Low	No	Capital	Bicycle
Linwood Avenue Bike Lanes (south)	Fill in gaps in existing bicycle network with bike lanes.	Juniper St	Harmony Rd	\$296	Low	No	Capital	Bicycle
Rusk Road Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Lake Rd	North Clackamas Park	\$936	Low	No	Capital	Bicycle
21 <sup>st</sup> Avenue Bike Lanes	Fill in gaps in existing bicycle network with bike lanes.	Harrison St	Lake Rd	\$50	Low	No	Capital	Bicycle
Police Enforcement on Drivers	Enforce laws related to bike lanes and bicycle safety.	Citywide	Citywide	\$10	Low	No	Operational	Bicycle
Bike Lane Striping	Re-stripe existing bike lanes and stripe bike lanes on streets where buses and bicyclists share the road.	Citywide	Citywide	\$20	Low	No	Operational	Bicycle & Transit
Kellogg Creek Trail Improvements	Resurface trail and provide wayfinding signage to/from trail.	Milwaukie Riverfront	Treatment Plant	\$623	Low	No	Capital	Bicycle
Hwy 224 Access Modifications at Freeman Way	Modify access at Freeman Way to improve intersection functioning.	Location specific	Location specific	\$1,313	Low	No	Capital	Automobile
Stanley Ave Connectivity at King	Enhance connection along Stanley Ave at King Road.	Location specific	Location specific	\$53	Low	No	Capital	Automobile
Stanley Ave Connectivity at Monroe	Enhance connection along Stanley Avenue at Monroe Street.	Location specific	Location specific	\$53	Low	No	Capital	Automobile
Harmony Road Grade Separation and Realignment at Linwood	Grade separate Harmony Road from Union Pacific Railroad and align as a through east-west movement. Outcome of alignment and geometry is dependant upon the Harmony Road Environmental Assessment project (scheduled for completion Fall 2008).	Location specific	Location specific	\$28,000	Low	No	Capital	Freight & Automobile

Project Name	Project Description	From	To	Estimated Cost (\$1,000s) <sup>4</sup>	Priority Ranking <sup>5</sup>	Is Project Funded? <sup>6</sup>	Project Type	TSP Chapter
<b>REGIONAL PROJECTS WITHIN OR THROUGH THE CITY OF MILWAUKIE<sup>7</sup></b>								
Milwaukie Light Rail Extension or High Capacity Transit Improvements	Construct light rail or high capacity transit improvements between Milwaukie and Portland.	Rose Quarter MAX Station	Milwaukie Town Center	\$515,000	—	No	Capital	Transit
Oregon City Light Rail Extension or High Capacity Transit Improvements	Construct light rail or high capacity transit improvements between Milwaukie and Oregon City.	Milwaukie Town Center	Oregon City	\$577,500	—	No	Capital	—
Milwaukie Transportation Management Association Program	Implement a transportation management association for employers.	Milwaukie Town Center	Milwaukie Town Center	\$200	—	No	Operational	Transit
Portland Traction Company Multiuse Trail	Plan, engineer, and construct multiuse trail along Portland Traction Company right-of-way.	Milwaukie	Gladstone	\$1,386	—	No	Capital	—
North Clackamas Greenway Corridor Study	Study feasibility of corridor for multiuse path construction (possibly along Kellogg Creek).	Milwaukie	Clackamas Regional Center	—	—	No	Capital	—
Linwood/Harmony /Lake Road Intersection Improvements	Add northbound right turn lane and eastbound right turn lane.	Location specific	Location specific	\$28,000	—	No	Capital	—
McLoughlin Boulevard Improvements	Complete boulevard design improvements.	Scott St	Harrison St	\$3,300	—	No	Capital	—
Tillamook Branch Trestle Trail Study	Study feasibility of east-west multiuse trail construction.	Milwaukie Town Center	Lake Oswego Town Center	—	—	No	Capital	—
Railroad Junction Improvements	Implement track and signal improvements to allow for increased track speeds between UP Willsburg Junction and UP Albina Yards.	Milwaukie	UP Railroad Albina Yards	\$8,800	—	No	Capital	—
Railroad Track Extension	Extend two tracks from Willsburg Junction to Clackamas.	Milwaukie	I-205	\$19,000	—	No	Capital	—

Key:  
 NDA = Neighborhood District Association  
 NTMP = Neighborhood Traffic Management Program  
 CIP = Capital Improvement Program  
 STSP = Safe Trips to School Program  
 RTP = Regional Transportation Plan

<sup>7</sup> 2004 Regional Transportation Plan (RTP) projects in the Milwaukie area that may or may not be shown on mode-specific master plans or project lists.



Agenda Item: WS. 3.  
Meeting Date: 3-5-13

## COUNCIL AGENDA ITEM SUMMARY

**Issue/Agenda Title:** Riverfront Park Capital Campaign Update

**Prepared By:** JoAnn Herrigel, Parks and Sustainability Director

**Dept. Head Approval:** Steve Butler, Interim Community Development Director

**City Manager Approval:**

**Reviewed by City Manager:**

### ISSUE BEFORE THE COUNCIL

Provide staff with input and guidance on next steps for the Riverfront Park capital campaign consultant contract.

### STAFF RECOMMENDATION

Postpone contract extension until grant outcomes are known.

### KEY FACTS & INFORMATION SUMMARY

The capital campaign for Riverfront Park began in June 2011 with a study to explore the feasibility of a fundraising effort for the park. Much progress has been made since then on project material development, discussions with potential funders and generation of capital campaign seed funding commitments. Further detail on project progress is presented in this staff report and options for moving forward are presented.

### OTHER ALTERNATIVES CONSIDERED

- Extend C3 Strategies contract to June 2013 but at a reduced scope and a set maximum number of hours.

### CITY COUNCIL GOALS

2013 Goal #2: Complete Riverfront Park

### ATTACHMENT LIST

1. November 2011 Report on Capital Campaign
2. Draft Scope of Work for March to June 2013

### FISCAL NOTES

The current Community Development budget has adequate funds to accommodate a contract of \$1,600 for the next four months, if the alternate approach is selected.



**To: Mayor and City Council**

**Through: Bill Monahan, City Manager**  
**Steve Butler, Interim Community Development Director**

**From: JoAnn Herrigel, Parks and Sustainability Director**

**Subject: Riverfront Park Capital Campaign Update**

**Date: March 5, 2013**

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#### **ACTION REQUESTED**

Provide staff with input and guidance on next steps for the Riverfront Park capital campaign consultant contract.

#### **HISTORY OF PRIOR ACTIONS AND DISCUSSIONS**

**November 2011** – Staff provided Council with update on Riverfront Park capital Campaign

**December 2011**- Council approves resolution authorizing City Manager to sign an amendment to C3 Strategies contract

**July 2012** – Council study session with C3 Strategies regarding City funding commitment

**January 2013** – Council study session regarding campaign update and contract extension

#### **BACKGROUND**

The capital campaign for Riverfront Park began in June 2011 with a study to explore the feasibility of a fundraising effort for the park. Since that time, with the assistance of Betsy Wright and Mark Sherman of C3 Strategies, the campaign has achieved the following goals:

- Development of a high quality project prospectus and visual materials
- Establishment of a Campaign Steering Committee and Advisory Group
- Establishment of a Capital Fund at the Oregon Community Foundation (OCF)
- Completion of interviews with key project supporters and a lengthy list of prospective funders

- Commitment of a total of \$43,000 in campaign seed funding, with \$9,100 in the OCF fund to date

A more complete description of the capital campaign development and implementation is presented below. The progress of the campaign is broken into 6 month phases over the course of the campaign.

## **I. Feasibility Study** (June 2011-Dec 31, 2011)

### **Scope**

In May 2011 the City issued an RFP for a capital campaign consultant. Staff posted the RFP on the City web site and sent it directly to three area companies known to provide capital campaign services: C3 Strategies, Metropolitan Group and Tom Wilson. Wilson and Metropolitan Group declined to bid based on the size of the contract and funding available. The scope proposed by the City included:

1. Recommendations for structure and operation of capital campaign;
2. Draft capital campaign timeline;
3. Strategy for identifying and recruiting potential leaders and donors;
4. Prediction of the amount of money the City may reasonably raise;
5. Help setting realistic fundraising goals during each phase of solicitation;
6. Draft plan for identification and organization of advisory committee and volunteers;
7. Pricing guidance for inducements and feedback on effectiveness;
8. Identification of costs associated with managing the campaign and a team of volunteers;

In June 2011, the City signed a contract with C3 Strategies for \$18,000, the term of which ended December 31, 2011. Funds for this stage of the project were provided by a grant from the Clackamas County Tourism Office.

### **Tasks Completed**

In November of 2011, City staff and C3 consultants, Mark Sherman and Betsy Wright, attended a Council work session and provided Council with an update on the feasibility stage of the project. Staff reported that since June, 2011 the following tasks had been completed:

- A cost estimate for Riverfront Park was completed which broke the project into discrete elements, such as the amphitheater, play area, boat ramp, etc., and a phasing plan for the project was developed to go along with this estimate
- Using these materials, C3 Strategies met with 6 potential funders (4 local and 2 regional) to review the project and the proposed phasing plan to get input on the project's funding potential
- Interview summaries were developed and shared with staff
- A final report recommending next steps in the capital campaign was submitted to the City.

The summary shared with Council at the November 2011 work session is attached (see Attachment #1).

## **II. Campaign Start Up (December 2011-June 2012)**

### **Scope**

In December of 2011, staff attended a regular session to request Council approval to extend the C3 contract to June 2012 and to set a maximum compensation for these services at \$5,000 a month. The scope, agreed to by staff and consultant, and described in a memo dated November 2, 2012, for this period was:

- Identify members for and establish a Steering Committee for the campaign and hold at least one coordinating meeting. Each steering committee member to commit to a minimum pledge of \$15,000, \$3,000 of which would be an up-front contribution to support project development costs.
- Establish a fiscal agent and set up a non-City account for the receipt of private funds
- Meet with all City Councilors and steering committee members to establish a list of local and regional businesses, individuals and non-profits with whom campaign staff should meet regarding the project and potential funding
- Develop project prospectus, logo, letterhead and other visual materials for use in meetings with potential funders and by project team
- Begin meeting with potential funders and solicit commitments of "seed funding" for the campaign
- Review public grant documents and advise on grant solicitation process

### **Tasks Completed**

Work completed between December 2011 and June 2012 included:

- Campaign fund established at Oregon Community Foundation in January 2012
- Steering Committee established of the following: Mike Richardson, Dark Horse Comics; Jonathan Nicolas, ODS Companies; Dave Green, Riverfront Task Force Chair; Craig Van Valkenburg, Willamette View; Tom Kemper, Kemper Co; and Gary Klein, Co-Chair of the Riverfront Task Force (Group meeting held at ODS - April 2012)
- Project logo development coordinated (donation: David Evans and Assocs.)
- Project art development coordination (Artist hired to do drawings)
- Project prospectus developed (layout donated by Dark Horse Comics, printing donated by ODS Companies)
- Solicited and obtained letters of support for project from: Governor Kitzhaber, U.S. Representative Earl Blumenauer, U.S. Representative Kurt Schrader, State Representative Bill Kennemer, State Senate Majority Leader, Diane Rosenbaum, Secretary of State Kate Brown, U.S. Representative Ron Wyden, and Clackamas

County Commissioner Jim Bernard.

- Solicited and obtained a letter to the US Army Corps of Engineers advocating a timely completion of their permit review process signed by U.S. Senator Jeff Merkley and U.S. Senator Ron Wyden. (work carried over into June 2012-Feb 2013)
- Organized and attended meetings (at least once, but often several times) with 5 City Councilors, 6 Steering Committee members, Riverfront Task Force, 4 special advisors to campaign and potential funders locally and within the region

In July 2012, staff and the C3 Strategies team met with Council to provide them with an update on the campaign and to discuss the need for the City to commit to a minimum investment of \$1.125 million, constituting 15% of the total funds to be raised for construction of the new Riverfront Park.

### **III. Public Funding Focus** (July 2012-January 2013)

As noted in the November 2011 project recommendations, the C3 Strategies scope of work for this period focused mainly on solidifying the public funding for this project. Since the City's funding commitment was still in development, the WES access issue was not settled and the US Army Corps of Engineers permit was still outstanding, outreach to potential funders continued but was less broad during this period.

#### **Tasks Completed**

Work completed between June 2012 to January 2013 included:

- Continued meetings and communications with prospective funders
- Attended meetings with Herrigel and Asher to advise on Adams Street fundraising effort and project overlap issues
- Advised on material development for and attended meetings with Oregon Marine Board (twice) and Oregon Parks and Recreation Dept Grant Administrators (once)
- Advised on project phasing description and estimate development for prospective grants to Oregon Marine Board and Oregon Parks and Recreation Department
- Coordinated and attended prospect luncheon at ODS, hosted by Jonathon Nicolas
- Advised on campaign strategic shift in face of WES access conflict and Corps of Engineers permit slow down
- Presented campaign strategy to Milwaukie Rotary

### **IV. Secure Public Funding** (March 2013 - June 2013)

During this 4 month period, City staff will focus on securing public funding for Milwaukie Riverfront Park. Staff will draft and submit grant applications to the Oregon Marine Board and the Oregon Parks and Recreation Department (OPRD) by April 5 and 12 respectively. The Oregon Marine Board (OMB) grant application will be for the proposed boat ramp and associated facilities (parking, access road, required plantings and small restroom) for \$1.5 million. The grant application to Oregon Parks and Recreation Department will focus on park amenities including park trails, the children's play area and the amphitheater. Staff plans to request the maximum grant available from OPRD, which is \$750,000. A 40% match is required for the OPRD grant and it is hoped that funds for this match can be secured from the Good Neighbor fund.

The City has also reached agreement with Water Environment Services on a design for access to the park. As a result, in addition to seeking grant funds, staff from WES and the City will meet within the next month to draft an agreement detailing the proposed design and the responsibilities for both entities for long term site circulation, maintenance and operation. With the access issue now settled, WES staff has indicated their willingness to retract their objection to the Corps of Engineers permit and to sign an ODOT Change of Access Permit application.

The next four months hold critical next steps for the Riverfront Park project. The success of the two grant applications, discussions with the Good Neighbor Committee regarding funding for the park, the issuance of the US Army Corps of Engineers permit and the submittal and approval of the ODOT access permit are all major milestones in the project's development.

### **CONCURRENCE**

The Riverfront Task Force discussed the capital campaign at their February 20, 2013 meeting. Task Force members understand the City's sensitivity to current City budget funding but expressed concern that the momentum gained to date by the capital campaign be maintained.

### **FISCAL IMPACT**

Postponing the C3 Strategies contract would avoid expenditure of a total of \$1,600 from the Community Development budget between March and July1, 2013.

### **WORK LOAD IMPACTS**

Under alternative #1 below, the work load for the Parks and Sustainability Director will increase slightly to ensure that Steering Committee members and prospective funders are kept up to speed on project progress.

### **ALTERNATIVES**

The capital campaign strategy, laid out by City staff, the steering committee and C3 Strategies to date has included support by C3 Strategies for the City's efforts until June 2013. However, Council members have expressed some concern regarding expending additional funds for capital campaign efforts, pending the completion of the grant applications and the securing of ODOT and Corps permits. In light of Council's stated concerns, staff proposes the following options for Council's consideration:

- 1) Postpone renewal of the C3 Strategies contract until June 2013 or such time as the success of the OMB and OPRD grant applications is known.
- 2) Renew and extend the C3 Strategies contract through June 30, 2013 with a minimal scope of work that maintains contact with existing project supporters. Maximum payment for these services would be a total of \$1,600 between March and June 30, 2013. A draft scope is attached for consideration.

### **ATTACHMENTS**

1. November 2011 Report on Capital Campaign
2. Draft Scope of Work for March to June 2013

## Report on Capital Campaign: Planning, Findings, Recommendations

Case Overview

The Willamette River is among our region's great treasures—a waterway with deep cultural, historical, recreational, aesthetic, ecological and economic impact on our region. The parks that line the Willamette River—from Portland's Waterfront Park and the Eastside Esplanade to Salem's Riverfront Park are among our most popular civic recreational amenities, promoting quality of life, health, civic engagement, and economic development for Willamette Valley citizens and residents.

It is a rare occasion in our region to have an opportunity to develop a new stretch of prime Willamette riverfront for park space. That is the opportunity before us now: Eight-and-a-half picturesque acres set between the mouths of Johnson Creek and Kellogg Creek as they feed into the Willamette River from the east. The site lies southeast along the riverside, just "upstream" from Waverley Country Club, north from Elk Rock Island and directly across the river from Portland's Dunthorpe neighborhood, right in the heart of a developing Milwaukie city center. A metro population of approximately 750,000 people live or work within a 15-minute travel radius from the Milwaukie riverfront.

The new Riverfront Park of Milwaukie vision integrates special amenities that speak to the core values of our community:

- **Amphitheatre** A scenic performance venue for cultural arts and civic gatherings with seating for 250.
- **Boat Launch** The new park will provide the only motorized boat-launch access point to the east bank of the Willamette River north of Oregon City; the launch site will support recreational traffic and sport fishing that draws anglers by droves to a prime salmon fishing location. It will also support non-motorized craft, such as kayaks and canoes.
- **Main Plaza** Festivals and public gatherings for up to 1,500 will be hosted on a multi-use, concrete-tiled open space bordered by a pavilion and a cascading fountain built into the natural slope between city and river.
- **Children's Playground** A state-of-the-art play area designed for toddlers to twelve year-olds will make the park a magnet for some 100,000 children living within a 15 minute travel radius of the park.
- **Interpretive River Walk** A scenic, maintained walkway will engage visitors with insights on the relationship between our region's historic populations and our Willamette Valley river-way; a regular destination for school groups.

The park design, by landscape architects David Evans & Associates, will earn the new Riverfront Park of Milwaukie a valued place among the most widely recognized and attractive parks in the Portland metro area. The Riverfront Park of Milwaukie campaign team conservatively estimates the park will generate more than 100,000 visits per year.

**Report on Capital Campaign: Planning, Findings, Recommendations**Capital Campaign Plan: \$8.75 million goal (includes \$1.25 million previous commitments)

The park design balances aesthetic and financial concerns, keeping costs far below the \$12 million level for a park of similar size and stature. The planned \$8.75 million campaign to complete the proposed Riverfront Park of Milwaukie is envisioned as a public-private partnership, making the most of scarce public dollars and generous philanthropic support.

With \$1.25 million already committed to the project, the capital campaign planning team aims to raise the \$7.5 million needed to meet the \$8.75 million campaign goal in two phases.

Campaign Phase One - BASIC IMPROVEMENTS: Sept 2011 through June 2013

Secures a minimum of \$4 million to support core costs for basic site preparation, landscaping and plantings. Approximately 80% of Phase One investment will come from public investment by Oregon Parks and Recreation Department, Oregon State Marine Board and City of Milwaukie. During Phase One the campaign organizers are committed to building a team of at least 60 private investors. Each investor will make a baseline "Community Leadership" pledge of \$15,000 plus consideration of Phase Two investment in the park's special amenities.

Campaign Phase Two – SPECIAL AMENITIES : July 2013 through June 2014

Raises \$3.5 million to underwrite major park amenities: boat launch, amphitheatre, plaza, fountain, playground and interpretive trail. Many of these gifts will have been cultivated during Phase One, requiring a shorter time period to secure Phase Two commitments.

Construction of the Riverfront Park of Milwaukie will be timed to capital campaign phasing with completion of discrete park elements to be implemented as funding benchmarks are met. Construction of the Riverfront Park of Milwaukie will be fully completed by April 2015.

Campaign Leadership

The Riverfront Park of Milwaukie campaign has strong support from the City of Milwaukie, with unanimous commitment from Mayor Jeremy Ferguson and City Council members Greg Chaimov (President), Dave Hedges, Joe Loomis and Mike Miller. During the years of city planning leading up to the campaign, the project has remained a priority for city leaders.

Conversations are currently underway with community advocates who are expected to be among the earliest investors and campaign leaders. The campaign is currently staffed by JoAnn Herrigel, City of Milwaukie Community Services Director, who is working with campaign consultants C3 Strategies. The campaign planning committee includes the seven-member Riverfront Board (Chair David Green; Vice-Chair Gary Klein), which has since 1999 assumed responsibility for guiding design and development of the Riverfront Park. During the first three months of Phase One, a campaign steering committee will be assembled to assume formal responsibility for meeting campaign goals. (See *detailed action plan below*.)

Note on Fiscal Agency Private gifts to the project may be made to a special Oregon Community Foundation project fund. Gifts will be 100% tax deductible and will be allocated to the project in accordance with donors' wishes with oversight by the steering committee.

Report on Capital Campaign: Planning, Findings, Recommendations

Budget Detail

*Estimates based on David Evans and Associates projected construction costs; includes hard/soft costs with 20% contingency.*

<i>Pre-Campaign Commitments</i>	
<i>Klein Point land donation</i>	<i>\$225,000</i>
<i>Klein Point development grants</i>	<i>338,000</i>
<i>Landscape design</i>	<i>596,000</i>
<i>Project Development Staff City of Milwaukie</i>	<i>91,000</i>
<b>TOTAL PRE-CAMPAIGN COMMITMENTS</b>	<b>\$1,250,000</b>

*Note: Above costs do not include street improvements to McLoughlin Avenue*

<b>Campaign Phase One</b>	
Basic Improvements to Park Site	\$2,249,400
65% of Boat Launch / Parking Area Costs	1,357,800
Campaign Costs 5.5% of Phase 1 and 2 construction costs	392,800
<b>TOTAL PHASE ONE</b>	<b>\$4,000,000</b>

<b>Campaign Phase Two</b>	
Plaza and Fountain	1,747,900
35% Boat Launch / Parking Area Costs	731,100
Overlook / Interpretive River Walk	632,600
Theatre and Playground Areas	369,200
Donor Recognition	19,200
<b>TOTAL PHASE TWO</b>	<b>\$3,500,000</b>

<b>OPTIONAL Stretch Goal</b>	
Boat Tie-up Facility	1,016,000
Pedestrian Bridge (Kellogg Creek)	495,200
<b>TOTAL STRETCH GOAL OPTIONS</b>	<b>\$1,511,200</b>

Report on Capital Campaign: Planning, Findings, Recommendations

Revenue Detail

<i>Pre-Campaign Commitments</i>	
<i>Public Funding</i>	1,025,000
<i>Private Land Donation</i>	225,000
<b>TOTAL PRE-CAMPAIGN COMMITMENTS</b>	<b>\$1,250,000</b>

<b>Campaign Phase One</b>	
Public Grants - Oregon Parks and Recreation Dept. - Oregon State Marine Board - City of Milwaukie	3,100,000
Community Leadership Gifts / Pledges * - 60 @ \$15,000	900,000
<b>TOTAL PHASE ONE</b>	<b>\$4,000,000</b>

\* Community Leadership gifts are contingent upon 1) Meeting public revenue goal of \$3.1 million and 2) Meeting the goal of a minimum of 60 pledges. Community Leadership gives pledge \$15,000 for Phase One; and further commit to consider underwriting one or more park amenities during Phase Two.

<b>Campaign Phase Two</b>	
Naming opportunities (6): Plaza Pavilion Boat launch Theatre Children's Playground Interpretive River Walk <i>Total Naming Opportunities</i>	 450,000 450,000 450,000 300,000 200,000 <u>150,000</u> <b>\$2,000,000</b>
Other targeted gifts ** 5 @ \$85,000 15 @ \$35,000 <u>30 @ \$10,000</u> <i>Total other targeted gifts</i>	 425,000 525,000 <u>300,000</u> <b>\$1,250,000</b>
Public campaign gifts \$200 up to \$15,000	 250,000
<b>TOTAL PHASE TWO</b>	<b>\$3,500,000</b>

\*\* Other targeted gifts: Amounts are based on increase above the \$15,000 level for Community Leadership Gifts during Phase One. For example a \$100,000 total commitment counts as \$15,000 for Phase One and \$85,000 for Phase Two.

## Report on Capital Campaign: Planning, Findings, Recommendations

Interviews with community members

The above material was shared with six community members. Four interviewees were selected as representative of leading citizens in Milwaukie, with a focus on business interests. Two contacts were selected by Linda Laviolette as representative of community leaders/donors with broader regional interests in parks, based on her experience as former Executive Director of Portland Parks Foundation. *(Note that the material shared with interviewees did not include budget information about \$1.25 million in pre-campaign commitments, which was not yet available when the interviews began).*

## Milwaukie Contacts:

- Eileen Drake, PCC Structural (Precision Castparts)
- Tom Kemper, Developer
- Jonathan Nicholas, ODS
- Mike Richardson, Dark Horse Comics

## Major Parks Leaders/Donors

- John Russell, Russell Development Co.; major contributor to Portland Parks Foundation
- Randy Sell, Northwest Bank; former Chair of Portland Parks Foundation

Interview Findings

- **Overall impression of case** Interviews indicated a general positive response to the project. Those with boating interests recognized the strong need for river access and expressed strong support for this element of the park; one person recognized the value to boaters but expressed a contrarian position that the boat ramp was the one element this person did not want to support.
- **Geographical relevance** Interviews confirmed that the project is deemed highly important to stakeholders in Milwaukie. Some indicated this project was transformational for the City, an “iconic” civic landmark, or a project that would become a destination (especially with light rail nearby). Those with broader regional interests indicated the project has significance: for boaters as a much needed access point to the river; in other respects, as filling in a deficient part of the larger Willamette River greenway. Generally, interviews suggest the less the project is branded as a Milwaukie-focused project the more relevant it will be to those with broader regional concerns. One person strongly recommended leaving “Milwaukie” out of the name of the project.
- **Public / Private roles** The presentation to interviewees represented a plan for the public sector to support \$3.1 million of a total \$7.5 million budget (a 40% share). Interviews affirmed potential donors see this ratio as reasonable. One commented that it would be better if there were a 50% - 50% split. By including pre-campaign commitments, the public sector share will increase to \$4.1 million out of a \$8.75 total (a 47% share). This adjustment will create stronger balance and a stronger appeal for those concerned about the public sector doing its fair share.

## Report on Capital Campaign: Planning, Findings, Recommendations

- **Campaign strategy** Interviews showed generally positive response to the phasing strategy of the campaign. Most responded that it was important to show commitment of funds from others—whether from public or private sources. Most responded favorably to the idea of ensuring that 60 private contributors were prepared to support the project with a minimum of \$15,000. Several indicated this was a reasonable goal and none expressed doubt that it could be achieved. While several recognized the overall goal would require a significant campaign effort, the general response was that the campaign strategy would likely be successful, especially with effective campaign leadership.
- **Leadership** The interviews confirmed strong leadership will be essential to the campaign. At the same time, interviewees were optimistic that strong leaders will likely rise to the occasion. Several interviewees indicated the majority of leaders would probably come from the communities closest to the park (i.e., those deriving the most immediate benefit). Several also mentioned Waverley Club members are an important constituency, and several of these members could be very high-level contributors. One person suggested aiming to get a campaign leader with Waverley membership and willingness to tap fellow members. Most people interviewed offered names of people likely to be effective leaders, including some potential top donors. Notably, the two interviewees from outside of the Milwaukie community identified potential leaders identified with the broader community but who also had historic ties to Milwaukie.
- **Interview Comments**
  - *Like the drawings; people can envision the finished result; good plan.*
  - *It is key to development in the city.*
  - *Will people just drive through or can we capture them?*
  - *Have to draw in businesses.*
  - *People see private investment on the riverfront as key to getting excited. Show locals. That draws people out.*
  - *The reintegration of community to river really appeals to me. I'm a big fan of civic public space. Between Brooklyn (neighborhood of Portland) and Oregon City there's no civic space.*
  - *ODS will be happy to partner at some level in bringing this forward. Also our Milwaukie facility has a big print shop. We like to donate printing for causes we are engaged with, as well as dollars.*
  - *There is more opportunity with light rail coming. Will put Milwaukie on the map. Development always follows light rail.*
  - *People beyond city of Milwaukie recognize the value of civic access (to the river). Entire population enjoys having access.*
  - *If it were private enterprise and I were CEO, I would drop Milwaukie (in the project name) completely. Easier sale. At least downplay it.*
  - *Concerned about access to park, crossing McLoughlin, which is very busy especially at rush-hour.*

## Report on Capital Campaign: Planning, Findings, Recommendations

- *Emphasize ability to access from nearest light-rail stop.*
- *Metro should be part of it. They do lots of green space. Should be transportation oriented.*
- *Very close to the Waverley neighborhood. Heavy hitters there.*
- *The sewage plant could be a concern for some.*
- *You need to get the Milwaukie Business Directory.*
- *A place on the water similar to downtown Portland would be useful.*
- *Need broad-based community effort. Businesses and citizens will support if they feel it is important to quality of life. If just a bright idea of public sector they won't.*
- *Get enough attention/publicity so people want to participate.*
- *It's the reclaiming of former industrial/commercial waterfront usage to public green space/recreation usage; this is an important point in the case statement.*
- *Might help to create options for smaller donors to support earlier.*
- *Park would be good addition with other street improvements/building removals the city has recently done; chance to make a statement that waterfront/green space is important to the city.*
- *Involve leaders from Milwaukie families that have been active in the community for decades, that hopefully also have deep roots in Portland.*
- *View the "local" community as greater Portland, with an opportunity to reclaim waterfront.*
- *Pedestrian access crossing McLoughlin in traffic is difficult; light rail use would require crossing McLoughlin, consider pedestrian bridge.*
- *Get a Waverley Country Club member on the committee willing to solicit other Club members; businesses in Milwaukie to get involved: funeral home, jeweler, credit union, ODS; consider Pendleton, as used to have manufacturing facility in Milwaukie.*
- *There are very few places where you can get down to the river; it's an unusual circumstance to be able to touch the Willamette; the river is blocked with housing and commercial facilities.*
- *The boat ramp is important; the number of places to launch are few and far between and are often jammed.*
- *Due to future light rail, perhaps a high priority as a place families could go and not need to drive (rare situation in the region).*
- *I feel people should do whatever it takes--the park has iconic potential for Milwaukie.*
- *For donors outside Milwaukie, it would be important for them to see the extent Milwaukie supports the project.*

Report on Capital Campaign: Planning, Findings, Recommendations

- **Recommended Contacts / Potential Leaders**

- Howard Dietrich
- Jim Desmond and/or Mel Huie at Metro
- Robert Gootee, CEO of ODS
- Tom Hughes
- Mike Richardson, Dark Horse Comics
- Neil Hankerson, Executive VP of Dark Horse Comics
- Peter Stott
- Eli Morgan (he had building on the East side of Sellwood bridge/north of bridge, red brick)
- Bob Scanlan
- Blount (Oregon Cutting Systems)
- Bob's Red Mill
- Bob Franz
- Caffall Bros. Forest Products
- Sam Wheeler
- George Passadore (Former CEO, Wells Fargo)

Report on Capital Campaign: Planning, Findings, Recommendations

Implementation Detail: Phase One

**October – December 2011**

- Secure seed funding for campaign operations
- Coordinate campaign activities with other major civic projects
- Cultivation meetings with potential campaign leaders
- Identify 100 – 150 potential Community Leadership donors
- Identify Campaign Steering Committee; define roles
- Formalize fiscal agent relationship with OCF or other entity
- Finalize case presentation materials
- Initial contacts with key public sector advocates

**January – June 2012**

- Secure first 25 Community Leadership pledges, including 100% participation from Campaign Steering Committee
- Expand prospect list as needed to ensure sufficient scope to reach 60 pledges by December 2012
- Expand Campaign Steering Committee as needed
- Refine campaign strategy as needed
- Follow up contacts with key public sector advocates; grant submissions and follow-up reports according to guidelines

**July – December 2012**

- Secure 60 Community Leadership pledges to meet Phase One goal
- Ensure public funding requests are on track to meet Phase One goal
- Cultivate Phase Two special amenity commitments

**January – June 2013**

- Secure \$3.1 million public funds to meet Phase One goal
- Continue to cultivate Phase Two commitments
- Expand Community Leadership base
- Finalize planning for Phase Two campaign; adjust campaign leadership as needed
- Celebrate completion of Phase One!

**Report on Capital Campaign: Planning, Findings, Recommendations**

In order to support smooth transition to early implementation of capital campaign activities, the following notes recommend roles and responsibilities for key players, with a focus on activities anticipated during October 2011 through June 2012.

Project Manager (JoAnn Herrigel)

- Meet with potential public and private investors as needed to provide Project Manager perspective.
- Engage other City leaders as deemed advisable to support involvement of potential investors.
- Draft grant applications requesting public-sector support.
- Coordinate general campaign activities with Consulting Team.
- Allocate support staff for routine correspondence and record keeping (approx. 3-4 hours per week on average).
- Manage contract with Campaign Consultants.

Campaign Steering Committee (participants to be determined)

- Pledge a minimum of \$15,000 to the project per member; this commitment will include a front contribution of at least \$3,000 to support project development costs (*individual, family foundation and/or corporate commitments accepted*).
- Identify qualified potential contributors through social and professional networks.
- Advocate for the project and the campaign with potential public and private investors.
- Initiate contact with potential private investors according to mutually agreed schedule.
- Provide stewardship for overall campaign progress; evaluate progress; review key campaign documents and advise on general development of the campaign.
- Ensure accountability to donors through oversight of allocation of funds for project purposes.
- Advise Project Manager in management of Campaign Consulting contract.

Consulting Team (Mark Sherman and Betsy Wright, principals)

- Provide strategic direction and guidance on capital campaign methods to Project Manager and (eventually) Campaign Steering Committee.
- Recruit Steering Committee in close cooperation with Project Manager.
- Coordinate and facilitate Steering Committee activities, including potential donor identification, cultivation and asks for support.
- Prepare presentation documents for review by Steering Committee and Project Manager.
- Review public grant documents and advise on grant solicitation process.
- Facilitate fiscal agency arrangements with Oregon Community Foundation or other appropriate party.
- Advise on coordination of capital campaign with other major civic ventures affecting Milwaukie and nearby communities.

**RIVERFRONT PARK CAPITAL CAMPAIGN**

**Proposed Scope of Work for Campaign Consulting:  
March – June 2013**

<b>Timing</b>	<b>Tasks</b>	<b>Basis for Cost Estimate</b>
March - June	<b>Maintain support network during grants process</b> Ensure key community members are informed about status of project during grant seeking process; maintain readiness to move forward following grant decisions; respond as needed to calls and requests for information; update the network occasionally as conditions warrant.	<i>10 hours</i> – Emails and phone calls as needed to approx. 25 key individuals.
<b>TOTAL</b>		<b>10 Hours @ \$160/hour</b> <b>Not to Exceed \$1,600</b>