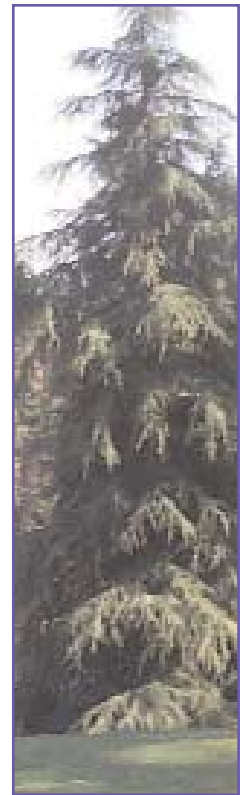


CITY OF LAKE OSWEGO  
QUALITY OF LIFE  
TASK FORCE



FINAL REPORT  
1999



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## INTRO- DUCTION

In 1997, the Lake Oswego City Council adopted Growth Management policies in response to growing concerns about the environmental, economic and social impacts of urbanization. The policies set forth a number of City actions, including the development of quantifiable indicators to measure changes in the quality of life in Lake Oswego.

In December 1998, the City Council selected a 24-member task force to inventory, identify, and develop specific quality of life indicators and to subsequently make recommendations to the Planning Commission and the Council on adoption and implementation of an indicator program. The City Council's charge to the Task Force stated:

*"The purpose of a Quality of Life Indicators Program is to maintain community livability and identify growth related impacts that may affect the community's quality of life. Goal 14 of the City's Comprehensive Plan provides direction for the development of objective indicators. Therefore, the assignment of the task force is to inventory, identify, and develop specific quality of life indicators and to make recommendations to the Planning Commission and City Council on adoption and implementation of an indicator program. Indicators shall be comprehensive, measurable, and use timely reliable information that is already available or can be readily obtained. The implementation program shall include: a time-frame; estimated budget; potential funding sources; and list of possible actions corresponding to the indicators."*

The Task Force began its work in February 1999. Over the course of nine months, Task Force members (1) received staff briefings on the principles of performance measurement, (2) reviewed the efforts of other municipalities, (3) identified broad topic areas for organizing its work, (4) developed more than 300 possible indicators, and (5) narrowed its list of recommended indicators to the 72 contained in this report.

The Task Force organized itself into 4 focus groups and divided the responsibility of developing recommended indicators based on general topic areas, such as community involvement, public safety, education and the environment. The Task Force held 12 formal work sessions and hosted two open house meetings to invite public review and comment. Task Force members also held numerous informal meetings to advance the work of individual focus groups. City staff posted the progress of the Task Force at regular intervals on an internet web page.



This report is organized into three sections. The first and main section contains the Task Force recommendations for 72 Quality of Life indicators, organized under 9 program categories. The second section provides a detailed plan for implementing an ongoing Quality of Life Indicators Program, including an estimated budget. This section also contains the Task Force recommendations concerning an expanded program for establishing community benchmarks for each Quality of Life indicator. The third and final section is a set of appendices that provide greater detail on the composition and work of the Task Force.

## QUALITY OF LIFE INDICATORS AND THE COMPREHENSIVE PLAN

Lake Oswego's existing character is the direct result of private development and public investment, guided over the last 20 years by the goals and policies of two Comprehensive Plans. The current Plan is a work of broad scope and vision, the expression of hundreds of citizens working towards a common definition of Lake Oswego's unique character. The 13 sections (chapters) of the Comprehensive Plan protect and preserve the community's present and future assets by delicately balancing a complex and changing mix of community needs and interests.



Change is an inherent part of the life of a community. The long-term success of a community's Comprehensive Plan depends on the ability of community leaders to respond to changing forces and situations and adjust community goals and policies accordingly. The proposed system of quality of life indicators will enable the City to monitor the impacts of growth and change on the community and suggest necessary changes to the Comprehensive Plan. These indicators collectively measure the extent that the community has achieved its goals as a livable city, and individually the indicators

serve to evaluate the impact that future development would have on the City's quality of life. In this way the indicators complement the vision and the functions of the Comprehensive Plan, and represent a powerful tool for guiding the community's evolution.

In addition to their direct relationship to the Comprehensive Plan, quality of life indicators provide the following benefits to the community:

- \* A framework to set community targets for future goals and to chart progress.
- \* A basis for analyzing the feasibility and benefits of specific programs and ordinances.

- \* A framework for program and performance evaluation and accountability for results.
- \* A basis for allocating limited resources.

## COMMUNITY IDENTITY – A CONTEXT FOR UNDERSTANDING QUALITY OF LIFE INDICATORS

It is impossible to consider the recommendations contained in this report without first understanding the context used by Task Force members to guide their deliberations. Each Task Force member brought to the process, personal impressions about the qualities that make Lake Oswego unique and desirable. These personal impressions reinforced and confirmed the expressions of community assets described in the Comprehensive Plan. While there certainly were differences about the relative importance of some qualities, it was evident that Task Force members were in general agreement about the following elements of community identity:

1. Lake Oswego's size, natural setting and pattern of development lend a predominant "village" character to the community. The city's village feel is accentuated by a physical isolation caused by natural and man-made barriers, such as the Willamette River, Palatine Hill, Tryon Creek State Park and Interstate 5.
2. Lake Oswego is a garden of natural beauty in the region of increasing urbanization. The variety of physical terrain, groves of trees, and sheltered watersheds offer rest, relaxation and recreation to city residents. The natural beauty promotes a demand by residents for human developments that respect and reflect the physical environment.
3. The city's predominant "village" character is reflected in distinct neighborhoods, close links between residential and commercial areas, and a local focus of businesses and commercial services.
4. The settled population and mature natural landscape afford Lake Oswego a sense of stability, continuity, peacefulness and permanence. The stable population, reflects a wide range of ages and socio-economic status. The residents and businesses are active participants in community activities and enterprises.



5. The residents of Lake Oswego share a common appreciation for free expression, and the pursuit of intellectual, cultural and athletic achievement. The community offers and supports a wide variety of opportunities and resources to promote these pursuits.

## THE CURRENT STATE OF THE CITY OF LAKE OSWEGO

Much of the context identified by the Task Force to guide its work is supported by a general assessment of the current state of the community. The following statistics and findings were readily available from existing City publications and the biennial Community Assessment Survey. They represent only a sampling of the kinds of information that will be produced by the Indicators Program envisioned in this report.

- \* City population totaled 34,300 in 1999, more than 11% greater than the 1990 population estimate. The public school enrollment totaled 7,132 in 1998, up more than 18% from 1990.
- \* The total real market value of taxable property was \$3.9 billion in 1998, representing an average annual increase of 19% since 1990. The city added 1,479 residential housing units between 1990 and 1998, valued at more than \$350 million.



- \* The city is home to 9 public elementary schools, 2 public junior high schools, 2 public high schools, and a private university.
- \* The city has an adult community center, a library, a non-profit performing arts center and a public amphitheater.
- \* City residents have access to an adjacent state park, 19 neighborhood and city parks and 11 public open spaces, 2 outdoor swim parks, a public river-front beach, 2 indoor swimming facilities, an indoor tennis center, more than a dozen outdoor tennis courts, a municipal golf course, and a water sports recreation center. In addition, the city is home to a private country club and a private lake.
- \* The city has a police station and 4 fire stations, operated by 70 police personnel and 50.5 fire personnel.

- \* The city has more than 170 miles of streets, 214 miles of water mains, 185.5 miles of sanitary sewers and 130 miles of storm sewers to serve 10.6 square miles of land area.
- \* The city is served by a regional public transit system and a non-profit trolley line that operates between Lake Oswego and Portland.
- \* City residents are served by at least 25 churches and houses of worship.

The following characteristics of Lake Oswego were reported in the findings of the 1998 Community Assessment Survey:

- \* On average, residents have lived in Lake Oswego for 14 years. 56% of residents have lived in Lake Oswego less than 10 years, while 22% have been residents for 11 to 20 years and 22% have been residents for more than 20 years.
- \* More than 75% of residents own their home. 24% of residents live alone and only 35% of households include children.
- \* More than 90% of adults have at least some post-secondary education. Only 1% of adults do not have a high school degree.
- \* Nearly 40% of employed residents work in Lake Oswego. 28% of residents are not employed.
- \* 90% of adults are registered voters. 80% of adults voted in the last general election.





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**SECTION 1**

**RECOMMENDED  
QUALITY OF LIFE INDICATORS**



## HOMES AND NEIGHBORHOODS

### 1. HOMES AND NEIGHBORHOODS

Lake Oswego is first and foremost a city of quality residential neighborhoods. The value, attractiveness and diversity of the housing stock are an economic strength that attracts a diverse and active residential population. Our quality of life is directly related to stable residential neighborhoods, neighborhood character that balances built and natural environments, and a diverse inventory of high quality housing. Housing and residential development occupy a strong place in the Lake Oswego Comprehensive Plan, reflecting popular concern for protecting the economic, social and environmental qualities of a predominately residential community.



The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 2 (Land Use Planning, Section 2 Community Design and Aesthetics); Goal 10 (Housing); Goal 11 (Public Facilities and Services); Goal 12 (Transportation); Goal 14 (Urbanization). City Council-adopted values and goals include, but are not limited to the following:

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained

within the following sections of the Lake Oswego Comprehensive Plan: Goal 2 (Land Use Planning, Section 2 Community Design and Aesthetics); Goal 10 (Housing); Goal 11 (Public Facilities and Services); Goal 12 (Transportation); Goal 14 (Urbanization). City Council-adopted values and goals include, but are not limited to the following:

- \* Maintain a balanced, diverse housing inventory.
- \* Retain the character of existing neighborhoods.
- \* Ensure that major subdivisions are compatible with the character of adjacent neighborhoods.
- \* Ensure an equitable distribution of increased infrastructure costs.
- \* Maintain and improve the environmental quality of the City.
- \* Maintain the per capita acreage of neighborhood parks and open space.
- \* Retain the carrying capacity of neighborhood streets and the major collection systems.
- \* Minimize the impact of increased student population on local schools.



## KEY INDICATORS

(not arranged in order of priority)



- 1.1 The average variation of new residential development to existing neighborhood characteristics as measured by footprint, height and setbacks.
- 1.2 The percentage of requests for variances and zone changes that are granted per year.
- 1.3 The percentage of actual municipal costs associated with new developments that are recovered by system development charges.
- 1.4 The percentage of utilization of the City's infrastructure as measured against the design capacity of the infrastructure. [Reported by major infrastructure component.]
- 1.5 The average number of years (and distribution of years) residents have lived in Lake Oswego.

- 1.6 Percentage of housing units which are rentals.

## MONITORING REQUIREMENTS

All of the indicators may be monitored based on data available at the City of Lake Oswego. Indicator No. 1.1 will require additional work to develop baseline averages of residential building characteristics by neighborhood. Neighborhood is defined as an area represented by a neighborhood association or community planning organization.

The infrastructure components referred to by Indicator No. 1.4 are water supply, sanitary sewers, stormwater management, local and collector streets, major streets, transit services, parks and open space, and public education.

## OTHER RELATED INDICATORS

- \* Ratio of real market value of non-rental housing and average residential rents to household income.
- \* Number of homeless shelters and senior care facilities per capita.
- \* Average occupancy rate and period for rental housing.
- \* Housing for sale or vacant as a percentage of total housing stock by type (homes, condos & rentals).
- \* Percentage of residential property that is owner-occupied.

## MOBILITY AND ACCESS

### 2. MOBILITY AND ACCESS

Lake Oswego developed during an age of dependence on the automobile. Much of our existing quality of life is influenced by our personal reliance on the automobile, and our city's ability to manage automobile-based transportation demands. As our city (and the surrounding region) develops and matures, our ability to preserve our quality of life will rely on a wide variety of transportation alternatives that promote mobility and access for our entire community. For those residents who are unable to drive (the young, elderly, disabled or disadvantaged), mobility is a particular challenge if they are to have access to the amenities and services that are readily available in Lake Oswego. Our transportation "resources" must accommodate the needs of all residents by providing an adequate mix of streets, sidewalks, pathways, bike lanes and bus services. By providing and promoting alternatives to the automobile, Lake Oswego improves its quality of life by reducing congestion, noise and pollution.

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 12 (Transportation); Goal 13 (Energy Conservation). Specific goal statements include:

- \* Develop a major streets system (arterials and collectors) which will have a minimal impact on the City's air quality, address the mobility needs of residents for all modes of travel, and promote energy conservation.
- \* Plan, develop and operate Lake Oswego's transportation system in a coordinated manner with other state, regional and local transportation providers.
- \* Develop a system of neighborhood and local residential streets which preserve the quiet, privacy and safety of neighborhood living, and which has adequate but not excessive capacity, necessary to accommodate planned land uses.
- \* Ensure that amendments to land use designations, densities and design standards do not generate traffic that exceeds the present design capacity and function of the planned transportation system.



- \* Undertake measures to reduce automobile travel, encourage transit ridership and provide viable alternatives to automobile travel.
- \* Provide safe and efficient bicycle and pedestrian improvements to connect residential areas to other areas of the community
- \* Plan for and implement a bike and pathway system to provide a viable alternative to automobile travel

### KEY INDICATORS

(not arranged in order of priority)

- 2.1 The ratio of actual volume of traffic on local residential streets and neighborhood collector streets to the desired volume (optimal planned capacity).
- 2.2 The level of service (LOS) provided by arterial and major collector streets and their intersections.
- 2.3 Ratio of total miles of bike and pedestrian facilities (bike paths and lanes, pathways and sidewalks) to total street miles.
- 2.4 Percentage of miles or feet of bike and pedestrian facilities constructed as a ratio of the total called for in the City's Transportation Systems Plan.



- 2.5 The counted number of bicyclists and pedestrians at identified intersections in Lake Oswego.
- 2.6 Per capita ridership or average number of bus trips (per capita) generated by transit agencies to and from Lake Oswego.

- 2.7 Ratio of miles of streets provided transit service to the total miles of streets in Lake Oswego.

### MONITORING METHODS

These indicators may be monitored based on data available at the City of Lake Oswego and Tri-Met (Tri-County Metropolitan Transportation District).

### OTHER RELATED INDICATORS

None identified.

## SECURITY AND WELL-BEING

### 3. SECURITY AND WELL-BEING

Adequate police, fire and emergency services assure the quality of life by imparting a sense of security and well-being for residents and business owners, and protecting our significant investment in private and public property. Changes in our community demand increasing levels of effort and sophistication by our public safety services, and increasing levels of understanding and involvement from our citizens.



The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 7 (Natural Disasters and Hazards); Goal 11 (Public Facilities and Services, Section 1 Public Safety Police and Fire Protection). Specific goal statements include:

- \* Protect life and property from hazards due to flooding, earthquakes, landslides, soil erosion and unstable soils.
- \* Ensure a high level of public safety through the provision of police and fire protection and emergency preparedness services.

#### KEY INDICATORS

(not arranged in order of priority)

##### Police Services

- 3.1 The annual occurrence of index crimes and victimization rates per thousand population, including trends in overall index crimes.
- 3.2 Number of non-index crimes such as MIP, Curfew, DUII and simple assault.
- 3.3 Number of auto crashes in Lake Oswego.
- 3.4 Officers per thousand population.
- 3.5 Number of complaints regarding the Lake Oswego Police Department filed with the City.



### Fire Protection/Suppression and Prevention

- 3.6 Fire Suppression Capabilities as rated the Insurance Service Office (ISO) Inc.
- 3.7 Percentage of City territory that can be reached by fire protection services within five minutes.
- 3.8 Percentage of fire alarms responded to within five minutes.



- 3.9 The ratio of fire hazards or safety violations corrected of the total recorded by the LOFD within its annual inspection cycle.
- 3.10 The number of Lake Oswego residents reached by fire safety programs and information.
- 3.11 The actual number of fires per capita.

### Emergency and Life Safety Services

- 3.12 The number of LO firefighters certified as emergency medical technicians (EMTs) and first responders per state/federal hazardous materials training regulations.
- 3.13 The number of citizens who have completed Community Emergency Response Training (CERT).
- 3.14 The number of citizens reached by special emergency and life safety training programs.

## MONITORING METHODS

These indicators may be monitored based on data that are currently collected or may be easily developed by the City of Lake Oswego. Additional data may be collected from our public safety partners, including the sheriffs' departments of Multnomah and Clackamas Counties, neighboring local and regional law enforcement agencies and the Oregon State Police. In addition, a definition and monitoring methodology regarding Police Department complaints would need to be developed in concert with the City Manager and the Police Chief.

## OTHER RELATED INDICATORS

None identified.

## EDUCATION

### 4. EDUCATION

The quality of a community's public school system is one measure of the community's concern for its children and the future of the community as a whole. Quality public education also is a strong influence on the attractiveness of a community to businesses and home-buyers. It is safe to say that what is good for quality education is good for the social and economic interests of a community, and advances its quality of life.



The citizens of Lake Oswego believe in quality education and demand it. They believe that the community shares a responsibility for educating its children. Despite grave concerns about the future of public finance for public education, the citizens of Lake Oswego carry on a long tradition of investment in educational opportunity and achievement. The following indicators measure both the knowledge and capabilities of Lake Oswego students, and the quality of educational opportunities offered by

Lake Oswego schools.

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 11 (Public Facilities and Services, Section 5. Government Services and Schools). The following goal statement applies directly to the Education indicators:

- \* Coordinate the efforts of others to provide school, energy and communication services.
- \* Review all residential development proposals for potential impact to the school system including the adequacy of existing schools and the need for new facilities.
- \* Recognize that education is vital to the social and economic well being of the citizens of Lake Oswego and the region.



## KEY INDICATORS

(not arranged in order of priority)



- 4.1 The graduation rate at Lake Oswego public high schools.
- 4.2 The percentage of students who attend post-secondary educational institutions.
- 4.3 The student-teacher ratio of Lake Oswego public schools.
- 4.4 The performance of Lake Oswego public schools as measured against applicable state and national performance on standardized tests of academic accomplishment and competency.

- 4.5 The percentage of high school students involved in school athletics and extracurricular activities.

## MONITORING METHODS

These indicators may be monitored based on data collected and reported by the Lake Oswego School District. In addition, regular report on the status of Quality of Life Indicators may include annual performance reports of the school district.

## OTHER RELATED INDICATORS

- \* Percentage of students who drop-out or are expelled from public school.
- \* Average scores on the SAT - measured among high school seniors.
- \* Percentage of school-age residents of Lake Oswego attending private schools.
- \* Percentage of high school students who perform volunteer services to the community.
- \* Number of residents who volunteer in school activities and programs.
- \* Number and average size of donations to school foundations and other school fundraising activities.



## ENVIRONMENT AND NATURAL RESOURCES

### 5. ENVIRONMENT AND NATURAL RESOURCES

Lake Oswego exists in a sensitive and dynamic natural environment. It is impossible to separate the health and quality of our community from that of the surrounding environment. The citizens of Lake Oswego recognize the inseparable connection between our built and natural environments, and place the highest importance on efforts to protect and preserve the quality of both in balance to each other. Our recommendations for quality of life indicators fall into the following categories:



\* **TREES AND NATURAL HABITAT PROTECTION.** The very number and size of many trees in Lake Oswego is part of the City's identity, charm and is inherent to the quality of life we all enjoy. Small tributaries and creeks are in almost every neighborhood, bringing clean water, wildlife and fish through corridors of natural habitat to our backyards. It is this experience that adds tremendously to our quality of life.

- \* **AIR QUALITY.** Air quality directly affects personal health of residents, the long-term economic life of our community, and the general health of our natural environment.
- \* **SURFACE WATER QUALITY.** The quality of area streams and rivers have direct environmental and economic impacts on our community. Our efforts to maintain and enhance surface water quality allow Lake Oswego residents to enjoy the benefits of living close to the Willamette and Tualatin Rivers and Oswego Lake. These major resources provide clean and safe recreation, and enhance the physical attractiveness of our neighborhoods. They also are essential to our efforts to improve the habitat of endangered fish, a requirement of recent federal Endangered Species Act designations.



- \* WATER SUPPLY. The residents and businesses of Lake Oswego depend on a clean, safe and adequate supply of water for personal and economic consumption, and fire prevention and suppression. We have a direct interest in the quality of distance water sources on the Clackamas River, and the maintenance of our water transportation and distribution system. It is safe to say that the quality and availability of our water supply connect us directly to water supply decisions made throughout the greater metropolitan area.
- \* SANITARY SEWER TREATMENT. The safe collection and treatment of sanitary sewage is necessary for sustaining the economic and environmental health of Lake Oswego. Our interests extend beyond the system of sewer main lines and collectors that transverse our community. The quality of our rivers and streams also depend on our efforts to prevent the unintended release of raw sewage during heavy rain events or as a result of poorly maintained sewer lines.
- \* SOLID WASTE MANAGEMENT. Efforts to reduce pollution and waste have an economic benefit to our community and help us sustain our sustaining the quality of life. Reduction of solid waste and increased use of recycling also reflects citizen awareness of the environment and willingness to make choices that benefit the society as a whole.

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 5 (Open Spaces, Scenic and Historic Areas and Natural Areas); Goal 6 (Air, Water and Land Resources); Goal 11 (Public Facilities and Services). Special goal statements include:

- \* Preserve and restore environments which provide fish and wildlife habitat.
- \* Protect and restore the community's wooded character and vegetative resources.
- \* Protect, maintain, enhance and restore wetlands.
- \* Protect, restore and maintain stream corridors to maintain water quality and provide open space and wildlife habitat.
- \* Protect, enhance, maintain and expand a network open space areas and scenic resources within and adjacent to the Urban Services Boundary.
- \* Protect the natural resource, energy, aesthetic and recreational values of Oswego Lake.





- \* Reduce air pollution and improve air quality.
- \* Reduce water pollution and ensure that future land use activities protect and enhance area water quality.
- \* Protect and enhance the functions and values of the natural ground and surface drainage systems.
- \* Manage solid waste to achieve the maximum reduction of materials going to landfills.
- \* Reduce storm water problems which cause flooding , erosion and water quality problems.
- \* Ensure a reliable and adequate supply of high quality water to meet existing and future needs.
- \* Provide an adequate and efficient wastewater collection and treatment system.

## KEY INDICATORS

(not arranged in order of priority)

### Trees and Nature Habitat Protection

- 5.1 Number of trees removed by permit, number of trees proposed for removal which are denied a permit, and number of illegal tree removals (resulting in the issuance of a civil infraction notice), as recorded annually.
- 5.2 Tree density as measured citywide from annual forest canopy classification mapping. (For example, see Metro's map contained in Appendix 20)
- 5.3 Percentage of designated tree grove Protection Areas that are preserved above the required minimum 50%.
- 5.4 Upland, aquatic, and in-stream habitat quality as measured annually at several locations.

### Air Quality

- 5.5 Average annual maximum and mean measures of air quality as reported for:
  - \* Ozone
  - \* Nitrogen Oxide
  - \* Lead
  - \* Light Scattering
  - \* Particulates
  - \* Carbon MonoxideAs reported by Oregon DEQ (see Appendix 18 for example)

## Surface Water Quality

5.6 Levels of the following pollutants as measured by the City of Lake Oswego at identified water quality monitoring locations (such as, Ball Creek, Carter Creek, Tributary to West Bay of Oswego Lake, Tributary to Tryon Creek, Lost Dog Creek, Springbrook Creek, and the Tualatin and Willamette Rivers):

- \* Suspended solids
- \* Phosphorus
- \* E. Coli bacteria
- \* Copper
- \* Dissolved oxygen
- \* Ammonia
- \* Chlorophyll A
- \* Conductivity
- \* Nitrate
- \* Temperature

(See Appendix 19 for example Water Quality Report)

5.7 Number of educational programs in schools and published articles in the City newsletter, and signage that informs the public about stream health.

5.8 Percentage of impervious surface area per drainage sub-basin.



## Water Supply

5.9 Compliance of Lake Oswego's treated (finished) water with all federal and state water quality standards.

## Sanitary Sewer Treatment

5.10 Number of times the City violates the National Pollutant Discharge Elimination System (NPDES) Permit. (See Appendix 18 for memo from Associate Engineer, John Lewis, and further NPDES information)

## Solid Waste Management

5.11 Amount of solid waste sent to landfill per capita.

5.12 Recycling as a percentage of waste generated in Lake Oswego and expressed as a ratio of recycled materials to the total amount of waste generated by the city as a whole.

## MONITORING METHODS

The City of Lake Oswego collects data to monitor many of the recommended indicators. Additional efforts may be needed to sample tree density in selected neighborhoods, and to collect records and surveys to measure the reach and effectiveness of public education efforts.

Upland habitat data can be collected through application of the City's adopted Wildlife Habitat Assessment Scoring methodology to tree groves. In-stream habitat data can be collected by application of the Oregon Dept. of Fish and Wildlife's "Water Quality Monitoring" guide.

In some cases, the City of Lake Oswego will rely on the City of Portland, other neighboring jurisdictions, METRO and the State of Oregon for monitoring information. The Lake Corporation may also be asked to provide long-term data regarding the water quality Oswego Lake, and by extension the quality of its many tributaries.

## OTHER RELATED INDICATORS

- \* Percent of impervious area that is treated. [Measures that amount (%) of total runoff that is filtered first of nutrients or sediments or any harmful contaminants.]
- \* Efficiency of sanitary sewer system as measured by annual estimates of inflow and infiltration expressed in millions of gallons and as a percentage of total sewage flow. (See Appendix 18 for example of this indicator in graphic form, and for an explanation of the methodology)





## ECONOMIC OPPORTUNITY AND VITALITY

### 6. ECONOMIC OPPORTUNITY AND VITALITY

Lake Oswego exists in a large metropolitan economy that is increasingly influenced by global economic forces. While these regional and global forces may seem overwhelming to a small community like ours, the size, shape and vitality of our local businesses are important to the character and quality of life in Lake Oswego. Our quality of life is enhanced by economic opportunities that make it possible to work and shop close to home, and by a strong local economy that provides the full

range of goods and services needed by our residents.



The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within Goal 9 (Economic Development) sections of the Lake Oswego Comprehensive Plan. The following goal statement applies directly to the Economic Opportunity and Vitality Indicators:

- \* Provide economic development opportunities which enhance the prosperity and livability of the community.
- \* Encourage a mix of commercial, residential, entertainment, cultural and public land uses within the City's general commercial districts to enhance the vitality of these areas.

#### KEY INDICATORS

(not arranged in order of priority)

- 6.1 The range of square footage rental or lease costs in Lake Oswego (broken out by commercial and industrial areas as set forth in the Comprehensive Plan).
- 6.2 The amount of vacant space in Lake Oswego (broken out by commercial and industrial areas as set forth in the Comprehensive Plan).



- 6.3 The number of persons employed in Lake Oswego (broken out by commercial and industrial areas as set forth in the Comprehensive Plan).
- 6.4 The number of local, regional and national “chain” businesses located in Lake Oswego (broken out by commercial and industrial areas as set forth in the Comprehensive Plan).
- 6.5 The goods and services available in Lake Oswego (broken down by major category of good or service as defined in the Comprehensive Plan, see Appendix 1 for definitions).
- 6.6 The “Pedestrian Environment Score”, which utilizes a point system to assign a score to various elements such as safety and ease of crossing, connectivity to businesses and services, and the continuity and condition of pedestrian pathways/sidewalks.



- 6.7 Parking supply as a percentage of design capacity, determined by a compliance review of all existing parking areas pursuant to the adopted Parking Standards for Lake Oswego.
- 6.8 The average number of days for the City to issue new business construction or tenant improvement permits.

## MONITORING METHODS

A few of the recommended indicators are measurable from data currently available at the City of Lake Oswego and from local business associations. Additional work will be needed to develop information on the costs of renting or leasing commercial property, vacancy rates, local employment, and the extent to which local business meet the consumer demands of Lake Oswego residents. We propose that the City and Chamber of Commerce develop a coordinated effort to monitor the City’s official indicators. Furthermore, we encourage efforts by the Chamber of Commerce and other associations to document the business climate in Lake Oswego and provide such information as a supplement to the City’s periodic status reports on quality of life.

## DEFINITIONS

Definitions, as set forth in the Comprehensive Plan, appear in Appendix 1 of this report.

## OTHER RELATED INDICATORS

- \* The number of new business licenses and business license renewals issued annually.
- \* The number of construction permits and tenant improvement permits issued.
- \* The number of business signage permits issued.
- \* The adequacy and effectiveness of City business signage codes as perceived by local businesses.



- \* The ratio of each type of business to the total number of businesses in Lake Oswego.
- \* The variety, quality, and availability of local goods and services.
- \* The quality of services provided to the customer by local businesses.
- \* The availability, visibility, quantity, and quality of local business signage.
- \* The adequacy and condition of customer parking spaces.





## PARKS, RECREATION AND OPEN SPACE

### 7. PARKS, RECREATION AND OPEN SPACE

Rest, relaxation, recreation and renewal are a necessary part of human existence, and very much the basis of Lake Oswego's development during the 20th century. Separated off from Portland by Palatine Hill and Tryon Creek, Lake Oswego offered a sylvan alternative to the hectic pace of the urban center. Lake Oswego remains a place of striking physical beauty and offers the opportunity to relief from the rest of the urbanized region, despite years of development within and around our community. Our city parks, recreational facilities, recreational programs, and open space each help to improve the entire community's quality of life by providing all residents the opportunity to exercise, relax and enjoy nature.



The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 5 (Open Spaces, Scenic and Historic Areas, and Natural Resources); Goal 8 (Parks and Recreation). Specific goal statements include:

- ✦ Protect, enhance, maintain and expand a network of open space areas and scenic resources within and adjacent to the Urban Services Boundary.
- ✦ Plan, acquire, develop and maintain an attractive, safe and functional system of park, open space and recreation facilities, both active and passive. Ensure that this system is available to all segments of the population, and serves diverse current and long-range community needs.



- \* Enhance the quality of life in the community by providing recreational programs that are creative, productive, and responsive to the needs of the public, including those who have special needs such as the elderly, disabled, and disadvantaged.
- \* Distribute park and recreation opportunities by type throughout the City as land availability allows.

## KEY INDICATORS

(not arranged in order of priority)

- 7.1 The number of recreational programs offered to the community and the number of participants enrolled in those programs.
- 7.2 The number of residents and the number of non-residents enrolled in recreational programs.
- 7.3 The amount/percentage of the City Budget allocated to open space enhancement projects, parks development, capital improvements and programs.
- 7.4 The total acres of open space, City parks, developed facilities, undeveloped parks per 1,000 residents.
- 7.5 Lake Oswego Adult Community Center:
  - \* The number of Lake Oswego senior citizens served.
  - \* Number of Lake Oswego seniors that participate in ACC programs.
  - \* The number of volunteer hours performed.
  - \* Special services that are offered.
- 7.6 The number of residences that are located within Lake Oswego's Urban Services Boundary and are located within 1/4 mile of a park, open space, or school facility (see map contained in Appendix 21).



## MONITORING METHODS

These indicators may be monitored based on data that are currently collected or may be easily developed by the Lake Oswego Parks & Recreation Department and Planning Department. Some related indicators might require the creation and implementation of a citizen survey.

## OTHER RELATED INDICATORS

- \* Availability, or ease in reserving game times/tee times/court times by residents.
- \* Percent of residents rating Parks & Recreation programs as "good" or "very good."



Department of Parks

- \* Percent of residents rating quality of city parks and open space as "good" or "very good."
- \* Number of Oswego Lake easements and number of members.
- \* The number of residents using city parks two or more times per month.
- \* Annual performance indicators provided by the Lake Oswego and Recreation.





## CULTURE AND HISTORY

### 8. CULTURE AND HISTORY

Lake Oswego prides itself in its cultural and historical heritage. The arts and cultural resources of our community play an increasing role in our civic and economic life by providing opportunities for self-expression and entertainment. The Lakewood Center, Lake Oswego Library, Adult Community



Center and Marylhurst University are important local institutions that provide a multitude of cultural opportunities. They are joined by other important cultural partners, including our local schools, arts galleries, arts festivals and concerts, and our local night club scene.

Our attention to history provides a necessary understanding and appreciation of the economic, social and physical forces that continue to shape our community. The Heritage House, Peg Tree, Iron Furnace in George Rogers Park and the Iron Mountain Trail represent an important beginning for preserving and celebrating the history of Lake Oswego. Other important historic resources remain undiscovered and unrecognized throughout our community.

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 5 (Open Spaces, Scenic and Historic Areas, and Natural Areas, Section 8 Historic and



Cultural Resources). The following goal statement applies directly to the Culture and History indicators:

- \* Preserve the historical, archaeological and cultural resources of the community.

## KEY INDICATORS

(not arranged in order of priority)

- 8.1 Number of public and private enrichment programs and classes.
- 8.2 Number of resident artists as reported by the Arts Commission.
- 8.3 Number of historic structures/sites identified, inventoried, lost as listed by the City of Lake Oswego.
- 8.4 Percentage of historic structures/sites which have signage.
- 8.5 Number of dollars invested in restoring old and or abandoned buildings.
- 8.6 Library circulation numbers.
- 8.7 Total number of hours Library is open annually.



## MONITORING METHODS

Many of cultural indicators may be monitored based on data collected and reported by the Lakewood Center, Marylhurst University, PCC, Lake Oswego Library, Lake Oswego School District, Heritage House, community organizations. The number of course offerings noted in proposed indicator 8.1 would need to be further defined. The historical indicators may be monitored from data provided by the Planning Department and the Historic Review Commission of the City of Lake Oswego. Additional research may also be required to identify additional reliable sources to report the number of resident artists in Lake Oswego.

## OTHER RELATED INDICATORS

- \* Number of cultural institutions.
- \* Percentage of residents which participate in public and private enrichment programs and classes.
- \* Percentage of residents indicating satisfaction with present offering of enrichment programs and classes.
- \* Public funding per capita spent on cultural activities.
- \* Number of ethnic cultural opportunities including dining.
- \* Public awareness of Lake Oswego history and historic structures.
- \* Frequency of updates to City's inventory list.
- \* Number of historic districts.
- \* Number of archaeological sites identified.



- \* Percentage of archaeological sites protected.





## COMMUNITY INVOLVEMENT

### 9. COMMUNITY INVOLVEMENT

The health and vitality of a community is dependent on the active involvement and engagement of its citizens. The following indicators measure the extent to which the citizens of Lake Oswego invest themselves in community-based organizations and activities, and are engaged in the civic life of the communi-



ty. The indicators measure the breadth and width of community involvement, paying particular attention to participation in service clubs and community organizations, participation in elections and the diversity of religious organizations.

The above statements and the indicators presented below are consistent with the goals, policies, and recommended action measures

contained within the following sections of the Lake Oswego Comprehensive Plan: Goal 1 (Citizen Involvement); Goal 12 (Transportation). Specific goal statements include:

- \* Create opportunities for every interested citizen to be involved in all phases of the planning process to ensure that their concerns are heard.
- \* Encourage broadly based public participation including all geographic areas and diverse interests.
- \* Ensure regular and ongoing two-way communication between citizens and City elected and appointed officials.
- \* Recognize and promote community events as having potential for positive impacts and as important community identity.

#### KEY INDICATORS

(not arranged in order of priority)

- 9.1 The number of non-profit organizations, service clubs, voluntary associations and other community organizations in Lake Oswego.
- 9.2 The percentage of Lake Oswego residents who belong to non-profit organizations, service clubs, voluntary associations and other community organizations.
- 9.3 Number of Neighborhood Associations, CPO's and Neighborhood Plans.
- 9.4 The percentage of Lake Oswego residents who volunteer for civic, community or non-profit activities.
- 9.5 The percentage of registered voters in Lake Oswego who participate in general elections.
- 9.6 The number of houses of worship located in Lake Oswego.
- 9.7 Number of civic celebrations and participants.



### MONITORING METHODS

Some of the recommended indicators may be monitored based on data available from the elections officers of Clackamas, Multnomah and Washington counties. Additional information may be available from a registry of local organizations and associations that is currently being compiled by the City of Lake Oswego. A citizen survey may be necessary to measure the extent to which Lake Oswego residents are involved in volunteer activities.

### OTHER RELATED INDICATORS

- \* The percentage of Lake Oswego residents who feel a part of their community.
- \* The percentage of Lake Oswego residents who are satisfied with their local government.
- \* The percentage of Lake Oswego residents who are involved in religious activities.

## **SECTION 2**

# **IMPLEMENTATION PLAN, BUDGET AND TIME TABLE**



## IMPLEMENTATION PLAN AND TIME TABLE

### IMPLEMENTATION PLAN AND TIME TABLE

The Task Force has identified two major categories of action steps for implementing the Indicators Program. The components form a comprehensive approach to community goal-setting and performance monitoring. Each component represents a distinct set of activities and products that may be undertaken in phases as set forth below.

#### PHASE I BASIC INDICATORS PROGRAM

The basic program represents the minimum commitment required by the City to fulfill the directives of the Growth Management policies. Following adoption of a final set of indicators, City planning staff will further define each indicator, identify specific sources of data and develop a benchmark of historical and comparative data to form the basis of future monitoring. At the end product of this initial stage, the City will have a collection of "yardsticks" that will serve to measure change over time and compare the experience of Lake Oswego to other communities. An example of the data analysis and level of detail that would be required in order to monitor a fully developed indicator appears in Appendix 18 of this report.

Once development is completed, City planning staff will collect monitoring data and produce Indicator reports on annual or biennial cycles as determined by the Council. These regular reports will be made available to the City Council and staff, and broadly distributed to organizations and institutions in the community. If produced in conjunction with the Community Assessment Survey, the Indicators Report may become a valuable tool for policy, program and budget deliberations, as well as an information base for the Planning Commission.

The program development components of Phase I can be completed within 9 months of adoption of the Indicators Program. The first cycle of data collection and monitoring should occur at least 12 months later during the summer and early fall, and repeated annually or biennially as directed by the Council.



## PHASE II VISION STATEMENTS AND COMMUNITY TARGETS

The basic program establishes indicators for measuring change and progress in Lake Oswego. As such, these “yardsticks” may only tell the community about its past and current condition. Without targets on the “yardstick”, the community has no way of relating and comparing its past or current condition to a set of common goals and aspirations. Without targets, the Council will be unable to develop a set of Quality of Life Action Steps and measure progress towards their completion. The true value of the Indicators Program can not be fully realized if the indicators can not measure the community’s performance towards achieving important goals. Without targets, the community focus is on the present and past. With targets, the community focus shifts to the present and future. This forward-looking orientation is essential to building collaboration among Lake Oswego’s private and public partners, increasing the efficiency and effectiveness of community investments, and expanding the levels of participation and civic engagement of residents and business owners.

The Task Force recommends that the City Council authorize the development of Indicator Targets based on the vision statements and goals set forth in the Comprehensive Plan. This value-added process will require the formation of a new task force to guide the initial development of the basic Indicators Program and generate broad public involvement in the setting of Indicator Targets. We anticipate that this phase of development will take 12 months and may overlap the 9 months required for the initial program development described for the basic program. This phase will require the involvement of City planning staff and other support resources required of a major public involvement process.

GENERAL  
TIME TABLE

GENERAL TIME TABLE

The Task Force recommends that the Planning Commission and the City Council authorize the Indicators Program and Targeting Project (Phases I and II) as a part of the FY 2000-2001 budget. If work gets underway in July 2000, we anticipate that the first formal Quality of Life Indicators Status Report will be available by April 2001 as a resource to the Planning Commission and to inform the Council's planning for FY 2001-2002 budget. The Targeting Project should be completed by July 2001 for inclusion in the January 2002 Indicator's Report.

Implementation Task	2000				2001		
	Jan.	April	June	July	Jan.	April	July
Council Initiates Phases I and II		•••	•••				
Begin Phases I and II				•••			
Complete Phase I, Quality of Life Status Report Available					•••		
Complete Phase II, Indicator Targets Established							•••

Finally, the Commission and the Council may wish to use the Targeting Project report and Indicator's Reports to guide a process of determining short and long term action steps regarding the City's Quality of Life. We strongly recommend that the Council involve its many community partners in these deliberations with the expressed intention of leveraging private actions to compliment public actions. If the Council can accomplish this level of collaboration and coordination, the Indicators Program will have achieved its fullest potential.





**BUDGET ESTIMATES**

The Task Force budget estimates are based on a recommendation for implementation of all indicators and an intensive targeting program. Therefore, the following costs are presented to accomplish these objectives without respect to funding or staffing resources, or the alternative of implementing a reduced program consisting of a lesser number of indicators.

**PHASE I - BASIC INDICATORS PROGRAM**

The following schedule summarizes the annual staffing and operating requirements to support a Quality of Life Indicators Program at the level of effort described for Phase I of the Implementation Plan based on annual and biennial reporting cycles.

<b>Budget to Monitor All Proposed Indicators</b>	<b>Initial Program Development</b>	<b>For Each Report Cycle</b>
<b>Staffing Requirements:</b>		
Project Coordinator	1 FTE for 9-12 months	1 FTE for 3 months
Intern	1 PTE for 6 months	1 PTE for 3 months
Clerical Services	1 .50 FTE for 2 months	1 .50 FTE for 1 month
<b>Total Staffing Requirements</b>	<b>\$58,500</b>	<b>\$16,750</b>
<b>Operating Requirements:</b>		
Materials and Printing	\$2,000 per 100 copies of full report \$500 per 100 copies of report summary	\$2,000 per 100 copies of full report \$500 per 100 copies of report summary
Distribution (postage)	\$150	\$150
Professional Survey	\$10,000	\$10,000
Tree Canopy and Impervious Area Mapping & Analysis	\$4,500	\$4,500
Traffic Counts (\$200 per local street \$500 per arterial)	\$3,500	\$3,500
Other Data Development and Collection	\$1,500	\$1,500
<b>Total Operating Requirements</b>	<b>\$22,150</b>	<b>\$22,150</b>
<b>Indicators Program Budget</b>	<b>\$80,650</b>	<b>\$38,900</b>

*Note: The Task Force assumes that the Indicator's Program will require the addition of several questions to the Community Assessment Survey, resulting in incremental costs to the City. This budget does not assume the full cost of the current survey.*



## PHASE II - TARGETING PROJECT

The Targeting Project will add one-time-only financial requirements to the Indicators Program in the fiscal year immediately following Council authorization. The following schedule summarizes the staffing and operating requirements for Phase II based on current budget factors.

One-Time-Only Operating Budget	Targeting Project
Staffing Requirements:	
Project Coordinator	1 FTE for 12 months
Senior Staff Involvement	1 .50 FTE for 12 months
Administrative Support	1 .50 FTE for 12 months
Total Staffing Requirements	\$98,000
Operating Requirements:	
Materials and Supplies	\$1,500
Copying and Distribution	\$1,000
Professional Services – Survey	\$10,000
Total Operating Requirements	\$12,500
<b><i>Targeting Project Budget</i></b>	<b><i>\$110,500</i></b>

## BUDGET ESTIMATES FINAL NOTE

The Task Force is not necessarily recommending that additional staff would be required to implement the proposed Quality of Life Program. The above estimated program costs may or may not be accomplished through existing staff resources and projected City Budgets. However, if undertaken by current staff, this would require adjustments to projects identified on the Planning Department’s work program and a complete analysis of the various alternatives would need to be carefully considered by the Planning Commission and the City Council. In addition, further development and implementation of the Quality of Life Program relies on public and private partnerships to be successful.

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**QUALITY OF LIFE  
INDICATORS  
LIST**



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**SECTION 3**  
**APPENDICES**

