

DEVELOPMENT CODE IMPROVEMENT PROJECT 6 (DCIP-6)

TREE CODE

Work Plan

Urban Design & Planning - Comprehensive Planning

Revised July 12, 2012

Prepared by Tina Osterink, Associate Natural Resources Planner

PROJECT DESCRIPTION

This project is one component of the Development Code Improvement Project - Phase 6 (DCIP-6), which is on the 2012 Council Work Plan.

The Tree Code has had minimal updates over the years and is considered difficult to understand by the public and City staff. The existing Tree Code has resulted in interpretation inconsistencies that have affected and continue to impact public and private projects.

The purpose of the project is to:

- Clarify and consolidate sections of the Tree code so it is easy to use and clear to residents, property owners, developers, tree care professionals and City staff;
- Develop clear and objective standards for tree protection, preservation, removal and replacement; and
- Create a recommended City tree list to ensure the right tree is planted in the right place for required trees.

The project will direct its efforts through the Urban Forestry Subcommittee (UFS). The UFS consists of members with expertise associated with trees. The UFS is the advising subcommittee to the Natural Resources and Sustainability Committee (NRSC) on Urban Forestry issues.

BACKGROUND

On February 21, 2012, the Council enacted new urban forestry goals, policies and action measures as part of Volume 1 - Findings and Volume 2 - Policies of the Gresham Community Development Plan. This project carries out an action measure in the Council-adopted Urban Forestry Management Plan (UFMP) and aims to address outdated tree provisions scattered throughout the Development Code, parts of which are more than 20 years old. The project will include Code Amendments that should be effective at the end of 2013.

PROJECT SCOPE

The City has a number of tree rules that establish a framework for tree protection, preservation, removal and replacement, planting and care. The Tree Code Update project will clarify these existing rules and address outdated tree provisions scattered throughout the Development Code.

The phases of the project are:

PHASE 1: WORK PLAN

This phase involves planning the project and its phases and tasks.

PHASE 2: RESEARCH & ANALYSIS

This phase includes an analysis of issues related to the Tree Code. It will begin with a summary of issues identified by staff:

- *Outdated and un-organized Tree Code.* The Code is difficult to understand, follow, apply and implement.
- *Outdated lists for planting the right tree in the right place.* This includes along streets and arterial medians and within parking lots, buffer and landscape areas.
- *Unclear and subjective standards.* Including rules for tree protection, preservation, removal and replacement prior to and during the development process.
- *Inadequate and unclear Tree Code permit process.* This includes the role of arborists, review type, fees, utility exemptions and trees in environmental areas.
- *Unclear options for tree violations and for mitigation.* This addresses cases that replace larger trees with smaller trees.

Public outreach will be conducted to present the Tree Code Issues Summary and solicit input on Development Code issues and potential solutions. It will include outreach to:

- Gresham residents
- Gresham property and business owners
- Local neighborhood and business associations
- Arborists and tree care company operators
- Developers and land use applicants
- Homebuilder and Homeowner Associations
- Watershed councils
- Public utilities such as PGE
- Decision makers - City Council and Planning Commission
- City staff representing Urban Design & Planning, Department of Environmental Services, the City Attorney's Office, Park Operations and Community Development

PHASE 3: ALTERNATIVE DEVELOPMENT & SELECTION

Based on Phases 1 and 2, alternative approaches will be developed that address the previously identified issues/concerns. A community workshop and work sessions with the Planning Commission and Natural Resources and Sustainability Committee will be conducted to review the alternatives and select a preferred approach.

PHASE 4: CODE AMENDMENTS/LEGISLATIVE PROCESS

Once a preferred approach is selected, new Code will be drafted to implement the approach. The new Code will be considered for adoption by the Council.

Assuming adoption of the Tree Code update by the Council, amendments to Volume 3 (Code) of the Community Development Plan will be drafted to implement the preferred approach. This will require adequate public notice and public hearings before Council approval.

PHASE 5: PROJECT CLOSEOUT

This phase will involve archiving the project, evaluating the project, and identifying follow-up tasks and projects as determined by a prioritized action plan.

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
PHASE I: WORK PLAN				
Task 1.	Form and Interview Project Team Members Finalize City team members and meet individually to interview to discuss their issues with the Tree Code.	Interview notes	Tina Osterink	Feb - May 2012
Task 2.	Create Problem Definition Review Tree Code issues in the UFMP and the 2012 Council Work Plan.	One page doc.	Tina Osterink	Mar - Apr 2012
Task 3.	Project Team Meetings Review project scope and conduct needs and wants assessment to inform Project Goal. Begin discussing issues.	Meeting schedule and materials, meeting notes, Needs & Wants Report	Tina Osterink	5/3 and 6/8/12
Task 4.	Prepare Draft Work Plan and Public Participation Plan (PPP) This Work Plan and PPP is a key first step in this project.	Draft Work Plan, Excel Schedule, Draft PPP	Tina Osterink Lauren McGuire	Mar. - June 2012
Task 5.	Prepare Stakeholder Matrix Identify expertise and how/when each stakeholder will be involved.	Matrix	Tina Osterink	June 2012
Task 6.	Neighborhood Coalition	Presentation	Tina Osterink	6/12/12 (Eve)

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
	Project introduction. Collect neighborhood Tree Code issues.			
Task 7.	Prepare Final Work Plan, Schedule and Public Participation Plan Refine based on Project Team and UFS input.	Work Plan, Excel Schedule, Public Participation Plan	Tina Osterink	June - July 2012
Task 8.	Prepare Public Outreach Materials Create documents and a project web page that summarize the project and explain the project's background, history and goals. Materials should include project schedule. Advertise and inform.	Project web page, project flier, forum fliers, fact sheets, online forum, FAQ	Tina Osterink Lauren McGuire	Ongoing
Task 9.	Planning Commission Work Session Review project scope, schedule and gain feedback on issues.	Memorandum, Issues Chart, Work Plan, Schedule, presentation	Tina Osterink	7/23/12 (Eve)
Task 10.	Project Team Meeting Review project schedule and solicit input on issues. Begin discussion on alternatives.	Meeting materials and summary	Tina Osterink	7/12/12
Task 11.	Developer Focus Group Review project and gain input on issues from local development community and homebuilders association.	Meeting materials and summary		7/26/12
PHASE 2: RESEARCH & ANALYSIS				
Task 12.	Research and Writing Conduct Tree Code research and determine what other Oregon and Northwest jurisdictions are doing to address issues.	Comparable Code Matrix and Report, a five to eight-page Issues White Paper	Tina Osterink	May - Aug 2012

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
Task 13.	Conduct Fieldwork Conduct fieldwork to analyze issues and collect photos. Coordinate fieldwork with project team members.	Photographs, fieldwork notes	Tina Osterink Lauren McGuire	Mar - Oct 2012
Task 14.	Tree Code Review Read, take notes and comprehend extent of Tree Code.	Notes	Tina Osterink	Feb – Sep 2012
Task 15.	Policy Leadership Team Review project Work Plan, Schedule and proposed Council meetings.	Work Plan, Schedule, Issues Chart	Tina Osterink	8/8/12
Task 16.	Neighborhood Coalition Project introduction. Collect neighborhood Tree Code issues.	Meeting materials, presentation	Tina Osterink	8/14/12 (Eve)
Task 17.	Community Forum - #1 Describe project and gain feedback on issues and opportunities.	Forum materials, online video, Input Summary	Tina Osterink Lauren McGuire	8/15/12 (Eve) August
Task 18.	UFS Meeting Discuss and seek input on issues and opportunities and research.	Meeting materials, meeting summary	Tina Osterink	8/20/12 (Eve)
Task 19.	NRSC Work Session Discuss project scope, Work Plan and Tree Code issues.	Memorandum, presentation	Tina Osterink	9/12/12 (Eve) (Memo 8/29)
Task 20.	Other Outreach Seek input from neighborhood coalition and other groups as appropriate.	Meeting materials, summary, and email blast	Tina Osterink	Ongoing
Task 21.	Policy Leadership Team Review Council Staff Report and Issues Presentation.	Draft Council Staff Report, presentation	Tina Osterink	9/12/12

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
Task 22.	Project Team Meeting Review to solicit input and ideas on the approaches.	Meeting materials and summary	Tina Osterink	9/13/12
Task 23.	Farmers Market Display Issues and Draft Alternative Approaches.	Issues Chart	Tina Osterink	9/15/12 (Sat.)
Task 24.	Focus Groups Gain input on Issues and Alternative Approaches from Watershed Councils and Business Community (GDDA, RBC, Chamber, GREAT, Tree Care & Tree Plan Applicants).	Meeting materials, Input Summary	Tina Osterink Lauren McGuire	9/25 & 9/26
Task 25.	City Council Work Session Discuss project Schedule and Issues.	Staff Report, presentation	Tina Osterink Jonathan Harker	10/9/12
PHASE 3: ALTERNATIVES DEVELOPMENT & SELECTION				
Task 26.	Create Alternatives Prepare Alternative Approaches to addressing Tree Code issues.	Draft Alternative Approaches	Tina Osterink	Aug - Oct 2012
Task 27.	Coordinate Consultant Work On Tree List Draft, submit and review RFP. Contract management and meeting coordination.	RFP, Draft and Final Alternatives	Tina Osterink Lauren McGuire Consultant	Sep – Nov 2012
Task 28.	Project Team Meeting Review to solicit input and ideas on the Alternative Approaches.	Meeting materials and summary	Tina Osterink	10/11/12
Task 29.	UFS Meeting Review to solicit input and ideas on the Alternative Approaches.	Meeting materials and summary	Tina Osterink	10/15/12 (Eve)
Task 30.	Prepare Final Alternatives Synthesize feedback from Team	Report	Tina Osterink	Oct 2012

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
	and UFS to create final range of Alternative Approaches.			
Task 31.	Planning Commission Work Session Review Draft Alternatives and seek Commission input.	Memorandum, attachments, presentation	Tina Osterink	11/12/12 (Eve)
Task 32.	NRSC Work Session Review Draft Alternatives and gain Committee input.	Memorandum, presentation	Tina Osterink	11/14/12 (Eve) (Memo 10/31)
Task 33.	Community Forum - #2 Discuss and collect input on Draft Alternatives.	Meeting materials, email blast, online video, Input Summary	Tina Osterink Lauren McGuire	11/28/12 (Eve) Nov - Dec
Task 34.	UFS Meeting Review Alternatives and gain input.	Meeting materials and summary	Tina Osterink	12/17/12 (Eve)
Task 35.	Create and Mail Utility Advertising Inserts. Advertise upcoming outreach events for Preferred Approach input (4/6 Arbor Day, 4/24 Forum).	Utility insert (InDesign and PDF)	Lauren McGuire	January 2013
Task 36.	Prepare Draft Preferred Approach Synthesize input from Planning Commission, forums and others.	Draft report	Tina Osterink	January 2013
Task 37.	UFS Meeting Review Alternatives if needed.	Meeting materials and summary	Tina Osterink	1/21/13 (Eve)
Task 38.	Project Team Meeting Input on Preferred Approach, part one.	Meeting materials and summary	Tina Osterink	2/14/13
Task 39.	UFS Meeting	Meeting materials	Tina Osterink	2/18/13 (Eve)

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
	Input on Preferred Approach, part one.	and summary		
Task 40.	Project Team Meeting Input on Preferred Approach, part two.	Deliverable?	Tina Osterink?	Time frame?
Task 41.	Advertise Preferred Approach Events/Forum Article for Outlook and Oregonian to advertise Preferred Approach and events.	Press release flyers	Tina Osterink Lauren McGuire	3/11/13
Task 42.	UFS Meeting Input on Preferred Approach, part two.	Meeting materials and summary	Tina Osterink	3/18/13 (Eve)
Task 43.	Planning Commission Work Session Review Preferred Approach and gain Commission input.	Memorandum, attachments, presentation	Tina Osterink	3/25/13 (Eve)
Task 44.	Arbor Day Outreach Event Advertise Preferred Approach at annual event.	Meeting materials	Tina Osterink	4/6/13 (Sat)
Task 45.	Neighborhood Coalition Review Preferred Approach and gain Coalition input.	Meeting materials, presentation	Tina Osterink	4/9/13 (Eve)
Task 46.	NRSC Work Session Review Preferred Approach and gain committee input.	Memorandum, Presentation	Tina Osterink	4/10/13 (Eve) (Memo 3/27)
Task 47.	Stakeholder Meeting Review Preferred Approach and gain stakeholder input (Developers, Business & Watershed Groups).	Meeting materials and summary	Tina Osterink	4/17/13
Task 48.	Community Forum - #3 Review Preferred Approach and	Meeting materials, email blast,	Tina Osterink Lauren McGuire	4/24/13 (Eve) April - May

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
	gain public input.	online video Input Summary		
Task 49.	Policy Leadership Team Review Preferred Approach and gain feedback for Council Work Session.	Draft Council Staff Report, presentation	Tina Osterink	5/15/13
Task 50.	Farmers Market Display flyer on Preferred Approach.	Flyer	Tina Osterink	5/18/13 (Sat.)
Task 51.	East Gresham Info Fair Display flyer on Preferred Approach.	Flyer	Tina Osterink	6/5/13 (Eve)
Task 52.	City Council Work Session Review Preferred Approach with Council and gain input.	Staff Report, presentation	Tina Osterink	6/11/13
PHASE 4: CODE AMENDMENTS				
Task 53.	Prepare Draft Code Amendment Code changes will be put into Volume 3 (Code) Amendments.	Draft report	Tina Osterink	May - Sep 2013
Task 54.	Project Team Meeting Review Code Amendments and gain input over a few meetings.	Meeting materials, summary notes	Tina Osterink	6/13, 7/11, 8/8
Task 55.	UFS Meeting Review Code Amendments over a few meetings.	Meeting materials, summary notes	Tina Osterink	7/22, 8/19, 9/16 (Eve)
Task 56.	Nadaka Community Festival Display Preferred Approach and Code Amendments.	Preferred Approach Flyer, Draft Code Amendments	Tina Osterink	8/10/13
Task 57.	Metro/DLCD Notice	Draft notice	Tina Osterink	8/12/13
Task 58.	Planning Commission Work Session	Memorandum, presentation	Tina Osterink	8/26/13

	TASK	DELIVERABLE	PERSON(S) RESPONSIBLE	TENTATIVE TIME FRAME
	Review Code Amendments prior to PC Hearing.			
Task 59.	Community Forum - #4 Display Draft Code Amendments open house style.	Meeting materials, email blast, online video Input Summary	Tina Osterink Lauren McGuire	9/11/13
Task 60.	Planning Commission Hearing The Planning Commission shall hold a hearing to reach a recommendation on the proposed Amendments prior to the City Council public hearing on the proposals.	Staff Report, presentation	Tina Osterink	10/14/13
Task 61.	City Council Hearing Decision on proposed Amendments.	Staff Report, Presentation	Tina Osterink	11/19/13
Task 62.	Council Enactment	Staff Report	Tina Osterink	12/17/13

PHASE 5: PROJECT CLOSEOUT

Task 63.	Closeout <ul style="list-style-type: none"> • Training for relevant staff • Assisting in any form and checklist updates • Archiving project materials (electronic files, hard copies, web page) • Evaluate project • Any outreach or marketing of the project • Celebrating the project with the team • Web updates 		Tina Osterink	January 2014
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PROJECT TEAM

Core Group

- Tina Osterink, Comprehensive Planning (Project Lead)
- Lauren McGuire, Comprehensive Planning (Project Advisor)
- Jonathan Harker, Urban Design & Planning Director
- Dave Krogh, Development Planning
- Ken Koblitz, Development Engineering
- Rita Humphrey, Code Compliance
- Rick Faus, City Attorney's Office
- Todd Jones, Parks Operations
- Kathy Majidi, Natural Resources Division
- Laura Guderyahn, Natural Resources Division

As Needed

- Eric Schmidt, Community Development Director
- Ann Pytynia, Principal Planner
- Ashley Berman, City Attorney's Office
- Jeff Shelley, Transportation Engineering
- Erin Aigner, GIS
- Jennifer Belknap-Williamson, Watershed Division Manager