CITIZENS HANDBOOK

A Guide For Neighborhood Associations

OFFICE of NEIGHBORHOOD ASSOCIATIONS PORTLAND, OREGON
CITIZENS HANDBOOK

A Guide for Portland’s Neighborhood Associations
July 1995 edition

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Dear Neighborhood Activist,

The Office of Neighborhood Associations is pleased to make this updated edition of our Citizens Handbook available to you. The information provided is designed to be a useful guide for your efforts in leading your neighborhood association.

Portland's neighborhood associations and citizen activists have made a tremendous difference in the quality of life in our city. Our strong tradition of neighborhood organization has led to many accomplishments. It is our hope that this handbook will give both new and experienced volunteers information that will continue to make this work fun, challenging and effective. Please feel free to copy and distribute any parts of the Handbook to other citizens. We will provide periodic updates as new and useful information becomes available.

We hope you share our sense of pride in our neighborhood program and in Portland. Thank you for helping citizens become effective participants in so many aspects of our city's life.

Sincerely,

Diane Linn
Director
Office of Neighborhood Associations
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Welcome to Portland's Neighborhood Program

---How To Use This Handbook---

This handbook was originally written in 1986 to aid citizens in their work with neighborhood associations and other citizen involvement programs. Since then, Portland's neighborhood program and the role of citizens in setting directions for our City have grown tremendously. Well-informed and active citizens are crucial to our future, but citizens need information in order to be effective participants in neighborhood activities.

This book will help you build stronger neighborhood organizations. Each section has been written to simplify the elements of neighborhood association work. Some of it may be relevant for your situation, other information is not. Don't let the amount of material overwhelm you. Learn the basics and find other sections that concern you and your neighborhood association. Then, follow the steps for addressing that issue. Please remember that this is not intended to be a complete encyclopedia of the Portland City government or citizen involvement process. Rather, it is a beginning, a place to go to learn the basics of a particular problem or concern. If your problem is more complex than the information in this book, call your district neighborhood office or the Office of Neighborhood Associations for advice.

Good luck in your work!
Neighborhood Associations

Neighborhood associations are formally recognized organizations which offer an opportunity for citizens to participate in decision-making for their neighborhood. Participation in a neighborhood association is voluntary and open to all citizens who live or own property within its boundaries. Neighborhood associations draw together a great diversity of people to work together to enhance the livability of their neighborhood. While each neighborhood association differs depending on the needs of its residents, there are many things that all neighborhood associations can offer.

Neighborhood associations are the officially recognized channels for citizen participation. These volunteer organizations bring neighbors together in order to improve the livability of Portland’s neighborhoods. Although neighborhood associations have been active in Portland since the 1930's, their level of activity and credibility are now an increasingly important part of City government.

There are over ninety neighborhood associations throughout Portland that help citizens to make their voices heard in City Hall. You and other citizen volunteers are the heart of the neighborhood programs. If you are a resident of the City of Portland, there is a neighborhood association in your area.

Most neighborhood associations are concerned with issues that affect the quality of life in the community. This can include issues such as zoning regulations or traffic improvements, as well as events that strengthen neighborhoods on a person-to-person basis. Sponsoring neighborhood festivals, block parties, crime prevention activities and upgrading neighborhood parks are important projects for neighborhood associations.

Advocacy

- Represent neighborhood interests to City staff in identifying issues and advocating solutions to neighborhood problems.
- Recommend political action when needed.
- Share information and build consensus on issues.

Study And Planning

- Assess needs and determine priorities.
- Develop neighborhood plans through committees, task forces, meetings, surveys, and studies.
Policy Advice

- Review proposals and offers advice to City agencies.

Communications

- Facilitate two-way communication between local government and citizens in order to reach mutually satisfying solutions to neighborhood problems.
- Promote personal interaction and strengthen the social fabric of the community via newsletters, flyers, events and other means of communication.
- Provide a forum for discussing issues of importance to the neighborhood and the larger community.

Self-Help Activities

Using community volunteers to help the City move from talk to action in all areas of concern to neighbors, including crime prevention, housing rehabilitation, park cleanups and policy direction.

There are generally three bodies of membership within a neighborhood association:

- **General Membership** usually includes any interested person who lives, works, owns property or does business within the boundaries as specified by the neighborhood association’s bylaws. The number of general membership meetings, usually one to four a year, are also determined by each neighborhood association’s bylaws. The general membership may receive all mailings, newsletters, etc. of the neighborhood association upon request.

- **The Board Of Directors** is the governing body of the neighborhood association. Each board has officers (as stated in the bylaws) and is the decision-making body for the general membership. Board members are elected for a specific period of time. Meetings are held regularly in order to conduct the business of the neighborhood association.

- **Committees** are the task-related groups of the neighborhood association organized to work on a particular task or issue. Some committees meet for a specific project and end when the project is over while others are ongoing. Committees report to the board of directors.

Bylaws are the operating rules for your neighborhood association and will determine the makeup and procedures for the organization. The powers of the board, elections process and meetings are described in the bylaws (See Section IV). In addition, Standing Rules will help clarify meeting times and dates and other operations not covered by the bylaws and are a simple way to keep operating rules simple and flexible.

Guidelines for neighborhood associations, district coalitions and the Office of Neighborhood Associations have been developed by citizens and staff to clarify roles and
processes. A copy of the Guidelines is included in the Appendix to this handbook. Your neighborhood association must comply with the Guidelines in order to be recognized as a neighborhood association and receive services.

The Guidelines is an important document for your neighborhood association. It describes roles and responsibilities of recognized neighborhood associations, district coalitions, and the Office of Neighborhood Associations. It also provides a vehicle for citizens and staff to work together to periodically review the neighborhood association program and ensure that it meets the needs of citizens in Portland. This handbook, the ONA Guidelines, and your neighborhood association’s bylaws provide the guidance and basic information your group needs to be an effective, efficient organization.

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District Coalitions

The City funds Neighborhood District Coalition Offices to serve distinct geographic areas. Coalitions often address issues on a regional basis and provide efficient, coordinated assistance to citizens and neighborhood associations. The district offices provide direct support and service to the neighborhood associations located within their boundaries. Each of the offices is staffed with a coordinator, crime prevention specialists and other support staff who assist citizens with information and resources. District coalitions are independent non-profit organizations which are governed by a board of directors representing the neighborhoods served. As of this publication, a North Portland Neighborhood Office - which is not a district coalition - serves the neighborhood associations in North Portland.

Each district office differs in the way it is organized and the services offered to its member neighborhood associations. As you begin your volunteer activities, make an appointment with your district office staff to be briefed on the programs and procedures of that office. Also, you might want to attend a district coalition board meeting to better understand how the program is conducted in your district. Your neighborhood association’s representative to the coalition should attend an orientation session and serve as a liaison between your association and the coalition board.

District office staff, under the guidance of the board of directors, provide these services:

**Administration and Management**

- Helps neighborhood associations with grant applications, accounting and bookkeeping.
- Maintains all financial records to be accountable to ONA and the City Auditor’s office.
- Maintains files and records for neighborhood associations.
- Provides clerical support to staff and neighborhood associations.
- Provides insurance for block parties and other appropriate neighborhood events.
**Communication**

- Prints and distributes meeting minutes, provides notification and produces newsletters. (Check with your district office on its specific policy.)
- Provides information and referrals to residents.
- Keeps City staff informed on neighborhood issues.
- Facilitates communication between neighborhood associations and the business community.
- Notifies neighborhood associations and others of land use changes and other actions affecting particular neighborhoods.
- Acts as a liaison between neighborhood associations, City staff and others.
- Provides organizational continuity and history to new neighborhood leaders.

**Projects and Activities**

- Coordinates neighborhood activities and projects.
- Trains volunteers.
- Assists neighborhoods with long-range planning.
- Assists in organizing new or inactive neighborhood associations.
- Provides staff support to committees, activities, and projects.
- Researches information and resources.
- Assists with crime prevention and other community problem-solving activities.

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**District Coalition Boards**

Just as neighborhood associations differ in how they meet the needs of their residents, so do the district coalitions. A coalition board is a group of people who represent neighborhood associations, businesses or other community groups or agencies within a particular area. The type of decision-making powers and procedures entrusted to each board varies from group to group. Coalition boards are made up of the neighborhood associations (and other organizations as may be designated by the board). They are intended to serve the neighborhood associations of which they are comprised.

Board members fill two roles: In addition to acting as a link for the group they represent and the rest of the coalition, board members are responsible for the corporate affairs of the district coalition. Coalition boards set policy, hire staff, approve and monitor work plans and the annual contracts with the City, and ensure that the program is accountable to the neighborhoods served while spending public money wisely. The coalition boards take action on area-wide or Citywide issues and assist or support neighborhood associations in their districts. More information on the roles of staff and board members of the district coalitions is found in Section IV, "Creating the Formal Structure" and in the ONA Guidelines found in the Appendix.

Neighborhood district coalition offices, located throughout the City, are funded by the City, through ONA, to provide assistance to neighborhood associations. These
programs are independent non-profit organizations, governed by a board of directors that formulates policy and develops a work plan for that office. Staff help with information and referral, assistance with projects, and crime prevention and community organizing.

The district coalitions have provided the descriptions of their programs on the following pages.
North Portland Neighborhood Office

The North Portland Neighborhood Office serves some 60,000 people on the peninsula west of I-5, as well as the Hayden Island and Bridgeton areas. Nine neighborhood associations are independently organized within this neighborhood service area including University Park, St. Johns, Portsmouth, Overlook, Hayden Island, Friends of Cathedral Park, Kenton, Bridgeton, and Arbor Lodge. The St. Johns Business Association, North Lombard Business Association, Interstate Business Association, Kenton Business Associations, and the Kenton Action Plan are also located within the North Portland Neighborhood Office service area.

Neighborhood associations serve as a vehicle for citizens to organize efforts to maintain and improve the livability of North Portland. The nine neighborhood associations are officially recognized by the City of Portland and have legal standing in land-use matters. These groups are also involved in a wide variety of self-help activities to improve their neighborhoods. Government jurisdictions and private concerns rely on neighborhood associations for advice on matters including crime prevention, traffic, social services, housing, the environment, and land use. North Portland neighborhood associations work in cooperation on issues of mutual concern. The neighborhood chairs meet on a monthly basis as part of a network. The network provides North Portland neighborhoods flexibility in working either together or independently, depending on the issue and/or the goals and the directions of the individual neighborhood associations.

In addition to providing support services for the nine neighborhood associations, the North Portland Neighborhood Office provides direct service to citizens in North Portland. These services are offered in an effort to help citizens help themselves in creating a more livable North Portland. Crime prevention services, from block watches to foot patrols, are provided along with services to assist citizens in land-use, traffic, open space, housing, and nuisance issues. Two crime prevention specialists work along with the neighborhood coordinator to offer these services to neighborhood associations and citizens in North Portland. Customer service is the principal goal of the North Portland Neighborhood Office.
East Portland District Coalition

The East Portland District Coalition (EPDC) is a publicly-funded, private non-profit agency providing technical assistance, information and referral, and crime prevention services to citizens and neighborhood groups east of I-205 and within the City limits. The program is managed by a citizen-based board of directors comprised of representatives from nine neighborhood associations and community groups including Argay Neighborhood Association, Hazelwood Community Group, Mill Park Neighborhood Association, Parkrose Community Group, Parkrose Neighborhood Association, Parkrose Heights Association of Neighbors, Powellhurst/Gilbert Neighborhood Association, Centennial Neighborhood Association, and Wilkes Community Group.

Responsibilities of the Board:

- The Board of Directors is made up of two representatives from each participating neighborhood. The EPDC Board is responsible for setting policy and overseeing the program of the East Portland District Office.
- The Board also acts as a sounding board for neighborhood issues and provides support for area-wide issues and local neighborhood issues where appropriate.
- The Board supervises and participates in the development, adoption, and implementation of an annual work plan.

The District Office:

- EPDC maintains a user-friendly office at 1917 SE 122nd Ave. with a staff of four: a Coordinator, two Crime Prevention Coordinators, and an Office Manager.
- Office space is donated by EPDC to community-based activities including an East Precinct Community Contact Office, Neighborhood Mediation, the Police Activities League, American Association of Retired Persons, and others.
- The office is open from 9:00 a.m. to 6:00 p.m. Monday through Friday and is available for meetings evenings and weekends as well.
- Citizen Participation: The East Portland office staff is available to individuals and issue groups as well as neighborhood associations for technical assistance, information and referral, neighborhood newsletter assistance, etc.
- Crime Prevention: Crime prevention staff work with individuals and neighborhood groups to set up neighborhood watches and/or work to resolve specific problems through community organizing efforts.
Central Northeast Neighbors, Inc.

Central Northeast Neighbors Inc. (CNN) is a coalition comprised of nine neighborhood associations: Beaumont-Wilshire, East Columbia, Hollywood, Madison North, Madison South, Rose City Park, Cully, Sumner, and Sunderland. CNN is a 501 (c)(3) nonprofit organization. The mission of CNN is to strengthen neighborhoods through citizen involvement. CNN is committed to enhancing and preserving the quality of life of its community by building a network of informed, active citizens.

Responsibilities of the Board:

Two representatives from each neighborhood association are members of the CNN Board of Directors, which oversees the program and works to:

- Ensure continuity of the organization, establish policy, and approve program plans to carry out organizational policy.
- Monitor and review CNN projects/programs.
- Plan for the future of CNN.
- Secure resources to fund CNN and its programs.
- Provide neighbor-to-neighbor interaction and exchange of ideas, experiences, and accomplishments.

The District Office:

CNN employs a Coordinator, two Crime Prevention Specialists and an Office Manager. All possess expertise to assist neighbors on a wide range of community issues such as crime prevention and community policing, racial intolerance, nuisance abatement, land use, problem solving, building community consensus, revitalization of neighborhoods and neighborhood organizational development. Daily, CNN serves as a central point of information exchange and a forum for sharing views. CNN strives to build an informed citizenry and sense of community. Other services include:

- Providing information and referral concerning both the neighborhood and the City of Portland.
- Providing technical assistance on land use, crime prevention issues and special projects.
- Helping neighborhood associations develop strategies to accomplish goals.
- Serving as a conduit for neighbors, associations, other coalitions, and the City.
- Providing program planning and resource development assistance.
- Planning and facilitating community meetings, forums, and workshops.
- Recruiting and training citizen volunteers on topics such as the application of bylaws, ONA Guidelines, the Oregon Public Meetings Law, planning and conducting meetings, workplan development, and grant writing.
- Encouraging recognition of neighbors for dedicated service to their community.
Central Northeast Neighbors, continued—

- Consulting, guiding and convening neighbors, neighborhood association leaders, social service providers, church members, and business association representatives on issues affecting the livability of their neighborhood.
- Working with local units of government and agencies such as Tri-Met, Metro, Portland Public Schools, the Oregon Liquor Control Commission and others to solve local community problems.
- Maintaining a resource library and providing copying and faxing services.
- Providing assistance to neighbors in producing, printing and distributing newsletters.
- Applying community organizing principles to address community issues.
Established in 1965 under the Model Cities Program, the Northeast Coalition of Neighborhoods (NECN) is a non-profit, tax-exempt corporation. Thirty-one members comprise the Northeast Coalition of Neighborhoods Board. Twenty-six are elected from the thirteen Inner Northeast Neighborhoods and five are elected, selected or appointed as members-at-large.

Responsibilities of the Board:

- Develops and carries out comprehensive planning efforts which include economic development, employment and training, housing, neighborhood livability, public safety, and gang prevention services.
- Staff and Board members work with neighborhood organizations, governmental agencies, community, business, and church groups to keep a communication network open and working for the benefit of the total community.
- Board works with staff to develop and monitor budgets and contracts and acts as fiscal agent for neighborhood grants.
- The Board does not make decisions for individual neighborhood associations. Each neighborhood is autonomous in its decision-making power.
- The Board sponsors and is involved with the following committees:
  - Land Use/Transportation
  - Jobs
  - Economic Development  - Livability
  - Public Safety
  - Youth Gang Task Force

Ad Hoc Committees are established to respond to emerging community needs.

- Works with staff to develop an annual work plan.
- Serves as forum for community issues.
- Contracts with City, County, State and other funding sources.

The District Office

- Provides quarterly reports on budget and program activities and prepares budgets for submission to City, County, State and other funding sources.
- Meets with City bureaus, government agencies and community groups.
- Provides community organizing and problem solving assistance to strengthen citizen participation and crime prevention efforts.
- Provides staff assistance to the Board and the twelve Inner Northeast neighborhood associations. Services include:
  - Assistance with newsletters and fliers
  - Tools for clean-ups and livability projects
  - Assistance with neighborhood clean-ups and other projects
Northeast Coalition of Neighborhoods continued—

- Staff provides assistance in organizing neighborhood and business watches. Technical assistance is provided on issues such as liquor licenses, problem parks and drug and gang activities.
- Provides space for community meetings and for neighborhood volunteers and special project staff.
- Publishes district-wide newsletter.

**Special Programs:**

- The Northeast Coalition Youth Gang Program provides educational presentations, prevention and intervention services for gang-affected youth and their families.
- The Northeast Coalition Work Force Center Program assists residents of Inner North/Northeast Portland to obtain self-sufficiency through employment and training. The Center also maintains an information and referral system for employees and tracks clients who receive employment.
Southwest Neighborhood Information, Inc.

Southwest Neighborhood Information, Inc. (SWNI) is a non-profit agency presently representing sixteen neighborhood associations and two business associations. Each neighborhood association and business association has one representative on the Board of Directors.

Responsibilities of the Board:

- Hires and manages staff.
- Develops and approves, with the staff, an annual budget.
- Develops an annual work plan for citizen participation and crime prevention with the staff and member neighborhoods.
- Contracts with the City of Portland to provide services.
- Provides information to citizens on citizen participation, crime prevention, and how to work with City processes.
- Provides a forum for Southwest and Citywide issues and organizes areawide events.
- The Board does not make decisions for individual neighborhoods. Each neighborhood association is autonomous in its decision-making power.

The District Office:

- Provides community organizing assistance for citizen participation and crime prevention.
- Assists neighborhood associations with publicity including designing, printing, and distributing flyers, press releases, etc.
- Implements and facilitates projects as requested by citizens.
- Publishes a monthly newsletter for the entire district membership.
- Prepares budgets and assists with development of work plans for the administration of the office.
- Acts as an information resource for all southwest citizens in citizen participation and crime prevention issues.
- Provides training, guidance and clerical support to member neighborhood associations.
Neighbors West/Northwest

Neighbors West/Northwest is a non-profit 501(c)(3) coalition of nine neighborhood associations in west Portland, all north of Highway 26 or the I-405 loop south of downtown. This area extends to the county line west and north and includes every type of “neighborhood” from the downtown area to almost-rural Forest Park to independent Linnton, north of the Northwest Industrial neighborhood (NINA). In the densely populated and mixed-use Northwest neighborhood (NWDA), citizen involvement and independence founded an all-volunteer office in 1969. Citizens within Neighbors W/NW thus participate in a long tradition of citizen activism. The neighborhood associations see their role as ensuring that our City is truly a participatory democracy.

Responsibilities of the Board:

- The Neighbors West/Northwest Review Board has at least one member representing each of the nine neighborhoods: Downtown Community Association, NWDA, Goose Hollow Foothills League, Arlington Heights, Hillside, Sylvan-Highlands, NINA, Linnton, and Forest Park. The Review Board is committed to preserving and improving neighborhoods through the power of citizens acting in concert.
- Because each neighborhood has its own goals and opinions, the W/NW Review Board operates as a decentralized forum for an egalitarian exchange of information. It controls the personnel, budget, and program management policy for the neighborhood office, while each individual neighborhood is empowered to take action on issues within its boundary. Often joint goals and projects arise out of the Review Board agendas.

The District Office:

- Responds to 6,000 information and referral queries from citizens each year.
- Utilizes staff expertise and resources to implement the programs and ideas coming from approximately 500 volunteers in over 400 neighborhood meetings per year.
- Produces several monthly neighborhood association newsletters.
- Advocates and advances the concerns of neighborhood residents to governmental bodies. Examples include negotiations with Oregon Liquor Control Commission over problem taverns, with Land Conservation and Development Commission and Tri-Met over light rail decisions, with the City’s Bureau of Buildings over code violations, and with the Office of Transportation over bus service and intersection upgrades.
- Employs staff who specialize in enabling citizens to resist and reduce crime through individual and collective action. These Crime Prevention Specialists are instrumental in implementing Community Policing.
- Keeps minutes, agendas and historical documents for neighborhood association board meetings and provides staff support.

Strengthens other volunteer groups such as business associations, social service forums, historic societies, tenant councils and service organizations. When their needs dovetail with those of the wider neighborhood, they are encouraged to combine forces.
Southeast Uplift Neighborhood Program

Southeast Uplift Neighborhood Program has provided support to neighborhood associations and citizen volunteers since 1968. Southeast Uplift is a coalition of twenty-two neighborhood associations with a population of 160,000. Nine full-time and additional contracted staff provide a complete range of services to help associations and volunteers effectively address community concerns.

Responsibilities of the Board:

- Develops policy and direction for the organization. The Board of Directors is comprised of a delegate from each neighborhood association and representatives of business, religious and social service communities in Southeast Portland.
- Maintains several standing committees. Administrative committees include Executive, Finance, and Personnel. Other ongoing topic-specific committees, such as Land Use and Crime Prevention, assist citizens in developing programs and events for education and issue resolution.
- Maintains two regional coalitions of neighborhood associations within SE Uplift to help groups work together on issues that cross neighborhood boundaries. The Inner Southeast Coalition (ISEC) and the Outer Southeast Coalition (OSEC) each have seven member neighborhood associations.

The District Office:

- Provides information and referral for the public.
- Publishes Southeast Uplift Neighborhood News (SUNN), a monthly district newsletter, and Private Eyes, a quarterly crime prevention newsletter.
- Assists in production of more than 200,000 neighborhood newsletters every year.
- Provides strategies and assistance, as appropriate, for on-going programs such as crime prevention, and for special events such as forums and neighborhood cleanups. These programs and events can be for specific neighborhoods or district-wide.
- Assists neighborhood associations with all phases of organizational operations and development (e.g., bylaw drafting and review, meeting facilitation, volunteer recruitment, goal setting, work plan development).
- Conducts annual neighborhood leadership training program for Citywide participation, and annual orientation trainings for neighborhood leaders.
- Serves as liaison for Neighborhood Needs and other formalized processes for City/neighborhood communication.
- Administers SE Uplift's various grants and contracts.
The Office of Neighborhood Associations

In 1974, the Portland City Council officially recognized the importance of involving citizens in decisions made by local government. An ordinance was passed which recognized neighborhood associations as an established means of participating in the process of government. This ordinance also established the Office of Neighborhood Associations (ONA) as a vehicle for communication between City Hall and the citizens of Portland and recognized district coalitions as the means for providing services to neighborhood associations and citizens. This formal structure ensures that all citizens have an equal opportunity for participation and access to services. The ordinance and organizational chart outlining the City-neighborhood association relationship is in the Appendix at the back of this handbook.

The Office of Neighborhood Associations (ONA), located in City Hall, is a City bureau funded by general fund dollars. It is the primary link between citizens and the City bureaucracy. The Office of Neighborhood Associations is a vehicle that helps you put your ideas into action. ONA and the Neighborhood District Offices assist citizens working in neighborhood associations throughout Portland improve life in their community.

To meet this goal, ONA supports a number of services that promote citizen participation and facilitate communication among neighbors:

- City-wide planning coordination and program development for citizen participation and crime prevention activities.
- Prepares budgets, contracts and ordinances for citizen and crime prevention programs based on the needs of the neighborhood coalitions.
- Coordinates interaction among the district offices and City bureaus.
- Manages crime prevention programs.
- Provides technical assistance and problem-solving for citizens and groups.
- Provides a quarterly-updated list of neighborhood association contacts.
- Prepares and distributes a monthly calendar of neighborhood association meetings and community events.
- Publishes a periodic newsletter to provide information and maintain a link among the neighborhood associations and between itself and neighborhood associations.
- Provides information and referral to citizens.
- Publishes information and materials for use by neighborhood associations, including this handbook.
- Works with government agencies and other City bureaus including the Police Bureau, the Bureaus of Community Development and Planning, and the Office of Transportation in representing the needs of the neighborhoods to the City.
- Conducts and participates in conferences, seminars and workshops relating to the role of neighborhood associations in City government.
- Keeps district offices informed of City business and activities as they relate to neighborhoods.
- Coordinates citizen involvement in the City's budget process.
Neighborhood Mediation Center

Conflicts and disputes between neighbors are one of the given aspects of City life. The Neighborhood Mediation Center provides a positive alternative to the court system in order to resolve many of these problems. Professional mediators and trained volunteers help address problems on a one-to-one basis without lawyers, judges, and high court fees. Mediation is not a court hearing. There are no witnesses needed, and no-one is determined guilty or innocent.

Mediation is a method of helping people to jointly solve their problems and to help them settle the conflict in a way that is fair to both parties. Many disputes can escalate into serious problems that can cause injury or criminal complaints if not resolved in a constructive manner. Impartial mediators can help settle these disputes between neighbors.

The mediator is the “person in the middle” who helps bring the disputing parties together in a comfortable environment. The mediator will listen to both sides of the story and help both parties talk about finding a satisfactory solution to their dispute. The mediator will not blame or take sides. The mediator assists in defining and resolving the difficulties of the people involved.

The Center also works to mediate problems involving business organizations, neighborhood associations, non-profit agencies, school districts and City bureaus. In addition, trained volunteers are available to facilitate meetings for neighborhood associations and other community groups.

Mediation is a voluntary process. It is offered by the City free of charge. The only condition is that once the situation has been settled in a manner that is acceptable to all parties, everyone must agree to abide by the proposed solution. If you need mediation services, follow the process outlined below:

1) Call or come to the Neighborhood Mediation Center. It is located at the King Neighborhood Facility, 4815 NE 7th Ave. Phone (823-3152)

2) State the problem as clearly as possible.

3) An appointment will be made within 48 hours to discuss the situation.

4) After your initial discussion - if your case is accepted - a mediation specialist will call to further discuss the problem with you. The mediator will then call your neighbor to discuss the situation. Both parties must agree to participate in the mediation process.

If a phone call does not settle the situation, a mediation hearing is scheduled. This is a panel hearing where citizen volunteers trained in conflict resolution act as facilitators to help the disputing parties explore solutions to resolve the conflict. Hearings are held within ten to twelve days after your initial contact.

5) The result of this hearing is a mutual agreement outlining a mediated solution to the problem. Both parties are asked to sign and abide by this agreement.

6) A follow-up is conducted after thirty days to check on the status of the agreement. Additional services such as referrals to other agencies or another hearing will be provided if necessary.
Mediation is helpful in many situations that appear to have no solution. In addition to neighbor-to-neighbor disputes, the Mediation Program has worked with the Portland Public Schools, Multnomah County, neighborhood associations and boards, and groups as well as individuals. The services of volunteer mediators may also be useful to neighborhood associations having difficulty facilitating meetings or resolving conflicts within the association.

Refugee/Immigrant Coordinator

The Refugee/Immigrant Coordinator position was created in 1980 in order to serve Portland’s growing refugee and immigrant community. Over 30,000 refugees live in Oregon, with 200 new arrivals coming into the state each month. Most of this population comes from Southeast Asia and the majority of them live in the Portland Metropolitan area.

The mission of the Refugee/Immigrant Coordinator is twofold:

1. To increase refugee understanding and use of City services and to assist agencies in better serving the refugee population and;
2. To ensure the humane, efficient and effective resettlement of refugees in Portland and eventual mainstreaming into American society.

The Coordinator works closely with service providers and refugees from Vietnam, Laos, Cambodia, Ethiopia, Eastern European countries, and Russia and the countries of the former Soviet Union to assist in the resettlement process. Recent immigrants from Asian countries also use services from the program. Public safety and legal systems are important issues for these citizens due to language and cultural barriers. The Refugee/Immigrant Coordinator assists the Police Bureau, the Mediation Center and citizens in solving problems between refugee populations and their neighbors.

If you are having a problem or know of a situation which could benefit from the program, call the Refugee/Immigrant Coordinator, 823-3049.
Two more avenues for citizen involvement are the Metropolitan Human Rights Commission and the Portland/Multnomah Commission on Aging. Both are funded jointly by Multnomah County and the City of Portland to advocate for human rights for all citizens and special populations in particular.

The Metropolitan Human Rights Commission (MHRC) provides resources for promoting equal opportunity, addressing discrimination and civil rights issues, and educating for improved intergroup relations. MHRC handles complaints, facilitates mediation, and provides information and referral services. A volunteer commission provides community input and oversight for programs and activities.

Elder abuse, adult foster care and safety for our aging population are among the issues with which the Portland/Multnomah Commission on Aging (PMCoA) is concerned. The Commissioners are volunteers who work with policy makers at all levels to ensure rights and benefits for the 108,000 elderly citizens in Portland.

Appointments are made to the Commissions by elected officials from Portland and Multnomah County. If you are interested in getting involved in human rights or aging issues contact the Commission offices at 823-5136 (MHRC) and 823-5269 (PMCoA).

In addition to the above, there are a wide variety of other citizen commissions which the City utilizes to ensure public involvement in decision-making. Information and applications are available from ONA at 823-4519.
Bureau Advisory Committees

The Office of Neighborhood Associations coordinates citizen participation in the City’s budget process. Through Bureau Advisory Committees, citizen volunteers learn more about City government and act as guardians of our financial resources.

Goals of the Citizens Bureau Advisory Committee

- To help produce a final budget that is responsive to the needs of the citizens of Portland.
- To increase understanding of the City budget and budget process by members of the Bureau Advisory Committees and other interested citizens.
- To enable citizens to address policy questions of the City as a whole as well as recommend the policy direction of individual bureaus and departments.
- To enable citizens to have an active role in reviewing and recommending reductions and additions in City services through the budget review process.

Guidelines For Membership to Citizens Bureau Advisory Committees

Citizen Bureau Advisory Committees (BAC) for each of the City’s major bureaus review policy, develop priorities, and make recommendations for their respective bureaus. They also work with the bureau to gain adoption of its proposed financial plan through the City’s budgetary process.

Volunteers who are interested in serving on a BAC make application through the Office of Neighborhood Associations. Appointments to the committees are made by the mayor or Commissioner-in-Charge of the specific bureau. A term lasts for three years with reappointment made on a yearly basis. A time commitment of four to eight hours each month, from September to April, is generally required.

In addition, the Portland/Multnomah Commission on Aging and the Portland Development Commission function as BACs for those groups.

Bureau Advisory Coordinating Committee

The BAC process is overseen by the Bureau Advisory Coordinating Committee (BACC) which is composed of past and present members of individual BACs. Each BAC selects a representative to send to the BACC. Besides coordinating the BAC process, the BACC is charged with providing a citizens’ perspective on issues of general importance to the City.
The first step to getting involved in your neighborhood is to find out what’s going on in your area. Since the Portland neighborhood system was established more than 20 years ago, all but a few small areas of the City have a recognized neighborhood association.

1) **Contact your district coalition office or ONA** to determine in which neighborhood association you live or own property.

2) **Contact the leadership** (ONA and the district coalitions have a directory of the chairs and other contacts for each neighborhood association). Express your interests, your willingness to help and how often, share your background and expertise.

3) **Determine the status of your neighborhood association.** Some neighborhood associations are finely-oiled machines, some are very stable and have a long, consistent history, still others struggle with monthly attendance and are screaming for new energy. Ask around, find out about the history of the area and the organization. Find out the status and approach your involvement as a team player. Your involvement will vary depending on your time, the state of the neighborhood association, and the need in your area.

Each neighborhood is unique, and the associations may be at different stages of development. Because the associations are independent they approach activities in their areas differently, except that all must follow the guidelines to be a recognized neighborhood association.

If your neighborhood association is well organized and inclusive, join in. Get on a committee that addresses an issue that interests or concerns you. Work with your neighbors on both the pressing and the ongoing items. Be prepared to provide ideas and input into program and policy for the City.

Here are some suggestions to build your personal credibility and stature in your neighborhood association:

- Listen and talk to your neighbors
- Follow the bylaws in good faith
- Be thoughtful about your decisions. Make them based on the merit of the arguments, not on personalities or inappropriate pressure
- Take advantage of trainings offered through the coalition or ONA to develop your skills
- Agree to help with as many projects as you can
• Be respectful of your neighbors and to the many people who will address your group
• Be assertive about your opinions. Use whatever communication tools are most comfortable to you - writing, talking, signing, or singing
• Welcome others into the group. Mentor new members and help make them comfortable
• Be creative and celebrate your successes and accomplishments
• When you are ready, consider running for a board, leadership, or chair position
• After some service in your neighborhood, consider running for public office so you can apply all of your good community-building skills to your new post

Apply the following suggestions if you decide to help reinvigorate your neighborhood, or if you are organizing a new area:

A Step-by-Step Guide

☐ Define/ know your neighborhood boundaries: Where does your neighborhood end and adjacent areas of town begin? What are the major streets, highways, etc. that define the boundaries of your neighborhood? What are the boundaries of nearby neighborhood associations? Prevent overlapping boundaries when you define your area.

☐ Become familiar with your neighborhood: Look around your neighborhood and talk to people. Find out what problems exist. It helps to look at your community in terms of its needs and its resources. Later you can focus on specific projects. In the meantime, you’ll have a list of things you can do and people who can help.

☐ Consider conducting an assessment: A survey, informal or formal assessment of your neighborhood can help you decide what issues need attention. Needs assessments can take place at your first meeting, through a door-to-door survey, or through a planning process. Some questions to be answered through an assessment include:

  • Are the streets littered? Adequately lit?
  • What transportation problems exist, such as dangerous intersections, speeding traffic or inadequate bus service?
  • Are there abandoned buildings? Or unused vacant lots in the area?
  • What are the needs of the small business owners in your area?
  • Is there an ongoing problem with land use or zoning?
  • Is there a crisis issue in your area? A crisis is the most common cause for organizing because it presents a direct threat to personal interest. Use this emotional response to get people involved quickly.
Resources: Identify the “components” of your neighborhood:

- What is the history of your area or neighborhood association? Try to build on the successes of the past. Which district coalition serves your neighborhood? What services can they provide?
- Who are the neighborhood leaders? Get their names, addresses and telephone numbers. Leaders are people who are outspoken, concerned or articulate about problems. This includes clergy, bankers, PTA members, businesspeople or people who have never before led yet are respected.
- What institutions and business groups exist in your neighborhood? What similar problems concern the businesses as well as residents of your area?

Talk to your neighbors: Talk to people about your concerns. Find people on your block, in churches, synagogues, at the schools, at shopping centers, in stores. For many people this is a difficult first step. *Don’t be afraid or embarrassed.* Most people would love an opportunity to talk about the problems they see in their neighborhood. On rare occasions, you may find someone who is not interested in talking. If that’s the case, thank them anyway and find someone else who is eager to talk to you.

- When you approach neighbors, begin by telling them your ideas about developing a neighborhood association or issues for the association to tackle.
  - Why you see the need (i.e., transportation problems, crime prevention).
  - Why a neighborhood association is a good thing in your community (the benefits of many people working together).

- Ask them if they are interested. What are some of the problems they see in the area that a neighborhood association could deal with?
- Exchange names and numbers. Get organized by keeping a notebook or clip pad with names and addresses.
- If they are interested, tell them that you will call soon about a meeting to discuss their ideas with other neighbors.
- Notify them of a meeting *within a month* (no later). If you wait too long, people will lose their enthusiasm.

Get a small group together to discuss your concerns: You can’t organize or reactivate a neighborhood association alone. You need to get together a core group of people who will be the organizing committee with this group, decide on issues that are most pressing, most extensive and the most easily solved. Discuss the need for an organized group to deal with these problems. Also, talk about how to get other people involved. Once you have a small group, set a date to get together.
Hold an organizing committee meeting:

- Now that you have a core group together, plan for a first meeting.
  - Plan a strategy for getting people to come to the first meeting.
  - Plan how to present the issues as this group sees them.
  - Tell why you see the need to organize a neighborhood group.
  - Tell what your group hopes to accomplish.

- Decide what you will discuss at the meeting as well as a strategy for
  getting people to come. Remember, this is just a planning group. At the
  first general meeting there will be people with different ideas. To be
  a successful neighborhood association, you must be open to all people
  and their concerns.

Planning your meeting: Use this outline to plan your first meeting.
Cover all areas listed below. Assign tasks. Make responsibilities clear. At the end of your meeting, review who is assigned to each job. Make sure that everyone understands what needs to be done. When you finally hold that first meeting, it is most important that it be well organized and runs smoothly. A well-run meeting is the beginning of a successful neighborhood association.

- Decide what kinds of things you want to discuss with the larger group. At your planning meeting discuss with the group your ideas for starting a neighborhood association. Allow time for all the neighbors at this meeting to share their thoughts. Also at this planning meeting discuss how you will present your ideas to the larger group at your first general meeting. How can you get people at the general meeting to give input and share ideas? Some possible questions (for your planning group as well as the larger group at the first meeting) include:
  - Why do you want/need to organize a neighborhood association?
  - What are some of the common problems in your neighborhood that you think your neighborhood association can help solve?
  - If there is a crisis situation, explain the situation. What are the issues involved? How might it affect the livability of your neighborhood? What are some strategies the neighborhood can use to address the problem?
  - What other things does each person want the neighborhood association to accomplish?

- Find a place to hold the meeting: Try to estimate the number of people you expect at your first general meeting and then look for a meeting space to fit that number. Possible sites include:

  - Schools
  - Churches/synagogues
- Community colleges
- Private homes (some people feel best meeting in private homes, others adamantly discourage it; consult the Appendix on the Public Meetings Policy for some guidelines)
- Community Centers

When arranging for a meeting space, ask if there is a cost (how much?) and if you need a permit. Schools and colleges require a permit. You can arrange for one through the school's administrator or principal. If you are unsure of the process, your district office can help with these plans. If there is a cost, contact your local office for its financial policy regarding payment for meeting spaces. Be sure your meeting space can accommodate people with disabilities!

- Plan What Is To Happen At The Meeting: To be successful, it is important that this first meeting run smoothly. To ensure its success, discuss the following:

  - What are roles of the organizers? What roles should the planners take during the larger first meeting? This may include:
    - Facilitating the meeting (decide who will do this)
    - Presenting well thought out ideas and projects
  
  - Encourage participation from newcomers. Don’t present just your ideas as the final decision for the group at large. They are only your opinions.
    - Allow people at the meeting to feel that their ideas and input are welcome.
    - Have something tangible to discuss. If not, others will not have much faith in your group to make things happen in the future.

  - The meeting agenda. The most important aspect of running a meeting is having a solid, well planned agenda (see Section III for sample agendas). Basically, an agenda is a listing of the topics and the order in which they will be discussed. Items on the agenda include:
    - Introductions of people present.
    - Purpose of the meeting (why you are interested in forming a neighborhood association).
    - Areas of concern to planning members.
    - Time for socializing (this can be done at the beginning or end of the meeting).
Decide at the planning meeting who will type and make copies of the agenda. Remember to collect the names and addresses of those attending. Set a date for your next meeting.

- **Publicize Your Meeting:** The best planned meeting can be successful only if you have people attending. The way to get people to attend is by publicizing (see Section VIII, *Getting the Word Out*). You don’t have to be a great artist or writer to do successful public relations. Just remember to include all pertinent information in your publicity: What, where, when and why. If possible, include a phone number for people who have questions about the meeting or are interested in future meetings but can’t make this first meeting. Neighborhood associations must comply with a Public Meetings Policy (see the Appendix). Publicizing meetings is not only a good idea, it’s a requirement.

☐ **Holding Your Meeting:** This is your first general meeting of neighbors. The original planning meeting was only a stepping stone to this meeting. Now’s the time for your dreams and hard work to become reality.

### Remember
— to be successful you must be open to the needs of your neighbors attending this meeting. You are not the neighborhood association — only the catalyst for it to happen.

- **Publicize the meeting.** Use flyers, newspaper announcements, or feature articles to draw attention to the problem and the reason for the meeting.

- **Invite district office staff** or crime prevention organizers to the meeting to explain what services are available to organized neighborhoods and to share suggestions for working together successfully.

- **Minutes:** Decide who will take the minutes.
  - A copy of minutes of all meetings should be kept. Buy a notebook! Your district office can keep them on file for public access.
  - A summary of the first meeting could be later used as a handout or as the basis of a neighborhood newsletter.

- **Speaker or Not?** Local speakers are available to come to your neighborhood association. They could be active members from other neighborhood associations or staff members from the Office of Neighborhood Associations, your district office, City government, or other agencies.

  The decision to invite a speaker is up to the planners. If you feel that a speaker is not necessary, don’t invite one. A speaker may be a good
addition to a meeting involving a particular issue, or to get more neighbors interested in meetings.

- **Getting People Involved:** As the organizer of the first meeting, you should try to make people feel as comfortable as possible. When people feel wanted, they are more likely to work with the neighborhood association.

- **Set Up The Next Meeting:** Don’t let people leave one meeting without knowing about the next meeting. Decide:
  
  - When will it be held?
  - Where?
  - How will it be advertised? (Who will be responsible?)

- **Develop Your Organization (See Section III):** Write bylaws, elect officers, and develop an action plan. This includes all the technical and legal areas of concern to neighborhood associations. Don’t be overwhelmed with the bureaucratic business. You can appoint a committee to do the work (some people like this kind of work). Often groups have members who do this professionally and will be able to get it done in no time! This is a necessary evil in assuring the long-term success of your neighborhood association.

  District office staff can help you draft or update bylaws for your association. In addition, training is available for citizens interested in working together effectively. Every organization needs an “expert” in meeting facilitation, project planning or finding the right person to talk to in City Hall.

- **Coalition Building:** A successful neighborhood association must find out about and work with existing neighborhood organizations. Don’t just duplicate services. Be sure to get your neighborhood association to support other groups when its interests are being served as well. This will provide you with a broad base of neighborhood political support that you will need to be successful.

  Many issues that your neighborhood is experiencing may be regional or Citywide issues. Work together to ensure that your neighborhood’s goals will not conflict with another’s or with existing policies.

  Form alliances with the small business owners and business associations in the area. Have them join your neighborhood association.
Developing and Maintaining the Organization

Introduction

People involved in neighborhood associations carry out a wide variety of activities together. Most people like to focus on improving the livability of their neighborhood but it is also necessary and important to develop and maintain a healthy organization.

Some sections of the handbook address the formal structure of the association, others provide tips on how individuals can get involved. This section will provide information and ideas on how to keep your organization strong through the various cycles of involvement over the years. These pages are not intended to be an exhaustive list or a rigid how-to manual; rather, consider them as helpful hints. Use what works for you and your neighborhood, modify (or ignore) the rest.

Another note: The Office of Neighborhood Associations and the district coalition offices are available to support and assist the City’s neighborhoods. The neighborhood associations, however, are independent, autonomous groups. Those of you who live or own property in the neighborhood are the ones in control and responsible for charting the course for the neighborhood association, including selecting your own leadership and determining the group’s activities. The association will be as strong and effective as the people committed to running it.

Meetings are clearly one of the most common neighborhood association activities. The importance of well-run meetings cannot be overstated. This section provides extensive information about how to run effective meetings. There are also other activities that are important:

- **Choose strong leadership**, especially the Chair.
- **Build the community and be inclusive.** ONA and the district coalitions provide training on this topic. It is vital that your neighborhood is welcoming to new members and always anxious to include as many neighbors as possible in association activities. If the actions of the neighborhood association begin to cause interest to erode or focus on responding to only a few people, support will decrease and the organization will suffer. Celebrate the diversity of your neighborhood. Make goals to add a certain number of new people each year, and make a special effort to recruit those who have not participated in the past. See section on recruiting new members and how to keep them, and on how to work with volunteers. Refer to Section VIII, “Getting the Word Out.”
- **Develop a work plan.** Map out what you would like to accomplish in the given year. A little planning can go a long way to holding your organization together.
- **Use creative approaches.** Have fun. Celebrate. Create rituals. Involve kids and senior citizens. Organize events for people who do not or will not attend meetings. Have parties. Honor volunteers. Partner up with businesses, other community organizations, and/or governmental entities. Raise money for a project to benefit the community. Create an identity for your neighborhood - signs, fliers, events that publicize the area. Ask businesses to refer to the neighborhood name in advertisements. Brainstorm within your group about other creative ways to get people involved. Share your ideas with other neighborhoods and copy other successful efforts. See Section VII, "Neighborhood Association Activities."

- After some time, **evaluate your neighborhood’s efforts.** Discuss what has worked and what hasn’t. Again, celebrate your successes. Don’t be too hard on yourselves. After all, you are volunteering your valuable time to your community.

**Remember:** A healthy, happy neighborhood association is the most productive.
Choosing Leaders

Once your neighborhood association is organized, the membership will need to choose leaders. Your bylaws will include provisions for electing a board of officers and describes what those positions will be, how often they are elected, and some of the responsibilities for those positions. Leaders provide continuity and accountability for the organization. Good leaders are trained, not born. Help each other become effective leaders and officers as you develop your association. Leadership training is available from a variety of sources. Call your district coalition or ONA for assistance.

Neighborhood Association
Board Responsibilities

by Arty Trost, Consultant, Organizational Dynamics

► Planning for the organization: where will it go, what will it do, how to accomplish goals.

► Organizing the association: who will do what, what resources will be needed.

► Directing the efforts of the volunteers.

► Evaluating the work as well as the association.

► Neighborhood Communication: Be responsive to the neighborhood, seek input from people who aren’t involved in the association, keep people informed about what the association is doing.

► Public Relations: develop a positive image in the community for the neighborhood and the association.

► Resource Development: Identify and solicit resources: active members, financial support, meeting space, supplies, etc.

► Leadership and Member Development: Recruit and train people to assume leadership responsibilities, help leaders and members to work effectively.
Neighborhood Association
Board Position Descriptions

Board Member

Any person who is a resident or property owner within the neighborhood association boundaries, or who meets the criteria set in the association bylaws, is a member and can participate in the neighborhood association. Elections are held annually for neighborhood associations to select a Board of Directors. These officers handle the business of the neighborhood association throughout the year. Each association has bylaws specifying the positions and the election process. These job descriptions outline the responsibilities of the board and individual officer positions.

Officers

- **Chairperson:** responsible for the overall leadership of the board. Sets the agenda and facilitates meetings.

- **Vice Chairperson:** Assists the chairperson. In the absence of the chairperson, the vice chairperson conducts the meetings and exercises all the usual duties of the chairperson.

- **Secretary:** Records the minutes of the meetings and makes sure that copies of the minutes, agendas, and other neighborhood association records are available for the board and the public.

- **Treasurer:** Responsible for the funds of the neighborhood association. Most boards do not require anything but an occasional status report from the Treasurer (Note: This is an optional position since some neighborhood associations do not have a treasury. The treasurer position can be added to the secretary position for a joint secretary/treasurer).

Additional Positions and Chairs

Each neighborhood association is different and will need different committees and positions accordingly. Some of the more common ones are:

- **Land Use Contact or Committee Chair:** This can be one of the more demanding positions (next to the chair person). The land use contact receives notification of land use matters affecting the neighborhood. This information should be shared with the membership and the board in order to ensure neighborhood involvement in land use cases.
• **Crime Prevention/Public Safety Contact or Committee Chair:** This can also be a demanding position. This job usually involves working with the crime prevention specialist at the coalition office and with the Police Bureau.

• **Newsletter Editor:** This position has overall responsibility for overseeing production of any newsletter the neighborhood association puts out. For more information, see Section VIII, "Getting the Word Out."

• **District Coalition Board Liaison:** This person is a member of the coalition board and represents an individual neighborhood association on that board. Some neighborhood associations have more than one liaison position. The liaison has two roles on the coalition board: to communicate with and represent the neighborhood association to other entities and government organizations through the district coalition, and to direct and oversee the activities and programs of the district coalition as a member of that board.

This includes:

- keeping your neighborhood association up-to-date about coalition issues and activities;
- carrying out your neighborhood association’s opinions back to the coalition; and
- working with the other members of your coalition board to ensure that your neighborhood association is getting what it wants and needs from the coalition (with the resources available, of course).

*Remember: The coalition works for the neighborhood associations*

Additional information on the responsibilities of coalition boards is found in Section IV, "Creating the Formal Structure."
The Chairperson

Every meeting needs someone to facilitate the proceedings. This person is the key to the success of the meetings and the organization. Usually the Chairperson is the neighborhood association President or ranking officer, but sometimes volunteers will be asked to Chair a committee or task force. It is most important that this person be able to be a non-partial bystander. The Chairperson never monopolizes the floor or dominates the discussions. The Chair keeps the meeting running smoothly while allowing participation and is the person who makes sure that people keep to the agenda and the task, both in content and timing.

Tips to make the job of chairperson easier:

- **Introduce yourself** at the beginning of a meeting. Don’t assume people know who you are. If there is time and the group is a reasonable size, have the others present introduce themselves as well.

- **Review** the agenda and establish ground rules.

- **Direct the discussion.** Keep people on the topic. When issues are brought up that are irrelevant, remind the group that there will be a time for new business. If people are repetitive, recap the information that has already been shared. If a decision needs to be made, call for a motion. Limit your own opinions.

- **Facilitate voting and decision making.** Never assume there is agreement until it is put to a vote.

- **Do not abuse the power of the chair.** Don’t ignore those who want to speak and don’t monopolize the floor because you are the Chair. A Chairperson facilitates discussion and does not dictate decisions. A Chairperson should remain neutral. If you want to speak, you may call on yourself, temporarily step out of your role as the chair, then say your piece. Return to your role as the Chairperson. Do not continue to speak when your turn is finished.

- **Mediate arguments when they arise.** Remain impartial and fair. Give each side a chance to state its point of view.

- **Review what has to be done.** Review all discussions, decisions made, and the tasks to be assigned. Make sure that people leave the meeting with a clear understanding of what decisions have been made and which tasks are to be done by whom.

- **Be organized.** Use a watch and follow the agenda. When it is time to end a discussion, announce that time is almost up. Select the final speakers and their order from those still indicating a desire to speak. The discussion ends when those people finish speaking.
- **Follow up** after the meeting to encourage members to get things done and help them when necessary.

The meeting Chairperson or his/her designee is responsible for:

- Preparing for the meeting; having an organized agenda;
- Encouraging participation from all;
- Keeping the meeting on the topic and time frame allotted;
- Mediating arguments among members;
- Bringing the issues to a vote as needed;
- Clarifying decisions made by the groups; reviewing task assignments;
- Following up on the decisions made at the meeting;
- Ensuring that bylaws and procedures are followed.

A Chairperson is not just the facilitator of a meeting, but also is responsible for the following:

- Understanding, promoting, supporting and interpreting the overall goals of the organization as well as the role of the board or committee;
- Knowing the organization's bylaws, *ONA Guidelines*, and *Robert's Rules of Order*;
- Consulting the Executive Committee and past Chairpersons in choosing committee members. Asking people to serve. Outlining responsibilities;
- Knowing budget allotments;
- Scheduling and conducting meetings, and making sure people are notified about meeting times;
- Observing correct procedure for correspondence;
- Seeing that meeting proceedings are recorded;
- Delegating responsibilities among officers and committee members. Seeing that work gets done. Giving credit and recognition for accomplishment;
- Meeting with your successor and transferring records, files, etc.
Recruiting New Members

Help! The energy level of your neighborhood association has sunk to a new low, and while you have successfully completed your latest community project, there's still lots more work to be done.

Groups may initially attract members through well-publicized meetings on issues that concern many or projects that involve lots of people. If your group is in the public eye, it will certainly boost membership. After the publicity dies away and the problem is solved, active members may disappear.

Finding new members is crucial to keeping neighborhood associations alive. While many people appreciate what the group is doing for their neighborhood, they may not attend meetings or even come in direct contact with your neighborhood association.

Neighborhood associations often inadvertently restrict their numbers by having membership forms and sign up sheets only at meetings. In order to maximize your membership potential, the group should come out of the closet and into the public’s eye. Be everywhere neighbors are. Undertake a membership drive that directly reaches every household within your boundaries.

- Have volunteers go door to door calling on their neighbors. This can be a week long or one day blitz. Consider having a membership drive and then sponsoring a party for volunteers where they can have fun and share experiences later that same day.

- Arm volunteers with printed materials to encourage the residents to get involved. This can be a brochure from ONA or a simple letter from the group’s Chair that explains the Office of Neighborhood Associations, your particular neighborhood association, and details of upcoming activities. Also, volunteers should carry membership forms with them and offer both immediate and mail-in membership opportunities.

- Neighborhoods can develop a block leader network as a foundation for a membership campaign as well as other activities. Block leaders can pass out flyers and newsletters, welcome new residents, serve as a conduit for specific problems on the block, and place volunteers in activities. Work with organized Block Watches.

- Members can also be found at community gatherings. Sponsor a booth at a community festival or event. This is a great opportunity to talk to people in your area. Remember, have information and membership sign-up sheets at your booth.
Keeping New Members

Getting new members is only half the battle. The other half is keeping them involved. For every member who is active in the association, there are probably two who would be involved if they were properly motivated. The following ideas can be useful.

- **Help members find a place in the organization.** Not everyone is a self starter. Many will offer to help but have no idea where to begin. Develop a list of volunteer activities that includes a job description and approximate time commitment for each task.

- **Welcome new people.** Officers and board members should watch out for new faces and welcome them assertively. Each new member or guest should be introduced to someone who lives near them or who shares a similar interest. Have an official “greeter” at each meeting.

- **Avoid the appearance of cliques.** New members who see the same people running every project will feel excluded and may not return. Appoint people who are not part of the core group or steering committee to leadership roles.

- **Welcome new ideas and input.** This is often difficult for people who long have been involved in the association and are more knowledgeable than newcomers. People coming into a situation for the first time, however, are able to see things in a new light and can offer new solutions to old problems. They just might have the answer that you have been seeking!

- **Organize meetings.** Busy people will not attend meetings or involve themselves in organizations they consider to be a waste of time. Have a written agenda before each meeting and **stick to it.**

- **Maintain membership records.** Keep a file that lists member’s names, addresses, phone numbers, family member names, occupation, special talents, concerns, and areas of interest. The district coalition office may be able to help with this.

- **Have fun.** The work of the neighborhood association doesn’t need to be boring drudgery. Sponsor parties and celebrations to get to know your neighbors better. Have events that appeal to all, including children.
The DOs And DON'Ts of Working With Volunteers

**Do**

- Involve each member in each step of organizing.
- Invite *all* residents within the boundaries to be part of the group.
- Be realistic about what the neighborhood association can do.
  - How much time is needed?
  - How many people are needed for this project?
  - What other projects are underway? Is it feasible to take on a new responsibility?
- Bring all activities to discussion and vote before the full membership before committing the group to a new project.

**Don't**

- Have one person or a small group make the decisions for the entire group.
- Try to do everything yourself. The leadership of the neighborhood association is *not* the neighborhood association.
- Drop projects without a good reason. Make sure everyone knows why the project is being dropped.
- Scare off new members by asking them to volunteer for life. Start small.

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**Volunteer Burnout**

Volunteers are special people who give their time and energy without receiving money in return. But without a paycheck to keep someone coming to meetings week after week, there must be other enticements. Volunteers remain active with organizations they feel are contributing positively to the community. But volunteers also remain active when they are recognized for the effort they make within that organization.

To prevent volunteer burnout, the positive feeling one has must remain high in spite of the many hours devoted to the work involved. This is especially true in neighborhood associations which often demand great commitment from their workers. Here are some
insight into the causes of volunteer burnout and ways to prevent your association members from succumbing.

**Why do people burn out?**

- The organization is lacking in clear goals and direction.
- There is too much work to be done. People are afraid to say “no,” thinking that it won’t get done otherwise.
- There is a popular notion that if you work for a public interest organization (such as your neighborhood association), you have to give selflessly for the cause. People see it as a measure of their worth.
- There are often few rewards or recognition for a job well done in volunteer organizations.
- All work and no play makes everyone tired and burned out!
- Too few people are involved.

**Tips for burnout prevention**

- Set realistic objectives that meet the association’s purpose and goals. It helps to have job descriptions or task outlines so people know what they are getting themselves into and what is expected of them.
- Different people are able to handle different amounts and types of work. Recognize different abilities and tolerance levels in handing out work assignments. Don’t let one person take on everything and then burn out. Get new members involved.
- Remind people that the quality of their work is what’s important, not the quantity.
- Recognize people for a job well done. You can verbally give thanks to people at meetings or develop an award system. This could be a certificate of appreciation, a gift given to a member who has worked hard for the group, or a yearly award potluck where members are publicly recognized. Nominate volunteers for recognition by the community.
- Organize fun events for your members. Creating a social network of friends and neighbors can provide support and also give people an opportunity to have a good time together.
Developing A Work Plan

All organizations should develop an annual work plan. Meeting goals and planning events, recruiting volunteers and strengthening the organization will be easier if you take some time to outline your expectations and objectives, and then make a plan for meeting those goals.

You should also make a work plan for individual projects to help everyone stay focused and on target. Here are some questions to answer in developing a work plan:

- What is the purpose of doing this project? If this is an annual work plan, review the purpose of the organization, then define goals for the year.
- Is there a need for it?
- What resources are available to help the neighborhood association meet these goals?
- Has any other neighborhood association tried this activity? Can they be contacted for help?
- What are the tasks involved for the project?
- How much time will be needed?
- Will money will be needed to do this? Does the neighborhood association have the funds? How can you raise needed money?
- Are enough volunteers available to do the work?

Planning assistance and sample work plans are available from your district office. Be realistic in setting goals and your accomplishments will grow!
Evaluation

- Regularly reassess the purpose(s) of the neighborhood association and its priorities
- Develop realistic plans and activities
- Make sure the leadership is representative of the neighborhood
- Maintain ongoing communication with all residents, whether or not they are members
- Use the association to enhance "neighboring"
- Don’t let factions develop. Deal with crises as they come up. Solve problems before they become crises
- Celebrate successes

Remember, neighborhood associations are formed for a variety of reasons. Don’t be discouraged if your association is struggling. It’s important to have an organized process for resolving issues, but your group shouldn’t spend all its time and energy on organizational problems. Build credibility and success one issue at a time and participation will grow.
---How To Have An Effective Meeting---

There is a lot to think about when conducting a meeting. Use this checklist as a guide to help you conduct meetings more effectively:

☐ Plan your meeting

☐ Start on time

☐ State the purpose of the meeting clearly on the agenda

☐ State ideas positively and show their relation to the overall issue

☐ Watch the pacing—keep it moving

☐ Find background information ahead of time or invite resource people to come to the meeting

☐ Get everyone to contribute

☐ Get points of view by questioning or restating as you go along

☐ Make frequent summaries during the discussion

☐ Stress cooperation, not conflict

☐ Assign tasks and delegate responsibility as the meeting proceeds. See that they are recorded in the minutes

☐ Guide the meeting from problem to solution

☐ Wrap up the meeting:
  - Summarize the decisions reached.
  - Point out differences not yet resolved.
  - Outline future actions, next steps to be taken.
  - Set deadlines and review task assignments.
  - Set the next meeting date, time, and place.

☐ Evaluate the meeting
Running Successful Meetings

Use these checklists when planning and running your meetings:

**Before The Meeting**

- **Set goals:** With the people on your planning committee, determine what you want to accomplish during the meeting. This should be clearly defined for all participants and included in your agenda.
- **Review the minutes of your last meeting:**
  - Who was assigned which task?
  - Are they prepared to make a report?
  - Where can they fit in the agenda?
  - How much time do they need for their presentation?
  - What issues were left unresolved?
  - On what issues are you now prepared to make decisions?
- **Collect Information:** Collect all new information which has been received by the committee. Put this in outline form so all committee members have the information in front of them during the meeting.
- **Resources and Information:**
  - Do you need additional information or a resource person to help you meet your goals?
  - Where can you get the information and how quickly?
- **Send Out Meeting Notices and Include:**
  - Date
  - Time
  - Place
  - Purpose
- **Set an Agenda:**
  - Write the agenda before the meeting. Make changes only with the consent of the group. Make enough copies for all attending the meeting.
  - Set a predetermined ending time.
  - Set a timed agenda to get through all the information on your agenda.
Prepare An Agenda

An agenda states the purpose, time and goals of a meeting. It outlines each topic to be covered and designates an amount of time allotted to each subject. List who is responsible for each topic and the type of action needed to help clarify the goals and direction of the meeting.

When possible, send out your agenda in advance so people know what is expected of them and what will happen at the meeting.

Points to consider when preparing an agenda:

- Keep the agenda in the shortest form possible.

- Keep your meetings as short as possible. After about ninety minutes people get tired and restless and their attention span grows shorter and shorter.

- Plan the agenda to mix items of importance. Don't save big decisions for the end, when people are tired or have left the meeting.

- List each item. Include who is responsible for the presentation, what kind of action is needed (when appropriate) and the time allotted.

- At the opening of the meeting, ask for additions to the agenda.

- Include an ending time for the meeting.

- Get group approval for the agenda before you start the meeting.

A sample agenda is on the next page.
# Sample Agenda

<table>
<thead>
<tr>
<th>Item</th>
<th>Person Responsible</th>
<th>Action Needed</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call to order</td>
<td>Chairperson</td>
<td></td>
<td>7:30 p.m.</td>
</tr>
<tr>
<td>Announcements</td>
<td>Chairperson</td>
<td></td>
<td>7:35</td>
</tr>
<tr>
<td>Minutes</td>
<td>Secretary</td>
<td>Approval</td>
<td>7:40</td>
</tr>
<tr>
<td>Treasurer’s Report</td>
<td>Treasurer</td>
<td>Approval</td>
<td>7:45</td>
</tr>
<tr>
<td>Standing Committee Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Finance</td>
<td>Committee Chair</td>
<td>Approval</td>
<td>7:50</td>
</tr>
<tr>
<td>• Land Use Planning</td>
<td>Committee Chair</td>
<td>Info only</td>
<td>8:00</td>
</tr>
<tr>
<td>Ad-hoc Committee Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• By-laws</td>
<td>Committee Chair</td>
<td>Discussion</td>
<td>8:10</td>
</tr>
<tr>
<td>Unfinished Business</td>
<td></td>
<td>Possible actions</td>
<td>8:25</td>
</tr>
<tr>
<td>• (list each item)</td>
<td></td>
<td>include: refer to committee;</td>
<td></td>
</tr>
<tr>
<td>New Business</td>
<td></td>
<td>Postpone for further consideration; decision.</td>
<td>8:40</td>
</tr>
<tr>
<td>• (list each item)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation</td>
<td>Chairperson</td>
<td></td>
<td>8:55</td>
</tr>
<tr>
<td>Adjournment</td>
<td>Chairperson</td>
<td></td>
<td>9:00 p.m.</td>
</tr>
</tbody>
</table>
**Committee Reports**

Documenting the activities of your committees makes good sense. It not only helps you to track your group’s progress and decisions, it also provides a permanent historical record that future neighborhood leaders can refer back to in their own decision-making processes.

When writing a committee report you want to hone what transpired down to the essentials. The following format will help you do that:

---

**Sample Committee Report**

Title of Committee

<table>
<thead>
<tr>
<th>Date of board meeting:</th>
<th>(when report is presented)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee members:</td>
<td>(list by name)</td>
</tr>
<tr>
<td>Agenda item number</td>
<td>(corresponds to Board agenda)</td>
</tr>
<tr>
<td>Situation:</td>
<td>(describe in as much depth as appropriate)</td>
</tr>
<tr>
<td>Options:</td>
<td>(list at least 2 or 3 options that were considered by the committee, with advantages and disadvantages of each)</td>
</tr>
<tr>
<td>Recommendations:</td>
<td>(specify which option is being recommended and why)</td>
</tr>
<tr>
<td>Action required:</td>
<td>(define what action is needed by the total Board)</td>
</tr>
</tbody>
</table>

---
At The Meeting

☐ Keep information items brief and relevant.

☐ Discuss decision items at a time when most group members are present.

☐ Know the limits of the group’s decision making authority.

☐ Committee reports should recommend action with clearly stated proposals.

☐ Present financial information with written copies for everyone.

☐ Involve everyone who attends the meeting. Often newcomers are not recognized or taken seriously and then don’t return to future meetings. Have them introduce themselves before they speak, or introduce everyone at the beginning of the meeting.

☐ Use visual aids as much as possible. This includes charts, graphs, posters, etc. Visual aids give groups something to focus on during a discussion.

☐ Establish the next meeting time and place. People should walk away from the meeting knowing when and where they will meet next.

☐ Hand out new task assignments. Be clear about who is doing what and what is expected of that person.

☐ Allow time for new business so that all participants have an opportunity to bring up issues.

☐ Minutes are to be taken at all meetings and should include:
  - The persons attending and their capacity.
  - A summary of all items presented and discussed and the action to be taken.
  - A record of all decisions made, including a record of votes taken.
  - The votes on plans made, tasks assigned, etc.
  - All items which are referred to committees or to future meetings.

Minutes may be kept on file at your district office and must be available to anyone requesting them.
Elements of Successful Meetings

The two things you do most at any given meeting are speaking or listening to others speak. Both of these are important skills that everyone involved in group work should master. They are key elements for successful meetings.

Speaking

People who are the most respected members of a group are often also the best speakers. This does not mean they are the most educated. They are, however, able to get an idea across to a group of people without dominating the meeting or rambling on and on.

Here are tips to help you improve your group speaking ability:

- **Know what you want to say.** The secret to being a good speaker, whether it is part of an on-the-spot group discussion or a prepared speech, is knowing the point you want to convey. If you don’t know what it is you are trying to say, surely the rest of the group won’t know either! Clearly outline your ideas before you speak. Jot down your main points on a piece of paper.
- **Keep it short.** No matter what kind of speech you are making, keep it short and to the point. People tend to listen to you if you make your point and stop. People who go on and on bore others and are not effective speakers.
- **Speak clearly.** Don’t mumble. Speak strongly and with confidence. If you speak as if you believe in yourself, others will too.
- **Practice.** If you have to make a presentation to the group, try practicing in front of your mirror at home before the meeting.
- **Be concise.** Don’t try to jam too many ideas into one speech. Limit your points to no more than three per speech.
- **Eye contact.** Make eye contact with people as you speak. Don’t talk to the floor.
- **Avoid distractions.** Words like “um,” “ah,” “kinda,” and “you know” detract from the real message. Also, avoid physical distractions like playing with your hair or glasses, or jingling your keys. Don’t cover your mouth with your hand.

Listening

Listening to others has become a forgotten art. However, a successful neighborhood organizer knows how to really listen to others’ concerns—not just the words being spoken, but what those words mean. This is a skill that takes practice and hard work. Don’t get so caught up in your own ideas that you dismiss what someone else is saying without really listening. The guidelines below will help you to become a better listener.

- **Listen for the unfamiliar.** You may just think you have heard it all before.
- **Learn to concentrate.** Do not let boredom get to you.
• Rephrase important points in your own words.
• Be fair when you disagree.
• Pay attention to details.
• Shun preconceived ideas.
• Consider the source of what you hear.
• Listen unemotionally.
• Want to listen. Do not let your eyes or ears wander.
• Do not interrupt. Hear a person out.
• Avoid getting hung up on words. If you are not clear on terms being used, ask the speaker to define them.
• Ask clarifying questions such as:
  – Do you mean....?
  – Are you saying that....?
  – Could you be more specific....?

• Avoid endless discussions or arguments about unsolvable items.
Parliamentary Procedure for Meetings

Robert's Rules of Order is the standard for facilitating discussions and group decision making. Copies of the rules are available at most bookstores. Although they may seem long and involved, having an agreed-upon set of rules makes meetings run easier. Robert's Rules will help your group have better meetings, not make them more difficult. Your group is free to modify them or find another suitable process that encourages fairness and participation, unless your bylaws state otherwise.

Here are the basic elements of Robert's Rules, used by most organizations:

1. **Motion:** To introduce a new piece of business or propose a decision or action, a motion must be made by a group member (“I move that...”) A second motion must then also be made (raise your hand and say, “I second it.”). After limited discussion the group then votes on the motion. A majority vote is required for the motion to pass (or quorum as specified in your bylaws).

2. **Postpone Indefinitely:** This tactic is used to kill a motion. When passed, the motion cannot be reintroduced at that meeting. It may be brought up again at a later date. This is made as a motion (“I move to postpone indefinitely...”). A second is required. A majority vote is required to postpone the motion under consideration.

3. **Amend:** This is the process used to change a motion under consideration. Perhaps you like the idea proposed but not exactly as offered. Raise your hand and make the following motion: “I move to amend the motion on the floor.” This also requires a second. After the motion to amend is seconded, a majority vote is needed to decide whether the amendment is accepted. Then a vote is taken on the amended motion. In some organizations, a “friendly amendment” is made. If the person who made the original motion agrees with the suggested changes, the amended motion may be voted on without a separate vote to approve the amendment.

4. **Commit:** This is used to place a motion in committee. It requires a second. A majority vote must rule to carry it. At the next meeting the committee is required to prepare a report on the motion committed. If an appropriate committee exists, the motion goes to that committee. If not, a new committee is established.

5. **Question:** To end a debate immediately, the question is called (say “I call the question”) and needs a second. A vote is held immediately (no further discussion is allowed). A two-thirds vote is required for passage. If it is passed, the motion on the floor is voted on immediately.

6. **Table:** To table a discussion is to lay aside the business at hand in such a manner that it will be considered later in the meeting or at another time (“I make a motion to table this discussion until the next meeting. In the meantime, we will get more information so we can better discuss the issue.”) A second is needed and a majority vote required to table the item being discussed.

7. **Adjourn:** A motion is made to end the meeting. A second motion is required. A majority vote is then required for the meeting to be adjourned (ended).
Note: If more than one motion is proposed, the most recent takes precedence over the ones preceding it. For example if #6, a motion to table the discussion, is proposed, it must be voted on before #3, a motion to amend, can be decided.

In a smaller meeting, like a committee or board meeting, often only four motions are used:

- To introduce (motion).
- To change a motion (amend).
- To adopt (accept a report without discussion).
- To adjourn (end the meeting).

Remember, these processes are designed to ensure that everyone has a chance to participate and to share ideas in an orderly manner. Parliamentary procedure should not be used to prevent discussion of important issues.

Board and committee chairpersons and other leaders may want to get some training in meeting facilitation and in using parliamentary procedure. Additional information on meeting processes, dealing with difficult people, and using Robert’s Rules is available from district office staff and community resources such as the League of Women Voters, United Way and other technical assistance providers. Parliamentary Procedure at a Glance, by O. Garfield Jones, is an excellent and useful guide for neighborhood association chairs.
Tips in Parliamentary Procedure

The following summary will help you determine when to use the actions described in *Robert’s Rules*.

- A main motion must be moved, seconded, and stated by the chair before it can be discussed.
- If you want to move, second, or speak to a motion, stand and address the chair.
- If you approve the motion as is, vote for it.
- If you disapprove the motion, vote against it.
- If you approve the idea of the motion but want to change it, amend it or submit a substitute for it.
- If you want advice or information to help you make your decision, move to refer the motion to an appropriate quorum or committee with instructions to report back.
- If you feel they can handle it better than the assembly, move to refer the motion to a quorum or committee with power to act.
- If you feel that there the pending question(s) should be delayed so more urgent business can be considered, move to lay the motion on the table.
- If you want time to think the motion over, move that consideration be deferred to a certain time.
- If you think that further discussion is unnecessary, move the previous question.
- If you think that the assembly should give further consideration to a motion referred to a quorum or committee, move the motion be recalled.
- If you think that the assembly should give further consideration to a matter already voted upon, move that it be reconsidered.
- If you do not agree with a decision rendered by the chair, appeal the decision to the assembly.
- If you think that a matter introduced is not germane to the matter at hand, a point of order may be raised.
- If you think that too much time is being consumed by speakers, you can move a time limit on such speeches.
- If a motion has several parts, and you wish to vote differently on these parts, move to divide the motion.
Creating The Formal Structure

Neighborhood association volunteers work on an endless stream of projects and commitments. The last thing that anyone really wants to think about is the legal and fiscal requirements of your neighborhood association. They are often tedious and confusing. This section will help unravel some of the complexities of these requirements.

Your neighborhood association should be organized in a way that best suits your needs as it meets the ONA Guidelines and other legal requirements. There are certain things that all neighborhood associations must do (like writing bylaws). You are encouraged, however, not to take on more fiscal/legal responsibilities than are appropriate for your organization.

For example, if you are a small neighborhood association that deals with small sums of money, you do not have to incorporate and/or apply for non-profit tax exempt status. You could simply write bylaws, request recognition by the City through ONA, apply for an assumed business name, receive a tax ID number, open a checking account and .... voilà .... you’re in business.

Also, before you start, check with your district office. They can advise you about the status of your association, some options for conducting business, and the use of the coalition’s non-profit status for bank accounts and bulk mailing permits.

If your neighborhood association decides to incorporate as a nonprofit organization in the State of Oregon or if you are a member of a district coalition board, the section on board liability, the Oregon nonprofit law and coalition board responsibilities is essential reading.

Since neighborhood associations are not required to organize in any one particular way, there are a number of options open to your organization. There are some options you may want to consider and some that wouldn’t work for your group. Again, do what is best for your neighborhood association.

The material in this section can be divided into three sub-sections.

- Things you must do.
- Things you should consider.
- Things you can elect to do.
Must Do

- **Write bylaws.** To be recognized as a legitimate neighborhood association by the City, you must have bylaws on file with the Office of Neighborhood Associations.

- **Open Meetings and Records Policy:** Neighborhood associations must abide by the established policy regarding open meetings and records. (See the *ONA Guidelines* in the Appendix)

Should Do

- **Bookkeeping.** Even if you are dealing with small sums of money, you should set up a bookkeeping system.

- **Assumed business name.** The least you should do as a neighborhood association is to apply for a business name. This protects your identity as the "whatever" Neighborhood Association.

- **Tax I.D. Number.** Similar to a Social Security number for your neighborhood association, this number is necessary to open a bank account and is obtained from the IRS.

Might Want To Do

- **Incorporate.** You can incorporate with the state as a non-profit corporation. This is necessary if you intend to apply for a non-profit, tax exempt status. Corporations must comply with a number of legal and fiscal requirements, some of which are outlined in this section.

- **Apply for tax exempt status.** The Internal Revenue Service allows neighborhood associations to apply for a tax-exempt status.

- **Apply for bulk mailing permit.** The post office offers a special rate to non-profit, tax-exempt organizations. Most district offices have this permit for use by their affiliated neighborhood associations. *Check with your district office before you consider applying on your own.*

Some research may be necessary before you decide which of these optional actions you need to take on. The size of your organization, level of activity and amount of money you have are among the factors that determine the best status for your neighborhood association. Your district office can help, or you may need to seek advice from an attorney or accountant (look for a volunteer from your neighborhood!).
Bylaws

Bylaws contain the “rules governing the internal affairs of an organization.” They are the constitution of your organization that establishes the legal requirements for the group. Bylaws govern the way you must function as well as the roles and responsibilities of your officers.

To be recognized as a neighborhood association by the City of Portland, you must have bylaws written and adopted by your group and on file with the Office of Neighborhood Associations. They are, therefore, an essential element to organizing a neighborhood association. Bylaws are also an integral part of the process for obtaining tax exempt status by the federal government.

While most people see writing bylaws as a tedious, difficult procedure, they can be of great benefit to a new organization by helping members clearly define and understand the purpose and procedures of their neighborhood association. Bylaws should also be reviewed periodically. This will help orient new members to the purpose and processes of the organization. Reviewing bylaws will ensure that they continue to meet the association’s needs and other legal requirements. When bylaws are updated, they should first be reviewed by ONA.

This section includes a list of what information to include in your bylaws and a detailed outline to use in writing your own. Also, a complete sample set of bylaws is included in the Appendix, which can be used as the basis for your own bylaws or simply as a guide. The outline gives you an idea of the kinds of information that should be included in your bylaws, including sections that are specifically required by the ONA Guidelines. The sample bylaws in the Appendix provide some specific wording for these sections. Consult with your district office, ONA, or an attorney before writing and adopting your own neighborhood association’s bylaws and standing rules.

Remember, bylaws are the governing set of rules for your particular neighborhood association. It is, therefore, important to think about the needs of your group and then tailor your bylaws to meet your needs. Be as specific as possible, yet allow for flexibility within your organization. Take this process seriously. Your bylaws will be with your neighborhood association for a long time.

Note: Bylaws are an essential element to organizing a neighborhood association. To be recognized by the City of Portland as a neighborhood association, you must have written bylaws that have been reviewed by and are on file with the Office of Neighborhood Associations, and they must include information specified in the Guidelines. While writing bylaws is often seen as a tedious, difficult procedure, the process can be of great benefit to an organization by helping members to clearly define the purpose and procedures of their neighborhood association.
Bylaws of Any Neighborhood Association (ANA)

Article I PURPOSE

- Section 1 - Name of Organization
- Section 2 - Purpose of ANA

Article II MEMBERSHIP*

- Section 1 - Membership Qualifications
- Section 2 - Membership Voting

Article III DUES*

Article IV - MEMBERSHIP MEETINGS*

- Section 1 - General membership meetings
- Section 2 - Special membership meetings
- Section 3 - Agenda
- Section 4 - Quorum
- Section 5 - Participation
- Section 6 - Procedures

Article V BOARD OF DIRECTORS

- Section 1 - Number of Board Members
- Section 2 - Terms of Office
- Section 3 - Eligibility for Board Service
- Section 4 - Duties of Board Members
- Section 5 - Election of Board Members
- Section 6 - Board Vacancies
- Section 7 - Duties of Board Officers
- Section 8 - Board Meetings
- Section 9 - Emergency Powers
- Section 10 - Termination for Nonattendance

Article VI COMMITTEES

Article VII CONFLICT OF INTEREST PROCEDURES

- Section 1 - Definition
- Section 2 - Declaring the Conflict of Interest
These sample bylaws outline the information that should be included in your neighborhood association bylaws. The wording is suggested wording only. Neighborhood associations are free to create bylaws that are reflective of their own organization.

ARTICLE I Purpose

Section 1 NAME OF ORGANIZATION: The name of the organization shall be the Sample Neighborhood Association (SNA).

Section 2 PURPOSE OF SNA: The purposes for which SNA is organized are:

a) To enhance the livability of the area by establishing and maintaining an open line of communication and liaison between the neighborhood, government agencies and other neighborhoods.

b) To provide an open process by which all members of the neighborhood may involve themselves in the affairs of the neighborhood.

c) To do and perform all of the activities related to said purposes, to have and enjoy all of the powers granted and engage in any lawful activity for which corporations may be organized under ORS Chapter 61.

d) To be organized exclusively for educational, scientific and charitable purposes. Notwithstanding any statement of purposes or aforesaid, this association shall not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of its specific and primary purpose.

ARTICLE II Membership

Section 1 MEMBERSHIP QUALIFICATIONS: Membership in SNA shall be open to any person who lives and/or
owns any real property within the recognized boundaries of SNA. (Other individuals or organizations may be members as further set forth in each neighborhood association's bylaws.)

Section 2

MEMBERSHIP VOTING: All residents and property owners located with SNA boundaries shall have one vote each to be cast during attendance at any general or special meeting. One representative from each government agency and nonprofit organization located within SNA boundaries shall have the same privilege as the residents listed above.

ARTICLE III

DUES: Charging of dues or membership fees shall not be made; however, voluntary contributions will be accepted. Activities to raise funds for SNA use may be held if appropriate.

ARTICLE IV

MEMBERSHIP MEETINGS

Section 1

GENERAL MEMBERSHIP MEETINGS: There shall be at least two general membership meetings yearly. The meetings shall be convened in the fall and spring and upon any day decided upon by the majority vote of the board of directors. Notification for all general meetings shall require seven (7) days advance written or telephone notice to all active members of SNA and public notice. "Active member" is defined as one who has attended at least one of the last two general or special meetings of the membership.

Section 2

SPECIAL MEMBERSHIP MEETINGS: Special meetings of the membership may be called by the chairperson or the board of directors as deemed necessary. Notification and purpose(s) of the special meeting shall require seven (7) days advance written or telephone notice to all active members of SNA and public notice.

Section 3

AGENDA: Subject to the approval of the board of directors, the chairperson shall prepare the agenda for general and special meetings of the membership. Any person may add an item to the agenda by submitting the item in writing to the board of directors at least seven (7) days in advance of the membership meeting. Any member of SNA may make a motion to add an
item to the board, general or special agendas at those respective meetings. Adoption of that motion requires a second and majority vote.

Section 4

QUORUM: A quorum for any general or special meeting of SNA shall be the number of members in attendance. Unless otherwise specified in these bylaws, decisions of SNA shall be made by a majority vote of those members present at any meeting.

Section 5

PARTICIPATION: Any general, special, board or committee meeting is open to any person and all who wish to may be heard. However, only those eligible for membership are entitled to vote. All actions or recommendations of the general or special meetings shall be communicated to all affected parties, including minority reports.

Section 6

PROCEDURES: The SNA shall follow Robert's Rules of Order (Revised) in all areas not covered by the bylaws.

ARTICLE V

BOARD OF DIRECTORS

Section 1

NUMBER OF BOARD MEMBERS: The board of directors shall determine the exact number of board positions annually. There shall be at least __ and no more than __ board members.

Section 2

TERMS OF OFFICE: Each director shall hold office for a term of one (1) year for which he/she is elected or appointed and until his/her successor shall have been elected or appointed to take office. (The season in which a position is open for election will be indicated in paren following that position's duty description.)

Section 3

ELIGIBILITY FOR BOARD SERVICE: Only persons eligible for SNA membership shall be qualified to hold an elected or appointed position.

Section 4

DUTIES OF BOARD MEMBERS: The affairs of SNA shall be managed by the board in the interim between general meetings. The board shall be accountable to the membership; shall seek the views of those affected by any proposed policies or reactions
before adopting any recommendation on behalf of SNA; and shall strictly comply with these bylaws.

Section 5

**ELECTION OF BOARD MEMBERS:** Board members shall be elected annually by a vote of the membership at its annual meeting. The names of all candidates for the board shall be placed in nomination. Secret written ballots shall be used for voting for board members. Election requires a majority vote of the membership present.

Section 6

**BOARD VACANCIES:** The board may fill any vacancy on the board or a committee by majority vote of the board in cases involving absences by a board or committee member from three (3) consecutive meetings. A member appointed to fill a vacancy shall serve the remainder of the unexpired term and until his/her successor is elected or appointed.

Section 7

**DUTIES OF BOARD OFFICERS**

a) **CHAIRPERSON (ELECTED IN SPRING):** The chairperson shall prepare the agenda and preside at all meetings of the board and membership; shall appoint members of committees not elected, with a majority approval of the board, except for members of the Grievance Committee.

b) **VICE CHAIRPERSON (ELECTED IN FALL):** The first alternate shall assist the chairperson; in the chairperson’s absence shall function as chairperson; shall serve as a member of the area board of directors representing SNA.

c) **SECRETARY (ELECTED IN SPRING):** The secretary shall keep minutes and written records of majority and minority opinions expressed at all meetings; shall be responsible for all correspondence of SNA; shall make records of SNA available for inspection for any proper purpose at any reasonable time.

d) **TREASURER (ELECTED IN FALL):** The treasurer shall be held accountable for all funds and shall give an accounting at each general
meeting; shall receive, safekeep and disburse SNA funds, but such disbursement shall require the signature of one other board member.

e) BOARD MEMBERS-AT-LARGE AND COMMITTEE CHAIRPERSONS: Chairpersons of committees shall inform the board and SNA of all activities of their respective committees.

Section 8

BOARD MEETINGS: The board shall meet at least fourteen (14) days prior to any general or special membership meeting and at any other time the chairperson may designate. These meetings shall be open session; however, only board members shall be entitled to vote. A quorum for board meetings shall be the number of board members in attendance; decisions shall be made by majority vote. Directors shall be notified of board meetings in writing or by telephone in advance. A majority of board members, by signed petition, may call a board, general or special meeting.

Section 9

EMERGENCY POWERS OF THE BOARD: In such cases where the board is required to provide neighborhood response before the question is presented to the membership, the board must indicate to the questioner that this is the case, and shall present the action taken at a special or general meeting with 30 days, or within a reasonable time for ratification by the membership where circumstances dictate.

Section 10

TERMINATION FOR NONATTENDANCE: Board members failing to attend three consecutive board meetings shall be automatically deemed to have resigned from the board.

ARTICLE VI

COMMITTEES: The board shall establish both standing and ad hoc committees as it deems necessary. Committees shall make recommendations to the board for board actions. Committees shall not have the power to act on behalf of the organization without specific authorization from the board.
ARTICLE VII

CONFLICT OF INTEREST

Section 1

DEFINITION: A conflict of interest exists for a member or board member whenever the member or board member holds a personal financial interest which will be impacted by the action or inaction by SNA on a proposal before the membership or board. A personal financial interest shall include a financial interest held by the member or board member and/or by members of their immediate family. A personal financial interest includes an ownership interest above 5% of a business which will be impacted by the decision of SNA. Examples of personal financial interest would include: Employment by SNA; ownership of property the use or control of which is being considered by SNA; plans to purchase property the use or control of which is under discussion by SNA, etc.

Section 2

DECLARING THE CONFLICT OF INTEREST: Whenever a member of board member determines that they have a conflict of interest relating to an item under discussion, they must inform the body (membership or board) hearing the proposal that the conflict of interest exists.

Section 3

ABSTENTION FROM VOTING: Members or board members shall not vote on matters in which they have a conflict of interest.

ARTICLE VIII

GRIEVANCE PROCEDURES

Section 1

ELIGIBILITY TO GRIEV: A person or group adversely affected by a decision or policy of SNA may submit in writing a complaint to any member of the Grievance Committee.

Section 2

COMPLAINT RECEIPT: Within seven (7) days of receipt of the complaint, the committee shall arrange with the petitioner a mutually acceptable place, day and hour for a review of the complaint, and will, in writing, within thirty (30) days, recommend a resolution of the grievance to the board.

Section 3

FINAL RESOLUTION: The committee shall attempt to resolve the complaint and shall submit a report of
their recommendation and/or action to the complainant, board and membership. If the committee, board and petitioner cannot reach agreement, final resolution of the complaint shall be by vote of a majority of the membership at a general or special meeting.

ARTICLE IX

PROCEDURE FOR CONSIDERATION OF PROPOSALS

Section 1

SUBMISSION OF PROPOSALS: Any person or group, inside or outside the boundaries of SNA and any City agency may propose in writing items for consideration and/or recommendation to the board. The board shall decide whether proposed items will appear on the agenda of either the board, standing or special committees or general or special meetings.

Section 2

NOTIFICATION: The proponent and members directly affected by such proposals shall be notified in writing of the place, day and hour the proposal shall be reviewed not less than seven (7) days in advance.

Section 3

ATTENDANCE: The proponent may attend this meeting to make a presentation and answer questions concerning the proposal.

Section 4

DISSEMINATION: The SNA shall submit recommendations and dissenting views as recorded from the meeting to the proponent and other appropriate parties.

ARTICLE X

BOUNDARIES

Section 1

BOUNDARIES: Boundaries of SNA shall be defined as follows: Beginning at the ____________...

ARTICLE XI

PUBLIC MEETINGS/PUBLIC RECORDS

REQUIREMENT: SNA shall abide by all Oregon statutes relative to public meetings and public records. Official action(s) taken by SNA must be on record or part of the minutes of each meeting. The minutes shall include a record of attendance and the results of any vote(s) taken. A summary of dissenting views should be transmitted along with any recommendation made by SNA to the City.
ARTICLE XII  
NON-DISCRIMINATION: SNA must not discriminate against individuals or groups on the basis of race, religion, color, sex, sexual orientation, age, disability, national origin, income, or political affiliation in any of its policies, recommendations or actions.

ARTICLE XIII  
ADOPTION AND AMENDMENT OF BYLAWS: All amendments to these bylaws must be proposed in writing and submitted to members at least seven (7) days before voting on their adoption may proceed. Notice of proposal to amend the bylaws, specifying the date, time, and place for consideration, must be provided to all members at least seven (7) days before voting. Adoption of and amendments to these bylaws shall require a two-thirds (2/3) vote by the members present at a general meeting.
• Section 3 - Abstention from voting

Article VIII GRIEVANCE PROCEDURES*

• Section 1 - Eligibility to grieve
• Section 2 - Complaint receipt
• Section 3 - Final resolution

Article IX PROCEDURE FOR CONSIDERATION OF PROPOSALS

• Section 1 - Submission of proposals
• Section 2 - Notification
• Section 3 - Attendance
• Section 4 - Dissemination

Article X PUBLIC MEETINGS/PUBLIC RECORDS REQUIREMENT*

Article XI BOUNDARIES*

Article XII NON-DISCRIMINATION*

Article XIII ADOPTION AND AMENDMENT OF BYLAWS

*These sections are required by the ONA Guidelines. Excepting a few particular cases, the ONA Guidelines require only that these topics be dealt with, not any specific language.
Open Meetings and Records Policy

Although a recent State of Oregon Supreme Court decision (Marks, Ball, Petitt, and de Sieyes v. McKenzie High School, argued and submitted 5 January 1994) finds that organizations such as the City’s neighborhood associations and coalitions are not “public” bodies and, therefore, are not bound by the Oregon Public Meetings and Records Law, it is in keeping with the goals of neighborhood associations and the City that citizen involvement be as broad and inclusive as possible, rather than narrow and exclusive. To that end, the neighborhood associations and coalitions (and certain of their respective sub committees, task forces, or ad hoc committees) are required by the ONA Guidelines to observe an “Open Meetings and Records Policy for Neighborhood Associations and District Coalitions.”

This policy was created by a task force composed of citizens, technical experts, the City Attorney’s Office, and the ONA director and staff members. The policy is modelled after the State Law and includes many of the same provisions, although it allows more flexibility. The main difference, of course, is that the policy is not enforceable through the legal system. It will, however, be strictly enforced by the City. Failure to comply with its provisions could mean a neighborhood association or coalition may lose it’s eligibility to receive funding and/or services. Ultimately, lack of compliance with the policy could mean a neighborhood association loses its official recognition by the City, including the rights and privileges that go with it.

For most neighborhood associations and coalitions these requirements enhance, rather than restrict, the decision-making process. Most associations and coalitions are glad to observe them and feel their meetings are more effective if efforts are made to include all interested parties, making them feel comfortable about participating. The infrequent extra time and effort the policy requires is more than offset by the positive effects. Following is a summary of the Open Meeting and Records Policy. The district offices and ONA can help you with orientation and training in this area.

Following is some summary information regarding the Open Meetings and Records Policy. For a copy of the document refer to the ONA Guidelines. Refer questions of meaning and interpretation to ONA, which is the arbiter of the policy.

Open Meetings

- **Meetings must be open to the public:** All meetings must be open to the public, except for executive sessions.

- **Direct notice must be given to those who have requested it, in writing, including any media:** Actual (direct) notice must be provided to specifically interested persons, such as board and committee members, and others who have requested notification in writing, including any media.

- **Notice must also be given to the public at large:** Reasonable notice must also be provided to the public at large although this does not need to be direct. To meet the requirement regarding notification of the public at large, the posting of a notice will generally meet the minimum requirements. The bulletin board or other site where the notice is posted must be accessible to the public.
District coalitions and neighborhood associations are encouraged, however, to provide public notice as broadly as is practical.

- **Notification must include a description of the agenda issues, but additional issues may be added after the notice is given:** Notification to specifically interested persons and to the public must include date, time, place, and a brief description of the nature of the principle subjects to be discussed. Issues which were unknown at the time of notice and therefore not listed may be discussed and voted on.

- **The amount of notice given under the policy must be reasonable, but no specific amount of time is required:** For most meetings, adequate notice can be provided to the public at large through press releases to the local media. District coalition staff and ONA staff can help with notifying the press, but if that help is wanted, an organization must request it ten days before the scheduled meeting date (the policy does not require a certain amount of notice which must be given; ten days is the lead time which ONA and the coalitions need to get the information published in *The Oregonian*). Also, the policy does not require an organization to guarantee publication of a news release; it does encourage sending them out and it does require notification to any news media requesting it. For more information on contacting the media, see Section VIII, "Getting the Word Out."

- **Parties with special interests should be notified directly if it can be done reasonably:** Newsletters, flyers, notices, and mailings sent to interested parties, including agenda information, also help get the word out. The policy also encourages organizations to directly notify those parties which it knows have a special interest in a meeting. It does not, however, require that this be done in order to minimally comply.

- **Special and emergency meetings may be called with minimal notice:** Although coalitions and neighborhood associations are encouraged to set meetings and provide notice as far in advance as possible, this is not always feasible. In the case of an actual emergency an organization may hold a meeting with less than 24-hour notice being provided. It must, however, describe the emergency in the minutes of the meeting and state why the meeting could not be delayed to allow at least 24-hour notice. As in the case of special meetings (generally where more than 24-hour notice can be given), a good faith effort should be made to notify the public at large and those members of the public with a special interest in the issue at hand. An attempt must be made to provide such notification. It is good practice to document this attempt.

Only the emergency issue(s) may be dealt with at an emergency meeting.

- **Meetings should - but do not have to - be held in the area where the organization works:** Meetings must be held within the geographic boundaries of the area that the public body has jurisdiction over. Meetings may be held in restaurants, private residences, or businesses but adequate notice and arrangements for convenient attendance must be made.
• **Public participation in board deliberation is not required:** Meetings must be open to the public, but do not have to be open to public participation. The Chair controls the extent of public participation at a meeting. Organizations may want to adopt guidelines for public participation to aid Chairs in being fair and consistent at meetings.

• **Whenever requested by a voting member, votes must be recorded by the name of the voter**

• **Telephone-conference and other electronic meetings may only be conducted under certain circumstances:** Conducting a meeting through electronic conferencing means such as by telephone or computer is allowable under the law if notice is given and the public is provided at least one place to "listen" to the meeting by speaker or other devices.

• **Smoking is banned:** Smoking is banned at meetings designated as open, as defined by the policy.

• **Public meetings must be accessible:** A good faith effort must be made to make meetings accessible to people with hearing impairment and other disabilities. When an activity or meeting is publicized, there should be a statement attached to the effect "If an individual is in need of special accommodation, contact ___ one week in advance." If someone indicates the need for a special accommodation, it should be provided. Otherwise, continue as planned. ONA and the Metropolitan Human Relations Commission can assist with accessibility information.

• **Members may gather after a meeting to discuss agenda items if the intent is not to deliberate a decision and no decisions are made:** Although informal gatherings following meetings are permissible under the law, the intent of such a gathering may not be to deliberate issues and no decision may be made. Members constituting a quorum must avoid any group discussion of the business of their board or committee during private social gatherings.

• **Boards, public bodies or committees may meet privately to discuss certain issues in executive session:** Boards, public bodies, or committees of boards may meet privately to discuss certain issues without including the general public in "executive sessions." An executive session may be part of a regular meeting or be a separate meeting, but public notice must be given in either case.

Personnel issues such as salary negotiations or disciplinary action, labor negotiations and legal advice regarding litigation are among the items that may be discussed during an executive session. Representatives of the media must be allowed to attend an executive session if they have been active - as media - in the previous twelve months (or in the case of the press, published in the previous twelve months). They may not, however, publish or air information from that meeting. Final decisions may not be made at executive session although members may reach a consensus; votes or final action must take place at a public meeting.
Open Records

- **Minutes must be taken at all required open meetings and be available upon request to the public:** Minutes must be taken at all meetings and those minutes must be available to the public, upon request, within a reasonable time following the meeting. Even though the minutes will not be approved by the board until the next meeting, they must be available for public review within the reasonable time frame.

- **Minutes do not have to be a verbatim transcript of the meeting:** Minutes should be taken by the officer of the Board designated by the bylaws to do so. Minutes do not have to be a verbatim transcript of the meeting, but should, at a minimum, summarize discussions and actions. Minutes of executive sessions may be taped rather than written.

- **Nonexempt records may be inspected by any member of the public:** The policy requires that records which are not exempt may be inspected by any member of the public. It does, however, give the custodian of the records the right to adopt rules to protect the records and to maintain office efficiency and order, and it exempts certain information.

- **Neighborhood associations and coalitions may charge reasonable fees as reimbursement for the cost of making records available to the public:** District coalitions and neighborhood associations should adopt policies and procedures for dealing with requests for access to public records and for copies of public records, including the establishment of a formula for a reasonable fee based on staff time involved and other costs of reproduction. Remember, the fee may not exceed the actual cost.
Basic Bookkeeping for
 — Neighborhood Associations —

While neighborhood associations generally do not have much money, it is important to keep track of whatever money does come in or go out from your organization. It is a good idea to have an accountant or bookkeeper help you set up a set of books from the start, then let someone who feels comfortable with numbers and figures take on bookkeeping responsibilities. The sooner your system is set up, the easier it is to keep accurate financial records.

The following system has been recommended for use by neighborhood associations to help them keep accurate records. This is a double entry system. The system provides a record of all money received and where it came from, and all money paid out and the purpose for which it was used.

A. Cash Receipts And Cash Disbursements

All money coming in to or going out from the organization should be recorded on a daily basis (or whenever you have something to record). These transactions are recorded in a format called a journal.

- Cash receipts journal. Record the total amount of money (cash or checks) the day it is received and the source of each amount, i.e., contributions, grants, sale of advertising, etc.

- Cash disbursements journal. Record each disbursement from each bank account. Disbursements made by check should be recorded with the check number, date of the check, the payee (who the check is made out to), the amount of the check and the purpose of the disbursement. For savings accounts without preprinted checks, record the date of the withdrawal, amount and the purpose (use) of the funds. Photocopy the withdrawal slip and file with the cash receipts journal to create a record of who withdrew the money.

B. General Ledger

Associations or coalitions with many different sources of receipts or many different categories for disbursements, particularly those which receive foundation grants which restrict the use of the grant money, may need to set up a General Ledger. The General Ledger is essential for an organization which wants to use the accrual basis of accounting which records amounts owed to the organization (receivables) and amounts owed by the organization (payables). If you think your association needs a General Ledger or has significant payables or receivables, get help from a trained accountant to set up your system.

The Treasurer or another designated person should prepare a written financial report each month. The report should present the results of the full month's activity (i.e., the March report covers March 1 to March 31). At a minimum, the report should include the following elements:
- Cash at the beginning of the month.

- Total receipts during the month (with breakdown by source).

- Total disbursement during the month (with breakdown by type - i.e., postage, supplies, printing).

- Cash at the end of the month.

The cash at the beginning of the month plus the cash received less the cash disbursed must equal the cash at the end of the month.

As the organization gets larger, you may want to use a more standard format for financial reports, the Balance Sheet and Statements of Support, Revenue and Expenses. You may also want to compare the funds received and disbursed to the budget adopted by your board. Even in a very small organization, it is essential that the bank statement be reconciled to the financial statements. This means that a written bank reconciliation should be available to prove that the amount of cash reported on the financial statement at each month end agrees to the reconciled bank statement. Reconciliation involves adjusting the bank balance for outstanding checks and deposits. If no one in the organization is familiar with bank reconciliation ask an accountant or bookkeeper to teach the treasurer a simple reconciliation method.
Bank Accounts

Over the course of time, every neighborhood association accumulates money for one reason or another. The association needs a management system in place for dealing with these funds. What kind of bank account should be opened and how do you go about opening an account for your organization? Either a person or a corporation can open a bank account. If you are a corporation and you also have nonprofit status, you may be eligible to receive free banking privileges at some banks.

To Open An Account

1) Obtain a Tax Identification Number. A tax ID number is a federal tax number that is filed with the IRS. You must have this number to open an account with the bank. This enables the bank to report the earnings of your account to the IRS. If you don’t have a number, get one from the IRS.

If you don’t have a tax ID number, you can open an account with a member’s personal Social Security number. Often the secretary will use his/her number. The person whose number is being used is liable for paying taxes on the interest income reported by the bank to the IRS. This means that the money in the account is considered the personal money of the ID holder and taxes must be paid as if it is additional income. The neighborhood association may want to reimburse the secretary or treasurer for this expense. Also, if there is ever a lien against the person’s assets, those monies are considered personal property and can be assessed.

2) Signature cards must be signed by the secretary of your neighborhood association along with anyone else who will be signing on the account. You will then also need a director’s signature (an officer of the corporation or a designated director).

3) If you are a nonprofit corporation, you must bring a copy of the Articles of Incorporation stamped “Filed” by the Corporation Division. If you are not a corporation, bring a copy of your bylaws or minutes of your first meeting. You must also state the names and titles of people who are authorized to conduct business for the organization.

4) The bank will provide a card with wording for a resolution authorizing the bank account. The resolution must be adopted by the board of the nonprofit organization or the members of an unincorporated association.

5) Not all nonprofits receive waivers of service charge. Banks may waive service charges to organizations that provide a necessary public service. The decision to waive the charge is at the discretion of the individual bank.

6) Personal identification, such as a driver’s license, credit cards or a passport, is required to open any type of account.

7) Determine your type of account. If you are a nonprofit organization and are eligible for a nonprofit account, there may be no charge for the service the bank is offering. You must, however, take the account offered by the bank. You cannot choose the type of account you would like.
If you pay for an account, you can choose any account you would like, depending on your needs.

Types of accounts to consider:

- **Checking**: Any accounts open to individual customers are open to neighborhood association accounts. The least expensive usually have minimum deposit requirements. Your association should obtain pre-numbered checks. The use of non-numbered checks is not an acceptable practice for neighborhood associations.

- **Savings**: If you make limited withdrawals, you might be better off with a savings account rather than a checking account. The best arrangement is often a savings account with checking privileges. These usually require a minimum balance.

There are two things to consider when determining the type of bank account for your neighborhood association:

- **How often you will withdraw money?**

- **The amount of money you have. Do you have enough to keep a minimum balance in your account or pay service fees, if any?**
Assumed Business Name

To do business as an association in the state of Oregon, the least you must do (legally) is to file and receive an assumed business name. Basically, an assumed business name lets the public know with whom they are doing business. Unlike a corporation, an assumed business name does not provide liability protection to the people in the business.

To get a business name, you must do the following:

- Write to the state and ask for an assumed business name form.

  Department of Commerce, Corporation Division
  State of Oregon
  158 Twelfth Street
  Salem, Oregon 97310

- File the application with the Corporation Division

- You must renew the application two years later. After the first renewal, it is renewed every five years.

- To ensure that renewal forms are sent automatically, keep a address of the authorized representative or principal officer current with the Corporation Division.

Tax I.D. Employer Identification Number

Every neighborhood association should have a Federal tax ID number. Basically, this number is like a Social Security number for your organization. It is used for opening bank accounts, applying for tax exempt status, filing IRS tax forms, etc. An organization does not have to be incorporated in order to get a tax ID number.

Call the IRS in Portland (221-3960) and ask for a tax ID form, SS-4. It’s a short form, and takes little time to fill out. Return to the IRS office in Utah to the address listed on the form.

It takes six to eight weeks to receive the ID number. If you need your number before it is sent to you (for a bank account or nonprofit status form), simply state that you have applied for the number and haven’t yet received it.
Articles Of Incorporation

A corporation is an intangible entity that is recognized by the law. It acts like a person, but since it's not, it needs people to function. These people are its board of directors.

Incorporating is an option for neighborhood associations. One reason for neighborhood associations to become corporations is that corporations provide some liability protection to their members. The corporation, not the individuals, is the legal entity responsible for its actions. If there is ever a legal situation, your neighborhood association (as a corporation) is liable for its actions, not its individual members. Incorporating, however, may not be appropriate for your situation. Consult with your district office staff or an attorney before you decide to incorporate your association.

To become a corporation in Oregon, you must follow these three steps:

1) Obtain Articles of Incorporation forms from the state at:

Department of Commerce, Corporation Division
158 Twelfth Street
Salem, Oregon 97310

When you request incorporation papers, ask for the nonprofit incorporation form. Neighborhood associations are eligible to be considered not-for-profit corporations.

2) Fill out and return with the money appropriate for the type of status you have chosen for your corporation.

3) Renewal: A corporation must file an annual fee and report statement. These are due a year (yearly) after the date you incorporated. Renewal forms will be sent to the registered agent. Make sure that address is kept current.

Note: Filing for nonprofit incorporation status does not mean you are also tax exempt. You must file with the federal IRS to become tax exempt. If however, you intend to get a tax exempt status, you must first be a nonprofit corporation.

Articles of Incorporation include much of the same information you've already written in your bylaws. You can use your bylaws as a guide for writing your Articles of Incorporation. Information needed for your Articles of Incorporation include:

I. Name and duration of organization

II. Type of nonprofit corporation: Public benefit, mutual benefit or religious. To meet ONA and IRS tax exempt status requirements, your organization must select "public benefit."
III. Provisions in event of dissolution

IV. Members and boundary (include map)

V. Directors: Officers, terms, names and addresses, filling vacancies

VI. Initial registered office and initial registered agent.

VII. Incorporator (The individual who takes responsibility for filing the Articles of Incorporation and for seeing that the initial board meeting is held to adopt the bylaws.)

**Note:** If your organization plans to apply for tax exempt status, you must include specific provisions regarding what will be done with the organization's assets in the event of dissolution; prohibition of political activity and dividends; and charitable and educational purposes. Get IRS Publication 557, *Obtaining and Maintaining Tax Exempt Status* and use the sample Articles of Incorporation to get the correct wording.
Tax Exempt Status

Nonprofit does not necessarily mean tax exempt. Many neighborhood associations choose to apply for a tax exempt status. To become both nonprofit and tax exempt, you must do the following.

1) Obtain nonprofit corporation status (State). As outlined previously, a neighborhood association may choose to become a corporation by writing Articles of Incorporation and applying to the state for status as a nonprofit corporation. However, being a nonprofit corporation does not automatically mean you are also tax exempt. To get tax exempt status you must continue the process as outlined below.

2) File with the federal internal revenue service. The form you file and the status you receive depends on how your bylaws are written. If you are organized as an educational or charitable organization, you may be eligible for a 501(c)(3) status. If you are organized as a "civic league," you may receive a 501(c)(4).

It is to your advantage to receive the 501(c)(3) status. Having a 501(c)(3) allows individuals or corporations to claim a tax deductible charitable contribution for their donation of money or goods to your neighborhood association. Most foundations will make grants only to organizations with 501(c)(3) tax exempt status. If your organization is determined by the IRS to be exempt under 501(c)(4) donors will not be able to claim their contributions as tax deductible charitable gifts. Most foundations will not make grants to 501(c)(4) organizations.

Before filing the IRS form (1023 for 501(c)(3) status or 1024 for 501(c)(4) status), check with your district office and/or an attorney or CPA for help in determining which status you can receive and for help in filling out the forms.

To apply for federal tax exempt status:

1) Secure the funds required for the IRS application processing fee, $375 for organizations expected to gross more than $5,000 per year, $50 for organizations expecting gross receipts under $5,000. Gross receipts means all funds received before any deduction for expenses.

2) Complete all parts of the application (1023 for 501(c)(3) status or 1024 for 501(c)(4) status) that apply to the organization.

3) Include your employer identification (tax ID) number:
   - If you have one, write it in the space provided.
   - If you are a newly formed organization and don’t have an employer identification number, attach a completed Form SS-4 (if you haven’t already applied for one).

4) Enclose financial statements as requested on the application form.
- Current year (must include period up to within 60 days of the date the application is filed) and 3 preceding years.
- Detailed breakdown of support, revenue, and expenses and standard balance sheet statement of assets, liabilities and fund balance.
- If the organization has been in existence less than one year, you must also submit proposed budgets for 2 years showing the amounts and types of receipts and expenditures anticipated.

5) Include a conformed copy of the complete organizing instrument. In Oregon, the organizing instrument is the Articles of Incorporation and the bylaws.

- Articles of Incorporation: must have the “Filed” stamp and date from the State of Oregon Corporation Commission.
- Bylaws: A conformed copy is one that agrees with the original and all amendments to it and carries an original signature of an officer attesting to the date the bylaws were approved.

Your organizing instrument, either expressly or by operation of state law, must limit your activities to those permitted under section 501(c) and must provide for a proper distribution of your net assets upon dissolution.

6) Have the 1023 or 1024 application signed by one of the following:

- An officer who is authorized to sign; or
- A person authorized by power of attorney (submit the power of attorney, too).

7) Give name and telephone number of someone that can be reached during business hours if additional information is needed.

Note: Make sure your application is complete. Submit the application to the IRS office for Oregon, which is currently located in Los Angeles, CA. You may be contacted by one or more IRS employees regarding your application. If you do not complete all applicable parts of the application or do not provide all required attachments, the IRS will return the incomplete application to you for resubmission with the missing information or attachments.
After you have applied for and received nonprofit incorporation status from the State and received a tax ID (employer ID) number from the IRS, you must also:

- Submit the application for tax exempt status and the required processing fee.
- Receive a letter from the IRS documenting that the organization has been determined to be tax exempt.
- If your organization has received 501(c)(3) status, you must also register with the State of Oregon Charitable Trust Section.
Oregon Nonprofit Law And
Board Members' Responsibilities

All Oregon nonprofit corporations are governed by Oregon Revised Statutes, Chapter 65. This State law overrides anything the individual corporation has put into its bylaws or Articles of Incorporation. Your association can obtain a complete copy of ORS Chapter 65 by sending $3.00 to the Legislative Council, State Capitol Building, S-101, Salem, OR 97310.

The law describes the responsibilities of board members of nonprofit corporations. Basically, board members of nonprofits have responsibilities similar to those of board members of for-profit corporations. Board members are responsible for using care in their oversight of the activities of the organization and for making decisions that reflect the careful judgement of a reasonable person. Board members have a duty of loyalty to the organization which requires them to put the interests of the organization before their own personal interests. Board members must inform the board any time the board is discussing or acting upon matters in which the board member has a personal interest. This requirement is discussed in law under the term “conflict of interest.”

The State law also addresses the rights of members on nonprofit organizations. Your organization should review the law periodically to be certain that you are aware of the rights of your members.

A very useful book in this regard is the Oregon Non-profit Handbook, by Cumfer and Sohl. It can be purchased at Stevens-Ness Office Supplies in downtown Portland, ordered through bookstores, or from the publisher:

Technical Assistance for Community Services (TACS)
1903 SE Ankeny
Portland, OR 97214
(503) 239-4001

This book, however, is expensive, and you may prefer to use a reference copy available from any district coalition office and the ONA office.
**Board Liability Issues**

Many board members have questions about the possibility of becoming personally financially liable as a result of board service. This question is sometimes expressed as "what if I get sued as a board member?"

In general, board members of nonprofit corporations are not liable for the corporation's debts. For example, if the corporation had a large printing job done by a printer and then was unable to pay the bill, the printer would not be able to collect the debt from the individual board members because the debt is with the corporation. In order to be able to collect from individual board members, the printer would have to prove either that an individual board member had guaranteed or co-signed on the amount or that the board had beengrossly negligent. It is generally very difficult to prove gross negligence if the board produces evidence that they met regularly, considered financial decisions carefully, and used care in making decisions in light of the information available to them at the time.

In thinking about potential liability for board members, it is important to note that anyone can sue anyone else. Even though it is very difficult to persuade a court that board members should be held personally liable, many board members fear the cost of defending themselves from a lawsuit. Consequently, many nonprofits put a provision in the bylaws indemnifying board members in the event they are sued as a result of board service. These indemnifications are promises that the corporation will repay the board members for costs of defending themselves in lawsuits and/or for costs of judgments against board members.

Unfortunately, such indemnifications are pretty meaningless if the organization doesn't have funds available to cover the board members' legal costs. For this reason, larger organizations carry directors' and officers' liability insurance. This coverage may be available through the district coalition with which your association affiliates.

Whether or not your organization can afford directors' and officers' liability insurance, there are several steps you should take to protect board members from potential personal liability:

- Have regular board meetings and keep board members well informed.
- Keep good minutes of board meetings, recording which members attended, and the seriousness of board discussions.
- Obtain good insurance coverage for all organization activities. Insurance coverage, including coverage for board liability, is provided to member neighborhood associations through the district coalitions.
- If your association or coalition has employees, be certain the association meets all tax and reporting requirements (see the Oregon Non-profit Handbook).

Most individual homeowners' policies can provide coverage for the policyholder's volunteer activities as a very low annual fee. Check with your insurance agent to see what volunteer coverage is available.
District Coalition Board Issues

Board members of the district coalitions should consider their responsibilities carefully. All the district coalitions contract with the City of Portland. Board members are responsible for being certain that the corporation complies with the terms of the City and any other contracts. Board members may delegate certain responsibilities to staff but they retain responsibility to be certain that the contractual and other legal responsibilities are fulfilled.

The district coalitions employ paid staff. Consequently, board members must be certain that all employment laws and payroll tax requirements are observed. At a minimum, district coalition Board members should require understandable monthly financial reports. When a district coalition obtains funding from more than one funding source, board members should be certain that the bookkeeping system is set up to track the use of each distinct source of funds (this is called fund accounting). Board members may obtain additional assurance by arranging for an annual independent audit (by a CPA) of the coalition’s financial records, although this is not required by ONA.

As employers, the district coalitions should have clear personnel policies. Board members should be certain that the personnel policies are being followed and that adequate personnel records are maintained. The State Bureau of Labor and Industry has requirements in this regard which must be met.

Finally, district coalition board members should pay particular attention to the relationship between the district coalition and the neighborhood associations. By reviewing the district coalition’s bylaws, board members can determine whether they are bound to vote according to the views of the neighborhood associations they represent, or are free to vote independently. The district coalition bylaws should also identify any requirements to refer certain questions back to the neighborhood associations.

Note: District coalition board members should consider whether or not they want the coalition to act as fiscal sponsor for the neighborhood associations. If they determine that the coalition should offer fiscal sponsorship, board members should be certain that a clear written agreement is developed with each neighborhood association.
Annual Reports For Nonprofit Organizations

Tax Exempt: Federal

Tax exempt organizations 501(c)(3) or (4) are required to file annual tax returns only if your organization’s gross receipts or assets are over $25,000/year. If your organization has gross receipts over $25,000 but under $100,000 you should file the 990EZ (a simplified return).

Additionally, if you have unrelated business income, you will be asked to file form 990T. Unrelated business income is a complicated issue. The most common type of unrelated business income in neighborhood associations is income from the sale of advertising in newsletters. If your association sells advertising or sponsorships, or has other sales activities on a regular basis, you should request Publication 598, Tax on Unrelated Business Income of Exempt Organizations from the IRS.

Tax Exempt: State

Organizations with 501(c)(3) status which were required to register with the Oregon Charitable Trust Section must file the annual report CT12.

If you file the federal 990T, you must also file Oregon Form 20.

Corporation, Not Tax Exempt: Federal

Regardless of income earned, you must file form 1120. All income over and above expenses (profit) may be considered taxable income.

Corporation, Not Tax Exempt: State

Send a copy of the federal form 1120 along with a copy of Oregon form 20, the Oregon corporation excise tax return.

Use Of The District Office Tax Exempt Status

Your neighborhood association may be able to obtain some of the privileges of tax exempt status or nonprofit incorporation by working out an agreement with your district coalition. Most of the district offices have procedures to provide fiscal sponsorship for neighborhood associations. This fiscal sponsorship makes it possible for foundations to make grants to the tax exempt district coalition for projects to be conducted by individual neighborhood associations. The district coalition may also permit neighborhood associations to use the district coalition’s federal tax ID number to open bank accounts and receive other nonprofit privileges.
These arrangements for fiscal sponsorship require careful study by the district coalitions, because the tax exempt district coalition assumes some legal responsibility for activities carried out under its sponsorship. Consequently, the sponsoring coalition must have ready access to information about what the sponsored neighborhood association is doing with the funds and some ability to control the neighborhood association’s use of funds. It is generally a good idea for a neighborhood association receiving fiscal sponsorship from a district coalition to work with a written agreement between the coalition and the association.
Bulk Mail Permits

Organizations that meet Postal Service standards for nonprofit status are eligible to obtain a special bulk mail permit. This gives these agencies a substantially reduced rate for sending quantities of mail. To do this, you must first apply and obtain a bulk mail permit. However, there are a number of stipulations for using this reduced bulk mail permit.

- Your organization must obtain specific approval from the US Postal Service to mail at “nonprofit” rates.

- While most organizations with 501(c)(3) tax exempt status will qualify for US Postal Service nonprofit mailing privileges, the Postal Service must make a separate determination for each organization. Organizations which have not obtained a 501(c)(3) status may qualify for Postal Service nonprofit mailing permits by completing a detailed application. It is much easier, however, to be accepted for nonprofit mailing by the Postal Service if the organization has 501(c)(3) status.

- This special rate is limited to a minimum of 200 pieces of the same mailing.

- The mail must be bundled in accordance with specific instructions from the Postal Service.

**Note:** Before applying for a bulk mail permit, check with your district office. Most neighborhood associations may use the coalition’s bulk mail permit.

To get the bulk mail permit, the following steps must be followed.

1) An application for authorization, *application to mail at special bulk third-class rates*, Form 3624, must be filed by the organization at each post office where the organization intends to deposit mailings. The application is available at the main Post Office in downtown Portland.

2) An application filed by your neighborhood association seeking authorization as a qualified nonprofit organization must include evidence that the applicant meets all the requirements. Acceptable evidence includes a certificate of exemption from federal income tax or a copy of filed Articles of Incorporation as a nonprofit corporation.

3) After the post office has received all pertinent information, the postmaster sends the application forms with all supporting papers to the local mail classification center. There the postmaster will approve or deny the application. Additional information may be needed to support or clarify the application. Failure to furnish the information is sufficient reason for denial.
4) If the application is denied, the applicant can appeal the decision by submitting a written appeal to the postmaster within 15 days of the applicant's receipt of the decision.

5) Authorizations to mail at the special bulk third class rates will be revoked for nonuse if no special mailings occur within a two year period.

6) Once your permit has been granted, an annual bulk mailing fee must be paid once each calendar year. This fee must be paid at or before the time of the first bulk rate mailing of each calendar year.

7) A specific set of standards is given by the post office for the size and weight allowed for this reduced bulk rate fee. Consult the bulk mail division for specific information.

8) Specific standards of how to prepare the mail are outlined by the post office. Again, consult the bulk mail division.

Regulations and rates concerning bulk mail change frequently. Obtain a current copy of applicable regulations from the Postal Service.
Finding Your Way Around City Hall

Neighborhood association work means involvement with government. Being thrust into this complex maze of activities and people can be confusing. Just knowing which agency to call for a particular problem takes research and time. This section will help you understand the processes and services provided by local government and the people to contact for help.

- **The first section** explains the processes of City Hall. Topics include an overview of Portland’s government, City Council functions, the kinds of decisions that the council makes, the process for making a law, when the Council meets, how to testify and the Council calendar.

- **The second section** provides a brief description of each City agency or bureau. If you are involved with a particular issue, call the appropriate agency for advice or assistance. If you don’t know where to begin, call the City of Portland Information and Referral Line, your district office, or ONA.

- **The third section** lists additional government agencies and their areas of responsibility, as well as opportunities for citizen involvement.
Understanding City Government

Since 1913, Portland has been governed by the commission form of government we have today. Four City Commissioners and the Mayor form the City Council. Commissioners are elected for four-year terms. To ensure continuity of the Council from year to year, the City Charter provides that the Mayor and two Commissioners are elected in one year, and the Auditor and the two remaining Commissioners are elected in a different year.

The City Council meets twice a week to conduct City business, exercising legislative, quasi-judicial, and administrative powers. They vote on budgets and ordinances (legislative), as well as manage City bureaus (administrative).

City government has five departments. Each of the Council members is responsible for one department. The Mayor assigns each Council member to a particular department and its portfolio of bureaus. The Mayor can change these assignments at any time, as well as rearrange the bureaus in the respective portfolios.

The Mayor presides over Council meetings but, like the other Commissioners, has only one vote on Council matters. In this respect, the commission form of government places the duties and responsibilities of managing the City in the hands of a group of elected officials of equal rank and power, rather than an all-powerful Mayor or a City Manager. Municipal leaders are elected at large and are accountable to the voting public citywide.

Meetings

The City Council meets each Wednesday at 9:30 a.m., again at 2:00 p.m., and on Thursday afternoons at 2:00 p.m. Meetings are held in the Council Chambers in City Hall. If a Council meeting day falls on a legal holiday, the meeting will be held on the next regular business day. All Council meetings are open to the public.

Coverage of these meetings is aired on radio station KBOO (90.7 FM). They can also be seen on cable TV, Paragon Cable on the east side and TCI Cable on the west.

The Council Calendar

At least 24 hours prior to each Council session, the Council calendar is published. Each calendar lists a summary of all matters to be discussed by the Council that week. Ordinances and resolutions are listed by title.

If additional subjects are listed for the shorter Thursday session, an additional calendar, called the “Four-Fifths Calendar,” is issued. These additional items must be filed in the Auditor’s Office no later than 5:00 p.m. that Wednesday.

The Tuesday edition of the Daily Journal of Commerce prints the complete Council calendar for the upcoming weekly meetings. Additional copies are available in the Auditor’s Office and in the Council Chambers during Council meetings.
City Government: The Process

During Council meetings all business is done by passing an Ordinance (law) or Resolution. Reports and miscellaneous documents may also be presented for Council action.

- **Resolution** states a policy or directs that an action be taken. It is not a binding legal restriction. Rather, it announces to the public what the Council intends to happen. For instance, a resolution may be passed to announce the City’s intention to widen a street. For the work to proceed, however, an ordinance must be passed.

- **Ordinance** is a binding legislative act. It is often written by the bureau that seeks the change. After it is written, it is reviewed by the City Attorney. The Commissioner-in-charge of that bureau or department introduces the ordinance and files it with the City Auditor. The Auditor then places the ordinance on the Council Calendar to be discussed by the entire Council.

After an informal discussion of the ordinance by the City Council, it is brought to a formal Council meeting. At this time the ordinance is discussed by the Council and the public. Testimony from both sides of the issue is presented. After all the testimony is heard, Council then chooses to either vote on the issue or table it for future discussion or more information. If a vote is taken, it is considered binding. The ordinance, if passed, becomes law. Ordinances are passed according to rules set in the City Charter, with three to five affirmative votes required.

Reports And Documents

Formal communications to the Council can come in the form of reports, petitions, letters or other documents. If these communications come from outside City government, they must be filed with the Auditor’s Office. Any citizen or group can submit a report or other communication to the City Council or to individual City Commissioners.

Becoming A Law: The Final Step

After an ordinance is passed by the City Council, it goes to the Mayor to be signed. The original ordinance goes to the Auditor’s office where it becomes a part of the permanent record.

Ordinances that provide appropriations and annual tax levies or relate to local improvements and their assessment, as well as all emergency ordinances, take effect immediately on passage or on any date within 30 days as specified in the ordinance. All other ordinances take effect 30 days after passage unless a later date is declared.

Transcripts are made of all formal City Council meetings. These include the complete text of all ordinances and actions taken and are kept in the Auditor’s Office where they are available for public inspection.


**Initiative And Referendum**

There is always opportunity for citizens to become involved in the decisions made by City Council. Oregon was one of the first states to allow citizens to bring issues to a vote of the people through the initiative process, and Portland citizens can offer their opinion on pending Council actions through testimony and communication with decision-makers and by voting on referenda. Citizens can also create laws through these processes.

- Before an ordinance becomes a law, it may be referred to a vote of the people through the referendum process. Any registered voter may do this by sponsoring a petition. A certain number of valid signatures must be gathered and verified within thirty days of the passage of the ordinance. Check with the City Auditor for specific instructions on sponsoring a petition for a referendum, the number of signatures necessary, and the time allotted.

- If an ordinance has already gone into effect, an initiative drive can be brought before the voters to repeal the ordinance. In this case, more time is allotted to gather signatures. However, more names are required for the petition to be valid. Again, check with the Auditor’s Office for the specifications of the process.

The City Council may refer any proposed ordinance to the voters.

**Testimony**

When an ordinance or resolution is presented to the City Council during the regular Wednesday or Thursday session, the public has an opportunity to discuss the issue at hand. This part of the process is called public testimony. (See Section VI, “Transportation and Land Use” for information on how to testify.)

If you are concerned about a particular issue, ask the Auditor to notify you when that subject is to be discussed by the Council. You may then go to City Hall to testify. Some issues automatically require notification of interested parties. For example, land use and zoning and liquor license recommendations ask for input from affected neighbors and neighborhood associations. Information on formal notification for these issues is included in Section VI.
The Auditor is elected by the citizens, serving four-year terms with no limit on re-elections. In addition to possessing the qualifications required of a commissioner, the Auditor must be a certified public accountant.

The mission of the Auditor’s Office is to promote efficient, effective, and accountable use of municipal resources by providing impartial information. The Audit Services Division produces audit reports, and the other divisions handle specialized record-keeping.

The Audit Services Division publishes a citywide financial and compliance audit every year, as well as performance audits of specific services. Audit reports also address the following questions:

- Are the financial records accurate?
- Was the approved budget followed?
- Were the applicable laws and regulations obeyed?
- Were services provided at the lowest cost?
- Were service results effective?

Copies of all completed audit reports are available to the public.

The Auditor’s Council/Contracts Division prepares the weekly agenda for City Council and produces summary minutes of all formal Council meetings. A deputy of the Auditor serves as Council Clerk during these meetings. The Division distributes updates of the City Code and Charter after Council action. It also reviews and disburses all City payments and monitors City contracts. The Division administers City election filings as well.

The Records Management Division ensures that City records are properly stored and available for use, and that records which are no longer useful are removed from storage. Records Division administers the City Archives and develops retention schedules for current materials.

The Assessments and Liens Division administers Local Improvement District (LID) process which arranges financing for improvements to sidewalks, streets, and sewers. In addition, the Division records, collects, and provides financing options for special assessments related to nuisance abatement and other neighborhood services.

The Hearings Officers program supports two functions: Land Use and City Code. These help Council with decisions based on existing laws and the facts of each case. Land Use hearings allow or deny land use permits under strict state and local rules. The Code Hearings officer considers appeals from code enforcement decisions by bureaus such as Buildings or Fire. Also, citizens who believe the City has illegally towed their vehicles can appeal to the Code Hearings officer.
Fire and Police Disability and Retirement Division administers the City’s benefits for public safety officers under a program authorized by the voters in 1948 and revised in 1989.

City Attorney—823-4047

The City Attorney of Portland is appointed by the City Council. The Attorney is the legal representative of the City and its citizens. If you have a neighborhood association-related legal question, call ONA (823-4519) - not the City Attorney’s office directly.

Among their many responsibilities, City Attorney staff members advise and counsel bureaus on legal matters concerning City business. In addition, Deputy City Attorneys specialize in such areas as land use planning, civil rights, energy, contracts, code enforcement, collections and complex lawsuits.

The Tort Litigation Section handles claims and lawsuits filed against the City for injuries to persons or property.

Besides legal actions in court, the office prepares ordinances and resolutions for submission to the City Council, monitors the City’s business transactions and reviews many kinds of documents to ensure protection of the public interest.

Bureau of Buildings—823-7300

The Bureau of Buildings is responsible for the review of new construction occurring on private property as well as additions and alterations. The Bureau also enforces regulations applying to existing houses and various nuisances as well as certain environmental and special zoning regulations.

- **Permit Center** - Located in the southeast corner of the first floor of the Portland Building, this Center is where the applications for permits are received and permits are issued. Permit Center staff, including representatives of the Bureaus of Building, Planning, and Transportation, help answer questions and provide assistance in submitting complete permit applications. Call 823-7310 for more information.

- **Records Center** - Located on the north side of the first floor of the Portland Building, this Center contains all of the permit history for all structures in the City. Assistance is available to help you with research on specific properties. Call 823-7660 for more information.

- **Plans Examination** - Simple permits are issued over the counter in the Permit Center. For more complex projects, applications are reviewed for compliance with construction regulations by the staff of the Plans Examination Division.

- **Construction Inspections** - Two separate divisions inspect for the compliance of new construction and remodeling projects. These inspectors ensure that construction
complies with the approved plans and the relevant regulations. Regulations of other Bureaus such as zoning, erosion control, and drainage will also be checked as part of the inspection compliance process:

- Residential Combination Inspections - Permits for new or remodeled single-family homes and duplexes are inspected by one or more inspectors from the Residential Combo team. Call 823-7000 to request an inspection
- Commercial Inspections - Specialized teams of inspectors will inspect permits issued for commercial buildings such as apartments, stores, offices, and factories. Call 823-7000 to request a commercial inspection.

- Housing, Nuisance, and Zoning Compliance Inspections - Inspectors respond to citizen complaints regarding conditions of existing structures. Housing inspectors enforce the City’s Dangerous Buildings Code. These inspectors also respond to complaints regarding noise, abandoned autos, trash, and cases where the use of land is not permitted by the zoning code. For general information about these services, call 823-7306.

Office of Cable Communications and Franchise Management – 823-5385

This office is responsible for cable regulation, utility, and telecommunications in the City. It oversees collection of franchise fees, identifies new sources of revenue that could arise from the City’s franchising authority; and assures that the City meets its federal legal responsibilities in cable television regulation, including protecting consumers.

- Cable Communications regulates and monitors the activities of local cable operators and Portland Cable Access (PCA), staffs the Mt. Hood Cable Regulatory Commission (a County-wide 6-jurisdiction citizen regulatory board), and provides information to consumers. The City contracts with PCA, a non-profit organization, to provide public, educational, and government-access programming. It also provides free TV-production training and facilities for Portland citizens.

- Franchise Management assists in telecommunications strategic planing, and works with utilities and other franchisees to negotiate fees, administer contracts and audits, and monitor legislative and Public Utility Commission (PUC) activities.

Energy Office – 823-7222

The Portland Energy Office helps local residents and businesses save money and use energy efficiently. A City Energy Policy, adopted April 1990, makes a renewed commitment to sustaining energy resources and maintaining a clean environment and a strong economy. Energy conservation and weatherization assistance is available for all residents and businesses.
The Sustainable Portland Commission advises City Council on energy and other environmental issues. Monthly meetings are held in the Portland Building and the public is invited to attend.

**Bureau Of Environmental Services—823-7740**

The Bureau of Environmental Services protects, enhances, and restores natural waterways, provides sewage and stormwater services to accommodate current and future needs, and manages solid waste collection and recycling.

- The **Surface Water Management Group** works to reduce the amount of polluted stormwater that flows into Portland’s waterways and to keep contaminants out of stormwater runoff. This group plans and manages restoration and cleanup efforts in the Columbia Slough and in the Balch Creek, Johnson Creek, and Fanno Creek watersheds.

- The **Business Operations Group** coordinates information management, financial operations, facilities management, affirmative action recruitment, staff training and development, and answers ratepayers’ questions about sewer service and billing information.

- The **Engineering Services Group** maintains, repairs, and expands Portland’s wastewater collection system, which includes keeping nearly 2,000 miles of pipe and 95 pump stations in good working order. This group is also connecting nearly 54,000 mid-Multnomah County homes and businesses to the sewer system.

- The **Combined Sewer Overflow (CSO) Program Group** is reducing combined sewer overflows into the Willamette River and the Columbia Slough.

- The **Wastewater Treatment Group** operates two treatment plants that treat wastewater from homes and businesses and stormwater that flows off streets and parking lots.

- The **Industrial and Solid Waste Group** manages Portland’s residential and commercial recycling and garbage programs. This group also investigates and monitors industrial discharges into the sewer system and to waterways. This group ensures compliance with federal regulations, investigates and coordinates cleanup of hazardous waste sites, and provides the bureau with water quality laboratory services.

**Office Of Finance And Administration—823-5288**

The office monitors and manages the City’s financial activities to ensure fiscal soundness and integrity. The director of Fiscal Administration serves as the budget officer and deputy treasurer of the City. The office manages four divisions:
• **Administrative Services Division** provides accounting, treasury, grants compliance, risk management and computer management for all City agencies.

• **Financial Planning Program** develops and administers the City’s budget process. It assists in the preparation of the mayor’s proposed budget and the development of the approved budget document based on decisions made by the City Council. Within this division, citizen involvement plays a large part in the budget process through the Neighborhood Needs Reports and Citizen Budget Advisory Committees (BAC).

• **Personnel** manages the City’s human resource system, including hiring and retaining staff, professional development and training, and contract negotiations.

• **Urban Services** manages the City’s annexation program

⚠️ **Bureau Of Fire, Rescue and Emergency Services**[823-3700](tel:+018233700)

The mission of the Bureau of Fire, Rescue, and Emergency Services is to protect lives and property from fire and other emergencies. The Bureau is divided into four divisions:

• **Emergency Operations** provides emergency response to fires, medical emergencies, accidents, and hazardous materials incidents.

• **Management Services** provides accounting, budget development and monitoring, liaison with the Council and other bureaus, and includes the **Logistics Section**, which maintains all the Bureaus buildings and fire-fighting apparatus.

• **Prevention** is headed by the Fire Marshal, who oversees the building inspection program, arson investigation, and public information and education about fire safety.

• **Emergency Management and Planning** provides expertise in emergency preparedness in the event of disaster, as well as long-range strategic planning for the Bureau.

• The **Training Section**, reporting directly to the Fire Chief, carries out both new recruit training as well as ongoing in-service training for all fire-fighting personnel, including specialties such as Confined Space Rescue, Dive Rescue, Rope Rescue, and Trench Rescue.
Bureau Of Housing and Community Development—823-2375

The Bureau of Community Development (BHCD) has responsibility for managing a variety of federal urban aid funds from the Department of Housing and Urban Development (HUD), including Community Development Block Grant (CDBG), the HOME Investment Partnership Program (HOME), and other grants such as the Emergency Services Grant.

While providing no direct services, BHCD contracts with over 100 public and private non-profit organizations to provide services to lower-income residents and neighborhoods. BHCD also has citywide policy-planning responsibilities for issues relating to affordable housing and community services, and serves as the designated lead agency for staffing the county-wide Housing and Community Development Commission (HCDC).

BHCD’s program goal is to benefit low- and moderate-income (80% of and below median income) individuals and neighborhoods, which is accomplished through the following major activities:

- **Housing**: This includes the rehabilitation of single family dwellings, renter occupied units, the rehabilitation and sale of abandoned houses, and a variety of other innovative projects.

- **Neighborhood Improvement**: This program provides upgraded public facilities such as streets, parks, traffic improvements, and recreational facilities.

- **Economic Development**: Financial and technical assistance, information and services to low- and moderate-income individuals and neighborhoods.

- **Housing and Services for people who are homeless**: Focuses on development and operation of homeless facilities, including year-round prevention programs and basic emergency shelters during severe winter weather.

- **Youth Employment and Involvement**: This program provides workforce preparation, education, support, and community involvement for disadvantaged youth.

- **Public Safety**: Provides outreach, education/alternative activities, domestic violence reduction, and treatment services to victims of crime and violence.

- **Community Services**: Programs provide technical assistance, information and services to low- and moderate-income individuals and neighborhoods.
Bureau Of Licenses——823-5157

As business activity grows in Portland, business license fees have become a prime source of revenue for the City’s general fund. Business licenses are issued for revenue purposes only and therefore do not provide a regulatory function. In addition to collecting business license fees, the Bureau is charged with collecting transient lodging taxes, business income taxes for Multnomah County, and the business property management license program to fund the downtown Clean and Safe program.

The License Bureau also administers or coordinates the City’s liquor license recommendation program; the film/video permit program; and the special events permit program for parades, marches, walks, and runs.

The License Bureau regulates certain business activities including: taxi, towing, amusement devices, social games, secondhand dealers, and pay and park.

Bureau Of Parks And Recreation——823-2223

Portland’s system of parks and recreation services is one of the best in the nation. More than a century of careful acquisition and nurturing development has resulted in a vast system of parks and gardens, trails and forests, activity centers and programs which offer a myriad of cultural and sports opportunities. The Bureau of Parks and Recreation, one of the largest bureaus, manages this complex and comprehensive system.

Recreational programs, including team sports, summer playground activities, recreation for special populations, and a variety of classes related to dance, music, theater arts, fine arts, and athletics are offered by the Parks Bureau. In addition, it operates and maintains community centers, community schools and gardens, swimming pools, cultural centers, golf courses and specialized facilities, and issues permits for public or private use of park facilities. These services are offered to the people of Portland either free of charge or for a modest fee. A quarterly brochure listing all the programs and activity centers is available to the public.

Citizens are often asked to participate in projects such as Parks Futures, a long-range strategic plan. Tree plantings, cleanups and maintenance responsibilities are increasingly shared by volunteers. Several Friends organizations that support specific parks or sites throughout the community.

With the passage of a City bond measure in 1995, nearly every neighborhood in Portland will be participating in plans for renovation or new construction of 112 parks and park buildings. A successful regional bond measure has allowed the City of Portland to expand its inventory of natural areas and open spaces to serve the public.
Bureau Of Planning

The Bureau of Planning provides efficient and cost effective planning for the City of Portland in order to promote the livability, economic health and appearance of the City and to preserve Portland’s heritage.

The Bureau administers the City’s Comprehensive Plan and related Zoning Codes through four sections:

- **City and Neighborhood Planning:** This section is responsible for developing plans and design proposals that implement adopted land use and design policies. Community Plans, Neighborhood Plans, and environmental planning are examples of the work done by this section.

- **Development Review:** Land use reviews and cases heard by the Planning Commission, Hearings Officer and City Council are administered by this division. Development Review also supports the Landmarks and Design Commissions and administers design and landmark codes.

- **Permit Center:** The staff of this section is the primary source of zoning information and advice available to the general public. The Center issues permits and receives land use applications. Planning and zoning information is available at the Permit Center located on the first floor of the Portland Building. A staff representative is always at the Permit Center to assist the public.

- **Administration staff** includes the Planning Director and computer and graphics support, personnel, and reception and Planning Commission support staff.

The Planning Bureau works closely with neighborhood associations and other community groups on land use and planning issues. For more information on citizen involvement opportunities and planning processes, see Section VI.

Bureau Of Police

The Police Bureau’s mission is “to maintain and improve community livability by working with all citizens to preserve life, maintain human rights, protect property, and promote individual responsibility and community commitment.” In 1990 the Bureau began a five-year transition to community policing with an emphasis on neighborhood problem-solving and improving service to the community.

The Bureau is administered by the Chief of Police who is appointed by the mayor. With 800 sworn and 200 non-sworn personnel, the Bureau provides services to citizens through three branches:
- The **Operations Branch** provides uniform patrol and traffic enforcement services by responding to approximately 320,000 calls for service each year. Operations provides services through North, Northeast, Southeast, East, and Central precincts and several community contact offices.

- The **Investigations Branch** provides investigative follow up on criminal cases, conducts drug investigations and investigates gang-related activities. This branch also investigates and resolves complaints from the public.

- The **Services Branch** provides the Bureau with fiscal training and personnel services.

Public participation activities by the Bureau include public safety action committees at each of the precincts, the Chief’s Forum policy advisory group, the Bureau Advisory Committee, and other police-citizen committees.

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**Portland Development Commission** ———— 823-3200

The Portland Development Commission is the City’s agency for economic development, housing, and urban renewal.

The agency is responsible for Workforce and Target Industry issues - helping to strategically build industries for the future while linking jobs to those who most need them. Economic Development efforts focus on regional business development, business retention, community-based economic development, and finance programs to help nurture small businesses.

The agency operates a broad range of development programs aimed at keeping the City vibrant and healthy. Projects include reclamation of the City’s riverfront into a major parkway, development of a new sports arena, preservation of historic districts, and downtown retail projects.

PDC housing programs offer a variety of loan programs aimed at assisting low-income citizens with home improvements, home ownership, and the restoration and retention or affordable rental housing.

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**Office Of Transportation** ———— 823-5185

The Transportation Office has responsibility for improving, operating, and maintaining the City’s transportation system. It consists of three bureaus:

- The **Bureau of Transportation Engineering** (BTE) manages improvements to the City’s street transportation network. It is responsible for designing and constructing City streets as well as all phases of engineering and inspection for structural projects such as bridges, retaining walls and stairways. This bureau also issues permits and reviews land use and building permit applications to determine
whether street improvements are needed. The City’s Bicycle/Pedestrian program is also administered by BTE.

- The **Bureau of Traffic Management** (BTM) is responsible for operating the City’s transportation systems safely and efficiently. Traffic Management plans, designs, installs, and operates all the traffic controls within the City including signals, signs, markings, parking management and enforcement, and street lighting. The Neighborhood Traffic Management Program provides a process for identifying and dealing with problems related to volume, speed and safety on local streets. Before decisions are made, City-adopted guidelines must be considered.

- The **Bureau of Maintenance** maintains and repairs streets, sewers, sidewalks, and other structures. Maintenance staff also install traffic signs, signals and street markings. Street cleaning, sidewalk inspection, and sewer cleaning and repairs are also the responsibility of this Bureau.

  In addition, the Transportation Planning Division develops project designs for transportation projects such as neighborhood traffic management studies, light rail development, capital improvement programs, transit services, and long range planning.

  More information about transportation processes and programs is found in Section VI.

**Bureau Of Water**—823-7404

The Bureau manages and maintains a municipal water distribution system for over 750,000 Oregonians. Conservation and maintenance programs ensure sufficient quantities of high quality water to meet existing and future needs. In addition, the Bureau administers hydroelectric generating facilities owned by the City.
Other Agencies
You Should Know About

Listings for government agencies are in the blue pages of the telephone book.

*Multnomah County* and the City of Portland have distinctly separate areas of responsibility as well as some shared responsibilities. The County administers justice services, including the jails and the courts. The County's social and health services includes programs such as the senior centers and youth services, teen health clinics in the public schools, and a variety of programs to treat chemical dependence and provide health and dental care for low-income citizens. The library, parks, planning in unincorporated areas and extension services are within Multnomah County's domain. In addition, the County funds many independent non-profit organizations which provide services such as housing, counseling, health care, and shelters for the homeless.

Multnomah County’s vehicle for citizen involvement is the *Citizen Involvement Committee (CIC)*. Representatives from each area of the county, including Portland, provide citizen input into County programs. All interested citizens are encouraged to get involved with the CIC.

*Metro* is the regional government agency for Multnomah, Clackamas, and Washington Counties. Metro is responsible for solid waste disposal and manages landfills and transfer stations. The Washington Park Zoo and management of the Urban Growth Boundary and public event facilities are Metro responsibilities. Metro is governed by citizen Councilors who are elected to two-year terms by district.

*Tri-Met* is the region's mass transit authority. The bus and MAX (light-rail) systems have been recognized as the best transit system in the country. Neighborhood associations work frequently with Tri-Met on route and scheduling issues, light-rail planning, and to site trash cans near Tri-Met stops.

Affordable housing is an important issue for all citizens. Several independent non-profits work to provide housing to a range of clients throughout the City. The *Housing Authority Of Portland (HAP)* manages low-income housing in Multnomah County and Portland. Primarily using federal funds, HAP owns and manages apartment complexes for low-income residents and administers the Section 8 subsidized housing program. HAP also provides much-needed services to a range of special populations.

*Central City Concern* provides housing and social services to residents of downtown Portland, primarily in the Burnside area.

*Reach* is a non-profit Community Development Corporation (CDC) which rehabilitates and manages rental housing in Southeast Portland. Reach is also involved in community development and restoration projects.

*Northeast CDC* is working to develop hundreds of new and rehabilitated housing units on the market for low-income home buyers in NE Portland.

New housing programs are developing at a fast rate. Several neighborhood associations are involved in housing issues, including starting new CDCs to address special needs in their area.
Citizen Involvement Opportunities

Portland depends on citizens for input into a number of programs and policy areas to ensure that the public's needs are being met by City bureaus. New citizen advisory groups form for current issues and projects in each bureau. Recent or current volunteer opportunities are listed below:

**Bureau of Environmental Services**
Environmental Commission
City/County Plastics Waste Reduction Task Force
Retail Waste Reduction Advisory Board
Neighborhood recycling Advisory Board
Mid-County Sewer Project Citizens Advisory Board

**Bureau of Planning**
Portland Planning Commission
Design Review Commission
Historic Landmarks Commission
Historic District Advisory Councils
Conservation District Advisory Councils
Adjustment Committee

**Bureau of Transportation**
Regional Rail Programs Citizen Interest Groups
Vintage Trolley Board
Traffic Safety Commission
Bicycle and Pedestrian Advisory Committees

**Other Bureaus and Agencies**
Police Internal Investigation Auditing Committee
Portland Cable Access Board
School Partnership Program
Hospital Facilities Authority Board
Code Enforcement Task Force
Community School Advisory Committees

Applications for citizen commissions are available through the ONA office or you may contact the Mayor's office.
General Principles for Working Effectively
with Local Government

The following list of principles from Family Community Leadership, OSU Extension Services, is designed to be used by an individual or a group. References are made to neighborhood associations, but they could be applied to any group.

1) **Set Your Goals**  What is most important for your neighborhood association to accomplish in order to maintain livability? If you are working on a neighborhood plan, some goals have likely been set. If not, set aside some time for your Board to set its direction and identify needs. Prioritizing issues will make reaching your goals easier.

2) **Know Your Issues**  Do your homework. Find out who is affected, to what degree and the consequences of no action. On a long-range issue, document your process, dates of events, who was involved, correspondence. Determine which issues will need to be addressed by a local government agency and which will need to be addressed by the neighborhood itself. Only neighbors working together will solve some problems.

3) **Know the Structures and Purposes of City Government**

4) **Become Acquainted with Procedure:**  Visit a few meetings of your public officials (e.g., City Council, boards, commissions, and so forth). Understand how they operate and realize the pressures they are under. Have someone explain to you the procedure if it isn’t otherwise clear.

5) **Work Personally**  Allow your officials to get to know you. The best form of contact is on the personal level: (1) personal appearance, (2) phone call, (3) letter.

6) **Keep Your Public Officials Informed**  Do not surprise your officials with unexpected actions. Bring written copies of your concern when meeting with them, and follow up on your concern and action with letters (keep copies of everything you do!). Make reference to things you have sent. Keep up an ongoing relationship. Show your appreciation as well as dissatisfaction. Send carbon copies to other individuals involved (citizens, City staff, others).

7) **Work on All Levels**  Try the chain of command first by going to the person most directly responsible for your concern. Then work on all levels by going to your appointed and elected officials. If you don’t know who to talk to, do not hesitate to go to the top. Since many decisions are political, be sure to keep your Council person informed. If necessary, address the Council as a whole to be sure you are heard.

8) **Make it Clear if You Represent a Group**  Identify the name of your group and its purpose. Use appointed contact persons to establish continuity and identity. Document attendance at general meetings and votes taken.
9) **Get Solid Answers**  Don’t be satisfied with vague answers. Talk to informed people and solicit answers you can rely on. Ask for and remind your officials of specific information - get dates, places, times, etc.

10) **Be Open to Suggestions**  Take the suggestions of your officials seriously and follow up on them. Progress happens when everyone pushes in the same direction.

11) **Follow Up**  Follow up a discussion with a memo summarizing the discussion and the outcome. Check back to see if whatever has been agreed to is being done or to see if decisions are being made. After the decision has been made, check back with the appropriate City staff or government official to be certain it is carried out.

12) **Keep the Neighborhood Informed**  Use your neighborhood newsletter to keep the neighborhood informed. Talk with neighbors and friends about what is happening. Contact the newspapers to let them know your concerns. You may wish to issue a press release. Make your written information interesting. For more information see Section VIII, *Getting the Word Out*. 
How to Influence Decision-Making

Action Check List

☐ Learn the decision-making process.

☐ Meet your elected officials as early as possible.

☐ Let your elected officials know about you.

☐ Concentrate and coordinate your efforts.

☐ Inform yourself—research the issue.

☐ Inform the members and the public of the issues.

☐ Attend meetings.

☐ Assist your elected officials.

☐ Know and support your allies.

☐ Always provide completely accurate information to elected officials; never deliberately provide misleading or false information.

☐ Focus on the preliminary stages of policy making.

☐ Never threaten elected officials.

☐ Form coalitions.

☐ Identify “swing votes.”

☐ Be discreet.

☐ Be realistic.

☐ Thank elected officials for their help.

☐ Inform your members about which officials helped and supported your cause.

☐ Evaluate your efforts.

☐ Monitor the implementation of decisions.
Land Use and Transportation Planning

Many neighborhood livability concerns are related to the impact of traffic and land-use issues. It is very important for neighborhood associations to understand some basic principles of land use and transportation planning. Information in this section will help clarify the issues, concepts, and terms associated with planning and traffic management. In addition, step-by-step guidelines for various types of planning cases are outlined to explain the process and opportunities for citizen input. This will give you a better understanding of the issues involved and the steps you need to take to work on these issues.

Because of the complexity of the planning process, this section is not intended to be a complete, detailed description of the laws governing planning and the technical requirements needed to work with City bureaus. If you find yourself involved in a land use or transportation issue, use this information to familiarize yourself with technical terms and the processes, but contact the various planning agencies, your Coalition, or the Office of Neighborhood Associations to get help with more specific requirements. Your neighborhood association should designate a land use contact who can make sure that land use issues are considered and acted upon appropriately.
Why Is Planning Important?

Civilizations have always engaged in planning. Orderly growth and development don’t just happen—they need to be planned in order to ensure that necessary services such as streets, sewers, and water will be available, and that parks, residential areas, industrial, and employment centers will complement and not conflict with each other. Town squares and plazas are historical examples of planning for the development of a city around a central area. Over the years the focus of planning has grown. Today planning involves not only the physical aspects of land development but also considers the processes that create growth and how the results of an action may impact existing conditions. Because of the possible effect planning decisions can have on a neighborhood or the city, citizens and neighborhood associations are involved in the planning process.

Portland is fortunate to have a long history of citizen involvement in planning. Neighborhood associations can be involved in pro-active efforts such as neighborhood planning, receive notification and information about proposed actions in their area, or express views and concerns to elected officials through the hearings procedure. Neighborhood associations that understand and use the processes are able to have a strong role in planning.

The Planning Commission

Since 1918, the main agency for planning oversight in Portland has been the Portland Planning Commission. The Commission advises the City Council and other agencies on planning issues and acts as a review body in certain land use cases. The nine Commission members are appointed by the mayor with approval by City Council and serve without pay in overlapping four-year terms. The Planning Commission is responsible for:

- Planning and zoning wisely for all desirable land uses in Portland by approving policies and plans.
- Advising City Council on all urban renewal plans presented by the Portland Development Commission and on Housing Authority plans.
- Providing advice to Transportation Engineering on permanent street closures.
- Reviewing and making recommendations on proposed amendments to the City’s Zoning Code.

Before the City Council votes into law land use matters related to the Zoning Code or the Comprehensive Plan, the Planning Commission must make a study and report. Council may accept or reject the Commission’s advice, but it cannot act without hearing this information first.
What Is A Comprehensive Plan?

Comprehensive city planning looks to the future of the city and provides for the community’s orderly and systematic growth. A Comprehensive Plan sets forth the city’s goals for growth and establishes objectives and policies that will accomplish these goals. This enables each future decision to be placed within the larger context of the public need. Rather than a confusing and haphazard conglomerate of conflicting land uses, Portland can grow to become a well-designed, smoothly functioning city. Comprehensive Plans are required by state law for all jurisdictions in Oregon.

Before a Comprehensive Plan can be adopted, extensive studies are conducted to determine:

- The physical, social and economic characteristics of various areas of the city.
- The suitability of these areas for particular uses.
- Current land uses.
- Trends in population, needs and land uses.
- Projected needs of new and growing businesses and industries.
- Scenic, historic and natural resources.
- Projections for school, hospital, park, fire and other service needs.
- Future traffic needs.
- Soils, topography and other physical characteristics in order to plan for different types of structures and conservation of natural features.

Once these studies are completed, a series of goals, objectives and policies are established. These are the guidelines that are used for all future planning decisions.

**Goals** cover all aspects of urban living. They are formulated after careful investigation of the needs of the city and of the growth trends in each district of the city. These all take into consideration what the citizens themselves want for a better urban environment. Goals establish an ultimately desirable state or situation. They may not be completely achievable. What is important, however, is the direction they set.

Example: To protect neighborhoods from through traffic to enhance their livability.
• **Policies** are more specific principles that must be followed in order meet previously determined goals. Policies may be achievable in the future but not in less than a decade or more.

  **Example:** Plan main arterials on the edge or boundaries of residential areas.

• **Objectives** provide specific direction to agencies, citizens and the business community.

  **Example:** Within a certain neighborhood, the streets will be widened to accommodate increased traffic where the widening will not interfere with neighborhood shopping and movement patterns, will not cause any other hardship or change in the character of the area.

• **Programs** are developed to implement policies and objectives.

  **Example:** Widen streets A and B to four lanes with signals set for 40 m.p.h. Place planters and dividers on residential streets and set speed limits there at 15 m.p.h.

Portland's Comprehensive Plan was adopted in 1981. Land use decisions made by governing bodies in Portland must conform to or amend the Comprehensive Plan.
**Zoning**

**What Is Zoning?**

Zoning is the limitation of certain kinds of buildings and uses of land within an area. Zones ordinarily have restrictions on the size of lots, the height of buildings, the placement of buildings on lots, density, required parking, and the specific uses that can be made of the buildings and lots. Typical zoning ordinances separate residential, commercial, and manufacturing areas from each other. *The Zoning Code* is the guidebook to zoning regulations in Portland.

Zoning regulations also require a land-use review prior to allowing development or changes in certain areas, or for certain uses, including environmental zones, greenways, design or historical district reviews, or for hazardous waste production.

**What Effect Does A Zoning Ordinance Have?**

It is a violation of the law to build on or to use land in a manner that is not allowed in the zone. Zone regulations are not just guidelines for land use: *they are the law*. Regulations are enacted by the City Council after a public hearing and with the advice of the Planning Commission.

**What Safeguard Is There Against Unfair Zoning?**

Zoning ordinances will not be upheld by courts if they are arbitrary or unreasonable, or if they cause unnecessary hardship to a property owner. Zoning ordinances were originally intended to protect property values by preventing certain offensive or "nuisance" uses of land. The theory was that if certain uses were allowed in a residential area, they would make the neighborhood undesirable to live in and thus drive property values down.

**Isn't Zoning Contrary To The Ideals Of Individual Freedom Found In The Constitution?**

Zoning has been tested against the Constitution. The United States Supreme Court upheld the test of zoning to state governments (and thus local governments authorized by the state). Zoning is, therefore, recognized by the courts to be legal and not against the rights of the individual. This authority, however, means that restrictions placed on an area must be reasonable, must be based on a public need or interest, and must be equally applied to all landowners with similar situations in an area.

**What If I Want To Use My Land In A Way Not Allowed By The Zone?**

Zoning has not always been flexible enough to meet all the desires of Portland's residents. Exceptions may be made to allow for other land uses not specified by the code. Without exceptions to zones, Portland would need to have a much more complex zoning code, which might result in widespread confusion.
There are three categories of exceptions to a zone:

- Adjustments
- Non-conforming use
- Conditional use

- **Adjustment.** An adjustment is needed when the use is allowed by the zoning, but some flexibility of development standards is needed to build on a particular site. Adjustments may be granted on sign regulations, setback requirements, building placement requirements, etc.

  **Example:** Because of a steeply sloping backyard, a house must be placed closer to the street than would ordinarily be allowed by the code.

- **Conditional Use.** A Conditional Use review is needed when the use is different from the main uses allowed in the zone but might fit in with the primary uses in the zone. Special conditions are usually imposed on the proposed use so that there will be a minimal effect on the surrounding area. Conditional uses for each zone in Portland are listed in the Zoning Code. Such uses are discretionary. They may be denied if they are found to damage the character of the area.

  **Example:** Part of a home in a residential area would be converted for use as a day care facility to benefit residents of that area.

- **Non-conforming Use.** If an ordinance is passed to change a zone, there may be some uses which will now be considered “non-conforming.” The City cannot forbid these non-conforming uses if they were in existence and were legal prior to the adoption of the new zone. However, the City can and does forbid enlargement, expansion, or change in the use, unless approved by a special review.

  **Example:** A grocery store built in 1945 in a residential area, prior to residential zoning, is a non-conforming use.

- **Zone Change.** If neither a variance nor a conditional use permit will meet the developer’s needs on a particular site, the alternative is to seek a Zone Change. This may also require an amendment to the Comprehensive Plan Map, although some Zone Changes may have been called for in the plan. The change must support the Comprehensive Plan and adequate public services must be available in order to be approved. The burden of proof is on the applicant.

  **Example:** In order to build an apartment (multi-family), the developer wants to change the Zoning from R2.5 (Single family attached or duplex) to R1 (multi-family attached).
Categories of Land Use Planning

There are two classes of processes that occur within the general category of "planning." They are categorized by the extent of the effect the outcome would have on planning policy.

- **Quasi-Judicial:** This involves pieces of property that come into review without having broader policy implications. The particular property owner in question requests one of the various kinds of land use reviews. It may affect the properties surrounding the property in question as well as the neighborhood and business associations in the vicinity.

- **Legislative:** When a request doesn't affect one particular area but, rather, concerns many areas or requires the adoption of a general policy or regulation, a different set of processes are involved. In this case, neighborhood associations, business associations, and various environmental groups are notified. People who request notification on a particular issue are also notified of the impending action.

Neighborhood groups are often contacted to respond to either a quasi-judicial or legislative plan, or to participate in developing policy and plans. These opportunities to be proactive about land use planning require a commitment of time, but neighborhoods are able to have concerns addressed as plans are developing.

Legislative Planning Process

The legislative planning process involves issues that are of great enough concern that they affect not just one particular piece of property, but have broad application. These include:

- Adoption or amendment of the Comprehensive Plan.

- Neighborhood or Community Plans.

- An amendment or refinement of zoning regulations.

Citizens and neighborhood associations are often involved in legislative planning processes. The following procedure is usually followed:

1) A discussion document is drafted. This outlines the rough proposal under consideration by the Planning Commission.

2) This draft is distributed to all interested groups. As many people as feasible are included in this distribution.

3) Your group is given 30-90 days to discuss the document. The amount of time allotted should be noted within the document.
4) Citizens are invited to comment on the document. The document is revised and then redistributed. Neighborhood associations are notified 30 days before a Planning Commission hearing on the document.

5) The Planning Commission holds a public hearing. At this time anyone wishing to testify may do so. You can testify:
   - In person
   - By written testimony
   - Through a representative (such as an attorney or a person testifying for an aging parent)

6) The Planning Commission takes testimony and makes recommendations to the City Council. This happens two to three months after the Planning Commission hearing. The staff advocates for the decision made by the Commission to the City Council.

7) Agendas for all hearings are published:
   - Mondays for Council hearings
   - Saturdays for Planning Commission hearings

8) Everyone who comes to the hearing and testifies is notified about the Council hearing date. Others are not renotified; therefore, if you didn’t come to the hearing or did not present written testimony, you will not be renotified unless you write or call the Planning Bureau and specifically request such notice.

**Note:** If you want your point of view on a particular topic to be considered, present it to the Planning Commission. Do not wait for the Council meeting. If you are asked for input on an issue and you don’t understand the issue, consult with the staff at the Bureau of Planning. They are there to assist you and your neighborhood association with information any planning situation.
Quasi-Judicial

Citizens are most often involved in cases that are resolved through a quasi-judicial process. Unlike legislative regulations, quasi-judicial regulations are specific to a particular piece of property. The property owner, for a variety of reasons, wants to use the property in a way that conflicts with the existing zoning regulations or for which a public review is required, such as Design Review or Greenway Review.

Often the type of change the owner requests is simple and requires little input from others. However, if the property is adjacent or near that of others in the area, many times the request would concern his/her neighbors. Citizens are encouraged to participate in quasi-judicial land use decisions that affect them and their neighborhood. Some examples include:

- Changes that would increase the traffic through residential streets.
- The encroachment of a business into residential zones.
- The scope of a development on a piece of property.
- The height of a building or its distance from the street.

Portland uses two processes to review quasi-judicial requests. A Type II review is an administrative decision made by the Planning Director. This process is used for simple matters which have less impact or discretion. The decision can be appealed to a review body.

A Type III review is longer and more in depth. It is used for proposals with the greatest potential impacts. Type III reviews require a public hearing before a review body, such as the Hearings Officer. Appeals to decisions made by the review board are heard by City Council.
The Review Process

Notification

The Office of Neighborhood Associations, the Auditor's Office, and the Bureau of Planning encourage citizen participation in land use cases by providing formal notification and access to the decision-making process:

1) When a land use application is received that requires a Type III review, the Bureau of Planning notifies all property owners and neighborhood association representatives within a specific distance from the affected property. In addition, information about the proposal will be posted on the property.

2) The notice contains a description of the change requested, the property's location, due date for a response, and the Bureau of Planning staff person to contact.

3) Once you receive notification, call together your neighborhood association board and hold a meeting on the issue, or discuss it at a regularly scheduled meeting. Be sure your association follows its own bylaws regarding meeting notification, consideration of proposals, and voting.

Many neighborhood associations have active land use committees that consider the implications of the application. Always work through the existing committee and involve as many citizens as possible in the process.

- **Before The Meeting:** Contact the developer or applicant and ask them to come to a meeting. If they can't attend, find out details of the request and what the neighborhood association needs to do to be involved.

- **At The Meeting:** Explain to the membership:
  - The requirements of the relevant zoning law.
  - Any existing neighborhood or district land use plans that may have an impact on this case.
  - Identify requirements for the site which the proposal must meet.
  - Identify areas of concern. Are there some potential impacts that should be considered? Are there reasons to object to the proposal within the zoning criteria?
  - **Vote:** Record the number for and against the proposal. Send the response back to the Bureau of Planning on the form provided.

4) Staff will make a recommendation to the Hearings Officer or other review body based on their professional opinion regarding merits of the proposal in relation to the Zoning Code, and responses from neighborhood associations, various agencies, and the general public. Staff reports are available for review and can provide helpful information about the basis for the decision.

5) The Hearings Officer or other review body makes a decision whether or not to grant the request. Notification of the decision is sent to all those who
participated in the hearing, whether in person, in writing, or through a representative.

6) Decisions can be appealed within 14 days. If an appeal is filed, the case is heard by the City Council or another review body.

Notification of Type II applications are also sent to recognized associations and nearby property owners. Although Type II decisions are made by the Planning Director, neighborhood associations and others may be consulted for information about the proposal and will also receive a copy of the Planning Director's decision.

**Appeals**

Sometimes your association may disagree with the decision in a land use review. A decision can be appealed and overturned if it can be shown that an error was made in the process or that the proposal did not meet the criteria for approval. To file an appeal, you must be the applicant, the property owner, a party entitled to receive notice of the review, or a participant in the hearing. The decision report for both Type II or Type III cases explains the appeal process.

- Get an official appeals form to state:
  - Your reasons for the appeal.
  - How the Hearings Officer or review body erred in making the decision.

- Be sure there is consensus within your neighborhood association whether or not to appeal. If time allows, be sure to record the vote taken to proceed with the appeal.

- File your appeal with the Planning Bureau, within 14 days of issuance of the decision, at the City's Permit Center, 1120 SW Fifth Avenue, First Floor. Neighborhood associations which have "standing" in the case (the association has responded to the Hearings Officer) can file an appeal without paying a fee.

- The City Council or another review body will review the case and the appeal in a [de novo (brand new) hearing]. Public testimony on both sides of the case are heard again. The Council, on the basis of the new information presented at the Council meetings, will decide whether or not to grant the request.

- If the public or the landowner is still not happy with the decision of the council, the decision can be further appealed to a higher authority. At this point, legal representation is necessary.

  - **Land Use Board of Appeals (LUBA)** is the state appeals board for land use cases. If a case is appealed, it is sent to LUBA which chooses whether or not to hear the case.

  - If the decision of LUBA is not satisfactory, the process could continue to the state **Court of Appeals**. The higher up the ladder in the court system you go, the greater the expense. State Court of Appeals decisions are appealed to the state Supreme Court.
Community Planning

Community Planning is a collaborative process between the City of Portland and the residents, business people, and property owners of a particular area. Community planning is a good way for citizens to work together to define their neighborhood’s future. Through this process, citizens identify issues and goals, generate and test alternative ways to reach those goals, and then propose a plan. The plan spells out policies and specific strategies to help realize the future that has been envisioned. Community Planning also helps the City update the Comprehensive plan and address policy concerns and current issues.

The planning process provides a forum in which people initiate rather than react to change. The process promotes communication among various interest groups within a neighborhood and helps them to work out differences and arrive at a mutually satisfactory plan. A strong partnership between citizens and City staff is vital to the ultimate success of the planning effort. The planning process builds a coordinated multi-agency approach for responding to community goals and problems.

Land use, transportation, public facilities and services, housing and parks, recreation and open spaces are addressed by community plans. In addition, the plan may address issues of particular concern to your neighborhood including economic vitality, environmental quality, urban design, public safety, or other livability issues. The plan will provide action strategies directed at the City and citizens so the responsibility for enacting changes are clearly defined. In some cases, neighborhood plans may change zoning or amend the Comprehensive Plan.

Community Plans are adopted by City Council and conform to the City’s Comprehensive Plan. Each plan serves as an advisory document for directing and managing change, and assists the Planning Bureau, City Council, citizens and other decision-makers in taking action on the neighborhood’s future. Plans focus on a five- to ten-year time span.

Community Planning will be conducted by each district over the next few years. The Albina Community Plan and the Central City Plan were the first Community Plans, and Outer Southeast is nearly completed. The Southwest Community Plan process is underway, and the Inner Southeast Plan is scheduled to begin in January 1996. Each Community Plan includes individual plans for several neighborhoods. Neighborhoods can begin working on plans with or without assistance from the Planning Bureau. Identifying issues, conducting surveys and organizing workshops to envision your neighborhood’s future are good ways to start getting neighbors involved in the planning process.
How To Testify

When you are involved with a land use case, you may testify at a hearing to state your opinion or to present that of your association. Make sure in what capacity you are testifying. Here are some tips that will help make your comments credible - and admissible - as part of the proceedings in the case.

Before The Hearing

Do your homework! Make sure you understand the proposal being made and that the comments you have address this proposal and its potential impacts. It helps to understand the process and the policies that guide development.

- Send a written statement from your neighborhood association to the City Auditor and each City Commissioner. Send the original to the Auditor. It is best to send it in advance of the Council meeting. To be sure it is received in time, the Auditor requests that all testimony be received by 5:00 p.m. Monday preceding the weekly council session.
- Lobby your position. Talk to staff people in the individual Commissioner’s offices. There is a person in each office who is responsible for briefing their Commissioner on these issues.

When lobbying the staff person, you want to communicate the concerns of the neighborhood residents regarding the proposal. Make your case in a rational, well-thought-out way.

- Prepare your testimony in advance. Make sure that the chair or designated person to speak for your association is at the Council meeting. Arrange for nearby residents to speak as well. If it is a complex issue, get different people to speak on different aspects of the issue. Attend a Council meeting or listen to other testimony and cases so you’ll know what to expect.

At The Hearing

- Give your name, address and who you are representing (name of your neighborhood association).
- Make your statement. Keep it brief and to the point. Don’t give lengthy testimony or stray from the topic. Testimony is usually limited to ten minutes for applicants and appellants, three minutes for individuals and five minutes for neighborhood associations. Rehearse ahead of time so you’ll be able to make all your main points in the time allowed.
- Ask the Commissioners if they have any questions. Be prepared to answer questions they may have for you.
- If you haven’t previously submitted copies of your testimony, make sure to bring copies for all the Commissioners and the City Auditor.
- You will be asked at the hearing if you are in favor of or against the proposed change. Know which position you are taking.
On major issues, a staff report is usually given at the beginning of the hearing. This includes a formal presentation of the issues at hand as well as the staff recommendations and decisions made by the previous review body. The applicant and appellant make their presentations after the staff report.

Testimony from the public comes next. Sometimes all testimony from one position (i.e., those in favor) will be given first. After that side is finished and the Council has had a chance to ask any questions, the other side will present its testimony. In some cases, those who wish to testify will sign up and testimony from the two sides will alternate.

**Note:** In preparing for cases, leave a *paper trail*. Send press releases, announcements, flyers, etc. to City Commissioners, planners, etc. Don’t just phone the Commissioners. Write. It is easier to keep track of written communications. Don’t forget to keep copies of everything you send out.
Transportation Planning And
Traffic Management

Transportation and traffic concerns are major issues in our neighborhoods. Citizens frequently ask for assistance with transportation needs and relief from traffic impacts. These inquiries range from an idea to improve the safety of an intersection to a request for roadway repairs. Some of these matters can be addressed quickly. Others may take years of planning and analysis before results can be seen. You can most effectively address transportation issues in your neighborhood if you understand the policies and processes that guide transportation activity in the City. You will also find it helpful to understand how the Portland Office of Transportation (PDOT) is organized and where to find the services you are seeking.

There are four main areas of transportation concerns: transportation policy and planning; facility design, construction, and management; traffic and parking operations; and facility maintenance. These are handled by different divisions within the Office of Transportation called: Transportation Planning (TRP), Bureau of Transportation Engineering and Development (BTED), Bureau of Traffic Management (BTM), and Bureau of Maintenance (BOM). The chart on the next page shows these divisions, the services provided within each, and the phone numbers to call for more information. Some services are described in detail on the following pages, and you are encouraged to call for information about services that are not included.

Another way to learn about transportation issues in Portland is by attending the “Portland Traffic and Transportation” class. This nine-week course is a partnership between PDOT and Portland State University and covers both neighborhood and regional transportation concerns. The course curriculum provides participants with policy information and opportunities to apply what they have learned to their own neighborhood concerns. Neighborhood association activists are eligible for course scholarships. Call the Bureau of Traffic Management for the status of the course and for more information.
Transportation Planning Division

Transportation Policy and Planning

Transportation Planning works on special projects such as Regional Rail planning, as well as policies and guidelines for the development of the City's transportation system. Transportation Planning is also one of the City Bureaus whose staff evaluates land use/development proposals and recommends actions which will support City development goals, neighborhood livability, and transportation system operations.

Transportation Planning provides services in the following areas:

- **Policy Section:** This group is responsible for long-range planning to meet the City's transportation needs. The Transportation Element of the Comprehensive Plan provides the primary policy direction for Transportation Planning. It incorporates the Arterial Streets Classification Policy and establishes a framework within which transportation projects and plans are developed. Portland's Transportation System Plan, scheduled for completion in 1997, will implement the Transportation Element, carrying out federal, State, and regional goals.

- **Projects Section:** The projects section works to implement PDOT's capital projects as identified in the five-year Capital Improvement Program. Staff provides technical assistance and advice to other PDOT bureaus and non-City agencies in developing transportation projects. Staff also develops subarea studies and projects to achieve identified City goals, implement the Comprehensive Plan and Region 2040 Plan, and provide project concept designs.

- **Transit Section:** Staff in this section works towards developing a transit system that will support the housing and economic goals of the City and reduce reliance on the automobile. This section works with Tri-Met on an ongoing basis to address transit service needs in the City of Portland. This section also includes the Regional Rail Program which is responsible for planning the regional rail system, including Westside Light Rail and the North/South Light Rail lines. Light Rail planning also includes promoting station area development and providing supportive bus service.
Traffic and Parking Operations

The Bureau of Traffic Management is responsible for traffic and transportation safety, ranging from abandoned autos and parking regulations to bikeway improvements, neighborhood traffic calming, street lighting, signalization, and educational outreach to Portland’s citizens. “Reclaiming Our Streets,” often identified with the Bureau’s driver education efforts, describes a fundamental part of the Bureau’s mission. This focus on safety is paramount for BTM, with innovative engineering, education, and enforcement tools integrated to help reclaim our streets. School age children and senior citizens are among the specific audiences for these efforts.

Some of the services provided in the Bureau of Traffic Management are:

- **District Traffic Operations:** District Traffic Engineers are available to examine public requests about routine traffic concerns such as traffic safety at an intersection. Citizens are encouraged to contact the District Traffic Engineers directly by phoning the Bureau of Traffic Management. Requests are evaluated and possible remedies reviewed after the staff visit the site and collect data needed to investigate the situation. For routine requests, this is the most expeditious way to have your concerns evaluated.

  If a traffic problem is not easily remedied, it may have to be referred to other Office of Transportation sections for development and implementation of a solution. Keep in mind that the process necessary to investigate the request and implement even simple solutions may take some time.

- **Traffic Calming Program (TCP):** The Traffic Calming Program provides a process for identifying and dealing with problems related to safety, traffic speeds, and traffic volumes on residential streets. Program solutions, which may include the construction of speed bumps, traffic circles, and curb extensions, can be implemented on roadways which are designated in the Comprehensive Plan as either local service streets or neighborhood collector streets. The TCP puts into practice adopted policies for the protection of residential streets and neighborhoods from the negative impacts of traffic.

  Streets are evaluated for a traffic calming project using objective scoring criteria. For neighborhood collector streets, the data needed to score each eligible street has been collected and analyzed by program staff. Problems on local service streets are brought to staff’s attention through public requests. Many local streets have already been evaluated and scored. Call the Bureau of Traffic Management for more information about the status of streets which have already been scored or to initiate a request for consideration of a street.

- **Bicycle Program:** The Bicycle Program works to make bicycling a more attractive transportation choice by planning, implementing, and maintaining a
safe, well-connected bikeway network to encourage bicycle use; providing publicly accessible bicycle parking throughout the City; and, educating people about the benefits of bicycles as a means of transportation. The Bicycle Program works closely with residents for all its projects and activities, and actively solicits input through events, the Bicycle Facility Improvement Request Program, and through the citizen’s Bicycle Advisory Committee (BAC). BAC meetings are open to all interested parties.

- **Neighborhood Speed Watch:** This public awareness program provides concerned citizens with an opportunity to play an active role in helping to solve their own neighborhood speeding problems. The purpose is to inform speeding drivers of the neighborhood’s concern about speeding. Local residents, trained by program staff in the use of a radar unit, record speeds and license numbers of cars traveling in excess of speed designations on residential streets. Notification is sent from the City to the registered owners of those vehicles, asking them to slow down when traveling on two-lane neighborhood collectors and local service streets. Registered owners of vehicles observed speeding are not fined and no violation is cited on their driving record. For information about conducting a Neighborhood Speed Watch project, call the Bureau of Traffic Management.

- **Abandoned Auto Program:** Some people believe that the street and sidewalk in front of their house “belongs” to them. Actually, they are for the public, and no-one is entitled to permanently use it for vehicle parking and storage. The Abandoned Auto Program responds to reports of vehicles — cars, trucks, trailers, RVs, and boats — that are being stored in the street and public right-of-way. When a report is filed, a field inspector will inspect and tag the abandoned vehicle, notifying the owner that the car will be towed if it is not removed. Vehicles that are a threat to public safety because of certain conditions will be towed within 24 hours of receiving a “warning tag.” Anyone can report an abandoned vehicle by calling the Abandoned Auto Hotline at 823-7309.
Facility Development and Management

The Bureau of Transportation Engineering and Development manages major street construction, local improvement districts, skinny streets, pedestrian improvements, and special street permits.

Services provided by the Bureau of Transportation Engineering and Development include:

- **Pedestrian Program:** This program was initiated in 1992 to make Portland more walkable. The Pedestrian Program is involved in planning and building a safe, accessible, and convenient network of walkways throughout the City, promoting walking as a viable transportation mode, and educating people about pedestrian safety. The Pedestrian Program offers a wide array of services to Portland’s walking residents by working with citizen groups, business associations, and other public agencies to improve and promote pedestrian travel.

The Pedestrian Program provides several ways for City residents to help shape Portland’s pedestrian environment. The eleven-member Citizen Advisory Committee establishes goals and policies to guide program activities. Program staff members meet with residents at neighborhood meetings and community events to solicit citizen suggestions for pedestrian improvements. These suggestions are incorporated into the pedestrian plan and funding requests. For more information about the Pedestrian Program, call the Bureau of Transportation Engineering and Development.

- **Right-of-Way Permitting:** This section regulated the non-traffic uses of the public right-of-way. Staff research, issue, and inspect a variety of construction and use permits. Some examples of construction permits are: utility lines and vaults, sidewalks and driveways, and minor encroachments such as retaining walls. Some examples of use permits are: street closures to facilitate construction, block parties, house moves, sidewalk cafes and vending carts, banners, bus shelters, and meter hoods to reserve parking. Staff is also available to explain and assist the public in the permitting process and to resolve problems related to the use of the right-of-way.

- **Local Improvement District Program:** This program is housed in the Local Design Engineering section and utilizes the Local Improvement District (LID) process to provide financing for improvement of neighborhood streets. Costs associated with improvement of local streets are the responsibility of the adjacent property owners. Once a street has been improved to meet City standards, the City will maintain it at no additional cost to the property owners. Local Design Engineering staff work with property owners who are interested in having their streets improved to determine the scope of each project and to
coordinate the preparation of an LID petition package. A majority of the
adjacent property owners must agree to the improvement to continue the LID
process. When a majority petition is returned, each project is scheduled for
design, and ultimately construction. Staff prepare plans, specifications, and
cost estimates used in project construction.

- **Cheap and Skinny Streets Program:** This program works to develop
and implement neighborhood improvements by combining the Local
Improvement District process with affordable housing. The program leverages
public and private funds to increase overall affordability of the infrastructure
and housing for neighborhood residents. The program is targeted for a five-
year process of partnering with residents/neighborhoods who desire street
improvements. Therefore, the program is targeted to low- and moderate-
inecome neighborhoods that request assistance. Targeted infrastructure
improvements include: a 20' wide street (parking on one side), curbs,
sidewalks, grass parking strip, and street trees.

- **Right-of-Way Acquisition:** The Right-of-Way Acquisition Section
acquires public rights-of-way, easements, and property for construction of both
Transportation and Environmental Services improvements projects. This
section also manages the street vacation process, subsurface and air-rights
leases, and legal records.
Facility Maintenance

The Bureau of Maintenance oversees activities to maintain and improve the quality of life for Portland residents by performing street, structural, sidewalk, traffic, and sewer maintenance. The Bureau is responsible for preserving the public investment of $1.9 billion in the street system and $1.4 billion in the sewer system. It is responsible for inspecting, cleaning, maintaining, and repairing all transportation and sewer-related facilities within the City including: paved streets (which includes the Transit Mall and Light Rail Corridor), sidewalks, traffic signals and signs, street corners, bridges, retaining walls, guardrails, stairways, street lights, parking spaces, sewers, and drainage facilities.

The programs that generate the most interest amongst Portland’s citizens include:

- **Sidewalk Posting**: The maintenance of sidewalks abutting private property is the responsibility of the abutting property owners. To inform property owners of the need to repair or replace hazardous conditions in sidewalks, driveways, and curbs, and provide estimates for the work, the Bureau operates an inspection and posting program. The program cycles the City on a regular basis. Once notified of the hazards, property owners may then have the necessary work completed by private contractors or may do the work themselves. Information on sidewalk posting and sidewalk repairs may be obtained through the Sidewalk section.

- **Curb Ramps**: To comply with the Americans with Disabilities Act of 1990 (ADA), the Bureau operates a program for development, planning, scheduling, and implementation of projects related to ADA compliance. As a part of this program, the Bureau constructs 800 to 900 curb ramps each year on a needs and priority basis. Information on ADA compliance and curb ramp installation can be obtained through the Sidewalk section.

- **Street Pavement Maintenance**: Streets improved to City standards are maintained by the Bureau of Maintenance. This totals about 1,670 miles of streets. To accomplish this, the Bureau annually provides 30 miles of asphalt and concrete resurfacing, 50 miles of slurry sealing, and significant amounts of pavement patching and grinding. Citizens are encouraged to bring unsafe pavement conditions or questions regarding pavement maintenance to the attention of the Street Maintenance Section.

- **Signals and Signs**: Maintenance of the street systems 15,000 parking signs and 1,030 signalized intersections is critical to the safe and efficient movement of traffic throughout the City. Efficient movement improves safety, reduces the release of automotive emissions into the air and enhances the City’s economy. The signs and signals maintenance programs rely to a great extent on the traveling public to provide notification of problems. Once problem locations have been identified the Bureau responds quickly to make the necessary repairs.
- **Graffiti Removal:** Graffiti has become an increasing problem in recent years. The City requires property owners to deal with graffiti on private property. Graffiti on transportation facilities in the public right-of-way, however, are the responsibility of the Bureau of Maintenance to cover or remove. Quick response of graffiti removal provides a deterrent to the graffitist. As a result, the Bureau has a policy of rapid response once locations have been identified by the public or BOM crews.

- **Street Cleaning:** There are over 1,400 miles of curbed streets in the City which are swept on a regular basis. These include local, collector, and arterial streets. The sweeping is of significant value in keeping drainage ways open, improving driving safety, and keeping the City beautiful. The Bureau's policy is to sweep only curbed streets where debris is trapped along the curb and can be removed efficiently and effectively. Non-curbed streets do not allow for the effective collection of debris because the debris blows off of the pavement and onto the shoulders or into ditches.

- **Leaf Composting:** Leaves collected in the fall from City streets are presently composted by the City. The leaves make a very high quality compost, most of which is sold each summer to the public. Each year an increasing amount of this compost is further processed into a material utilized for storm water filters to remove sediments and contaminants from storm water runoff, thereby helping to meet federal and state water quality standards for local rivers and streams. The composting of the leaves not only provides environmental benefits, but also saves significant cost over disposal of the leaves in landfills. Information on compost sales and deliveries can be obtained by contacting the Street Repair Section.

- **Sewer Cleaning and Emergency Crews:** The cleaning of Portland's 1,950 miles of sewers and storm lines and 50,000 catch basins prevents sewer blockages and backups of sewer and storm systems during heavy rains. This reduces building and street flooding, thereby avoiding damage and cleanup costs, and maintaining public health and safety. When blockages and backups do occur, the Bureau is available seven days a week to respond to sewer emergencies. Emergency crews provide residents with information on the source of the problem, resolution of the problem, and many times are able to resolve the problem themselves.

- **Wild Flower Program:** Roadside maintenance crews seed and maintain roadside areas throughout Portland with wild flowers. This program is extremely popular with Portland residents and provides the benefits of reduced maintenance costs through decreased mowing and spraying, enhancement of neighborhood aesthetics, reduced herbicide use, erosion control, and public enjoyment. Additional information on the wild flower program is available through the Drainage and Roadside Maintenance Section.
Crime Prevention and Other Neighborhood Association Activities

Neighborhood association activities are only limited by the amount of volunteer time and energy its members have. Although City bureaus often ask for input or participation from citizens, your neighborhood’s most important projects are your own. This section provides some help for the most common projects you are likely to encounter during your work with your neighborhood association. They include:

- Crime Prevention Programs
- Neighborhood Assessment
- Community Organizing and Social Events
- Block Parties
- Cleanup Projects

There are many other opportunities for citizens to be involved in programs and activities that affect your neighborhood. Section I, "Welcome to Neighborhood Associations" contains information about the Neighborhood Mediation Center, where neighbors can go when problems arise. The Appendix contains a list of citizen committees and involvement opportunities for your reference.
Crime Prevention and
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Other Community-Building Activities---------

The Neighborhood Crime Prevention Program has been in operation in Portland since 1978. The program was originally funded through a Federal grant. In 1980, the City Council began providing general fund dollars to provide Crime Prevention staff for each neighborhood coalition area.

Since the program began, citizens have received neighborhood anti-crime training or information to assist them in securing their homes, watching out for each other on their blocks, personal safety and self-defense, as well as ways to increase their involvement in reducing neighborhood crime problems. Similar assistance has been provided to business associations in each district in Portland.

By 1990, the City of Portland implemented community policing, and City Council increased the number of crime-prevention staff Citywide. All community public safety organizing is now done by the neighborhood crime prevention specialists.

Each district neighborhood coalition operates a neighborhood crime prevention program. These programs are designed for the particular needs of each neighborhood. The common goals for neighborhood crime prevention include:

- Establishing a network of neighborhood watch blocks throughout the City in which citizens agree to watch out for each other.
- Providing citizens with basic crime prevention information to increase their personal safety and home security.
- Providing facilitation and technical assistance to neighborhoods that are organizing to reduce crisis or chronic crime problems.
- Encouraging cooperation between police and neighborhood residents.

Thousands of Portlanders participate in the neighborhood crime prevention program. Their success at working together to keep their neighborhoods free of crime and fear has resulted in a number of innovative projects that affect a range of neighborhood issues.

Today, the neighborhood program engages citizens, law enforcement, and other agencies in community policing and problem-solving projects related to youth gangs, graffiti, drug houses, street cleaning, prostitution, problem parks, problem liquor outlets, and neighborhood "hot spots."

Neighborhood crime prevention planning reflects the concerns and interests of residing citizens. It varies from area to area, neighborhood to neighborhood, even block to block. City-wide, however, the focus of neighborhood crime prevention programs is on the following activities.
**Basic Neighborhood Watch**

One of the best ways to decrease crime in a community is for people to be "watchful," to know who and what activities belong in a neighborhood, and to document and report suspicious activity. Criminals are not likely to be active in an area that they know is united against them. Getting people to be watchful and involved in the overall safety of their community not only reduces crime, but also increases their pride in making their neighborhood a better place to live.

Neighborhood Watch programs were developed to increase citizen involvement in community safety and neighborhood cohesiveness. Watch programs are an excellent way to deal with a large number of community safety problems.

A Block Watch program typically involves:

- People living in an apartment or houses on a block meet to discuss crime problems and prevention issues specific to their area. At the meeting, people get to know each other and agree to participate in the Watch program.

- The neighbors learn about home security measures, personal safety strategies, and how to document and report suspicious activities.

- The neighbors agree to develop a block map which shows the addresses and phone numbers of participating Watch members. Most blocks develop a phone tree or alert system at the same time.

- Neighbors fill out block profile sheets which give additional information on block concerns, volunteer skills, and other information needed for maintaining the Watch program. The profile sheets can also identify larger issues that might be addressed by the neighborhood association.

- One or more volunteers agree to act as the block coordinator(s)/block captain(s). They are responsible for maintaining and distributing crime-related information and for keeping the lines of communication open among neighbors.

**Specialized Neighborhood Watch Efforts**

In areas where there is increased drug and gang activity and increased citizen fear of violent crime, the Neighborhood Watch program is sometimes modified to focus on problem-solving and organizing around a problem location which threatens the safety of citizens on a particular block. In these situations, the Block Watch meeting does not include emphasizing home security and other standard crime-prevention information. Instead, the focus is on identifying all of the information neighbors have on the patterns of criminal activity occurring in their neighborhood.

If, for example, there is a drug house on the block, citizens need help with learning how to document and report drug-dealing patterns so that they can get police assistance in a timely fashion. If the drug house is a rental property, they will learn how to work with
landlords. Crime prevention staff will work with the affected neighbors in resolving immediate problems caused by the neighborhood “hot spot” before they complete all of the traditional steps in organizing a regular Block Watch.

**Citizen Foot Patrols**

Citizen foot patrols are an extension of the Neighborhood Watch concept. Once neighbors have organized Watch blocks, they are increasingly interested in being a visible presence in their community.

To be officially recognized by the Police Bureau and the Neighborhood Crime Prevention program, foot patrols must meet certain basic requirements. These requirements include:

- Basic training on street safety
- Basic training on documenting and reporting suspicious activity
- Patrols must be non-confrontational. They serve as “eyes and ears” only, and rely on the Police to respond to threatening activity
- Patrols must wear officially recognized vests or jackets
- No weapons of any kind may be carried on patrol
- Patrol members must carry cellular phones or hand-held radios for emergency communication purposes
- Patrols must notify their police precinct prior to going on patrol

Foot patrols operate on local neighborhood streets, on commercial strips, and in some parks. Patrols frequently get involved in reporting neighborhood nuisance issues, reporting graffiti, and documenting liquor license violations. They can also be of great help in distributing information about neighborhood association and other community activities.

**Note:** Citizens who are interested in organizing a Neighborhood Watch on their block should contact the neighborhood office in their area for training and assistance.
Personal Safety and Self-Defense

Fear of crime can keep people from going outside and maintaining active lives. To avoid being a prisoner of fear through increased physical safety is a goal of these programs. Awareness of surroundings and increased assertiveness are basic principles of self-defense, rape prevention, and whistle alert programs. Increase of both the physical and psychological safety of individuals are the main objectives of programs like escort services and abuse education.

Self-defense programs are designed to make a person feel more confident on the street. Women and senior citizens are usually the targeted audiences for these programs. Classes emphasize being aware of your surroundings, including tips on ways to avoid a mugging or sexual assault. Self-defense programs for women place more emphasis on street fighting than those for senior citizens which stress awareness and assertiveness.

Note: At the end of this handbook is a directory of additional resources within the community.

Special Community Crime Problems

Often a community is plagued by an ongoing crime related problem such as a high number of burglaries or problems with prostitution. Neighborhood crime prevention programs also work with citizen groups to reduce particular crime problems.

For instance, in neighborhoods invaded by a rapist or child molester, rumor control networks have been formed to provide factual information. In other neighborhoods, arson watches have helped police reduce arson related crimes.

Citizens have also come together to study community problems resulting from prostitution, sex business, and drug traffic in neighborhoods. They have taken action ranging from working with other City agencies to looking at long-range planning solutions to the existing problems.

Police-Community Cooperation

Since the implementation of Community Policing in 1990, Portland citizens have experienced a real upswing in communication and mutual problem-solving with the police Bureau. Neighborhood Liaison Officers (NLOs) are assigned to attend neighborhood association meetings. These district officers provide citizens with updates on crime patterns in each association area. They also provide safety tips, do rumor control, and work with citizens on specific safety problems in the neighborhood. The more complex problems are referred to the Neighborhood Response Team (NRT). The NRT office and neighborhood crime-prevention staff then work with various agencies such as the District Attorney’s office, Bureau of Buildings, Bureau of Licenses, Children’s Services Division, Juvenile Court workers, and Adult Parole and Probation to resolve the identified crime concern.
Crime Prevention Tips

What can you do to reverse the rising crime rate?

- Organize a neighborhood watch on your block.
  - Know your neighbors
  - Engrave your property
  - Secure your home
  - Make a block map or phone tree

- Make sure that you and members of your family know how to personally defend yourselves.
  - On the street
  - In your home
  - On the bus
  - Anywhere

- Work with members of your community to identify and solve crime and potential crime problems.
  - Organize a neighborhood foot patrol
  - Work on committees
  - Testify before lawmakers
  - Canvass the neighborhood for information and support

- Learn what kinds of police services would be most beneficial to your neighborhood. Work cooperatively with police to create those police services in your area.

- Watch out for crime wherever you are. Do not hesitate to call the police when you are suspicious. Do not hesitate to call for help if you are being abused. Do not hesitate to help others.

Working together we can make our communities safe.
Taking Action on Needs

Solving problems and issues in your neighborhood is one of the primary reasons neighborhood associations organize. Identifying what your neighborhood needs and planning ways to solve problems is an ongoing task. Neighborhood associations should conduct periodic needs assessments in order to identify issues, plan projects, and to let other agencies know about problems that need to be addressed. Conducting a needs assessment is a useful tool for all organizations. Surveys, a planning workshop, or a walking tour are some good methods for identifying problems and issues in your area. Sometimes problems can be resolved by calling the appropriate City bureau or another agency that should address the issue. You may develop an action plan for the neighborhood association to work on, or apply a grant or other funding for a special project. Neighbors who can reach a consensus on what will help their neighborhood are more likely to be able to work together to solve those problems.

Steps for Solving Problems

- **Identify the Problem.** Define it and be able to describe it specifically.
- **Who does it affect?** Is it a problem for an individual, a block, the whole neighborhood, or the region? Is it a priority for your neighborhood association?
- **Find out who is responsible.** Identify the individual, bureau, or agency responsible for solving the problem. See Section V for information on City Bureaus or contact your district office for advice on who to call.
- **Identify resources** to solve the problem. Decide what the neighborhood association can or will do, how the district coalition can help, and who else should be involved.
- **Get Action.** Contact the people, agencies, or groups that can help. Develop a strategy for action and follow up until the problem is resolved.

Some neighborhood problems can be solved with a phone call to the right person. Requests for services or reports of neighborhood nuisances (abandoned cars, garbage, or uncut grass) are common problems that can be reported quickly. Assistance with traffic problems, some types of crimes, or special projects may require more work and coordination with other agencies. Large projects such as park development, neighborhood revitalization, or major capital improvements may take several years to complete. Sometimes the neighborhood association will have to raise money for the project or tackle the issue in a new way.

Citizens know their neighborhoods and are a big help to staff in letting them know about the problems they see. Staff, however, often work under policy or budget constraints that may prevent your idea from being acted upon. Work with the responsible staff person - often you can find a creative alternative that is workable, or even change policy to address your need. Your district office staff can help organize your neighborhood association’s problem-solving efforts.
Organizing An Event

Whether you are holding a summer block party or any other community event, it is crucial that your planning be well organized. Follow these steps for organizing a successful event, no matter what it is.

1) **Explore the possibilities.** What will work in your neighborhood? What kinds of activities will neighbors support?

2) **Select the event.** There are many reasons for events: To inform and educate the community on different issues, raise money, provide residents with a cultural or particular social event, publicize the neighborhood association, generate community support, or simply bring neighbors together. Consider the costs associated with the event you select.

3) **Appoint the event chairperson.** This is a major responsibility. The Chair is the coordinator of the event. Chairs must make sure that everyone is doing the assigned tasks so that everything is done for the event. The Chair should work with the event committee to make all the arrangements necessary.

4) **Set up a committee.** A committee makes organizing an event much simpler. Projects should be broken into pieces, with people assigned to each of those tasks. The committee should meet regularly to discuss their progress. The size of the committee will depend on the size and nature of the event.

5) **Define committee tasks and budget.** The committee should list in detail what it has to accomplish. The list should include each task, the person responsible, the date scheduled for completion, the estimated cost, and identification of potential financial resources.

6) **Develop a time table.** This is a crucial step since there are always deadlines that must be met along the way. Some tasks must be completed because others depend on their completion. Set up a weekly schedule. Determine the dates by counting backwards from the date of the event. Give yourself more time than you think you need. Things always take longer than you think.

7) **Recruit volunteers.** Try to involve as many people as possible. For most community events, there is usually something for everyone to do, including children! The more people involved, the less the burden falls on any one person. When volunteers work on a event, their commitment to that event (and the organization) increases.

8) **Publicize the event.** Use newspapers, radio, TV, community newsletters, and community bulletin boards.

9) **Hold the event.** The better organized, the better the event. The more prepared, the easier it is to put on a good event. All events take a lot of work. If you need volunteers, make sure you get enough people to help out the day of the event. But don't forget to let them enjoy the day, too!

10) **Clean up and give thanks.** The event is not finished when the public goes home. Make sure there are volunteers to clean up afterwards. Remove all signs
and posters. Be sure all organizers and sponsors receive “thanks” both at the event and afterwards.

11) *Evaluation.* Shortly after the event, the steering committee and task committee should meet to evaluate it. Note all successes, what went well, and improvements that could have been made.

If you follow these steps, your event will be a satisfying experience for everyone. Successful projects will build participation for your organization and will keep volunteers involved. Be sure to document your planning information for each event to make planning easier the next time. Share your success stories with other neighborhood groups.
Neighbors who live on the same city block used to be much closer than they are now. Work schedules and social pressures have resulted in fewer neighbors knowing each other, which often causes a breakdown among people who should have much in common—your neighbors. Block parties are a good way for neighbors to get to know each other again. People who have enjoyed a block social event find that parties not only break the ice, but also give neighbors a relaxed time to discover matters of mutual interest. These events often pave the way for future block meetings on common neighborhood problems, crime prevention, recreational needs, or other projects.

Block parties can be held any time of the year, indoors or outside. If the party is held outside, it can be in a neighbor’s yard, in a nearby vacant lot or park, or on the street closed for the party. If you choose to close the street, be aware that arrangements must be made, including obtaining a permit from the City. The following is a guide to holding a successful block party.

**Note:** Give yourselves 3-4 weeks advance time to make all your arrangements, especially if you plan to close your street. Ask your district office to help you arrange your event.

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**To Close the Street**

If you want to close the street for a party, you must get a permit in advance. Permits are available from the Permit Center in the Portland Building or from your neighborhood district office. To get a permit, you must show proof of liability insurance. District offices have insurance available for the use of recognized neighborhoods associations in their coalition area. Permits are issued through this process:

1) **Petition.** A petition must be signed by all residents on the block giving their approval for closing the street for a party. This includes all residents with properties bordering on the street, side yards included. Petitions can be obtained through the district offices.

2) Call the district office three to four weeks before you intend to hold your party. The office must review your party plans to see if they meet with insurance specifications. **The insurance will not cover races, any events where alcoholic beverages are sold, or the use of mechanical devices such as merry-go-rounds. Individuals participate in all events at their own risk.**

3) If you co-sponsor the event with a neighborhood group such as a church or business, see if their insurance will cover you. You cannot use the district office’s insurance if an event is co-sponsored. If you can’t use your co-sponsor’s insurance, purchase insurance coverage on your own.
4) A neighborhood association not affiliated with a district coalition is not covered by their insurance. Find a co-sponsor for the event or check with your own insurance agent about special coverage.

5) Once insurance is approved, please follow your district office’s procedures for issuance of the permit.

6) To close the street, you will need to rent barricades. Barricade companies are listed in the yellow pages of the Phone Book.

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**Permit to Amplify Music**

To amplify music, either live or recorded, you will need a permit from the Noise Control Section of the Bureau of Buildings. If you plan to use a large amplification system, the noise control officer will look at the location and suggest where to set up the equipment to avoid unnecessary noise.

- Get an application for a permit to amplify music from the Bureau of Buildings on the 9th floor of the Portland Building (796-7350). Either pick up the permit in person or call to have one sent. There is no charge for the permit.

- Give yourself two weeks advance notice to get the permit.

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**Suggestions for Activities**

- Games including volleyball, Frisbee, etc. are always a good idea. “New games” that are played by all ages and in which everyone “wins” are a lot of fun for a large group. Call your school physical education teachers or Portland State University for a new games “leader.”

- If neighbors want to go all out and hire a band (this costs money), call the Musicians’ Mutual Association, Local 99, at 235-8791. Union rates are based on the number of musicians, so if a small band is hired, the expense may be less than expected.

- Food arrangements include potluck dinners, or for fun try a “progressive dinner” where the meal moves from one neighbor’s house to another for each course.

- Invite your neighborhood crime prevention staff, neighborhood coordinators, or elected officials to stop by and talk to your neighbors. Many block parties take place during National Night Out, a crime prevention event held each August.

If you would like to meet the district police officers who patrol in your area, you may be able to arrange for them to stop by and visit sometime during your party. Call your area precinct and talk to the desk officer. Give them at least one week’s notice. You can also call the district office and ask the Crime Prevention staff to arrange for an officer to stop by your party.
Cleaning Up

Everyone wants to live in a clean, well-maintained neighborhood. Neighborhood cleanups, tree plantings, graffiti removal, and paint-a-thons are popular and effective ways to organize your community, address nuisance and vandalism problems, deter crime, help out low-income neighbors or seniors, and beautify the community. Many neighborhood associations sponsor annual cleanups. Volunteers also participate in cleaning up illegal dumpsites in the community or work on improving the neighborhood environment through beautification projects.

If you want to plan a similar project, read the following section on event planning. Then check with your district office to see what resources are available to help. Community-based non-profits are often partners in neighborhood beautification projects. In addition, funding for these projects varies from year to year. Begin planning early so you can identify potential sponsors and organize for a successful event. Planning Guides for conducting cleanups and paint-a-thons are available from your district office.

In addition to your district coalition office, check with these programs to see if they can assist with your beautification project:

- Stop Oregon Litter and Vandalism (SOLV) — 647-9855
- Friends of Trees — 282-8846
- Business District Associations
- Park Friends organizations
- Graffiti Removal Programs (Call your neighborhood district office for more information)
- Garden Clubs, social service agencies and service organizations
Getting The Word Out

Communication is one of the most important functions of a neighborhood association. People are interested in what is happening in their neighborhoods and need to know about activities they want to be involved in. Announcing upcoming activities as well as lauding your recent accomplishments are crucial to the success of your association. Good publicity will inform your neighbors about the next scheduled meeting, the installation of a new traffic plan or a successful neighborhood project.

Portland’s recognized neighborhood associations are bound by an Open Meetings Policy, which ensures that decisions that affect the public are made in public settings (For a summary of the policy, see the Appendix). Meetings must be open to anyone who wishes to attend, and they should be conducted in a way that encourages people to get involved in projects and events. The Appendix contains some procedures on notifying the public about your meetings.

There are many ways to publicize events. The type of activity, the amount of time you have to get the word out, the amount of money you can spend and the number of volunteers available to work will determine the best type of publicity. Here are some tips on how to meet your communication goals.
Newsletters

Newsletters are a great way for communicating with your neighbors, but because of the expense, as well as the time and energy it takes to produce a newsletter, not all neighborhood associations choose to publish newsletters each month. Some options include:

- Quarterly or annual newsletter
- Flyers
- Column in a neighborhood newspaper
- Column in a district newsletter
- Private donations to support monthly newsletter
- Once-a-year occupant newsletter
- Hand distribution

Each District office has a budget specifically earmarked for printing and mailing neighborhood association newsletters and flyers. Since funds for neighborhood communications are very limited, check with your district office to determine exactly what kind of support services and funds are available. Then make a plan for your neighborhood’s newsletter production schedule. District coalition Boards are responsible for setting their own policies regarding newsletter funding and publication. You must follow these policies to receive funds from the Coalition.

Some neighborhood associations supplement their newsletter budget by providing space for neighborhood business advertisements. This sponsorship can be an important resource for your newsletter, but the association may also be responsible for paying taxes on this income. Your district office staff can provide guidance if you are considering adding advertising to your newsletter.

Editorial Policies for Neighborhood Association Newsletters

Standards and editorial policies have been developed by citizens and neighborhood staff as part of the ONA Guidelines. Please read them carefully. They apply to every neighborhood association. It is imperative that these policies are followed. Violations may result in a district office refusing to pay for the printing and mailing of your newsletter or even in legal liability as well as derecognition by the City.

- Neighborhood associations are responsible for the content of their individual neighborhood newsletters. Neighborhood associations, using district coalition funds for printing and/or distributing newsletters are expected to familiarize
themselves with and comply with all applicable U.S. Postal Service and Internal Revenue Service regulations that affect a district coalition's or neighborhood association's not-for-profit status. If upon review the content is not in compliance with these regulations, the matter will be resolved cooperatively with the neighborhood association newsletter editor and the district office.

- A copy of each newsletter should be on file at the district office.
- Articles presenting personal opinions of a citizen must be identified as such and the name of the author must be included.
- Newsletters should not include statements which could be considered libelous or defamatory.
- Statements in support of or in opposition to any political candidate or ballot measure cannot be printed.
- Positions taken or recommendations voted on by a neighborhood association are matters of record and may be reported in newsletters. Efforts should be made to report positions taken by neighborhood boards relating to community issues in the newsletters.

**Note:** Newsletters are a great way to increase your association’s visibility. You *must* follow the policies to receive funding.

Currently there are several different types of neighborhood newsletters produced throughout the City. When launching your own newsletter, read assorted existing newsletters to see what style best meets your own needs. Assistance in producing newsletters is available through your district office.

**Production**

*Working Together:* Producing a newsletter requires a team effort. Editors who try to do it all become quickly discouraged because of the amount of work involved. One good system is to have an editor (coordinator) and one or more persons to help gather news. A production team to put the paper together and get it ready for mailing might also be helpful.

The following ideas may make your newsletter easier to produce:

- **Beats:** Decide on areas of interest and who will cover them. These issues should be covered regularly:
  - Meeting agendas and minutes from last meeting.
- Important issues (projects of interest to your neighborhood association), especially land use or other issues which affect your entire neighborhood.

- Lighter news, features, volunteer recognition, businesses and neighbors.

- Events and meetings (what happened, upcoming events). It's important to provide adequate notice of meetings and topics under consideration.

- Networking (news from other organizations in your area or other neighborhood associations).

• **Deadline:** Establish a deadline and keep to it! To find the appropriate deadline or day, count backwards from the day when you want the newsletter in people's homes:

  - Subtract **one or two days** to edit and prepare the copy for the printer.

  - Subtract **three to five days** for production, printing and preparing (labeling, sorting by zip code, and delivering it to the post office).

  - Subtract at least **ten days** for the post office to deliver.

A good rule of thumb is to set a deadline at least three weeks before you want it to be delivered. This allows time for things to go wrong.

• **Editor:** The editor is the heart of the paper. The editor should know what information should be included in the paper, assign stories to be written, and make sure all the stories are complete and handed in on time.

After people turn in their written materials (copy), an editor edits for grammar and accuracy of content. The editor should see that the information included in the article is complete and accurate and that it meets the editorial policies. If not, get additional information.

When preparing the copy for the printer, use a good typewriter or word processor. If one is not available, call your district office for access to computers for use in producing newsletters. Check with them to see what assistance is available, what training is required or available before you use their equipment, and how to schedule time in the office.
Flyers

For many activities a simple flyer announcing the activity, location, date and time is sufficient. Flyers are often the backbone of neighborhood association communications. They are the least expensive, the simplest to create and require no ongoing time commitment from neighborhood volunteers. Flyers are often used in conjunction with other forms of publicity.

Tips for Flyers

- Nice artwork or graphics is a plus for a flyer. But in a pinch or if your group lacks artistic expertise, don’t fret. A simple flyer with the correct information will suffice.

- A simple trick for nice flyers is to cut out artwork that you find from other sources and paste it onto your flyer (Be careful not to reproduce art that has been copyrighted.). You can do this with a xerox copier, or with desktop publishing clip art. There are also lots of clip art books that have page after page of pictures and designs for this purpose. Your district office may have these books or disks of art for your use.

- Flyers can be distributed in a number of ways. They can be hand delivered, mailed, left in piles at locations throughout the area (i.e. churches, stores, senior centers, etc.), put up on bulletin boards in your community, or inserted in other publications. A combination of methods is often the best (see section on mailing newsletters).

- When writing a flyer include:
  
  - Name of organization
  
  - Event you are announcing
  
  - Date
  
  - Time
  
  - Location
  
  - Phone number for contact person. If someone wants to get involved at a later date or simply wants more information, there should be a number to call.
Distribution

Some neighborhood associations publish one newsletter each month, others publish quarterly (four per year). Each district office varies in its policy regarding assistance with newsletter printing and distribution. Check with your district office.

Three options for distributing newsletters or flyers are listed below:

- **Hand Delivery:** This is the quickest and may be most effective. It can be done up to the day of a meeting, but should be completed in time to let people plan to attend. Since it is not necessary to have a complete mailing list, hand delivery can get to the greatest number of residents in a neighborhood association area. Hand delivery can be done in a variety of ways:
  
  - Deliver to homes, door-to-door. It is illegal to put them in mailboxes. Leave them in the door instead.
  
  - Deliver through local schools. Check first with the principal to see if they can be sent home with the students.
  
  - Deliver through churches, etc.
  
  - Leave stacks of newsletters at neighborhood stores.
  
  - Develop a system of distribution utilizing a block leader networking system, such as Neighborhood Watch networks.
  
  - Some neighborhoods use businesses which deliver door-to-door. This is usually less expensive than postage.

- **Mailing List:** To qualify for bulk, nonprofit mail permit rates, the neighborhood association needs at least 200 addresses. In addition to neighborhood residents, you can include local organizations, churches, schools, businesses, City officials, and the media on your list. It is essential to periodically update the mailing list to ensure that those on it are still residing at the address you have.

Note: Each neighborhood association is responsible for keeping their mailing lists updated. You can save postage money by eliminating duplication and by not sending information to people who are no longer living in the area. Your district office can assist with keeping a data base of your mailing list.

- **Occupant Mailings:** An occupant mailing goes to everyone in the neighborhood. They are extremely expensive. Due to cost, arrangements for
occupant mailings must be made with your district office. Currently, there are not enough funds to do occupant mailings in every neighborhood, but if funds allow you may want to do an occupant mailing once a year in lieu of monthly newsletters.

In order to be effective, a newsletter must get to people's homes before meetings. Using the special bulk mail rate, the post office requires up to ten days for delivery. Factor this amount of time into the lead time required for notifying residents about upcoming events. Information about bulk mail rates, regulations and procedures is available from your district office.
Public Relations/Media Coverage

Neighborhood association work is often interesting news to the community. Publicity can encourage greater attendance at an upcoming event or to get media coverage on the day of the event. Getting the word out, often called public relations (or PR), is an important element for making your event or activity successful.

The media is continually bombarded with requests for coverage from all sorts of groups. Therefore, it is important that you help them (and ultimately help yourselves) by learning and conforming to the standards of the industry. This will help to insure that they take your neighborhood association seriously.

A list of current media contacts in Oregon’s Updated News Media Directory, The Finder Binder, is available from the Office of Neighborhood Associations (823-4592). This includes contact information for both print and electronic media. Provide press releases and Public Service Announcements (PSAs) to the appropriate contact to ensure that your event is covered. Try to establish a personal relationship with the person assigned to cover your area.

Press Releases

A press release is an announcement to a newspaper or other printed media. It gives the necessary information about the event. The paper can choose to print a short informational piece directly from the release or go after a larger story. In that case, the press release is an invitation to investigate the event.

There is a standard press release format that should be followed:

- All releases should be typewritten on 8 1/2 by 11” paper.
- The heading should include:
  - Your organization’s name, address and the name of the contact person typed in the upper left hand corner of the first page. Include a contact phone number.
  - A release date noted in the upper right hand corner. This indicates when the release may be used. If at all possible, indicate “FOR IMMEDIATE RELEASE.” If it is not for immediate release, indicate the date this information can be published.

- Start off with a bold headline which summarizes your press release in a catchy way.
- Begin typing the copy one third of the way down the first page.
- Double or triple space the copy. Never single space.

The next page shows an example of a press release.
SAMPLE PRESS RELEASE

Anywhere Neighborhood Assoc.
1000 NE Martin Luther King, Jr. Blvd
Portland, OR 97203
Contact: Joe Smith, 555-5555

January 15, 1991
For Immediate Release

“Anywhere Neighbors Preserve Historic Building”

Members of the Anywhere Neighborhood Association are celebrating the victory won after a six-month battle to keep the abandoned Anywhere Theater from being torn down. The theater, once a glorious movie palace, has recently been placed on the City’s list of historic buildings. Neighborhood groups hope to turn the building into a community resource for arts programs for the community’s youth.

Neighbors and interested citizens are invited to an open house to discuss the future of the Anywhere Theater to be held on Saturday, February 12, 1991 in the Theater Foyer, 2233 NE Grand.

For more information contact Joe Smith, 555-5555
**Electronic Media**

**TV, Radio and Cable**

Since we live in such a technological age, it is likely that you will want to get your information out over the electronic media. Since more people watch TV than read a newspaper, it is a good avenue for public relations.

The simplest approach to electronic media is to write a news announcement that can be read over the air. Many radio, cable and TV stations have community announcements that are read or character generated (written electronically) via air or cable. These are called *Public Service Announcements* (PSAs). The Federal Communications Commission requires the media to play a certain number of public service announcements. Check with local stations regarding their policy and requirements for putting PSAs on the air.

If you are really serious about getting your message out, you could make a tape, audio or video, to be played by the various stations. Obviously, it is much easier to send a simple, written PSA to the stations than produce your own video commercial, but you may have a volunteer in your neighborhood with some expertise or interest in this type of production. Some stations may be able to help with production, or contact Portland Cable Access (see below). Whether you write an announcement or produce a commercial quality PSA, keep a few things in mind:

- Most stations accept public service announcements of about 30 seconds.
- When you write for radio or TV, you are writing to be heard, not read. Therefore, keep your writing sharp and crisp. Write like you are speaking.
- Don’t forget to include the day and date of your event, the location of the event, and a contact person and phone number.

**Public Cable Access**

An important resource for getting your neighborhood association message out to the community is cable TV’s public access programming. Public access gives local residents an opportunity to produce their own television programs which reflect unique concerns and perspectives.

If your neighborhood association is interested in producing such programming, you should realize that it takes time and a commitment. You must go through a series of training classes and prove proficiency on the television equipment before getting approval to produce programs. Once you have passed the course, however, you may use all the equipment necessary to produce your own TV show. You can do a one-time program or arrange for an ongoing series. This may be done either in the studio or on location with portable equipment.

There is no better way to get exposure for your neighborhood association than on TV. Call Portland Cable Access (288-1515) or Multnomah Cable Access (667-7636) for more information.
Speakers

One-to-one contact is a convincing way to let others know about your organization. If your neighborhood association has some successes that you think others can learn from, find a speaker to publicize your group. A volunteer who is enthusiastic and involved may be the perfect representative for speaking to other groups about your activities. A designated representative could be available to speak to the media, community groups, other neighborhood associations and committees.

Public speaking is a learned art. Make sure the person who represents your group knows how to speak to groups and individuals alike. Classes are available from a number of local schools, Toastmasters, public relations organizations, and other agencies.
Communication Tools

There are many ways to reach people. Here are only a few ideas.

- Neighborhood association newsletter
- Weekly area newspapers
- TV, radio, cable TV
- Schools, churches, club newsletters
- Door-to-door handouts
- Neighborhood survey
  - Mail
  - Phone
  - Door-to-door
- Person-to-person by phone
  - To friends
  - To neighbors
  - To network contacts
- Bulletins, notices, pamphlets, posters, flyers
  - Laundromats
  - Libraries
  - Supermarkets and stores
  - Local restaurants
  - Video stores
  - Waiting rooms in dentist/doctor's offices
- Booths at local events
- Coffees for interested persons
- Speakers at
  - Business groups
  - Service clubs
  - Youth groups
  - Schools/churches
- Cooperative efforts with adjoining neighborhoods
- Lawn signs
- Letters
- Telephone tree

The sky's the limit when it comes to publicizing your group, event, or issue. Be creative! The ideas you come up with may make the difference in the success of your neighborhood association.
Neighborhood Associations by Coalition

Call the Office of Neighborhood Associations (823-4519) for the names of current Coalition Chairs and contacts

Central Northeast Neighbors (CNN)

5540 NE Sandy Blvd
Portland, OR 97213
823-3156
823-3159 (FAX)

Beaumont-Wilshire
Cully
East Columbia
Hollywood
Madison South
Rose City Park
Roseway (Madison North)
Sumner
Sunderland

Neighbors West/Northwest (W/NW)

1819 NW Everett, Rm 205
Portland, OR 97209
223-3331
223-5308 (FAX)

Arlington Heights
Forest Park
Goose Hollow
Hillside
Linnton
Northwest District
Northwest Industrial
Pearl District
Sylvan-Highlands

East Portland District Coalition (EPDC)

1917 SE 122nd Ave
Portland, OR 97233-1303
256-0014
256-1421 (FAX)

Argay
Centennial
Hazelwood
Mill Park
Parkrose
Parkrose Community Group
Parkrose Heights Association of Neighbors
Powellhurst-Gilbert
Wilkes

Northeast Coalition of Neighborhoods (NECN)

4815 NE 7th
Portland, OR 97211
823-4575
823-3150 (FAX)
823-4112 (Youth Gangs)

Alameda
Boise
Concordia
Eliot
Grant Park
Humboldt
Irvington
King
Piedmont
Sabin
Sullivan’s Gulch
Vernon
Woodlawn
North Portland Neighborhood Office* (NPNO)

2410 N Lombard
Portland, OR 97217
823-4524
823-3162 (FAX)

Arbor Lodge
Bridge ton
Cathedral Park
Hayden Island
Kenton
Overlook
Portsmouth
St. Johns
University Park

Southwest Neighborhood Information, Inc. (SWNI)

7688 SW Capitol Highway
Portland, OR 97219
823-4592
823-3161 (FAX)

Arnold Creek
Ashcreek
Bridlemile-Robert Gray
Collins View
Corbett-Terwilliger-Lair Hill
Crestwood
Far Southwest
Hayhurst
Homestead
Maplewood
Markham
Marshall Park
Multnomah
South Burlingame
West Portland Park
Wilson

Southeast Uplift (SEUL)

3534 SE Main
Portland, OR 97214
232-0010
232-5265 (FAX)

Ardenwald/Johnson Creek
Brentwood-Darlington
Brooklyn
Buckman
Center
Creston-Kenilworth
Eastmoreland
Foster-Powell
Hosford-Abernethy
Kerns
Laurelhurst
Lents
Montavilla
Mt. Scott-Arleta
Mt. Tabor
Pleasant Valley
Reed
Richmond
Sellwood-Moreland
South Tabor
Sunnyside
Woodstock

Association for Portland Progress* (APP)

520 SW Yamhill, Suite 1000
Portland, OR 97204
224-7916
323-9186 (FAX)

Downtown Community
Old Town/Chinatown

Unaffiliated

Healy Heights
Lloyd District Community Association
Southwest Hills Residential League
Woodland Park

*Not a Coalition
ORDINANCE No. 159923

An Ordinance repealing the present Chapter 3.96, Office of Neighborhood Associations, and substituting a new chapter relating to neighborhood associations.

The City of Portland ordains:

Section 1. The Council finds:

1. That communication between the City of Portland, its citizens and citizen groups is necessary for Portland to be and remain a responsive local government.

2. That the Office of Neighborhood Associations is the City bureau charged with promoting and maintaining accessibility to City government for individual citizens and neighborhood associations and it is necessary for that office to have its duties and responsibilities sufficiently set out so that it can perform its functions.

3. That throughout Portland, citizens have formed neighborhood associations and district coalition boards to address issues that affect the quality of their neighborhoods and act as forums for communication of their concerns to City government.

4. That certain minimum standards for neighborhood associations and district coalition boards are necessary so that those groups can be recognized as an important and bona fide communicative link between the City and its citizens.

5. That the provisions of the existing Chapter 3.96 do not adequately fulfill the current needs of the Office of Neighborhood Associations, its constituent neighborhood associations and district coalition boards.

NOW, THEREFORE, the Council directs:

a. The present Chapter 3.96 is hereby repealed and a new chapter is substituted in lieu thereof, to be numbered, titled and read as follows:
Chapter 3.96

OFFICE OF NEIGHBORHOOD ASSOCIATIONS

3.96.010 Purpose. This chapter sets out the basis for City recognition of neighborhood associations, district coalition boards, and the responsibilities and benefits accruing thereto; creates the Office of Neighborhood Associations and sets out its functions, duties, and responsibilities.

Nothing is this chapter shall limit the right of any person or group to participate directly in the decision making process of the City Council or of any City agency.

3.96.020 Definitions. As used in this chapter the following terms have the meanings given them in this section.

(1) City Agency. Includes all departments, bureaus, offices, boards, and commissions of the City of Portland.

(2) Neighborhood Association. A group of people organized for the purpose of considering and acting upon any of a broad range of issues affecting the livability and quality of their neighborhood. A neighborhood association may be "recognized" by the City. A recognized neighborhood association is one which meets the minimum standards of this chapter and applicable guidelines adopted by the Office of Neighborhood Associations.

(3) District Coalition Board. The geographically defined neighborhood-based contracting agent with the City which serves as an information resource for citizens and a provider of citizen participation and crime prevention services. It is primarily composed of persons selected by member neighborhood associations and such other persons as are provided for in the board's by-laws.

3.96.030 Minimum Standards for Neighborhood Associations. In order to be eligible to receive City assistance that is provided for in this Chapter, neighborhood associations shall meet those guidelines adopted by the Office of Neighborhood Associations including but not limited to the provisions regarding membership, boundaries, grievances and dissent.
3.96.040 Functions of Neighborhood Associations. Any neighborhood association may:

(1) Make recommendation(s) concerning a particular action, policy or other matter to any City agency on any topic affecting the livability of the neighborhood, including but not limited to land use, housing, community facilities, human resources, social and recreational programs, traffic and transportation, environmental quality and public safety;

(2) Assist City agencies in determining priority needs of the neighborhood;

(3) Review items for inclusion in the City budget and make recommendations relating to budget items for neighborhood improvement; and

(4) Undertake to manage projects as may be deemed appropriate by the neighborhood association to benefit their neighborhood.

3.96.050 Functions of District Coalition Boards. The Office of Neighborhood Associations may choose to administer services to neighborhood associations through district coalition boards. In order to provide efficient delivery of services to neighborhood associations, a district coalition board shall:

(1) Facilitate communication between citizens and government; provide training and orientation, information and support services to neighborhood associations within the coalition;

(2) Administer contractual funds, develop a budget, and operate a neighborhood office in accordance with Guidelines established by the Office of Neighborhood Associations; and

(3) Promote citizen participation in all efforts which contribute to neighborhood livability within the prescribed geographic area of the coalition.

3.96.060 Responsibilities of Neighborhood Associations.

(1) All neighborhood associations shall be required to give reasonable notice to affected persons of neighborhood association
elections and planning efforts prior to the commencement of those actions.

(2) Neighborhood associations shall abide by all applicable statutes, rules, and regulations, both municipal or state, regulating open meetings and public records.

(3) Neighborhood associations shall include affected City agencies in discussion when engaged in planning efforts which affect neighborhood livability and shall cooperate with City agencies in seeking outside sources of funding for neighborhood projects affecting neighborhood livability.

3.96.070. Responsibility of City Agencies.

(1) City agencies shall notify all neighborhood associations affected by planning efforts or other actions affecting the livability of the neighborhood(s).

(2) City agencies shall include affected neighborhood associations and district coalition boards in planning efforts which affect neighborhood livability.

(3) Notice of pending policy decisions affecting neighborhood livability shall be given to the neighborhood association(s) affected at least thirty (30) days prior to final action on the decision by a City agency. If said 30 day period may injure or harm the public health, safety, welfare, or result in a significant financial burden to the City, this notice provision shall not apply.

3.96.080. Office of Neighborhood Associations.

There is hereby established and created an Office of Neighborhood Associations which shall consist of a Director and such other employees as the Council may from time to time provide. In order to facilitate citizen participation and improved communication between citizens, neighborhood associations, district coalition boards and the City, the Office of Neighborhood Associations shall:

(1) Notify interested persons of meetings, hearings, elections and other citizen participation events;

(2) Assist neighborhood associations and district coalition
boards and others in planning and developing programs for citizen participation, crime prevention, dispute resolution and citizen budget review;

(3) Act as an information clearinghouse and resource to neighborhood associations, citizens or other groups;

(4) Promote and facilitate open communication among City agencies, neighborhood associations and district coalition boards;

(5) Support and promote citizen involvement within the neighborhood associations framework; and

(6) Adopt and revise such guidelines as are deemed necessary for the implementation of this Chapter and for orderly citizen participation in City government through neighborhood associations and district coalition boards. In so doing, the Office of Neighborhood Associations shall involve neighborhood associations and other interested citizens as necessary.

3.96.090. Assistance to Neighborhood Associations.

(1) Any neighborhood association meeting the minimum standards established by 3.96.030 is entitled to and may request assistance from the Office of Neighborhood Associations in the performance of its functions.

(2) If a neighborhood association violates or fails to continuously meet the minimum standards contained in this Chapter, the Office of Neighborhood Associations may suspend partial or all assistance to that neighborhood association until such time as it achieves compliance.

(3) Open and fair grievance procedures shall be established for when handling complaints made against a neighborhood association, district coalition board, or the Office of Neighborhood Associations.

Passed by the City Council, July 29, 1987
INTRODUCTION
to the 1991 Revised Guidelines

The purpose of Neighborhood Associations is to consider and act upon citizen needs. A main function of Neighborhood Associations is to assist and broaden communication between citizens and government on matters affecting neighborhood livability and to encourage citizen participation in many levels of decision-making. Neighborhood Associations are open to everyone and are representative of those citizens who choose to be involved. Through an Ordinance adopted by the Portland City Council in 1974, the Office of Neighborhood Associations was established, as well as a process for recognizing Neighborhood Associations and providing support and assistance to them. Over the years, concerned and creative citizens have made many positive improvements in the livability of Portland. Assisting in such efforts is what the neighborhood program is all about.

These Guidelines for Neighborhood Associations, District Coalitions and the Office of Neighborhood Associations describe the components and the procedures for the smooth functioning of this neighborhood program. The Guidelines acknowledge and respect the inherent diversity within the neighborhood network. They establish a common base from which each Neighborhood Association and District Coalition can carry out its own activities.

The Guidelines provide a regulatory framework for the Neighborhood Associations, seven District Coalitions, the Office of Neighborhood Associations and thousands of citizen volunteers seeking information about and an understanding of the different components of the neighborhood system.

It is important to note the legal status of these Guidelines as they apply to Neighborhood Associations, District Coalitions and the Office of Neighborhood Associations. The Guidelines have been adopted by City ordinance to govern the expenditure of public money provided by the City of Portland to assist Neighborhood Associations and District Coalitions in carrying out their activities. Therefore, the Guidelines have the status of minimal legal requirements for Coalitions and recognized Neighborhood Associations.

Appendix
The neighborhood movement has grown and evolved over the past eighteen years. These Guidelines are the first update and describe the way the system works today. Over the coming years, as needs and structures continue to evolve, future changes may be incorporated into the Guidelines.

It should be noted that nothing in this document shall limit the right of any person or group to participate directly in the decision-making process of the City Council or any City agency.

**Note:** This version of the ONA Guidelines refers to the Oregon Public Meetings and Public Records Law (ORS 192). The law is no longer applicable to neighborhood associations and coalitions. It has been replaced by an “Open Meetings and Records Policy” which is still in draft form but is summarized in the main body of this document. When finished, the complete policy will be available from ONA and from the coalition offices.
I. DEFINITIONS

NEIGHBORHOOD ASSOCIATION

A neighborhood association is a group of people organized for the purpose of considering and acting upon any of a broad range of issues affecting the livability and quality of their neighborhood. A neighborhood association normally functions as a non-profit organization or is incorporated as a non-profit.

RECOGNIZED NEIGHBORHOOD ASSOCIATION

A recognized Neighborhood Association is one which meets the minimum standards of the City of Portland Code (Chapter 3.96) and applicable guidelines adopted by the Office of Neighborhood Associations and is currently recognized by ONA. ONA formally recognizes the Neighborhood Association with a Letter of Recognition which remains in effect unless the Neighborhood Association fails to meet the minimum standards and guidelines.

DISTRICT COALITION

A District Coalition is an independent non-profit corporation which contracts with the Office of Neighborhood Associations to facilitate citizen participation and neighborhood crime prevention services to Neighborhood Associations and citizens within a geographically defined area. The Board of a District Coalition (DCB) is primarily composed of representatives from its member Neighborhood Associations.

OFFICE OF NEIGHBORHOOD ASSOCIATIONS (ONA)

ONA is an agency of the City of Portland whose purpose is to facilitate citizen participation and improved communication among citizens, Neighborhood Associations, District Coalitions and the City.
II. REQUIREMENTS FOR BEING RECOGNIZED AS A NEIGHBORHOOD ASSOCIATION BY THE CITY OF PORTLAND AND TO BE ELIGIBLE FOR SERVICES FROM ONA

A. Basic Requirements

Neighborhood Associations which meet the following requirements will upon request be officially recognized by the City of Portland, and be eligible for the range of services provided by the Office of Neighborhood Associations and/or the District Coalition Boards:

1. Membership

Maintain membership which is open to any person who lives and/or owns any real property within the recognized boundaries of the Neighborhood Association. Other individuals or organizations may be members as further set forth in each Neighborhood Association’s bylaws.

2. Boundaries

Have clearly stated boundaries in its bylaws. The boundaries should not overlap those of any other Neighborhood Association, except to the extent that each Neighborhood Association affected agrees in writing. (See also Section VI.)

3. Non-Discrimination

A Neighborhood Association must not discriminate against individuals or groups on the basis of race, religion, color, sex, sexual orientation, age, disability, national origin, income, or political affiliation in any of its policies, recommendations or actions.

4. Dues

Membership contributions may be collected on a voluntary basis only.
5. **Bylaws**

File and maintain a complete and up-to-date set of bylaws at the Office of Neighborhood Associations and the appropriate District Coalition Office.

6. **Grievances**

Bylaws shall include provisions relating to the resolution of grievances concerning the activities, policies or recommendations of the Neighborhood Association. (See also Section VII.)

7. **Meeting Requirements**

Set forth meeting requirements for the membership in the Neighborhood Association bylaws.

8. **Public Meetings/Public Records Law/Minutes/Dissent**

Abide by Oregon statutes (ORS 192.410-192.710) relative to public meetings and public records. Official action(s) taken by a Neighborhood Association must be on record as a part of the minutes of each meeting. The minutes shall include a record of attendance and the results of any vote(s) taken. A summary of dissenting views should be transmitted along with any recommendation made by the Neighborhood Association to the City. (For further information, see the Addendum on Oregon Public Records and Public Meetings Law.)

**B. Liaison to District Coalition Board**

To have a voice in setting goals and priorities for a District Coalition and in determining the allocation of that Coalition's resources, a Neighborhood Association must participate as a member of its District Coalition Board.

1. Each Neighborhood Association which elects to participate should have a written procedure for selecting a delegate(s) to the District Coalition Board.

2. To become affiliated with a District Coalition, a recognized Neighborhood Association shall obtain a written agreement with the appropriate District
Coalition Board and inform ONA no later than the end of the current calendar year. Affiliation shall become effective at a time agreed to by the District Coalition Board and the Neighborhood Association.

C. **Recognition as a Neighborhood Association by the City of Portland**

A Neighborhood Association meeting the requirements in Section II-A will upon request be recognized by the City of Portland. The Office of Neighborhood Associations will send a "Letter of Recognition" to the Neighborhood Association. Recognized Neighborhood Associations are entitled to receive services including, but not limited to:

1. Placement on the ONA "contact sheet" which lists the names, addresses and phone numbers of the Neighborhood Association, its president and a designated contact person. This "contact sheet" is widely used throughout the City government for informational mailings relating to a variety of topics;

2. Notification by all appropriate City bureaus as required in the City Code on all matters that fall within its boundaries;

3. Placement on official Neighborhood Association maps, in brochures and handbooks relating to neighborhood affairs; and,

4. Support services when affiliated with a District Coalition Board which may include assistance with general communications, crime prevention activities, newsletters, grant writing, activity planning, public relations, and general information and referral.
III. **ROLE AND RESPONSIBILITY OF DISTRICT COALITION(S)**

A. Except as otherwise stated, the working and procedural relationship(s) among Neighborhood Associations, District Coalitions and District Coalition staff shall be determined by the groups involved, and these relationships shall be respected by the Office of Neighborhood Associations.

B. **District Coalition Boards**

Each District Coalition is represented by a District Coalition Board (DCB) which is composed of delegates duly selected by member Neighborhood Associations and any at-large members provided for in the Coalition bylaws. District Coalition Boards are the neighborhood-based contracting agents with the City which support citizen participation and provide crime prevention services. As the contracting agent for the Coalition, each Board must ensure that the Coalition meets the following requirements:

1. **Incorporation**

   Be a not-for-profit corporation in good standing and registered with the Oregon Corporation Commissioner.

2. **Tax-exempt Status**

   Qualify for exemption from corporate taxation under either 26 USC 501(c)(3) or 26 USC 501(c)(4).

3. **Bylaws**

   Maintain a current copy of the District Coalition's bylaws with the Office of Neighborhood Associations.

4. **Personnel Policies**

   Develop a set of Personnel Policies, which include hiring procedures, internal grievance procedures, and procedures for annual performance reviews of the District Coalition's staff.
5. **Affirmative Action**

Have an Affirmative Action and Equal Opportunity Policy approved by the City.

6. **Public Meeting/Public Records Law**

Abide by Oregon Statutes (ORS 192.410-192.710) relative to public meetings and public record(s). (For further information, see Attachment A on Oregon Public Meetings and Public Records Law.)

7. **Non-Discrimination**

Not discriminate against individuals or groups on the basis of race, religion, color, sex, sexual orientation, age, disability, national origin, income, or political affiliation in any of its policies, recommendations or actions.

8. **Grievances**

Have bylaws which include provisions for the resolution of grievances concerning the activities, policies, or recommendations of the District Coalition (See also Section VII.)

9. **Meeting Minutes**

Record in the minutes of each meeting all official action(s) taken by the District Coalition Board. Minutes shall include a record of attendance and the results of any vote(s) taken. A copy of the minutes with dissenting views highlighted should be transmitted along with any recommendation made by the DCB to the City.

10. **City Contract**

Administer all City contractual funds, develop District Coalition budget, and negotiate contracts in accordance with the procedures established by the Office of Neighborhood Associations and in line with standard accounting and business practices.
11. **Annual Work Program**

Develop an annual work program with objectives set by the DCB and submit same to the Office of Neighborhood Associations.

12. **Reports to ONA**

File a written progress report at mid-year and an annual accomplishments report at the end of the contract year with the Office of Neighborhood Associations.

13. **Allocations to Neighborhood Associations**

Establish written policies and procedures for the allocation of contractual funds for printing and mailing to affiliated Neighborhood Associations.

14. **Newsletter Policies**

Agree to uphold ONA newsletter policies. Ensure compliance with federal postal service regulations for bulk mailings and 501(c)(3) or 501(c)(4) regulations for not-for-profit organizations. (See Newsletter Policies, Section VIII.)

15. **Staff Salaries**

Compensate staff paid by ONA funds according to the salary ranges provided by the Office of Neighborhood Associations.

16. **Orientation**

Provide for the orientation of Neighborhood Association members and District Coalition Board members on the operations and procedures of the DCB and the District Office. Orientation topics or
materials may include materials related to the activities of the District Coalition:

Important dates (e.g. District Coalition Board meetings, Neighborhood Association meetings, upcoming workshops and special events)
District Coalition Board policies and procedures
ONA and District Coalition Board office resources
Outreach and advocacy techniques.

17. **Staff Evaluation**

Evaluate the performance of District Coalition staff annually.
IV. ROLE AND RESPONSIBILITY OF THE CITY OF PORTLAND
OFFICE OF NEIGHBORHOOD ASSOCIATIONS

The Office of Neighborhood Associations will meet the following requirements:

1. Negotiate contracts and maintain fiscal and program accountability for the funds routed to each District Coalition through its Board.

2. Monitor for compliance and enforce the contracts entered into between the City and the District Coalitions through their Boards.

3. Act as an information clearinghouse and resource to Neighborhood Associations and other citizens or groups.

4. Provide for orientation on ONA/City structure and procedures to Neighborhood Association Boards, District Coalition Boards, staff, and other interested citizens.

5. Facilitate open communication among City bureaus, other government agencies, Neighborhood Associations, District Coalition Boards and other citizens.

6. Assist Neighborhood Associations and District Coalition Boards in planning, developing and coordinating programs for citywide citizen participation and crime prevention activities.

7. Process requests from Neighborhood Associations seeking recognition from the City.

8. Maintain a current listing of all Neighborhood Associations and contact persons for each group.

9. Assist District Coalition(s) and Neighborhood Associations in identifying and submitting proposals for alternative funding sources for expanding citizen participation services.

10. Manage the Neighborhood Mediation Program, Neighborhood Needs Program, the citizens Bureau Advisory Committee Process, and the Refugee Program and provide management services to the Metropolitan Human Relations Commission and Portland/Multnomah Commission on Aging.
11. Publicize the citizen participation activities and meetings of the Neighborhood Association network in print and electronic media and other forums.

12. Respond to complaints about Neighborhood Associations or District Coalition(s) pertaining to their activities, policies or actions.

13. Encourage City bureaus to increase their outreach and timely and appropriate notification to citizens of matters affecting their neighborhood.

14. Report to the Commissioner-in-Charge on activities and concerns relating to citizen participation, crime prevention, and other programs funded through the office.

15. Make provisions for assisting newly forming Neighborhood Associations.

16. Within budget and program limits, provide minimum services to recognized Neighborhood Associations not affiliated with a District Coalition, including printing and mailing support, appropriate notification to citizens on matters affecting their neighborhoods, and general assistance.

17. Develop an annual work plan with the ONA Bureau Advisory Committee and in communication with the District Coalitions.
V. ROLE AND RESPONSIBILITY OF DISTRICT COALITION STAFF

The staff hired by each District Coalition Board (DCB) is primarily funded with monies from the District Coalition contract with the City. The staff serves the District Coalition and is accountable to it. The DCB is the employer -- not the City. The staff is subject to the DCB personnel policies, and staff performance should be measured in light of these policies and in furthering the activities set out in each District Coalition annual work plan.

All personnel issues relating to these employees are the responsibility of the District Coalition Board. It is recommended that each Board clearly establish the supervisory relationship between the Board and staff and among staff members themselves in order to have positive communication in both directions.

A primary role of a District Office is to increase the effective communication and flow of information between citizens and government by providing support to citizens who are involved in neighborhood activities, particularly activities of recognized Neighborhood Associations. Staff should provide training, orientation, information and consultation to Neighborhood Associations and other citizens according to the policies and directives of the District Board.

It is the role of staff to be a resource to citizens who in turn advocate a particular position on an issue, rather than for staff to become advocates themselves. In short, the staff role is to work to increase citizen participation and to provide technical support on pertinent issues. Advocacy of neighborhood concerns is and should be left to the citizens, except when staff is specifically directed to do otherwise by the Board.
VI. NEIGHBORHOOD ASSOCIATION AND DISTRICT COALITION BOUNDARIES

A. Designating Neighborhood Boundaries

Portland neighborhoods have a unique historic identity and their boundaries should be maintained and respected.

1. Recognized Neighborhood Associations are responsible for establishing their own boundaries and describing them accurately in their bylaws.

2. Recognized Neighborhood Associations desiring to change their boundaries shall do so in cooperation with adjoining Associations.

3. All changes in boundaries must have the written consent of the recognized Neighborhood Associations affected.

4. The District Coalition Board and the Office of Neighborhood Associations should be promptly notified in writing of all boundary changes so that notification processes, maps and brochures can be kept current and accurate.

B. Resolution of Boundary Disputes

Boundary disputes should be resolved at the Neighborhood Association or District Coalition Board level. If two or more Neighborhood Associations are unable to agree to a proposed boundary change the District Coalition Board shall assist in resolving the dispute through the following process:

1. The District Coalition Board and the Neighborhood Associations shall meet together to review the proposed boundary changes and attempt to reach a compromise solution. The Neighborhood Mediation Center is available as a helpful resource if requested.

2. If a solution to the boundary dispute cannot be reached by the affected Neighborhood Associations, they may select an alternate process, such as requesting a decision from the District Coalition Board, or a survey or vote of the residents in all
affected Neighborhood Associations. Before any such process is undertaken to resolve a boundary dispute, it shall be clearly described and agreed to in writing by all affected Neighborhood Associations. The results of any such process shall be final.

C. Neighborhood Boundaries Falling Outside the Portland City Limits

Boundaries of recognized Neighborhood Association(s) may extend beyond the Portland city limits at the discretion of the Neighborhood Association. However, services to non-city residents may be limited by the District Coalition Board or the Office of Neighborhood Associations.

D. Overlapping Boundaries

Overlapping boundaries confuse identification, create duplication in service delivery and in the notification process and should be discouraged.

E. Size of Recognized Neighborhood Association

A boundary change resulting in a Neighborhood Association with less than 200 households should be discouraged.

F. Changes in District Coalition Boundaries

District Coalition(s) are allocated resources to provide services to a specified geographic area. Proposed changes in District Coalition boundaries will be negotiated during the contracting process between the Office of Neighborhood Associations and the affected District Coalition Boards.
VII. GRIEVANCE PROCEDURES

Any major grievance or complaint against a Neighborhood Association or a District Coalition must be filed in writing with the appropriate Neighborhood Association or District Coalition.

Resolving the grievance is the responsibility of the Neighborhood Association or the District Coalition involved. Each affected Board is responsible for following the grievance procedure set forth in its bylaws.

If necessary or desirable, the parties involved may request assistance from the Neighborhood Mediation Center. However, it is the responsibility of the parties involved to achieve a fair resolution of the grievance. If not otherwise provided for in the Association or Coalition bylaws and in cases where the parties cannot reach an agreement, a decision by the majority of the Neighborhood Association Board or District Coalition Board will be final.

In the event that a grievance is made against a Neighborhood Association or District Coalition concerning compliance with these Guidelines, and after all of the review procedures of the Neighborhood Association or District Coalition have been exhausted, a determination may be sought from the Office of Neighborhood Associations. The Office of Neighborhood Associations Director will review the grievance and make a determination after discussing the grievance with the parties involved, and after reviewing any material in support of or in opposition to the grievance. A request for corrective action, if required, will be made to the Neighborhood Association Board or District Coalition Board. The Neighborhood Association Board or District Coalition Board will be asked to respond in writing with a corrective action plan.

Any major grievance against the Office of Neighborhood Associations must be filed in writing with ONA. ONA shall respond to the written grievance within ten (10) working days. A subsequent meeting(s) shall be scheduled by request and at the convenience of both parties. If necessary or desirable, the parties involved may request a mediation process acceptable to both parties. Resolution of the grievance should be the sole responsibility of ONA and the other party.
VIII. **NEIGHBORHOOD AND DISTRICT COALITION NEWSLETTER POLICIES**

The following are newsletter policies for newsletters funded with City dollars:

1. Neighborhood Associations and District Coalitions are responsible for the content of their newsletters. Neighborhood Associations, using District Coalition funds for printing and/or distribution of newsletters, will be expected to familiarize themselves with and comply with all applicable U.S. Postal Service and Internal Revenue Service regulations that affect a District Coalition's not-for-profit status. If upon review the content is not in compliance with these regulations, the matter will be resolved cooperatively with the Neighborhood Association newsletter editor and the District Office.

2. A copy of each newsletter should be on file at the District Office.

3. Articles presenting personal opinions of a citizen must be identified as such and the name of the author must be included.

4. Newsletters should not include statements which could be considered libelous or defamatory.

5. Statements in support of or in opposition to any political candidate or ballot measure cannot be printed.

6. Positions taken or recommendations voted on by a Neighborhood Association are matters of record and may be reported in newsletters. Efforts should be made to report positions taken by neighborhood boards and, if possible, to include principle topics to be discussed at board, committee or general membership meetings.
IX. AMENDMENTS TO OFFICE OF NEIGHBORHOOD ASSOCIATIONS GUIDELINES

Any party wishing to propose amendment(s) to the Guidelines may do so by submitting the proposed amendment(s) in writing to ONA.

The Office of Neighborhood Associations, in cooperation with neighborhood groups, will review the Guidelines at least every four years. A committee composed of a representative of each District Coalition, District Coalition staff and ONA staff, and a citizen representing the unaffiliated neighborhoods will receive and review proposed changes and revisions to the Guidelines.

Proposed amendments will be developed and distributed to each Neighborhood Association and District Coalition for review and comment during a 60-day period. A public hearing will be scheduled to receive oral and written testimony from all interested parties.

The committee will then review the citizen comments and develop and distribute amendments to refer to the Commissioner-in-Charge for approval.
These sample bylaws outline the information that should be included in your neighborhood association bylaws. The wording is suggested wording only. Neighborhood associations are free to create bylaws that are reflective of their own organization.

ARTICLE I  PURPOSE

Section 1  NAME OF ORGANIZATION: The name of the organization shall be the Sample Neighborhood Association (SNA).

Section 2  PURPOSE OF SNA: The purposes for which SNA is organized are:

a) To enhance the livability of the area by establishing and maintaining an open line of communication and liaison between the neighborhood, government agencies and other neighborhoods.

b) To provide an open process by which all members of the neighborhood may involve themselves in the affairs of the neighborhood.

c) To do and perform all of the activities related to said purposes, to have and enjoy all of the powers granted and engage in any lawful activity for which corporations may be organized under ORS Chapter 61.

d) To be organized exclusively for educational, scientific and charitable purposes. Notwithstanding any statement of purposes or powers aforesaid, this association shall not, except to an insubstantial degree, engage in any activities or exercise any powers that are not in furtherance of its specific and primary purpose.

ARTICLE II  MEMBERSHIP

Section 1  MEMBERSHIP QUALIFICATIONS: Membership in SNA shall be open to any person who lives and/or

Appendix
owns any real property within the recognized boundaries of SNA. (Other individuals or organizations may be members as further set forth in each neighborhood association's bylaws.)

Section 2

MEMBERSHIP VOTING: All residents and property owners located with SNA boundaries shall have one vote each to be cast during attendance at any general or special meeting. One representative from each government agency and nonprofit organization located within SNA boundaries shall have the same privilege as the residents listed above.

ARTICLE III

DUES: Charging of dues or membership fees shall not be made; however, voluntary contributions will be accepted. Activities to raise funds for SNA use may be held if appropriate.

ARTICLE IV

MEMBERSHIP MEETINGS

Section 1

GENERAL MEMBERSHIP MEETINGS: There shall be at least two general membership meetings yearly. The meetings shall be convened in the fall and spring and upon any day decided upon by the majority vote of the board of directors. Notification for all general meetings shall require seven (7) days advance written or telephone notice to all active members of SNA and public notice. "Active member" is defined as one who has attended at least one of the last two general or special meetings of the membership.

Section 2

SPECIAL MEMBERSHIP MEETINGS: Special meetings of the membership may be called by the chairperson or the board of directors as deemed necessary. Notification and purpose(s) of the special meeting shall require seven (7) days advance written or telephone notice to all active members of SNA and public notice.

Section 3

AGENDA: Subject to the approval of the board of directors, the chairperson shall prepare the agenda for general and special meetings of the membership. Any person may add an item to the agenda by submitting the item in writing to the board of directors at least seven (7) days in advance of the membership meeting. Any member of SNA may make a motion to add an
item to the board, general or special agendas at those respective meetings. Adoption of that motion requires a second and majority vote.

Section 4

QUORUM: A quorum for any general or special meeting of SNA shall be the number of members in attendance. Unless otherwise specified in these bylaws, decisions of SNA shall be made by a majority vote of those members present at any meeting.

Section 5

PARTICIPATION: Any general, special, board or committee meeting is open to any person and all who wish to may be heard. However, only those eligible for membership are entitled to vote. All actions or recommendations of the general or special meetings shall be communicated to all affected parties, including minority reports.

Section 6

PROCEDURES: The SNA shall follow Robert's Rules of Order (Revised) in all areas not covered by the bylaws.

ARTICLE V

BOARD OF DIRECTORS

Section 1

NUMBER OF BOARD MEMBERS: The board of directors shall determine the exact number of board positions annually. There shall be at least ___ and no more than ___ board members.

Section 2

TERMS OF OFFICE: Each director shall hold office for a term of one (1) year for which he/she is elected or appointed and until his/her successor shall have been elected or appointed to take office. (The season in which a position is open for election will be indicated in parenth following that position's duty description.)

Section 3

ELIGIBILITY FOR BOARD SERVICE: Only persons eligible for SNA membership shall be qualified to hold an elected or appointed position.

Section 4

DUTIES OF BOARD MEMBERS: The affairs of SNA shall be managed by the board in the interim between general meetings. The board shall be accountable to the membership; shall seek the views of those affected by any proposed policies or reactions
before adopting any recommendation on behalf of SNA; and shall strictly comply with these bylaws.

Section 5

ELECTION OF BOARD MEMBERS: Board members shall be elected annually by a vote of the membership at its annual meeting. The names of all candidates for the board shall be placed in nomination. Secret written ballots shall be used for voting for board members. Election requires a majority vote of the membership present.

Section 6

BOARD VACANCIES: The board may fill any vacancy on the board or a committee by majority vote of the board in cases involving absences by a board or committee member from three (3) consecutive meetings. A member appointed to fill a vacancy shall serve the remainder of the unexpired term and until his/her successor is elected or appointed.

Section 7

DUTIES OF BOARD OFFICERS

a) CHAIRPERSON (ELECTED IN SPRING): The chairperson shall prepare the agenda and preside at all meetings of the board and membership; shall appoint members of committees not elected, with a majority approval of the board, except for members of the Grievance Committee.

b) VICE CHAIRPERSON (ELECTED IN FALL): The first alternate shall assist the chairperson; in the chairperson's absence shall function as chairperson; shall serve as a member of the area board of directors representing SNA.

c) SECRETARY (ELECTED IN SPRING): The secretary shall keep minutes and written records of majority and minority opinions expressed at all meetings; shall be responsible for all correspondence of SNA; shall make records of SNA available for inspection for any proper purpose at any reasonable time.

d) TREASURER (ELECTED IN FALL): The treasurer shall be held accountable for all funds and shall give an accounting at each general
meeting; shall receive, safekeep and disburse SNA funds, but such disbursement shall require the signature of one other board member.

e) BOARD MEMBERS-AT-LARGE AND COMMITTEE CHAIRPERSONS:
Chairpersons of committees shall inform the board and SNA of all activities of their respective committees.

Section 8

BOARD MEETINGS: The board shall meet at least fourteen (14) days prior to any general or special membership meeting and at any other time the chairperson may designate. These meetings shall be open session; however, only board members shall be entitled to vote. A quorum for board meetings shall be the number of board members in attendance; decisions shall be made by majority vote. Directors shall be notified of board meetings in writing or by telephone in advance. A majority of board members, by signed petition, may call a board, general or special meeting.

Section 9

EMERGENCY POWERS OF THE BOARD: In such cases where the board is required to provide neighborhood response before the question is presented to the membership, the board must indicate to the questioner that this is the case, and shall present the action taken at a special or general meeting with 30 days, or within a reasonable time for ratification by the membership where circumstances dictate.

Section 10

TERMINATION FOR NONATTENDANCE: Board members failing to attend three consecutive board meetings shall be automatically deemed to have resigned from the board.

ARTICLE VI

COMMITTEES: The board shall establish both standing and ad hoc committees as it deems necessary. Committees shall make recommendations to the board for board actions. Committees shall not have the power to act on behalf of the organization without specific authorization from the board.
ARTICLE VII

CONFLICT OF INTEREST

Section 1

DEFINITION: A conflict of interest exists for a member or board member whenever the member or board member holds a personal financial interest which will be impacted by the action or inaction by SNA on a proposal before the membership or board. A personal financial interest shall include a financial interest held by the member or board member and/or by members of their immediate family. A personal financial interest includes an ownership interest above 5% of a business which will be impacted by the decision of SNA. Examples of personal financial interest would include: Employment by SNA; ownership of property the use or control of which is being considered by SNA; plans to purchase property the use or control of which is under discussion by SNA, etc.

Section 2

DECLARING THE CONFLICT OF INTEREST: Whenever a member of board member determines that they have a conflict of interest relating to an item under discussion, they must inform the body (membership or board) hearing the proposal that the conflict of interest exists.

Section 3

ABSTENTION FROM VOTING: Members or board members shall not vote on matters in which they have a conflict of interest.

ARTICLE VIII

GRIEVANCE PROCEDURES

Section 1

ELIGIBILITY TO GRIEVE: A person or group adversely affected by a decision or policy of SNA may submit in writing a complaint to any member of the Grievance Committee.

Section 2

COMPLAINT RECEIPT: Within seven (7) days of receipt of the complaint, the committee shall arrange with the petitioner a mutually acceptable place, day and hour for a review of the complaint, and will, in writing, within thirty (30) days, recommend a resolution of the grievance to the board.

Section 3

FINAL RESOLUTION: The committee shall attempt to resolve the complaint and shall submit a report of
their recommendation and/or action to the complainant, board and membership. If the committee, board and petitioner cannot reach agreement, final resolution of the complaint shall be by vote of a majority of the membership at a general or special meeting.

ARTICLE IX  PROCEDURE FOR CONSIDERATION OF PROPOSALS

Section 1  SUBMISSION OF PROPOSALS: Any person or group, inside or outside the boundaries of SNA and any City agency may propose in writing items for consideration and/or recommendation to the board. The board shall decide whether proposed items will appear on the agenda of either the board, standing or special committees or general or special meetings.

Section 2  NOTIFICATION: The proponent and members directly affected by such proposals shall be notified in writing of the place, day and hour the proposal shall be reviewed not less than seven (7) days in advance.

Section 3  ATTENDANCE: The proponent may attend this meeting to make a presentation and answer questions concerning the proposal.

Section 4  DISSEMINATION: The SNA shall submit recommendations and dissenting views as recorded from the meeting to the proponent and other appropriate parties.

ARTICLE X  BOUNDARIES

Section 1  BOUNDARIES: Boundaries of SNA shall be defined as follows: Beginning at the ____________

ARTICLE XI  PUBLIC MEETINGS/PUBLIC RECORDS REQUIREMENT: SNA shall abide by all Oregon statutes relative to public meetings and public records. Official action(s) taken by SNA must be on record or part of the minutes of each meeting. The minutes shall include a record of attendance and the results of any vote(s) taken. A summary of dissenting views should be transmitted along with any recommendation made by SNA to the City.
ARTICLE XII

NON-DISCRIMINATION: SNA must not discriminate against individuals or groups on the basis of race, religion, color, sex, sexual orientation, age, disability, national origin, income, or political affiliation in any of its policies, recommendations or actions.

ARTICLE XIII

ADOPTION AND AMENDMENT OF BYLAWS: All amendments to these bylaws must be proposed in writing and submitted to members at least seven (7) days before voting on their adoption may proceed. Notice of proposal to amend the bylaws, specifying the date, time, and place for consideration, must be provided to all members at least seven (7) days before voting. Adoption of and amendments to these bylaws shall require a two-thirds (2/3) vote by the members present at a general meeting.
STANDING RULES OR OPERATING PROCEDURES

Many neighborhood associations find it helpful to adopt "standing rules" or "operating procedures" separate from the bylaws. These rules generally may be changed more easily than bylaws may be amended. The purpose of such rules is to record agreements of a particular board or set of members about how to conduct meetings and other activities. Such rules should never be in conflict with the bylaws - they should address more detailed procedures than are covered in the bylaws. The key concept of standing rules or operating procedures is that they reflect the desires of the current board or members and are changed when the desires/needs of the group change.

One group has adopted the following very simple standing rules for all meetings:

- One person speaks at a time.
- Speak from your own experience.
- No put-downs of self or others.
- No cross talk (i.e. no side conversations or interrupting the speaker to dispute points).

Other groups include a list of the committees established for the current year in their standing rules. They may also describe the method for selection of committee chairs (i.e. does the board chair appoint committee chairs or do committee members elect their own chair).

The rules may also incorporate detailed descriptions of board, committees, and committee chair responsibilities.

While all of the matters described above could be described in bylaws, including them in standing rules instead of the bylaws helps communicate to current members of the group that these are their rules, representing their choices. This prevents the problem of bylaw bog-down by many volunteer groups. Because bylaws are designed to be the major, long-term governing document, the process for amending them is designed to assure careful consideration. Bylaws that are overly detailed in describing operating procedures go out of date quickly as board and membership composition shifts. Many groups don’t have time or choose to use time to amend the bylaws and allow procedures to vary from those detailed in the bylaws. If the group keeps operating procedures out of the bylaws and changes them easily, it can maintain compliance more easily and have the advantage of clear written rules as a shared basis for operations.
The following is excerpted from the publication "Non-Profit Organizations, Public Policy, and the Political Process: A guide to the Internal Revenue Code and the Federal Election Campaign Act," prepared by Perkins Coie. This guide explains the federal rules that govern allowed political activities for nonprofit organizations that have tax-exempt 501(c)(3) or (c)(4) status. If your neighborhood association is a tax-exempt nonprofit or is part of a district coalition, this guide and additional information available from your district coalition office will help you determine the limitations on your political activity. District coalition offices have a complete copy of the publication for your reference.
Part II: Rules on Lobbying Activities

A 501(c)(3) organization is permitted to lobby. There is, however, a limit on the resources and time an organization may expend on lobbying activities. Lobbying may not make up a substantial part of a 501(c)(3) organization's total activity. In order to stay within this limit, an organization must determine: (1) whether a particular activity qualifies as "lobbying," and (2) how much of the organization's total activity may be directed toward lobbying.

Determining Whether an Activity is Lobbying

Lobbying is any activity directed toward influencing legislation. Legislation includes any act, bill, resolution, or similar item by Congress, a state legislature, or local governing body or by the public such as a referendum, constitutional amendment, or initiative. Activities to influence legislation are divided into two categories:

- **Direct Lobbying:** contacting members or staff of a legislative body (U.S. Congress, a state legislature, or local council) or a government employee who participates in the legislative process, with the intent of encouraging them to introduce, support, oppose, repeal or otherwise influence legislation. Telephone calls, letters and office visits to a member of Congress, testimony at a public hearing, or publication of materials to encourage passage of a bill are all lobbying activities.

- **Grassroots Lobbying:** communicating with the general public, directly or through your members to encourage them to lobby on a particular legislative proposal. Letters to a Senator's constituents requesting that they write to the Senator to oppose a piece of legislation is grassroots lobbying. (See page 7.)

What is not Lobbying?

There are some activities which a 501(c)(3) organization may engage in freely that are not considered lobbying, but nevertheless are related to the legislative process. Consequently, expenditures for these activities need not be allocated as lobbying expenses.

- **Provide technical advice.** If a 501(c)(3) organization receives a written request from a legislative committee or body to testify or advise on legislation, this assistance is not lobbying.
  - the request must be official (from a committee or the legislature, not simply an individual member) and in writing;
  - the organization's response must be directly related to the advice requested; and
  - every member of the legislative body making the request must have access to the information provided.

(Note: An organization may testify or appear before a legislative body without a formal written request, but the costs of the activity must be accounted for as a direct lobbying expense.)

- **Distribute or make available nonpartisan analysis, studies or research to the general public, including legislators.** Care must be taken that these materials...
are nonpartisan and "educational." While the rules to determine what is educational are unclear, the following guidelines may be used as such materials are prepared.

Nonpartisan educational materials:
* must give complete treatment of the facts so that the reader may develop an independent conclusion on the issue; if the facts are distorted, essential facts are left out, viewpoints are expressed with no factual basis, or inflammatory or disparaging language is used to express conclusions, the IRS is not likely to view the material as educational;
* may state the organization's point of view on the issue; however, again the facts must be fully and fairly discussed and not presented in a manner that advocates the organization's position;
* may not have a specific legislative objective; the purpose of the material may not be to prepare for or encourage future lobbying activity;
* should be available to the general public. Organizations may choose to issue a press release or to publicize the availability of educational materials. A group is not required to make a distribution to the general public, but may simply alert them to the availability of the material.

- **Communicate with public officials without attempting to influence legislation.** A 501(c)(3) organization may invite a legislator to an educational meeting to discuss legislation or issues, or learn more about the organization's activities.

- **Conduct "self defense" lobbying.** The costs of lobbying on legislation that has a potential effect of the existence of the organization, its duties, tax-exempt status, or deductibility of contributions are not lobbying expenses.

- **Communicate with "bona fide" members** (applies to organizations operating under the "Election Test" only, see page 7). A "bona fide" member is an individual who has affirmatively expressed a desire to become a member, and has some connection with the organization such as paying dues or contributing time.

  Communications with "bona fide" members about proposed or pending legislation of direct interest to the organization do not constitute lobbying so long as there is no request to take some action to influence the legislation. If the communication gives members directions to contact their legislators or the general public about the legislation, then the communication is considered lobbying.

- **Conduct training workshops.** Educational training to encourage a greater interest and understanding of governmental affairs is permissible. The workshops may cover a wide variety of topics including, but not limited to: general issue briefings; lobbying techniques such as letter writing campaigns and use of the media; and the legislative process. Public officials may be invited to speak as part of the program, but the workshop may not focus on a future lobbying campaign for specific legislation, or even how to lobby in a specific issue area. Providing lists of committee chairs and phone numbers, or key legislators working on a bill, for example, should be avoided.

- **Communicate with government officials about administrative procedures, regulations and enforcement.** Once a bill is passed, an organization may want to ensure that adequate regulations are drafted to implement and enforce the legislation. Working with executive branch staff during the regulatory process and later to monitor enforcement of the legislation is not lobbying activity, as long as the tone is educational.

- **Volunteer lobbying.** So long as they are not reimbursed, officers and members of an organization may lobby at their own expense. The costs associated with such activities are not considered lobbying expenditures of the organization. Note that these individuals must appear in their individual capacity and not as representatives of their organization. Further, volunteer lobbyist's out-of-pocket expenses are not tax-deductible as contributions to the organization or as out-of-pocket costs of volunteer activity.
Influencing the legislature's vote on an executive appointment. Activity to influence such a vote, for example, Senate confirmation of a judicial appointment, is lobbying.

Activities that are Difficult to Classify

There are a few activities which do not clearly fall into the category of influencing legislation, that may or may not be viewed by the IRS as lobbying. It is recommended that the organization seek additional advice on the specific activity and how to allocate the associated costs.

Participating in a briefing about specific legislation is not considered lobbying so long as the meeting is for educational or informational purposes. If the purpose, however, is to prepare participants to influence specific legislation, i.e., formulating and agreeing upon positions, planning lobbying strategy, then this “back-up” activity is lobbying.

Influencing assignments to legislative committees. It is unclear whether or not efforts to support or oppose the assignment of particular legislators to certain committees which deal with issues important to a 501(c)(3) organization are classified as lobbying.

How Much Lobbying is Permissible for a 501(c)(3) Organization?

While lobbying is permitted, it may not make up a “substantial part” of a 501(c)(3) organization’s activity. Therefore, an organization must ensure, by keeping careful records, that lobbying is limited to a less than substantial level of total activity. There are two alternative tests an organization may apply to determine its permissible level of lobbying.

Test #1: The Substantial Part Test

Any 501(c)(3) may spend an insubstantial percentage of its total budget on lobbying. In determining whether a substantial amount of an organization’s activity is lobbying, the IRS examines all of the facts and circumstances surrounding the organization. Although the IRS has never set a specific limit, courts have ruled that less than 5 percent of an organization’s annual budget may be expended on legislative activity. In applying this test, total annual expenditures are compared to annual expenditures for lobbying activities; lobbying expenditures must be less than 5 percent of the total. Note, however, that this test is not based solely on an organization’s expenditures, and that the IRS may consider other factors in determining substantiality, including:

- the actual number of hours devoted by staff and volunteers to lobbying as compared to educational activity; for example, large amounts of time spent by an executive officer or prominent public figure may indicate that lobbying is a higher priority than other educational programs.

- the visibility and frequency of legislative efforts, both in the day-to-day agenda of the organization and in the contents of its publications.

The subjective nature of the Substantial Part Test presents some interpretative difficulty because of the uncertainty of what other factors, in addition to actual expenditures, to consider. Thus, there are no clear guidelines to assist an organization in determining a permissible level of lobbying activity. An organization exceeding the threshold for permissible lobbying may be penalized by a revocation of its tax-exempt status, and therefore the use of a vague test for determining the threshold, such as the Substantial Part Test.
can be risky. Use of the Substantial Part Test is advisable only for organizations planning to conduct very limited lobbying programs.

Legislation currently before Congress would impose a tax on public charities and their managers for excessive lobbying activity.

Test #2: Election Test: The "Safe Haven Rules"

Alternatively, a 501(c)(3) organization may elect to spend more of its budget on lobbying activities by filing with the IRS its intention to stay within specific expenditure guidelines set out below. Election is made by filing IRS Form 5768, "Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation," to the IRS. The objective guidelines under the Election Test establish an exact percentage of an organization's total annual "exempt purpose" expenditures (generally the organization's total annual budget) which may be devoted to lobbying activity. The percentage is set by the size of an organization's annual budget.

### Election Test Expenditure Guidelines

<table>
<thead>
<tr>
<th>Total Annual &quot;Exempt Purpose&quot; Expenditures (generally total annual expenditures)</th>
<th>Percent That May Be Spent on Lobbying</th>
</tr>
</thead>
<tbody>
<tr>
<td>$500,000 or less</td>
<td>20%</td>
</tr>
<tr>
<td>$500,000 - $1 million</td>
<td>$100,000 + 15% of budget over $500,000</td>
</tr>
<tr>
<td>$1 million - $1.5 million</td>
<td>$175,000 + 10% of budget over $1 million</td>
</tr>
<tr>
<td>$1.5 million and over</td>
<td>$224,000 + 5% of budget over $1.5 million</td>
</tr>
</tbody>
</table>

Note: Total lobbying expenditures may not exceed $1 million.

In addition to these overall limits, no more than 25 percent of total lobbying expenditures may be spent on grassroots lobbying. Thus, if an organization's annual expenditures total $100,000, 20 percent ($20,000) may be spent on lobbying and only 25 percent of that ($20,000 ($5,000 may be spent on grassroots lobbying.

As long as an organization remains within these guidelines, the lobbying activity engaged in will be within allowable limits.

**Penalty for Excessive Lobbying:** The IRS imposes an excise tax on any excessive lobbying expenditures. The penalty is 25 percent of the amount of the overrun. If an organization is allowed to spend $100,000 on lobbying, but exceeds that limit by $12,000, the penalty will be $3,000.

A similar tax is imposed if the limit for grassroots lobbying is exceeded. Thus, if your expenditures for grassroots lobbying are more than 25 percent of your total lobbying expenses, the tax will be 25 percent of the overrun. If the IRS finds that an organization has exceeded the allowable lobbying expenditures by an average of 150 percent over a four-year period, it may revoke the tax-exempt status (though excessive lobbying over any period, as short as one or two years, may lead to revocation).
to lobby the Congress should consult the Secretary of the Senate or Clerk of the House about registration and reporting requirements.

**Similar State Requirements**

Many states have similar registration and reporting requirements for lobbying activities in the state legislature. Information regarding these requirements is generally available from the Secretary of State's office.

**Current Developments: IRS Proposed Lobbying Regulations**

The IRS published proposed regulations in 1996 to provide guidance to public charities on the allocation and definition of lobbying activities. These regulations are being reconsidered, and, as a consequence, cannot be applied. Because of their potential impact on lobbying activities, however, 501(c)(3) organizations may want to monitor IRS actions regarding these regulations either by checking with a large nonprofit organization which is following the rulemaking procedure, or a local counsel familiar with tax law.

**Part III: Rules on Political Activity**

A 501(c)(3) organization is strictly forbidden from engaging in any political activity on behalf of or in opposition to a candidate for public office. In complying with this restriction it is essential to distinguish between political activities which are prohibited, and voter education and registration activities that a 501(c)(3) organization may conduct even during an election year.

**Determining What is Political Activity**

Political activity is participation or intervention in any election campaign in support of or in opposition to a candidate for local, state, or national public office. A 501(c)(3) organization's activities may not directly or indirectly benefit a candidate. Determining whether a proposed activity is a "political activity" is difficult, but certain activities are clearly prohibited:

- Formal or informal endorsements of a candidate for public office. A candidate for public office is any person who offers or is proposed by others to run for elective public office. Thus, recruiting an individual to run for public office, or supporting an individual before he or she officially registers as a candidate is political activity.
- Publication or distribution of statements in favor of or in opposition to a candidate.
- Direct financial contributions or other support to a candidate, political party, or political action committee (PAC); a contribution to a political party constitutes indirect support for candidates and an expenditure to influence voter preference.
- In-kind contributions to a candidate, political party, or PAC including, but not limited to:
  - mailing, membership, or donor lists or other resources for fundraising;
  - provision of facilities or office space;

*It is essential to distinguish between political activities which are prohibited, and voter education and registration activities that a 501(c)(3) organization may conduct even during an election year.*
• staff time;
• organizing volunteers for a campaign;
• opposition research.

This list is by no means inclusive, but it provides examples of political activities which are strictly prohibited. As a general rule, the IRS’ principle concern is the use of an organization’s resources. A 501(c)(3) organization is prohibited from employing any resources (including funds, facilities, lists, staff) to influence voter preference or the outcome of an election. The penalty imposed on a 501(c)(3) organization for engaging in any of these political activities may be a revocation of tax-exempt status by the IRS.

Permissible Voter Education and Registration Activities

Nonpartisan voter education and registration activities are not prohibited and provide valuable contributions to public understanding of and debate about key issues. In planning and implementing such activities, it is essential to stay within the guidelines outlined below in order to avoid straying into the restricted arena of “political” activity. Because of the many uncertainties in the rules governing 501(c)(3) voter education activity, it is quite possible to inadvertently cross the line.

There follows a list of voter education and registration activities which, while not comprehensive, represents relatively common projects for 501(c)(3) organizations. Other activities not listed in this Guide may also be possible, but consultation with an attorney familiar with the laws governing tax-exempt organizations is advised. In any event, as you plan a specific activity of the kind described here, it is always helpful to have professional legal advice to assure that you have adequately addressed all legal issues.

Publication of Voting Records

A 501(c)(3) organization may publish and distribute voting records of incumbent members of the U.S. Congress or other elective bodies such as a state legislature or town council. Generally, a voting record lists selected pieces of legislation, a brief description of each, and an indication of how members voted.

Guidelines

■ Include all incumbents: do not single out certain legislators or members of one political party.

■ Do not identify candidates for reelection, or relate the voting record to a political campaign. There should be no comparisons drawn between an incumbent’s record and his or her opponent’s stand on an issue.

■ Cover a broad range of issues. The IRS has ruled that concentrating a vote analysis on a narrow range of issues is not permitted. It is not entirely clear what constitutes a narrow range of issues, but, for example, focusing solely on land conservation issues is clearly too narrow. However, a full array of environmental issues including: air, water, natural resources, arms control, and energy issues, and the budget legislation which affects them may be sufficiently broad. Whatever the issue orientation of the group, it is advisable to identify the broadest spectrum of related legislation.

■ How widely voting records may be distributed depends principally on whether or not the publication includes editorial comment on incumbents’ votes. If the publication reports incumbents’ votes with an indication of whether he or she voted in accordance with the organization’s position on the issue (using a plus or minus, for example), distribution must be restricted to members of the
General Guidelines for Voter Education
and Registration Activities

These guidelines apply to the planning and conduct of all voter education and registration activities.

- **Partisan statements of candidate or political party preference are prohibited.** No support or opposition to a candidate or political party may appear in written or oral statements. This restriction includes not only communications or publications which are distributed or made available as part of the project, but also, for example, buttons, bumper stickers, or T-shirts with political preferences, worn or displayed by staff or volunteers during the implementation of a project.

- **Voter education projects may not be designed or targeted to influence voter acceptance or rejection of a candidate.** For example, targeting media ads or literature distribution in a particular voting district to directly or indirectly assist or oppose a candidate or influence the outcome of an election is not permitted. Indications of such targeting would include focusing on swing areas in a voting district. This restriction does not prohibit 501(c)(3) organizations from conducting voter education activities during an election year. However, extra precautions should be taken to avoid the appearance of political activity.

- **Coordination of activity with a candidate's campaign or a political party is prohibited.** Clearly, if an organization is coordinating a candidate debate or issue briefing, discussions with campaign staff or the candidate are not prohibited. (See discussion of Nonpartisan Candidate Debates, page 13 and Issue Briefings, page 14.) Any cooperation which is intended to benefit a candidate or influence voter preference is restricted.

- **All materials and publications associated with voter education activities should include a disclaimer stating that the information or activity is in no way intended to reflect an endorsement or, opposition to, any candidate or political party.** A disclaimer assists in avoiding the appearance that a voter education activity might be a restricted political activity.

organization. However, comments or conclusions about an incumbent’s overall qualifications for office are prohibited, as are ratings or percentages of “correct” or “wrong” votes.

Voting records which include no editorial opinion or approval or disapproval of incumbents' votes may be distributed to the general public and media.

- **The voter guide should note the limitations of judging the qualifications of an incumbent on the basis of a few votes.**

- **Do not time distribution of the report to coincide with an election campaign; if the report goes out annually after the end of the legislative session in the fall as a regular activity of the organization, sending it in the fall of an election year may be permissible; but distribution may not be timed to coincide with the campaign season.**

- **Avoid targeting distribution** of the report to swing districts, electorally sensitive areas or only to areas or states where elections are taking place.
Candidate Questionnaires

Preparing a questionnaire to be circulated to all candidates running for a public office and compiling the responses for distribution in a voter guide may also be a permissible voter education activity.

Guidelines

- The questionnaire must be sent to all candidates running for the particular office; a concerted effort should be made to get responses from all candidates. If only one candidate responds, it is not advisable to publish the questionnaire.

- Cover a broad range of issues. The IRS has ruled that concentrating the vote analysis on a narrow range of issues is not permitted. Although it is not clear exactly what constitutes a narrow range of issues, concentrating solely on one set of issues, for instance, land conservation issues is too narrow. However, a full array of environmental issues including: air, water, natural resources, arms control, and energy issues, and the budget legislation which affects them may be sufficiently broad. Regardless of the organization's specific issue orientation, it is advisable to identify the broadest spectrum of related legislation.

- Questions should be framed without bias or preference for a particular position. For example, questions should not be framed with a clear indication of the right or wrong answer.

- Distribution. The voter guide may be made available to the general public.

Issue Education

A traditional function for a 501(c)(3) organization is providing research and analysis on key issues of importance to the organization and the general public. Issue education programs might include: radio, television, or newspaper advertisements to educate the public about an issue and where to get more information; a publication on an issue; or a conference or series of local meetings to discuss the issue.

Guidelines

- All programs must be strictly nonpartisan and educational. Review guidelines about what is educational, see page 5.

- If candidates are invited to participate in a conference or meeting, follow the guidelines for public forums. (see page 13.)

- Issue education on a contested or controversial issue, particularly if it is an issue being debated by candidates in a particular election, requires additional safeguards. An issue which has become a subject of considerable political debate such as the farm crisis or federal funding for abortion would be considered a contested issue. As a consequence, a 501(c)(3) voter education project on such an issue may give the appearance of intervening in political activity. It is advisable to seek legal assistance, beyond this Guide, before initiating a project with a controversial or contested issue as a focus. If an organization's educational materials present a point of view, the organization may appear to indirectly endorse one candidate over another. It is particularly important under these circumstances to include a disclaimer at public programs and in publications. In addition, follow the general guidelines on page 11 with care.
Public Surveys and Polling on Issues

A 501(c)(3) organization may conduct and publicize results from an issue survey or poll. It is advisable, however, to have an attorney review the contents of the poll or survey before beginning work on it.

Guidelines

- No questions in the survey or poll may relate to candidate or political party preference.
- Surveys and polls may be publicized and distributed to the media or the general public and, in the latter case, such surveys or polls must be made available to anyone who requests a copy.
- The poll should not be conducted for the direct or indirect benefit of a candidate.

Public Forums: Nonpartisan Candidate Debates

A 501(c)(3) organization may invite candidates to a regularly scheduled meeting or hold a special public forum for candidates to discuss their views and answer questions on issues of interest to the organization.

Guidelines

- All legally qualified candidates from the voting district on which a public forum is focused must be invited to participate. For example, if the debate is for candidates running for U.S. House of Representatives, all candidates running for the congressional seat must be asked. At least two candidates must appear at the forum.
- The forum must address a broad range of issues, including issues considered to be of important educational interest to the organization's members.
- Questions should be prepared and presented by a nonpartisan, independent panel of individuals knowledgeable about the issues covered.
- A moderator should be designated to ensure that the ground rules are observed, and to make clear that the views expressed are those of the candidate and not of the sponsoring organization.
- Each candidate should be allowed an equal opportunity to speak and answer questions on his or her views. The candidates must be treated fairly and the moderator should disavow any preference or endorsement by the sponsoring organization.

Educational Training Workshops on the Electoral Process

Training to increase understanding and knowledge of the electoral process and stimulate more effective participation in the selection of government officials is a permissible educational activity. Workshops may cover an array of topics that will assist attendees in understanding and participating in the electoral process at all levels, including: voter registration; get-out-the-vote; issues in campaigns: the delegate selection process; fundraising; and media training.

Guidelines

- Training must not be conducted in an effort to direct participants into particular campaigns, but simply to develop understanding of the electoral process.
Avoid partisan presentations or discussions that may appear to favor participation in a particular party or candidate’s campaign activities. For example, if one party’s delegate selection process is discussed, the other party’s rules should also be covered.

Testimony on Party Platforms

A 501(c)(3) organization may testify on issues important to it at the National Platform Committee hearings of the Republican and Democratic parties. Similarly, testimony may be given on the state or local level following the same guidelines. Responses to the testimony may be reported in a regularly published newsletter of the organization.

Testimony may address specific legislative proposals supported or opposed by the organization. This activity may constitute grassroots lobbying; therefore, the costs associated with preparing and delivering the testimony and any subsequent activity should be allocated as a lobbying expense.

Guidelines

- **Testimony must be delivered to both parties' Platform Committees.**
- **Testimony should be both oral and written.** A disclaimer should be made both orally and in writing that the testimony is offered for educational purposes only and is not intended to affect the outcome of any election.
- **Any account of the testimony and responses may be reported in a regularly scheduled publication,** but not one exclusively printed for distribution of this information. Distribution of the newsletter should be confined to members, not to the general public. In addition, any educational materials used in the testimony may be made available to the general public through a press release.

Issue Briefings and Candidate Statements

A 501(c)(3) organization may conduct issue briefings to inform candidates running for public office of its position on issues and to encourage them to adopt a similar position. (Note: If the candidate is an incumbent officeholder, such an issue briefing, if it addresses specific legislation, may be direct lobbying.)

Guidelines

- **The issue briefing must be extended to all candidates running for a particular office and may not favor one candidate over another.**
- If, as a result of a briefing, a candidate publishes a statement or position paper on the issue, he or she may distribute it to the media and general public. A 501(c)(3) organization, however, may not circulate the candidate’s statement to either the media, the general public, or its membership.

Get-Out-the-Vote/Voter Participation Projects

Many voter participation projects are permissible educational projects for a 501(c)(3) organization:

- Publishing articles outlining rights to participate in elections and urging all individuals to vote.
- Printing and distributing instructional pamphlets on how to work in an election campaign, or when and where to vote on election day.
Providing transportation for voters to get to the polls.

Urging individuals by phone, street canvassing, or public service announcements to remember to vote.

**Guidelines**

- **No formal or informal coordination with a candidate, political party, or PAC is permitted.**
- **A disclaimer of any affiliation or preference for a candidate or political party is advisable for all literature.** (Example: This voter education project sponsored by ____________ is nonpartisan and does not reflect endorsement of any candidate or political party.)
- **These activities may not be targeted to geographical areas with a particular voter preference or party affiliation.**

**Nonpartisan Voter Registration Activities**

Nonpartisan voter registration drives, encouraging and assisting individuals to register to vote, may be conducted by a 501(c)(3) organization. The rules differ for public charities, which most often conduct the registration activities, and private foundations, which make grants for voter registration, so it is important to identify what type of organization is planning the program. Public charities are not subject to many of the rules that private foundations must follow in this area, unless a public charity receives an “earmarked” grant from a private foundation for voter registration.

**Voter Registration Rules for Public Charities**

- Avoid any reference to a candidate or a political party in literature or oral communications distributed as part of the drive.
- Voter registration drives may discuss issues. If the registration drive raises issues important to your organization, do not discuss how a candidate voted on these issues or distribute voter guides that may indicate a candidate preference. An appeal to individuals to register to vote in order to have a more effective voice in government is allowable.
- Distribution of voter registration forms by mail, canvassing or in the organization’s offices to the general public is permitted. In addition, maintaining booths at fairs, shopping centers, or other locations and advertising in the media urging people to register to vote are acceptable activities.
- Registration activities may not be coordinated with or targeted to assist a candidate, political party, or PAC. Lists of registered voters may be given to any candidate, political party or PAC; however, they must then be given on a nonpreferential basis to all candidates and political parties as a means to encourage public participation.
- Voter registration materials and activities must be made available to all individuals without regard to political views. For example, if an organization sets up a booth at a college campus or local fair, the workers may not determine a person’s political views before distributing the registration materials.
- A registration drive may be directed to register commonly disenfranchised or traditionally under-represented groups including blacks, women, and Hispanics. In developing the literature for these drives, it is important to discuss why these groups have been targeted. Facts that demonstrate historic patterns of under-representation in the political process should be highlighted.

**The rules differ for public charities, which most often conduct the registration activities, and private foundations, which make grants for voter registration, so it is important to identify what type of organization is planning the program.**
The rental or exchange value must be set at a fair market value and not vary between transactions. If it is difficult to set a fair market value, inquire about the cost of similar size and quality lists of other organizations.

Rental of Facilities

Similar rules apply to the rental of facilities. A 501(c)(3) organization may make its facilities available to candidates or political committees on a nonpartisan, nonpreferential basis. It is not advisable, however, for an organization to take this step unless it rents its facilities to other individuals or groups on a fairly regular basis. Facilities might include: a conference or meeting room, telephones, and access to office equipment. Again, the candidate or political committee must be charged fair market value for the rental.

Individual Volunteers: What May Staff, Directors and Volunteers Do That A 501(c)(3) Cannot?

The proscription on political activity by a 501(c)(3) organization does not cover the involvement of political staff, directors, or member volunteers in the electoral process during after-work hours, leave without pay, or accrued vacation.

An individual, acting on his or her own behalf, may participate in a campaign in support of or in opposition to a candidate. However, the individual must

Volunteer Activities: Other Considerations

The Federal Election Campaign Act makes various allowances for volunteer activity which are not subject to or limited by the political contribution limitations. A volunteer for purposes of the law is one who donates personal services and is not compensated for them by any other person, including an organization. The time devoted by the volunteer is truly his or her own and there is no limit to how much time he or she can commit to the benefit of any candidate, political party or political committee.

The law makes other allowances for volunteer activities which involve the expenditure by the volunteer of his or her own funds. For example, a volunteer truly committing time on an uncompensated basis to a candidate or a PAC may pay his or her own subsistence expenses—food and lodging—without treating the expenditure of these funds for day-to-day living expenses as a “contribution.” In addition the volunteer may absorb up to $1,000 per election per candidate in personal travel costs, including the cost of rental cars, or airplane tickets, which will not be treated as an in-kind contribution to the candidate. Any amount paid for travel by the volunteer in excess of this $1,000 exemption will, however, constitute a contribution in-kind.

An additional allowance made for volunteers is designed to facilitate and encourage their sponsorship of events in their own home for the benefit of a candidate (or political party committee). A volunteer who holds a fundraising event in his or her own home for the benefit of a candidate or a political party may finance up to $1,000 per election in food, beverages and invitations to the event. The $1,000 so spent will not be treated as an in-kind contribution.

Note, however, if volunteers coordinate their activity for a federal candidate, they may be considered a political committee under the Federal Election Campaign Act, subject to registration and reporting requirements and the $1,000 contribution limit.
not speak or act in the name of the organization while engaged in political activity. In addition, an organization may not organize or direct its volunteers to work for a candidate’s campaign or political committee. Within these constraints an individual may participate in any campaign activities, including:

- endorsing or opposing a candidate;
- holding a fundraiser;
- hosting a campaign gathering.

While an individual, for identification purposes, may be listed or introduced with mention of his or her organizational affiliation, some caution should be used in this area.

- always be sure to note clearly that the affiliation listed is for identification purposes only:

  Example: Claudia Bryan
  Arms Control Education Fund*

*for identification purposes only

**Forming a Political Action Committee**

A 501(c)(3) organization may establish a separate segregated fund (or affiliated PAC) for the limited purpose of influencing the selection, nomination or appointment of an individual to a non-elective office. For example, a 501(c)(3) may establish a PAC to influence a Senate confirmation vote on a judicial nomination. While the IRS has stated that such a special purpose PAC may be organized, the PAC is absolutely prohibited from conducting any activities that a 501(c)(3) organization is not permitted to conduct, including political campaign activity in support of or opposition to a candidate for elective office or more than an insubstantial amount of lobbying. (See Parts II and III)

Staff, directors, or members of a 501(c)(3) organization, as individuals, may form or serve on the board of a nonaffiliated PAC to support local, state or federal candidates. A 501(c)(3) organization may not provide any financial support and all costs of organizing and operating the PAC must be maintained and paid separately. In addition, safeguards to prevent the perception of any affiliation with the 501(c)(3) organization should be taken, including:

- no sharing of space, equipment, or staff, unless the shared resources are strictly accounted for and the PAC and 501(c)(3) organization pay their respective costs in a timely fashion and to the penny;
- the name of the PAC should not be similar to that of the 501(c)(3) organization; and
- the Board of Directors of the PAC and 501(c)(3) should not be identical or even have a majority of overlapping directors.

See Book III regarding establishment of independent political committees.

**Use of Publications**

A 501(c)(3) organization may print in its newsletter or other publication, articles about issues in a current election written by candidates. All candidates running in a particular campaign must be invited to submit an article, and be given equal treatment with regard to space and location in the publication. If only one candidate submits an article, even if all candidates in the particular campaign were invited, it is unwise to print it because of the risk of appearing partisan.

- No editorial comment may appear with the articles.
- No articles agreeing or disagreeing with a candidate’s position may accompany the candidate articles.
# Glossary

These are some common acronyms for agencies, organizations, terms, or programs neighborhood associations are likely to encounter.

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>ASCP:</td>
<td>Arterial Streets Classification Policy</td>
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<tr>
<td>BAC:</td>
<td>Bureau Advisory Committee</td>
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<tr>
<td>BACC:</td>
<td>Bureau Advisory Coordinating Committee</td>
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<td>Bureau of Housing and Community Development</td>
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<td>BOP:</td>
<td>Bureau of Planning</td>
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<td>Comprehensive Housing Affordability Strategy</td>
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<td>Citizen Involvement Committee (Multnomah County)</td>
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<td>Central Northeast Neighbors</td>
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<td>EPDC:</td>
<td>East Portland District Coalition</td>
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<td>HAC:</td>
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<td>HUD:</td>
<td>Housing and Urban Development</td>
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<td>LCDC:</td>
<td>Land Conservation and Development Commission</td>
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<td>LUBA:</td>
<td>Land Use Board of Appeals</td>
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<td>LOC:</td>
<td>League of Oregon Cities</td>
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<td>Metro:</td>
<td>Metropolitan Service District</td>
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<td>MHRC:</td>
<td>Metropolitan Human Relations Commission</td>
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<td>NAC:</td>
<td>Neighbors Against Crime</td>
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<td>NCPC:</td>
<td>National Crime Prevention Council</td>
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<td>NECN:</td>
<td>Northeast Coalition of Neighborhoods</td>
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<td>NPF:</td>
<td>Neighborhood Partnership Fund</td>
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<td>NPNO:</td>
<td>North Portland Neighborhood Office</td>
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<td>OCF:</td>
<td>Oregon Community Foundation</td>
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<td>ODOT:</td>
<td>Oregon Department of Transportation</td>
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<td>OLCC:</td>
<td>Oregon Liquor Control Commission</td>
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<td>ONA:</td>
<td>Office of Neighborhood Associations</td>
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<td>ORS:</td>
<td>Oregon Revised Statutes</td>
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<td>PDC:</td>
<td>Portland Development Commission</td>
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<td>PDOT:</td>
<td>Portland Department of Transportation</td>
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<td>PIC:</td>
<td>Private Industry Council</td>
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<td>PMCoA:</td>
<td>Portland/Multnomah Commission on Aging</td>
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<td>PUD:</td>
<td>Planned Unit Development</td>
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<td>SEUL:</td>
<td>Southeast Uplift</td>
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<td>SWNI:</td>
<td>Southwest Neighborhood Information</td>
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<td>TAC:</td>
<td>Technical Advisory Committee</td>
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<td>UGB:</td>
<td>Urban Growth Boundary</td>
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<td>UGM:</td>
<td>Urban Growth Management</td>
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</table>
Other Organizations

Center for Community Change
1000 Wisconsin Ave. NW
Washington D.C. 20007
202-342-0519

Center for Neighborhood Technology
2125 W. North Ave.
Chicago, Illinois 60647
312-278-4800

National Association of Neighborhoods
1651 Fuller St. NW
Washington D.C. 20009
202-332-7766

National Congress for Community Economic Development
1612 K Street NW, Suite 510
Washington D.C. 20006
202-659-8411

National Neighborhood Coalition
810 First St. NE, Suite 300
Washington, D.C. 20002
202-289-8173

Neighborhood Reinvestment Corporation
1325 G St. NW, Suite 800
Washington, DC 20005
202-376-2400

Neighborhoods USA
4643 Amesborough Road
Dayton, Ohio 45420
513-256-1384

Volunteer Bureau of Greater Portland
715 W. Burnside
Portland OR 97205
503-222-1355
Resources

Every neighborhood association should have some reference materials available for use by members or at meetings. This information should include this manual, Robert's Rules of Order, revised edition, and current information available from the City and your district office that will help your members get access to services and assistance they need.

Regulations from the IRS, the US Postal Service, the Attorney General's Office, and other public agencies change frequently. Make sure you have current information if you work with these agencies. Your district office usually has current information available for your use. Training materials and other technical assistance information may be available from your district office staff.

The following are other resources that will help you understand more about citizen involvement, government, and working with volunteers.


Haines, Mike, Volunteers: How to Find Them, How to Keep Them... 1989


*Community Organization in a Partnership Setting 1980*. Civic Action Institute, 1010 16th Street, NW, Washington, DC 20036.

*First Class, Third Class, and Fourth Class Bulk Mailing Permits*. U.S. Postal Service Publication 113.


Steering Nonprofits: Advice for Boards and Staff. The Management Assistance Group, 1705 DeSales Street, NW, Washington, DC 20036, 1984


— Crime Prevention Resources Directory —

Office of Neighborhood Associations, Crime Prevention
Program Manager ............................................. 823-3048

Neighborhood Association Crime Prevention Contact Numbers
Central Northeast ............................................. 823-3156
Southeast ..................................................... 232-0010
East .......................................................... 256-0014
Southwest ...................................................... 823-4592
Northeast ...................................................... 823-4763
West/Northwest .............................................. 223-3331
Downtown/Burnside ........................................ 224-8684
North ......................................................... 823-4098

Portland Police Bureau Crime Prevention Unit
Central Precinct .............................................. 823-0097
East Precinct ................................................ 823-4800
North Precinct .............................................. 823-2122
Northeast Precinct ....................................... 823-5700
Southeast Precinct ....................................... 823-2143

Multnomah County Sheriff’s Office .................. 225-3600
Self-Defense
Women's Strength (Portland Police Bureau)..........................823-0296
Provides three week classes for women 14 years and older on rape
prevention, self-defense and assertiveness training. (Free)

Portland State University...................................................725-4401
Provides a variety of self-defense classes for both men and women. (Free)

Crisis Intervention
Metro Crisis Line (24 hour hotline).................................223-6161
Provides telephone crisis counseling for victims of family violence.

Child Protection Services (of Child Services Division)...........731-3100
24 hour hotline to report incidences of child abuse. Provides counseling
and referral services for victims and offenders.

Harry's Mother (24 hour crisis line)...............................233-8111
3942 SE Hawthorne
For runaway children and teens

Victim's Assistance Program............................................248-3222

Domestic Violence
Raphael House.................................................................222-6222
Emergency shelter for women and children. Provides group and
individual counseling for both offenders and victims of domestic violence.
Confidential location.

Bradley-Angle House......................................................281-3540

YWCA Women's Resource Center......................................223-6281 X3020

Sexual Crimes
Portland Women's Crisis Line..........................................235-5333
24 hour hotline for victims of rape, assault and domestic violence. Provides
counseling and referral services. (Free)
Oregon Coalition Against Domestic And Sexual Violence...........223-7411
Advocacy group for battered/raped victims’ rights. Trains individuals to
work in crisis intervention, promotes legislation for improving laws
dealing with sexual violence. No counseling.