



CITY OF KIRKLAND

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MEMORANDUM

To: Kirkland City Council

From: Jeremy McMahan, Planning Supervisor

Date: January 24, 2007

Subject: DOWNTOWN STRATEGIC PLAN ASSESSMENT AND UPDATE – CONSULTANT INTRODUCTION AND SCHEDULE

Recommendation

Meet Bonnie Berk of Berk & Associates and review and comment on the proposed community process (see Attachment 1).

Background

In September, 2006, the City Council authorized staff to proceed with the assessment and update of the Downtown Strategic Plan. Staff issued a request for qualifications and received nine statements of qualifications from interested firms. After interviewing four teams, the interview panel (staff and DAT Chair Carolyn Hayek) selected Berk & Associates to assist in the project. A summary of team qualifications is included as Attachment 2. The scope of work is currently under discussion and staff would appreciate comments or suggestions from Council before completing the contract. We have invited Bonnie Berk of Berk & Associates to attend the Council meeting on February 6th to respond to any questions Council may have.

As noted in the attached process, we are recommending that the Downtown Action Team (DAT) be re-commissioned to form a Downtown Advisory Committee (advisory to City Council). The goals of this re-commissioning would be as follows:

- Shift the focus of the group back to being advisory rather than being a project-focused “action” team;
- Ensure that constituencies or individuals that should be represented are represented;
- Ensure that those who are selected to participate are fully committed to the process;
- Establish two-way communications so that members are committed to being conduits of information and ideas.

It should be noted that the public outreach is not limited to the advisory committee. The consultants and staff team feel strongly that the communications strategy needs to engage the community as broadly as possible through stakeholder interviews, community meetings, the media, internet, etc.

History of the Downtown Action Team

The City Council appointed a “downtown task force” in 1999 to develop recommendations for a downtown strategic plan. The membership of the group emerged from a collaboration of Council, staff, and various community organizations asking individuals to participate. Individuals were contacted by a letter from the mayor inviting them to participate and the City Council subsequently appointed the task force by motion.

With their recommendation to Council on the Downtown Strategic Plan, the task force recommended that they remain active as the “Downtown Action Team”. The organizational structure was established to be self-sustaining without the need for City appointments. As illustrated in the current roster (Attachment 3), community organizations (KDA, neighborhood organizations, KAN, Chamber, etc.) decide who to appoint to the group. There is currently no Council appointment or confirmation process. While this structure has generally worked well, the criticism is that some positions have sat vacant and some members are less committed to attendance and the process than others. The recommendation of staff and the consultant is that Council needs to feel confident that the group it tasks to advise them on the assessment and update has the membership and mission to deliver well-qualified recommendations.

Attachments

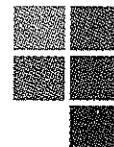
1. Proposed Strategic Plan assessment and update process
2. Summary of team qualifications
3. Current Downtown Action Team list

Cc: Downtown Action Team
Ellen Miller-Wolf



Kirkland Downtown Strategic Plan Update Process: Meetings & Products

2007	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
	Phase 1: Project Orientation & Strategic Situation Assessment					Phase 2: Strategic Plan Update—Exact Schedule & Products TBD based on Phase 1 Outcomes					
Analysis & Plan Update	Project Kick-off • Finalize Scope • Define Success	Strategic Situation Assessment • Stakeholder Interviews • Market & DSP Assessment		Draft Phase 1 Products • Strategic Situation Assessment • New Downtown Vision Statement • Strategic Opportunities and Next Steps	Final	Downtown Plan Update • Updated Vision, Goals, and Action Strategies • Timeline, Roles, and Responsibilities		1st Draft Plan		2nd Draft Plan	Final Plan
Downtown Advisory Committee	Form New DAC • Charge/Mission • Project Scope & Schedule • Operating Principles & Responsibilities • Membership & Leadership	1 • DAC Kick-off • Vision • Situation Assessment	2 • Draft Market/DSP/Stakeholder Findings • Prep for Community Mtg		3 • Community Mtg Debrief • Draft DSP/Situation Assessment • Next Steps	4 • Final Situation Assessment & Implications • Strategy Development	5 • Strategy Development	6 • Review Draft Plan • Prep for Community Workshop		7 • Review Draft Plan • Debrief Community Workshop	8 • Final Plan
Communication & Outreach	Develop Project Communication Strategy & Materials • About the Project, FAQs, Initial Press Release		Facilitated Community Mtg #1 • Current Situation Discussion • Vision for the Future		Facilitated Community Workshop #2 • Draft Plan Review & Comment						
Ongoing Communications: Project Website, E-Notices, Press Releases											
	1 Website Launch & E-Notice #1	2	3				4		5	6	
City Council Briefings	Council Briefing • Project Kick-off, Scope & Schedule • DAT Reconstitution		Council Briefing • Draft Findings		Phase 1 Completion: Council Briefing • Community Mtg Debrief • Final Products • Next Steps & Recommendations for Phase 2			Council Briefing • Draft Plan • Results of Community Workshop		Council Briefing • Draft Plan	Council Adoption of Final Plan



TEAM QUALIFICATIONS AND EXPERIENCE

Berk & Associates

Berk is an 18-year old, multi-disciplinary policy and management consultancy, providing integrated services in policy analysis and development; strategic and economic development planning; fiscal, economic and real estate market analysis; and stakeholder outreach, meeting facilitation and consensus-building. Since 1998, Berk has focused on economic development strategy, and has worked with dozens of communities to create living plans that energize and direct community activities, investments, programs and policies. Our products are analytically based, using best available data, supplemented by trends analysis, stakeholder perspectives, best practices research and benchmarks, and an understanding of political realities. Our work is also graphically rich, interesting and enjoyable to read.

Our mission is: Helping Communities and Organizations Create their Best Futures. We do this by:

- Integrating the art of effective decision-making with the science of rigorous quantitative and qualitative analysis;
- Bringing people, information, ideas and analysis together – to generate understanding and consensus on the best strategies and decisions; and
- Bridging across disciplines – to integrate and synthesize diverse information, and coordinate, collaborate and facilitate relationships.

We believe the world is full of complexity (and that's what makes it interesting), and that there is extraordinary value in elegantly simple analysis and decisions, effectively communicated. A hallmark of our approach is our ability to communicate complex information to multiple audiences, using words, numbers, pictures and maps. We know that when participants truly understand the issues and options before them, they are able to make good decisions, and can then communicate those decisions to the broader community. In the course of our work, we have developed numerous tools and processes to help us work efficiently and effectively with stakeholders and the public, and to help our clients achieve their policy objectives.

Special Expertise Relevant for this Project. In addition to our expertise in economic development, downtown revitalization, real estate market analysis, and outreach and communications, we offer the City expertise in the following specific, relevant areas:

- **Facilitation of robust agreements.** We are known for our "light touch" in working with a range of people on complex and controversial topics. Our tools and overall approach have consistently helped create successful, implementable strategic plans, as well as new relationships among project participants.
- **Downtown vitality and revitalization strategies.** We understand downtowns and neighborhood business districts, and can quickly assess the current strengths, challenges and opportunities for the area, then provide expert guidance on potential policy options, partnerships and strategies.
- **Site-specific market and strategic analysis.** Berk has extensive experience evaluating site-specific economic development opportunities in a range of Washington communities. Our approach allows cities to

make informed decisions regarding how to best use specific parcels, with an understanding of market conditions, development economics, and the fiscal impacts of various development options.

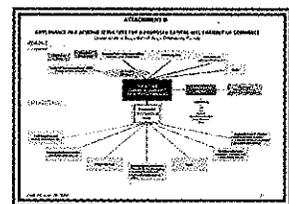
- **Arts and culture as an economic development strategy.** We understand the role arts and culture can play in attracting both businesses and residents to a community, and we have the expertise to advise the City how to build on its existing strengths to make the arts even more of a signature element for Kirkland.
- **Excellent report writing and strategic communications.** We expect the updated Plan to be scrutinized by many interested parties, and as such, it will need to be rigorous, defensible and highly readable. We are known for our ability to prepare clear, concise summary-level reports that convey quantities of complex information and analysis in an accessible, usable and reader-friendly format. Using information design principles, schematics, color and well-edited text, our reports effectively convey the content and conclusions of complex analysis to busy decision-makers and the public.

Results and Success

Berk & Associates has nearly 20 years of continuously successful experience working with communities like Kirkland. We are focused on making a measurable difference in the communities in which we work, and our projects have had both immediate and lasting results for many communities. In fact, many of our clients begin implementing the strategies and recommendations from our work before the project is completed. A few example profiles of successful outcomes from our projects include:

City of Snohomish Strategic Plan: IMAGINE SNOHOMISH: *Promoting Vitality and Preserving Character.* Before the project was concluded, the City Council endorsed the Citizen Advisory Committee's preliminary goals and action strategies, and approved several strategies for funding in 2007, including a new economic development coordinator, business retention and attraction strategies, and downtown revitalization strategies. Even more importantly, the Council agreed to align its annual budget process and appropriations with the Strategic Plan, thereby establishing a long-term framework for strategic City investments and new ways of conducting City business.

Seattle's Broadway Economic Vitality Agenda 2006-08: *A Strategy for an Economically Vital, Livable, Unique, Urban Community.* Based on this Strategic Plan, the Mayor and City Council have committed \$500,000 towards revitalization of this struggling business district (\$125,000 in 2006 and \$375,000 in 2007). The funding will be spent on capacity building to help form a new Chamber of Commerce, and on streetscape improvements to enhance the appearance of the corridor. The City and community together organized a "Clean Sweep" community event on Broadway in October; the Mayor and Council members attended and the business community sponsored equipment and publicity. The business community is stepping up generally, fundraising for matching cash contributions and providing in-kind support, such as office space for the new Chamber.



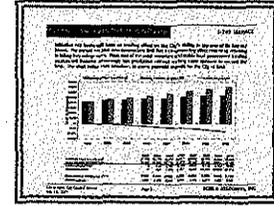
City of University Place 2002-07 Strategic Plan: *Strategies for a Livable and Sustainable Community.* The City Council unanimously adopted this Plan and funded a new economic development manager position for business retention, expansion and attraction. The City has moved aggressively ahead with many of the Plan's strategies, including redevelopment of several aging strip malls and facilitation of a major new Town Center development, which includes relocation of City Hall and the Library. The Town Center project will provide new housing units in the center of the City, will create a gathering place and activity center for the City, and will bring new, national retailers to the community. Based on the Plan, the City is also working to capitalize on

KIRKLAND DOWNTOWN STRATEGIC PLAN ASSESSMENT AND UPDATE

development of the new professional-level golf course being designed on the Chambers Creek property, located within City limits. We also developed a marketing brochure based on the Plan, which staff have used in discussions with businesses and developers considering locating to the City. Plan implementation has been so successful that the City has commissioned Berk to create an updated Plan for 2007-11.

City of Kent Economic Development Strategic Plan 2003-08: Positioning Kent as the Premier Location for Business and Community Vitality.

The City Council unanimously adopted this Plan, which won an International Economic Development Council (IEDC) award for economic development planning in 2003. The City has implemented many of the Plan's strategies, including proceeding with the Kent Station mixed-use project (new housing, a movie Cineplex, national retailers and restaurants – now a regional model for successful suburban mixed-use development), specific downtown partnerships with the Kent Downtown Partnership, and partnering with the Kent Chamber of Commerce to obtain federal funding for a feasibility study and business plan for a new Advanced Manufacturing Institute to be located in Kent. The City has also used the Plan as a marketing tool to attract new business.



City of Duvall Economic Development Strategic Action Plan: 2006-2011. Completed in late 2005, the City is implementing many of the Plan's strategies, including funding a new economic development manager in the 2007 budget. The Plan encompassed numerous arts, culture and tourism strategies, which the City is currently acting upon. The Plan integrated revitalization strategies in Old Town with actions to attract new residential and commercial development in other parts of town, leveraging the community's strong historic and artistic resources as well as allocating space for desirable new development.

Pierce County Economic Action Agenda: 2007-2011. In June 2006 we completed a Strategic Economic Development Vision and Plan for Pierce County government, which has been adopted and endorsed by the County Executive and County Council. The Plan focuses on primary job creation, and for the first time, brings together three County departments – Economic Development, Public Works, and Planning and Land Services – to work interdepartmentally on infrastructure development, planning policies and regulatory improvements to make Pierce County a great place to do business. We also created a PowerPoint presentation of the Plan, which is being used by County staff to communicate with the cities and towns, as part of a more coordinated, collaborative approach to economic development in the County.

Qualifications of Berk Project Staff

Bonnie Berk President of the firm, will serve as Project Manager. Bonnie specializes in managing multi-disciplinary studies involving diverse interests and often controversial issues, providing facilitation services, and designing processes that integrate technical analysis with policy making and citizen involvement. Bonnie has particular expertise and passion for community-building projects that involve downtown vitality strategies and incorporating history, arts and culture strategies into economic development plans. She has 25 years of experience and success working with community leaders and citizen volunteers to create energizing, implementable and sustainable community economic development strategies, and she particularly enjoys working with communities where staff, elected officials and community members are working together to create a great future for their city.

Bonnie has designed and managed numerous successful strategic economic and community development projects, including the Broadway Economic Vitality Action Agenda, City of Snohomish's 2007-2011 Strategic Planning Project, the City of Lynnwood's Strategic Economic Development Plan, the City of Lake Forest Park's Strategic Plan, the City of University Place's 2002-2007 Economic Development Strategic Action Plan, the City of

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Kent's Strategic Economic Development Plan, the Port of Seattle's Harbor Development Strategy process, the City of Seattle's Office of Economic Development Strategic Action Plan and Pierce County's Strategic Economic Development Planning project. She frequently facilitates workshops and retreats for Councils and Commissions, including most recently, Council retreats for the Cities of Burien, Redmond, Kent, Federal Way, University Place and others. She holds a MPP from the University of California, Berkeley and a MBA from the University of Washington.

Michael Hodgins will serve as Strategic Advisor to the project. Michael is the firm's practice area manager for financial and economic analysis, and has been with the firm since 1992. He will provide technical assistance on the real estate market and economic analysis components of the project, as needed. Michael specializes in the preparation of financial, economic and policy studies, with areas of concentration including urban land economics, regional economic and development patterns, market analysis, growth management issues, fiscal impact and feasibility studies for transportation and development projects, and municipal fiscal analyses, including comprehensive revenue and expenditure forecasting. Michael has conducted numerous economic analyses and feasibility studies for public and private sector clients, and our clients often rely on his analysis in making strategic investment decisions and in choosing among competing development alternatives or proposals. Recent clients include the Cities of Redmond and Snoqualmie, where he is providing expertise on the fiscal and economic issues associated with large-scale development proposals, and the Cities of Kirkland, Mukilteo and Anacortes, where he is developing strategic financial plans that integrate market and annexation analyses with long-term revenue forecasting.

Kapena Pflum is a policy analyst with expertise in market, demographic, and GIS analysis. Recent projects include economic and market analysis to facilitate creation of new economic development strategic action plans in Snohomish, Mountlake Terrace, University Place, Woodinville and Duvall; market and land-base analysis for the City of Mukilteo to assess economic development opportunities in Mukilteo and its potential annexation areas; a strategic assessment of economic development potential in the North Highline area of King County for the City of Burien, which included spatial analysis of emergency service provision changes in the area; and research on economic development best practices to inform development of an economic action agenda for Pierce County. Kapena received his MPA from the University of Washington's Evans School of Public Affairs, where he worked as a research assistant with the Center for Urban Simulation and Policy Analysis, assisting in GIS analysis related to advanced land use and transportation simulation processes.

Meghann Glavin is a policy analyst with a background in urban and neighborhood development, public policy, and community outreach. Most recently, Meghann has been coordinating the stakeholder outreach component of the Washington State Transportation Commission's State Rail System and Capacity Needs Study, facilitating the Broadway Economic Revitalization Action Team to identify action steps to improve Seattle's Broadway neighborhood, and working with the City of Renton to estimate the revenue capacity available from the establishment of a business improvement district downtown. Her projects have also included working with King County and the West Hill Governance Alternatives Task Force to complete an annexation analysis for the unincorporated island of West Hill, assessing the economic impacts of the Seattle Public Library's New Central Library, and working with the cities of Duvall and Woodinville to assess current market conditions and build a strategic economic development plan. Prior to Berk, Meghann worked for the City of Seattle's Office of Economic Development where she assisted the Neighborhood Business District program. She has also worked for the Downtown Schenectady Improvement Corporation, a business improvement district in upstate New York, where she closely worked with the community, the City and County of Schenectady, local businesses, and key stakeholders to rebuild downtown Schenectady.

Natasha Fedo is a financial and policy analyst specializing in policy research, data collection, market and financial analysis. Recent projects include the City of Snohomish's Strategic Plan, the Lakewood Annexation Feasibility study, the City of Mukilteo's Economic Development and Annexation study, the Economic Development and Fiscal Analysis project for the City of Anacortes, market analysis for the City of Burien's Strategic Assessment of Economic Development Potential in North Highline project, financial analysis for the Washington State Ferries 20-year Long Range Plan and several studies focused on annexation and incorporation throughout King County. Prior to joining Berk & Associates, Natasha was with Kennedy Associates Real Estate Counsel, Inc., where she performed financial analysis for the commercial real estate industry.

Leland Consulting Group

Leland Consulting Group, Real Estate Strategists, is a national firm of seasoned strategic advisors serving public and private leaders in the development and redevelopment of urban places. The firm has offices in Portland, Denver, Seattle, Boston, New York and Austin. LCG's principals have decades of experience working on challenging urban projects and achieving successful results, including developing strategies to revitalize more than 80 downtowns across the country. LCG's services encompass market strategy, acquisition and development programs, marketing and implementation strategies, public-private partnership development and negotiation facilitation. Principals for this project will be Dave Leland and Chris Zahas.

Dave Leland is among the most knowledgeable urban strategists in the country, with more than 40 years of experience in the real estate industry as a consultant, advisor, developer, and owner. He has conducted and managed more than 3,000 real estate projects and assignments in 25 states and abroad. As the former CEO of a national real estate acquisitions and development company and as someone who is educated in architecture, city planning and urban economics, he brings a unique and thorough perspective to any project. Dave's strength is a comprehensive understanding of real estate and planning issues. His particular interest lies in downtown revitalization, smart growth communities, transit-oriented development, and innovative mixed-use employment centers. He has worked with more than 200 communities with a portfolio that includes 80 downtown revitalization and implementation strategies, 70 light rail transit stations and a host of smaller centers, corridors and main streets.

Dave is a member of The Counselors of Real Estate, the highest designation in the real estate industry. As a CRE, he is also a member of the National Board of Realtors. He is a national lecturer for ULI on the subject of Place Making and Transit Oriented Development. He is a contributor to ULI national and international publications including the new *Mixed-Use Development Handbook*.

Chris Zahas works with LCG's private and public sector clients to prepare strategies to develop and revitalize a variety of urban places. As a principal, he manages complex projects and multidisciplinary teams with an emphasis on downtown revitalization, urban corridors, transit-oriented development, mixed-use development, and public-private partnerships. He has worked on revitalization and economic development projects in Alaska, Arizona, California, Colorado, Idaho, Montana, Oregon, Utah, Washington, and Wyoming. His approach involves carefully matching smart growth principles and market realities with the client's vision, to create successful, innovative projects. Chris previously worked at the Portland Development Commission, where he coordinated complex urban renewal projects among multiple public agencies, community organizations and private consultants. He holds a master's degree in urban and regional planning from Portland State University and a Bachelor of Arts degree in international affairs from Lewis and Clark College. Chris is a member of the American Planning Association, American Institute of Certified Planners, and the Urban Land Institute.

Downtown Strategic Plan

Downtown Action Team

December, 2006

Businesses:

- **ART GALLERY ASSOCIATION** ^(a)
Patricia Rovzar
- **MERCHANTS:** ^(b)
 - **Retail**
Georgie Kilrain
 - **Financial**
Mike Nelson
 - **Restaurant**
Todd Ormsby
- **OFFICE** ^(b)
Doug Davis
Michael Shulman
- **PROPERTY OWNERS** ^(b)
Marilyn Dillard
Joe Castleberry

Residents/Neighborhoods:

- **DOWNTOWN RESIDENTS** ^(b)
 - George Lawson
 - Sinclair Jones
- **NEIGHBORHOOD ASSOCIATIONS:** ^(a)
 - Market Neighborhood Association
Jeff Leach
 - Norkirk Neighborhood Association
Eric Eng
 - Moss Bay Neighborhood Association
Ken Dueker
- **KIRKLAND ALLIANCE OF NEIGHBORHOODS (2)** ^(a)
Vacant
Greg Butler

Boards and Commissions:

- **PLANNING COMMISSION** ^(a)
Carolyn Hayek
- **TRANSPORTATION COMMISSION** ^(a)
Don Samdahl
- **PARK BOARD** ^(a)
Jeff Trager
- **PARKING ADVISORY BOARD** ^(a)
Glenn Peterson
- **SENIOR COUNCIL** ^(a)
Joanna Hancock
- **LTAC** ^(a)
Sheila Cloney

- **KIRKLAND YOUTH COUNCIL** ^(a)
Aja Chinnell-Mateen
- **DESIGN REVIEW BOARD** ^(a)
Brian Berg
- **ARTS AND CULTURAL COUNCIL** ^(a)
Boris Srdar

Community Organizations:

- **KIRKLAND HERITAGE SOCIETY** ^(a)
Bob Burke
- **CHAMBER OF COMMERCE** ^(a)
Bill Vadino
- **KDA EXECUTIVE DIRECTOR** ^(a)
Dick Beazell
- **CITY (2)** ^(a)
Dave Ramsay
Eric Shields

Development/Planning

Professionals (4): ^(c)

- Tom Uren
- Bob Cornish
- **vacant**
- **vacant**

Notes:

(a) *Denotes appointment made by corresponding organization*

(b) *Denotes KDA appointment*

(c) *Denotes DAT appointment*

The selection guide is intended to provide a list of the types of representation that should be active on the DAT. Because positions change over time and other qualified individuals will come forward, it is intended to provide some flexibility. It should also be clear that most if not all representatives are not just business people, board and commission members, or organization representatives, but also residents of Kirkland who are active in their community.

DAT Executive Committee

- DAT Chair
- DAT Vice Chair
- Immediate Past Chair
- City Manager
- KDA Executive Director
- City Planning Commissioner
- Parking Advisory Board member
- Chair persons of active Working Groups

Staff

- Jeremy McMahan, Planning and Community Development
- Ray Steiger, Public Works
- Mike Metteer, Parks and Community Services
- Ellen Miller-Wolfe, City Manager's Office