



# Metro | Agenda

**REVISED, 5/9**

Meeting: Metro Council Work Session  
Date: Tuesday, May 14, 2013  
Time: 2 p.m.  
Place: Council Chamber

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## CALL TO ORDER AND ROLL CALL

- |         |     |                                                                                                                                                                                                     |                                                             |
|---------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| 2 PM    | 1.  | <b>ADMINISTRATIVE/ COUNCIL AGENDA FOR<br/>MAY 16, 2013/ CHIEF OPERATING OFFICER COMMUNICATION</b>                                                                                                   |                                                             |
|         | 2.  | <b>COMMUNITY INVESTMENT INITIATIVE UPDATE:</b>                                                                                                                                                      |                                                             |
| 2:15 PM | 2.1 | • <b>SCHOOL FACILITIES PLANNING – <u>INFORMATION</u></b>                                                                                                                                            | <b>Joe Rodriguez<br/>Dick Steinbrugge<br/>Nikolai Ursin</b> |
| 2:55 PM | 2.2 | • <b>BREAK</b>                                                                                                                                                                                      |                                                             |
| 3 PM    | 2.3 | • <b>DEVELOPMENT-READY COMMUNITIES PILOT PROGRAM –<br/><u>DISCUSSION</u></b>                                                                                                                        | <b>Deanna Palm<br/>Lorelei Juntunen<br/>Joel Schoening</b>  |
| 3:45 PM | 3.  | <b>USE OF OPPORTUNITY MAPPING IN UPCOMING REGIONAL<br/>PLANNING AND DEVELOPMENT DEPARTMENT ACTIVITIES<br/>AND THE EQUITY STRATEGY PROGRAM DURING FY 13-14 –<br/><u>INFORMATION / DISCUSSION</u></b> | <b>John Williams<br/>Nuin-Tara Key<br/>Mara Gross</b>       |
| 4:30 PM | 4.  | <b>COUNCIL BRIEFINGS/COMMUNICATION</b>                                                                                                                                                              |                                                             |

## ADJOURN

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Agenda Item No. 2.1

**SCHOOL FACILITIES PLANNING**

Metro Council Work Session  
Tuesday, May 14, 2013  
Metro, Council Chamber

# METRO COUNCIL

## Work Session Worksheet

**PRESENTATION DATE:** May 14, 2013      **TIME:** 2:15      **LENGTH:** 45 minutes

**PRESENTATION TITLE:** Community Investment Initiative School Facilities Planning

**DEPARTMENT:** Community Investment Initiative Leadership Council

**PRESENTER(s):** Joe Rodriguez (Leadership Council member), Dick Steinbrugge (Beaverton School District), Nikolai Ursin (Metro)

### WORK SESSION PURPOSE & DESIRED OUTCOMES

- Purpose: To provide a demonstration of the Context planning tool for school facilities and inform the Metro Council of the outcomes from the 21<sup>st</sup> Century Classroom workshop.
- Outcome: The Metro Council liaison to the Community Investment Initiative has guidance from fellow councilors about the expanded application of the school facilities planning tool.

### TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

To facilitate and encourage a broad range of infrastructure projects across the Portland metropolitan region, the Community Investment Initiative (CII) Leadership Council adopted a [strategic plan](#) to develop recommendations on the following:

- Invest in infrastructure to catalyze jobs and economic prosperity;
- Foster conditions that support development ready communities;
- Ensure the reliable and efficient movement of goods and people;
- **Protect and enhance our communities' investment in school facilities and properties.**

At the September 18, 2012 work session, the Metro Council indicated that the CII Leadership Council should seek partners to support their interest and efforts in school facilities. This work session discussion will inform the Metro Council of the CII deliverables and partnerships created to enhance our investment in school facilities.

As background, several school districts in the region are considering or have passed facility capital improvement bonds. However, there are few useable tools or guidelines for prioritizing facility investments to meet the 21<sup>st</sup> century needs of our students.

Since the spring of 2012, representatives from seven school districts in the region have convened six times to develop a pilot planning tool in partnership with Metro's Data Resource Center. The purpose was to help school districts prioritize investment in school facilities. When populated with demographic, equity, facility, performance and enrollment indicators, the tool provides a composite score for each school. The data analysis informs decision-making for facility planning and investment based on objective information. The Beaverton School District will share with the Metro Council how the tool could be applied to inform investment priorities.

The pilot school districts group, led by CII committee chair Joe Rodriguez, has been working to identify resources needed to support the future use of the Context planning tool with interested partners and school districts. Metro's Data Resource Center has developed a cost estimate proposal to host the tool as a fee for service for those interested in using the planning tool.

In addition to developing the Context planning tool, the CII is also collaborating with the Center for Innovative School Facilities, the Portland STEM Center, the Beaverton School District and the Portland Public School District in hosting 21<sup>st</sup> Century Classroom workshop on May 14, 2013. The workshop will focus on three areas important to creating classrooms that advance a new paradigm of learning for the next generation of students: school facilities, classroom technology, and teacher training. The purpose of the workshop is to move from ideas to action and identify implementation steps that school districts can use to meet today's learning needs and opportunities. The end result includes upgrading our learning environment so students are prepared to participate in our region's workforce.

### **Connection to Metro's Priorities**

The Metro Charter requires Metro to address growth management and land use planning matters of metropolitan concern. The Regional Framework Plan outlines policies that guide Metro in doing so, including guidance regarding school and local government planning and policy coordination. It is the policy of the Metro Council to:

- Coordinate plans among local governments, including cities, counties, special districts and school districts for adequate school facilities for already developed and urbanizing regions.
- Consider school facilities to be "public facilities" in the review of city and county comprehensive plans for compliance with the Regional Framework Plan.
- Work with local governments and school districts on school facility plans to ensure the Urban Growth Boundary contains a sufficient supply of land for school facility needs.
- Use the appropriate means, including but limited to, public forums, open houses, symposiums, dialogues with state and local government officials, school district representatives, and the general public in order to identify funding sources necessary to acquire future school sites and commensurate capital construction to accommodate anticipated growth in school populations.
- Prepare a school siting and facilities functional plan with the advice of MPAC to implement the policies of this plan.

### **QUESTIONS FOR COUNCIL CONSIDERATION**

- What feedback does the Metro Council have on the school facility Context planning tool?
- What recommendations does the Metro Council have for expanded use region-wide of the school facility Context planning tool?

### **PACKET MATERIALS**

- Would legislation be required for Council action  Yes  No
- If yes, is draft legislation attached?  Yes  No
- What other materials are you presenting today? Materials included for in the Metro Council work session packet includes

Agenda Item No. 2.3

**DEVELOPMENT-READY COMMUNITIES  
PILOT PROGRAM**

Metro Council Work Session  
Tuesday, May 14, 2013  
Metro, Council Chamber

# METRO COUNCIL

## Work Session Worksheet

**PRESENTATION DATE:** May 14, 2013      **TIME:** 2:50 p.m.      **LENGTH:** 45 minutes

**PRESENTATION TITLE:** Community Investment Initiative Development-Ready Communities Pilot Program

**DEPARTMENT:** Council Office

**PRESENTER(S):** Deanna Palm (CII Leadership Council), Lorelei Juntunen (ECONorthwest), Joel Schoening (Metro)

### WORK SESSION PURPOSE & DESIRED OUTCOMES

- Purpose: To present the preliminary results of the Community Investment Initiative's Development-Ready Communities pilot program.
- Outcome: The Metro Council liaison to the Community Investment Initiative has guidance from fellow Councilors regarding the implementation of a permanent regional program and Metro's potential role.

### TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

To facilitate and encourage a broad range of infrastructure projects across the Portland metropolitan region, the Community Investment Initiative (CII) Leadership Council adopted a [strategic plan](#) to develop recommendations on the following:

- Invest in infrastructure to catalyze jobs and economic prosperity;
- **Foster conditions that support development ready communities;**
- Ensure the reliable and efficient movement of goods and people;
- Protect and enhance our communities' investment in school facilities and properties.

At the September 18, 2012 work session, the Metro Council indicated an interest in being an active participant in the Community Investment Initiative's (CII) Development-Ready Communities pilot program for the current fiscal year. This presentation will inform Metro Council of the initial findings of the Development-Ready Communities pilot program and provide the Council with some potential options for continued participation in the program. The Council will be asked to comment on the results of the program and clarify Metro's future role.

The Development-Ready Communities program piloted a readiness assessment that assists willing communities in achieving their economic development goals. The assessment examined alignment in building codes, permitting, zoning, public engagement, staff capacity, and financial tools to meet the community's development goals.

The Metro Council expressed a desire for this program to build on the many efforts and partnerships already under way to support development in communities with underutilized capacity. The Metro Council also indicated its support for the Leadership Council's efforts to engage communities who want to voluntarily participate in the pilot program and who are likely to act on the results. In addition, the Metro Council opted for a program that balanced the needs of the public with the needs of the development community and which included participation from both. At the February 2013 discussion with the Leadership Council representative, the Metro Council provided support for a partnership with the Urban Land Institute's (ULI) Thriving Cities Alliance (TCA).

At Metro Council work session meetings in November 2012 and February 2013 the Council was informed of the following:

- Completion of the discovery phase
  - Outreach to public and private sector development professionals
  - Incorporation of feedback from MTAC and MPAC into program design
  - Development of a model Framework of Development Challenges and Opportunities to be used in the design of a pilot development-readiness assessment tool
- Initiation of program design efforts
  - Completion of a draft assessment tool
  - Continued engagement with public and private sector development professionals
- Initiation of pilot program with a Oregon City

Since the February meeting with Metro Council, the CII has accomplished the following:

- Implementation of the pilot assessment in Oregon City
- Preliminary analysis of the pilot program results
  - Amendments to the assessment tool
  - Amendments to the desired program process
  - Recommendations for Oregon City
- Further engagement with the Urban Land Institute for the development of a program implementation partner

This work has generated the following deliverables to be presented for Metro Council's consideration and comment:

- Draft tool (attached)
- Draft program process recommendations
- Options for Metro's future role

In addition to developing a diagnostic tool and implementing a pilot program, the CII's Development-Ready Communities' Implementation Group has also been seeking a partner to act as a permanent administrator for a fully functional program. The Urban Land Institute (ULI) is one potential program administrator. The ULI has expressed an interest in developing a relationship with the CII and folding the Development-Ready Communities program into its emerging Thriving Cities Alliance (TCA). Metro Council expressed support for this partnership in February, but much work remains to be done to successfully establish the TCA.

Options for the Metro Council

- Support the continued implementation of a Development-Ready Communities program by the CII and its partners (Urban Land Institute) through contributions of staff time in the form of:
  - Participation on advisory or steering committees
  - Participation in the assessment review process
  - Participation in delivering technical assistance to implement changes identified by the review process
- Identify opportunities to incentivize jurisdictional participation in the program by connecting it to other programs or initiatives
- Provide additional/alternate partnership recommendations to the CII
- Conclude support for the Development-Ready Communities program at the end of the 2012-1013 fiscal year

## **QUESTIONS FOR COUNCIL CONSIDERATION**

- What feedback does the Metro Council have for making the Development-Ready Communities program and assessment tool appealing and useful for the region's jurisdictions?
- What feedback does the Metro Council have regarding Metro's ongoing participation in the implementation of a regional Development-Ready Communities program?

**PACKET MATERIALS**

- Would legislation be required for Council action  Yes  No
- If yes, is draft legislation attached?  Yes  No
- What other materials are you presenting today?

Attachment: Development-Ready Communities Assessment Tool

# Development Readiness Pilot Project

## WORKING DRAFT 4/25

The Development-Readiness Group of the Community Investment Initiative (CII) has identified a need to improve the overall efficiency and consistency of local government support of project delivery in the Portland region. Some in the private development community in the Portland region have experienced situations in which public-led processes are time intensive and overly costly, carry more risk than reward, and do not always lead to the anticipated outcomes. The Development-Readiness Group is interested in exploring the feasibility of a diagnostic tool that will, in collaboration with jurisdictions and the private sector, increase the effectiveness, value, and predictability associated with the public-sector components of development projects.

## Purpose of the DRAFT Diagnostic Tool

The first step of this pilot program begins with the creation of a draft tool (contained on the following pages) that can be used to diagnose the strengths and limitations of the pilot jurisdiction's support programs (planning and zoning, permitting, and customer service, among others). The tool is not intended to provide exhaustive evidence of jurisdictional programs and processes, but rather to: (1) document successes and efficiencies, and (2) serve as a starting place for conversations about opportunities for improvement and implementation of best practices.

The consultant team<sup>1</sup>, along with the pilot jurisdiction of Oregon City, will complete this diagnostic tool together. The purpose of the initial diagnostic in Oregon City will be two-fold: (1) to assess the tool's effectiveness, value, and efficiency, and inform edits to finalize the tool, and (2) to initially identify programmatic strengths and provide insight on ideas for improvement in Oregon City.

## How to Use the DRAFT Diagnostic Tool

This draft diagnostic tool will only be used in Oregon City. As a result of the initial diagnostic (which will be completed in early to mid-April), the diagnostic tool will be refined. The assessment asks for information that will help Oregon City arrive at conclusions about the following variables:

**Overall score for each indicator:** Document whether the jurisdiction exceeds, meets, or needs improvement in a series of specific indicators.

**Strengths:** Document what the jurisdiction is doing well, including any successes that they should build upon.

**Ideas for improvement:** Outline potential solutions that could be implemented to improve processes and programs within that area to achieve the desired outcomes.

**Goals for next review cycle:** Identify areas for improvement and set specific goals for the next planning period.

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<sup>1</sup> ECONorthwest and Group Mackenzie.

## A. Land availability & site readiness

This category evaluates jurisdictions' planning and implementation activities that are necessary to ensure an adequate supply of residential and employment lands. It also evaluates site readiness efforts, defined here as efforts to identify, invest in, and market key available opportunity sites.

DESIRED OUTCOMES	STRENGTHS	IDEAS FOR IMPROVEMENT	COMMENTS
<b>A1.</b> The jurisdiction has plans and procedures in place to ensure sufficient availability of residential and employment lands.			
Evidence of efforts to ensure that amount and location of zoned land reflects realistic market potential in the short- and long-term ( <i>market assessments, job lands analysis, updates to comprehensive plans</i> )	+ = - 0		
Connection of an economic development strategy to land supply needs ( <i>Clearly articulated job creation actions that tie to needed changes in or supply of employment lands</i> )	+ = - 0		
Evidence of work with overlapping taxing jurisdictions to coordinate investments in infrastructure and facilities to support land availability ( <i>MOUs or IGAs, coordinated CIP processes</i> )	+ = - 0		
<b>A2.</b> Staff has identified specific development opportunity sites and is proactively working to encourage development on them.			
Identified <b>employment</b> opportunity sites that are critical to economic development outcomes ( <i>Progress on State's industrial site certification/Decision Ready</i> )	+ = - 0		

or an equivalent program)				
Identified <b>residential or mixed use</b> sites that are critical to growth management outcomes ( <i>downtown or centers plans that identify target sites</i> )	+ = - 0			
Evidence of efforts to identify and overcome redevelopment barriers and prioritize infrastructure funding to support site readiness ( <i>through CIP or other processes</i> )				
Staff actively promotes technical or financial assistance to property owners and/or end users/private development community on key opportunity sites ( <i>business assistance programs, urban renewal, targeted infrastructure investments, low interest loan programs, marketing of site to end users, take up rates on programs, etc.</i> )	+ = - 0			

Overall score measurements: + exceeds | = meets | - needs improvement | 0 doesn't exist

## B: Development culture & customer service

This category evaluates the effectiveness/efficiency of staff interactions with customers.

DESIRED OUTCOMES	STRENGTHS	IDEAS FOR IMPROVEMENT	COMMENTS
<b>B1. The jurisdiction encourages inter- and intra-departmental teamwork and efficiency.</b>			
Evidence of a team approach among departments and bureaus, and coordination with other regulatory bodies (State, Counties, utilities, etc.) to ensure timely decision-making and collaborative problem solving ( <i>routine meetings before pre-app and / or debrief meetings, broad invitations to pre-application conferences, pro-active communications with other agencies, briefings for elected officials</i> )	+ = - 0		
<b>B2. Procedures in place for increasing predictability and staff responsiveness in the permitting process.</b>			
Clearly documented and appropriate requirements for required developer materials at pre-application conferences	+ = - 0		
Timely pre-application conferences that provide pertinent information and guidance with attendance from necessary departments / bureaus and other agencies	+ = - 0	Varies depending on developer feedback.	
Documented efforts to increase responsiveness and expedite permitting processes ( <i>eg. concurrent review processes, single staff point of contact, policies requiring quick</i>	+ = - 0	Fairly flexible on this; allow for paying overtime, also allow outside consultant	Limited formal policies

<i>response to applicants)</i>				
Established benchmarks for permitting timeline (varied by dev't type)	+ = - 0		Some benchmarking on infrastructure side, but not on the development side.	
Available and effective customer service training ( <i>for frequently asked questions, workshops with customers, etc.</i> )	+ = - 0			

**B3. The jurisdiction makes ongoing efforts to improve development permitting processes.**

Completion of continuing technical education for staff, and elected officials regarding development processes to keep up with current trends and construction methods ( <i>training in LEED / sustainability, new structural codes, pro-forma evaluation, current development market, etc.</i> )	+ = - 0			
Customer feedback tools in place ( <i>including confidential exit interviews with applicants and customer service surveys, seeking input from customers when hiring processes for key positions</i> )	+ = - 0			
Evidence of improvements to customer convenience ( <i>option for third-party plan review, ability to submit information for permits electronically</i> )	+ = - 0			

Note: + exceeds | = meets | - needs improvement | 0 doesn't exist

## C: Regulatory environment

This category evaluates the predictability and flexibility in land use and permitting processes.

DESIRED OUTCOMES	STRENGTHS	IDEAS FOR IMPROVEMENT	COMMENTS
<b>C1.</b> Regulations and permitting processes reflect the community's identified short-term development and long-term growth priorities.			
Frequency and adequacy of development code updates and streamlining ( <i>code update processes coordinated across multiple departments, regular schedule for updates, customer feedback regarding development codes</i> )	+ = - 0		
Pre-approved or fast-tracked processes for building permits for development types that meet community vision	+ = - 0		
Demonstration of stakeholder involvement in examining and improving code, design review, and approval processes ( <i>Committees for code updates that include affected neighborhood representatives, developers, property owners</i> )	+ = - 0		
Evidence of customer feedback being applied to dev't/zoning code updates or improvements to the development process	+ = - 0		
<b>C2.</b> The jurisdiction achieves a consistent balance between the predictability and flexibility of the land use and permitting processes.			

Evidence of appropriate flexibility in the use of the development code to address specific project situations ( <i>use of form based or outcome based code, design review, appeals or variances allowed in certain situations</i> )	+ = - <b>0</b>			
Differentiation of permitting tracts for differing project complexity ( <i>i.e. tenant improvements are less complex than a master planner community, and therefore have shorter timelines; availability of over-the-counter permits for certain site improvements</i> )	+ = - <b>0</b>			

Note: + exceeds | = meets | - needs improvement | 0 doesn't exist

## D: Development fees & incentives

This category evaluates the predictability and transparency of tax, fee, and incentive structure in the recruiting and permitting process.

DESIRED OUTCOMES		STRENGTHS	IDEAS FOR IMPROVEMENT	COMMENTS
D1. Information about applicable taxes, development fees, and incentives is readily available and accurate.				
Current fee schedule and any available waivers available on jurisdiction's website.	+ = - 0	Yes, but very limited availability to provide waivers b/c of City code.		
Online building permit and SDC fee estimator program available.	+ = - 0	Working on this right now.		
Availability of information at pre-application conference that provides accurate overview of all fees and incentives that are applicable to project.	+ = - 0			
Permitting fees and SDC rates are tracked and adjusted relative to actual jurisdictional costs	+ = - 0			
Staff is aware of and shares information about applicable fees, incentives, and opportunities for fee reductions ( <i>availability of brochures about fees / programs that staff and applicants can reference; employee performance reviews, customer feedback</i> )	+ = - 0			

D2. The jurisdiction has adopted development incentive programs and/or processes, and informs/educates potential customers during the development process regarding various options.

Public assistance availability for certain types of development <i>(Urban Renewal Areas, fee/tax abatements, pre-development assistance, fast-track permitting for some development types)</i>	<p>+</p> <p>=</p> <p>-</p> <p><b>0</b></p>			
Flexibility with payment of System Development Charges (SDCs) payments <i>(upfront at permit issuance or SDC payment plan/loan program)</i>	<p>+</p> <p>=</p> <p>-</p> <p><b>0</b></p>			

Note: + exceeds | = meets | - needs improvement | -0 doesn't exist

## E: Outreach & engagement

This category evaluates outreach and engagement efforts to the general public as well as to the development community, and the alignment between these efforts and the visions outlined in plan documents.

DESIRED OUTCOMES	STRENGTHS	IDEAS FOR IMPROVEMENT		
<b>E1.</b> The jurisdiction actively informs the public about the development process and provides multiple avenues for feedback.				
Processes in place for gathering and sorting feedback from various development stakeholders ( <i>web-based forms, exit interviews with customers, surveys of customers</i> )	+ = - 0			
Frequency of communications and information provided to neighborhood groups ( <i>staff attendance at neighborhood meetings, regular newsletters, staff briefings with neighborhood leaders about major developments</i> )	+ = - 0			
Availability of bi- or multi-lingual staff and/or outreach materials during communication and education efforts, or ability to communicate with those with limited English proficiency	+ = - 0			
OTHER IDEAS: Quality and relevance of neighborhood responses to development applications.  Engagement timeline requirements that minimize	+ = - 0			

impacts to permit applicants and provide timely feedback from community to developer for consideration				
<b>E2. The jurisdiction actively informs the developers about the vision for development, opportunity sites and incentives, and development processes.</b>				
Evidence of efforts to engage the development community in creating visions and implementation strategies ( <i>developer roundtables for small area plans or urban renewal plans, developer participation in citizen advisory committees</i> )	+ = - 0			
Evidence of efforts to market opportunity sites and apply incentives ( <i>targeted websites; including discussion of incentives in pre-apps; regular outreach and communication to property owners and developers; take up rates for incentive programs</i> )	+ = - 0			

Note: + exceeds | = meets | - needs improvement | 0 not available

## **Additional evidence of excellence**

Please document additional procedures, processes, or plans that your jurisdiction has in place that you feel improve the overall quality of development, your overall development readiness, or help move forward your community's vision for redevelopment. Some examples of specific best practices are included in the addendum to this Diagnostic Tool, but may include such items as incentives for green building or LEED, use of cost benefit or other evaluations to prioritize implementation of infrastructure investments to improve land availability, or use of the State's vertical housing development zone incentives.

## Development Statistics

This table shows a number of potential numerical indicators to illustrate how the City's development environment is changing over time.

	2011	2012	2013	2014
<b>Development Review Process</b>				
<b>Land use approval timeline (in working days) by project type:</b>				
<b>SF residential</b>				
<b>MF residential</b>				
<b>Industrial</b>				
<b>Commercial</b>				
<b>Average time (in working days) to completeness of application</b>				
<b>Ratio of FTE to permit applications</b>				
<b>Building permit timeline:</b>				
Number of times application is sent back with redlines				
Average time (in working days) for building permit issuance and land use approval, by project type: (tenant improvement vs other)				
<b>SF residential</b>				
<b>MF residential</b>				
<b>Industrial</b>				
<b>Commercial</b>				

<b>Development Activity</b>					
Pre-applications processed (total)					
Development applications processed (total)					
Residential permit activity (total)					
Commercial permit activity (total)					
Commercial value of construction (in \$)					
<b>Other Statistics</b>					
Survey responses: (for hypothetical survey) Overall experience fair to excellent					
Appeals (including LUBA): (percent of total)					

## GOALS for next review period

TBD after completion of diagnostic

Agenda Item No. 3.0

**USE OF OPPORTUNITY MAPPING IN  
UPCOMING REGIONAL PLANNING AND  
DEVELOPMENT DEPARTMENT  
ACTIVITIES AND THE EQUITY  
STRATEGY PROGRAM DURING FY 13-14**

Metro Council Work Session  
Tuesday, May 14, 2013  
Metro, Council Chamber

# METRO COUNCIL

## Work Session Worksheet

**PRESENTATION DATE:** May 14, 2003

**TIME:** TBD

**LENGTH:** 45 min

**PRESENTATION TITLE:** Use of Opportunity Mapping in upcoming regional Planning and Development Department activities and the Equity Strategy Program during FY 13-14

**DEPARTMENT:** Planning & Development, Office of the Chief Operating Officer

**PRESENTER(S):** John Williams 503-797-1635 [john.williams@oregonmetro.gov](mailto:john.williams@oregonmetro.gov)  
Nuin-Tara Key 503-797-1917 [nuin-tara.key@oregonmetro.gov](mailto:nuin-tara.key@oregonmetro.gov)  
Mara Gross (Coalition for a Livable Future)

### WORK SESSION PURPOSE & DESIRED OUTCOMES

- Purpose: Staff will describe how the emerging opportunity mapping materials might be used in our various work efforts, including the Metro Equity Strategy Program, the 2014 Urban Growth Report (UGR), the Regional Transportation Plan update, the Climate Smart Communities project, MTIP and other planning initiatives.
- Outcome: Council understanding of how the opportunity mapping tool and data will be used in Planning and Development Department activities, and how these activities relate to Metro's Equity Strategy Program

### TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

The Metro Council has adopted policies to make decisions that advance six desired outcomes found in the Regional Framework Plan. One of those desired outcomes pertains to equity. Following Council's policy direction, staff has been working to build its capacity to provide the Council with information on regional performance related to the six desired outcomes and equity. One example is that Metro has partnered with the Coalition for a Livable Future (CLF) to develop a mapping tool and data that can be used to illustrate demographic conditions and access to opportunities (e.g., access to transit or affordable housing) in the region.

As background, Metro was part of a coalition that applied for a HUD/EPA/DOT Sustainable Communities grant in the fall of 2011. The development of a regional housing strategy was the main focus of the grant proposal. To support the development of that strategy, one deliverable of the proposal was a printed report on regional access to opportunity (building on work done to date on opportunity maps). The coalition did not receive the grant. Had the coalition been successful in that application, work would have begun in FY 2012/2013.

Despite not receiving the grant, Metro and CLF continued their already-established partnership to develop a mapping tool with a robust set of indicators. Generally, Metro staff's role has been to co-manage the effort to develop the mapping tool and to complete the technical work to do so. Planning staff spent roughly 100 hours (estimated) co-managing the project and funded approximately 1,000 hours in the Data Resource Center to develop the mapping tool and

incorporate indicator data into the tool. Along with co-managing the project, CLF took the lead on engagement activities, identification of which indicators to map, and data collection.

Development of the mapping tool and data has now been completed, though improvements and updates may be made in the future. Using the tool and data, CLF anticipates releasing its web-based Regional Equity Atlas update in June 2013. In the intervening time since the Sustainable Communities grant proposal was denied, Metro staff has worked to identify other opportunities to utilize opportunity maps in existing and upcoming work programs and Council decisions. Staff will look to the Metro Equity Strategy Program for guidance on how best to incorporate this information into work programs and products, and at the work session will describe the connections that are currently envisioned.

#### **QUESTIONS FOR COUNCIL CONSIDERATION**

None at this time.

#### **PACKET MATERIALS**

- Would legislation be required for Council action  Yes  No
- If yes, is draft legislation attached?  Yes  No
- What other materials are you presenting today? None

Examples of how various work programs may utilize opportunity maps:

***2014 Urban Growth Report (UGR):***

The UGR is the basis for the Council's periodic growth management decision. The next UGR must be completed and accepted by the Council by the end of 2014. Staff intends to release a draft UGR in July 2014. Staff intends to incorporate performance measurement into the 2014 UGR and to relate performance measures to the six desired outcomes. With guidance from the Metro Equity Strategy, the 2014 UGR will also seek to highlight new data such as those depicted in Opportunity Maps. Given the particular focus of the growth management decision, staff anticipates that opportunity maps that describe demographic conditions and access to jobs and housing will be of particular interest.

***Climate Smart Communities:***

Under the Climate Smart Communities Scenarios Project, the Council will adopt a preferred scenario for the region to pursue to reduce greenhouse gas emissions from light vehicles, considering the effects on advancing all six of the region's desired outcomes – including equity. The preferred scenario selected in December 2014 will guide future RTP and MTIP updates and regional functional plans that direct local implementation. The CSC work program calls for development of a “regional trends snapshot” in coordination with the 2014 RTP update for release in October 2013. The snapshot will summarize existing regional trends related to land use, housing, jobs, socio-demographics, travel behavior, land use and public health – relying on existing/available data sets and methods. The purpose of the snapshot is to provide context of where we are today, relative to the three 2035 future year scenarios that will be evaluated in summer 2013. Some analysis has already been completed as part of the Regional Active Transportation Plan existing conditions. CSC staff has also been coordinating with the UGR, RTP, MTIP and Equity Strategy Program staff to identify potential opportunities for collaboration. The opportunity mapping data and Equity Atlas provide new and compelling options for the regional snapshot and social equity analysis to be conducted on the three scenarios this summer, though we have not fully explored its potential, or whether it represents a step forward from our current best practice for equity and environmental justice analysis. In addition, Metro's Equity Baseline is anticipated to be completed in time to inform development of the preferred scenario (between October 2013 and March 2014).

***RTP & MTIP:***

Both the Regional Transportation Plan (RTP) and Metropolitan Transportation Improvement Program (MTIP) must meet federal requirements for Title VI Civil Rights and more broadly, for ensuring that our planning activities address the needs of the “traditionally underserved.” This core requirement for the RTP and MTIP forms the basis for how we address the larger question of equity and environmental justice in our region through these programs. Over the past several updates to the RTP and MTIP, we have incrementally improved our ability to understand and address equity and environmental justice issues through enhanced engagement and mapping using census data available to Metro. In this way, the opportunity mapping data and Equity Atlas provide new and compelling options for this part of the RTP and MTIP equity and environmental justice analysis, though we have not fully explored its potential, or whether it represents a step forward from our

current best practice for equity and environmental justice analysis. As the 2014 RTP update and 2015-18 MTIP update work programs are completed, staff will analyze the costs and benefits of utilizing the opportunity mapping data and Equity Atlas to advance the current practice of conducting equity analysis and proceed accordingly. Staff responsible for these programs have been coordinating with the Equity Strategy Program and Climate Smart Communities staff to identify potential opportunities for collaboration. Future RTP and MTIP updates will be guided by Metro's Equity Strategy Program recommendations.

### ***Southwest Corridor Study:***

The Southwest Corridor Plan used the information in the early opportunity mapping to understand existing conditions and identify needs of diverse populations to define and eventually prioritize public investments in transit, transportation, parks, natural resources and development incentives to support community visions. As work continues on project implementation (particularly for an HCT alternative to take into study under NEPA) the opportunity maps will provide critical information to support station locations and to identify needed pedestrian and bike connections to serve a variety of populations.

### ***Equity Strategy Program:***

The Equity Strategy Program will define Metro's roles and responsibilities in advancing equity (one of the region's six desired outcomes) and will guide implementation of an actionable and measurable Equity Action Plan across the agency.

The program goals are to:

- ✓ Establish an evidence-based decision making process that ensures meaningful engagement from communities most impacted by disproportionate burdens.
- ✓ Co-create internal and external capacity to understand Metro's role in advancing equity across the region's desired outcomes.
- ✓ Identify the institutional systems that stand in the way of equitable outcomes, as well as the institutional systems that provide opportunities to support equitable outcomes, including the tools needed to implement equitable practices throughout the agency.
- ✓ Define and implement a Metro-specific equity strategy that is actionable and measurable

The scope of work for this effort has been organized in three steps (see figure below).

The following is a brief overview of the first step of this process, the development of Metro's Equity Baseline, and includes a summary of how this effort will utilize the Equity Atlas during this process.

The **Equity Baseline** is intended to answer the research question "within the region's six desired outcomes, what are the regional inequities and where are there disparities?" To answer this question, program staff will employ Technical Assistance Contracts (TAC) to support the development of a set of proposed equity indicators for the five regional outcomes aside from equity.

(Rather than isolate equity as a standalone outcome, the Equity Baseline will identify how to evaluate each of the five other outcome areas through an equity perspective.)

The focus of these contracts will be to help organize existing indicators and map them to the desired outcomes and also to frame these indicators within a narrative context, identifying the structural drivers of existing disparities.

The Equity Baseline will be grounded in existing indicator projects from around the region, including but not limited to the Greater Portland Pulse, the Regional Equity Atlas, and regional opportunity mapping efforts. In using existing indicators and data sets when possible, Metro will build on those efforts when identifying how to evaluate the region's desired outcomes through an equity perspective, rather than creating a new set of regional indicators.

Along with the final proposed equity indicators there will be supporting research and narrative on the structural nature of inequities in the region. The Equity Baseline indicators should give decision-makers information on the root causes of the inequities and will inform the Equity Strategy Advisory Committee's recommendations to the COO and Metro Council.

Program staff and consultants will work with Metro staff and the Equity Strategy Advisory Committee (appointment in-progress) to select the recommended Equity Baseline indicators. The Advisory Committee will make recommendations on a set of indicators for each outcome area to the COO, who will present the final recommendation on proposed indicators to Metro Council with full transmittal of all Steering and Advisory Committee recommendations.

Equity Strategy Program staff identify the Equity Atlas as being a central foundation of the Equity Baseline. The key distinction between the two is that the Equity Baseline will define how the Equity Atlas, Greater Portland Pulse and other existing indicator efforts map to the region's desired outcomes. The Equity Strategy Advisory Committee is being tasked with the responsibility of providing insight and expertise throughout this process by recommending which indicators are most relevant for evaluating the desired outcomes through an equity perspective.

Program staff is currently coordinating on the following activities:

- Title VI compliance
- Metro's Diversity Program and DAP implementation
- Climate Smart Communities Scenarios Project
- Community Investment Initiative
- Regional Opportunity Mapping
- Urban Growth Report
- Regional Transportation Plan updates
- Data Resource Center: Enhanced RLIS Demographic Project

# Equity Strategy Program Timeline



Materials following this page were distributed at the meeting.

Metro Council May 14, 2013

# Community Investment Initiative

Joe Rodriguez, Richard Steinbrugge, Nikolai Ursin

# Purpose of briefing

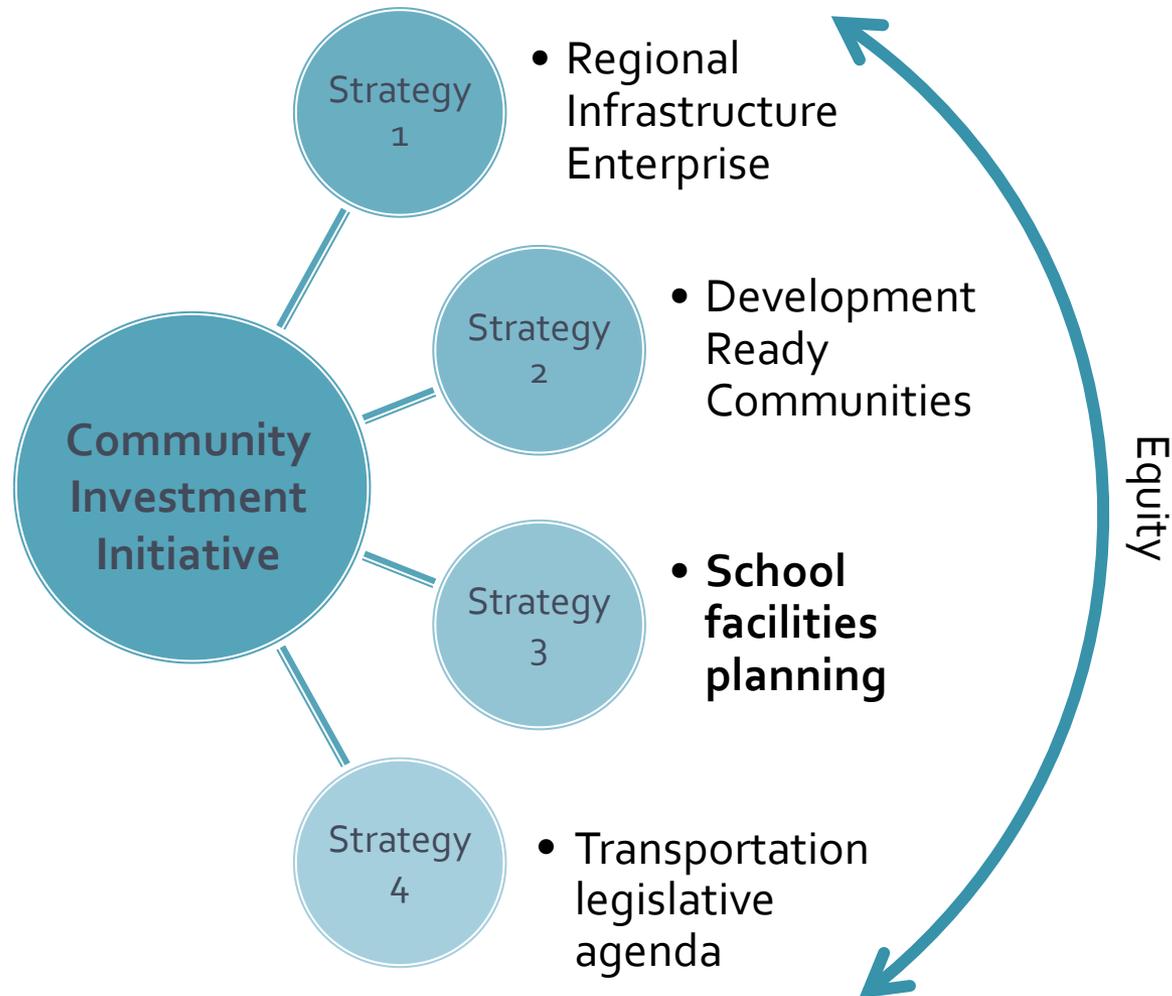
## AGENDA

- Today's goals
- Context
- Schools
  - Demonstrate School Facilities Planning Tool
  - Describe STEM workshop outcomes
- Development Ready Communities

## DESIRED OUTCOMES

- Feedback on effectiveness of the tools
- Recommendations to scale the application of the tools region-wide

# Context: CII's key strategies



# Context: The challenge

- **Workforce preparedness**
- **\$27-41 billion dollars in infrastructure needs**
- **Relationship between school facilities and student performance**
- **Changing technologies**

# Process

- Pilot District Program
- School Facility Planning Tool

Facility Indicators	Demographic Indicators
Year school built	% Free & Reduced Lunch
Seismic collapse potential	% ESL
Operating Expenditures	Chronic absenteeism
Energy Use Intensity	Graduation Rate
Capacity Utilization Factor	Reading/Math testing
Facility Condition Index	Student Mobility
	Disadvantaged students

# Next Steps for planning tool

- Senate Bill 540
- Presentations to Education Service Districts
- Partnerships with schools directly

# Technology & Learning Environments Workshop

- Technology guidelines and action plan to upgrade school facilities, classroom technology, and teacher training to prepare our workforce

# Discussion questions

- What feedback do you have on the school facility planning tool?
- What recommendations do you have for expanded use region-wide of the school facility planning tool or technology guidelines?

Joe Rodriguez— [joerod@teleport.com](mailto:joerod@teleport.com)

Dick Steinbrugge— [richard\\_steinbrugge@beaverton.k12.or.us](mailto:richard_steinbrugge@beaverton.k12.or.us)

Nikolai Ursin— [nikolai.ursin@oregonmetro.gov](mailto:nikolai.ursin@oregonmetro.gov)

**Thank you.**

Audience and Date

# **Community Investment Initiative: Development-Ready Communities Pilot Program**

# Challenge

- Inability to maximize development potential
  - Developers perceive regulatory barriers
    - Time uncertainty
    - Process/outcome uncertainty

*Lack of "development ready land"*

# Cost of doing nothing

- Persistent uncertainty in the development process
  - Inability to attract development
  - Increased pressure to expand the urban growth boundary

*Failure to fully realize value of existing infrastructure investments*

# Potential Benefits

- Maximize potential of available land
- Capitalize on existing infrastructure
  - Reduce demand for new infrastructure
- Generate Development and associated returns
  - Tax base
  - Jobs

# Development-Readiness Pilot Program

- Develop and test a “readiness” assessment tool
- Gauge interest in a program
- Assess feasibility of a permanent program

*Deliver more certainty at the local level*

# Why we are here

- Inform Metro Council about the progress of the pilot program and preliminary findings
- Seek feedback on how to make the program more useful and attractive to its intended users: jurisdictions

# Project Background

- The CII Development-Readiness Implementation group
- Created pilot tool and program
- Identified partner jurisdiction
- Vetted pilot tool through outreach and engagement
- Conducted pilot program
- Compile results and deliver recommendations

# The Pilot Program Process

1. Select pilot jurisdiction from volunteer communities
2. Work with jurisdiction to ensure commitment from local leadership
3. Familiarize staff with the assessment tool
4. Meet with staff to complete assessment tool
5. Follow up with staff to ensure clear communication
6. Deliver results

# The Diagnostic Tool

## **Focused on issues at the jurisdictional level**

1. Land availability and site readiness
2. Development culture and customer service
3. Regulatory environment
4. Development fees and incentives
5. Outreach and Engagement
6. Innovation/Other
7. Development Statistics/Benchmarking
8. Goals

# Diagnostic Tool: Example

## B. Land availability & site readiness

This category evaluates jurisdictions' planning and implementation activities that are necessary to ensure an adequate supply of residential and employment lands. It also evaluates site readiness efforts, defined here as efforts to identify, invest in, and market key available opportunity sites.

DESIRED OUTCOMES	STRENGTHS	IDEAS FOR IMPROVEMENT	COMMENTS
<b>B1. The jurisdiction has plans and procedures in place to ensure sufficient availability of residential and employment lands.</b>			
B1.1 Evidence of efforts to ensure that amount and location of zoned land reflects realistic market potential in the short- and long-term <i>(market assessments, job lands analysis, updates to comprehensive plans)</i>	+ = - 0		
B1.2 Connection of an economic development strategy to land supply needs <i>(Clearly articulated job creation actions that tie to needed changes in or supply of employment lands)</i>	+ = - 0		
B1.3 Evidence of work with overlapping taxing jurisdictions to coordinate investments in infrastructure and facilities to support land availability <i>(MOUs or IGAs, coordinated CIP processes)</i>	+ = - 0		

# Findings: Refining the Diagnostic Tool

## **Easier to fix:**

- Avoid ALL HR issues
- Put Outreach and Engagement somewhere besides last
- Development statistics not practical (though a good idea)

## **Harder to fix:**

- Where is the practical midpoint between comprehensive and specific?

## **Overall:**

- Comprehensive and valuable
- Tool less useful than conversation
- Developer emphasis: Development culture and customer service

# Findings: Oregon City Program

- Strengths:
  - Do a lot with a little
  - Commitment to outreach: Land of Opportunity campaign as example
- Focus on:
  - Customer service training
  - Goals and policies to support efficiency and readiness
  - Alignment and coordination

# Findings: Program Development

- Incentives will help
- “Vision” is an important issue
- Context sensitive process
- Needs both public and ‘quiet’ components
- Include direct customer feedback component
- Additional refinement needed

*Program administrator and tailored process will be critical to success*

# Preliminary Recommendations: Program Development

Possible program format:

1. Use diagnostic for goal setting
2. Develop work program
3. Provide support throughout implementation and track success

Questions:

- Incentives? Payment? Both?
- Graduation or certification?
- Self-evaluation or third party?

# Options for Metro role

- Support the continued implementation of a Development-Readiness program by the CII and its partners (Urban Land Institute)
- Identify opportunities to incentivize participation
- Provide alternate recommendations to the CII
- Conclude support for the Development-Readiness Program

# Discussion

- What would make this more appealing to your constituent jurisdictions?
- What would prevent jurisdictions from participating?
- Facilitated self-eval or 3<sup>rd</sup> party review?
- Fee-for-service, incentive, or some combination?
- To certify or not to certify?
- What other recommendations would you have for the program administration?