

**2040 PLANNING AND DEVELOPMENT GRANT
INTERGOVERNMENTAL AGREEMENT
Metro – City of Portland
SW Corridor Equitable Housing Strategy**

This 2040 Planning and Development Grant Intergovernmental Agreement (this “Agreement”) is entered into by and between Metro, a metropolitan service district organized under the laws of the state of Oregon and the Metro Charter, located at 600 Northeast Grand Avenue, Portland OR, 97232 (“Metro”), and the City of Portland, a municipal corporation, located at 1900 SW 4th Avenue, Portland, OR 97201 (the “City”). Metro and the City may be jointly referred to herein as the “Parties” or each, individually as a “Party”.

RECITALS

WHEREAS, Metro has established a Construction Excise Tax (“CET”), Metro Code Chapter 7.04, which imposes an excise tax throughout the Metro regional jurisdiction to fund regional and local planning that is required to make land ready for development after inclusion in the Urban Growth Boundary; and

WHEREAS, the CET is collected by local jurisdictions when issuing building permits, and is remitted to Metro pursuant to Intergovernmental Agreements to Collect and Remit Tax entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, the City has submitted a 2040 Planning and Development Grant Request attached hereto as Exhibit A and incorporated herein (the “Grant Request”) for the SW Corridor Equitable Housing Strategy (the “Project”); and

WHEREAS, Metro has agreed to provide 2040 Planning and Development Grant Funds to the City for the Project in the amount of \$230,000 subject to the terms and conditions set forth herein (the “Grant Funds”), to be matched by a contribution of \$85,000 from the City and the Parties wish to set forth the timing, procedures and conditions for receiving the Grant Funds from existing CET funds for the Project.

AGREEMENT

NOW THEREFORE, the Parties hereto agree as follows:

1. **Metro Grant Award.** Metro shall provide the Grant Funds to the City for the Project as described in the Grant Request, subject to the terms and conditions specified in this Agreement and subject to any specific funding conditions recommended by the Metro Chief Operating Officer and adopted by the Metro Council in Resolution No. 18-4902.
2. **Project Management and Coordination.** The Parties have appointed the staff identified below to act as their respective Project Managers with the authority and responsibility described in this Agreement:

For the City:	Ryan Curren Project Manager City of Portland, Bureau of Planning and Sustainability 1900 SW 4 th Ave. Portland OR 97201 Ryan.Curren@portlandoregon.gov 503-823-4574
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For Metro: Patrick McLaughlin
 TOD Development Project Manager
 Metro
 600 NE Grand Avenue
 Portland, OR 97232
 Pat.McLaughlin@oregonmetro.gov
 503-797-1736

In the event the City needs to assign a new Project Manager other than the individual named above, the City will present in writing to Metro the qualifications and experience of the proposed new Project Manager. Metro shall have the opportunity to review the qualifications and may reject a proposed Project Manager who Metro deems unqualified.

3. Mutual Obligations of both the City and Metro. The Parties and their respective Project Managers will collaborate to oversee the successful implementation of the Project as follows:

(a) Selection of Consultants. The Project Managers will work together to identify consultants best qualified to perform the scope of work described in the Request for Proposals, attached hereto as Exhibit B. The Project Managers and any additional reviewers selected by the Parties will jointly review proposals from consultants and select a mutually agreeable consultant team to perform the work required to successfully complete the Project.

(b) Schedule of Milestones. The Parties have agreed to a preliminary schedule of milestones for completion of the Project, which are attached hereto as Exhibit C (the "Milestones"). After the Project Managers have selected a consultant team as described in subsection 3(a), the Parties expressly delegate authority to the Project Managers to prepare a revised schedule of Milestones that will provide more detailed performance timelines for the Project ("Revised Milestones"), including specific consultant and/or City deliverables for each Revised Milestone, and establishing the amount of Grant Funds to be disbursed by Metro upon satisfactory completion of each Revised Milestone. The Parties agree that the Revised Milestones will replace the Milestones, and will become the final and binding Exhibit C to this Agreement ("Revised Exhibit C"), unless and until it is later amended as allowed under paragraph 9 of this Agreement. This IGA will be incorporated by reference into the contract between the City and the consultants hired for the Project.

(c) Project Committee(s). The Project Managers will jointly determine the role of the Project steering/technical/advisory committee(s), if any, and the composition of such committees or other bodies. Metro's Project Manager will participate as a member of any such committee.

4. City Responsibilities. The City shall perform the Work on the Project described in the Grant Request, attached as Exhibit A, and as specified in the Revised Milestones, subject to the terms and conditions specified in this Agreement and subject to any funding conditions recommended by the Metro Chief Operating Officer and adopted by the Metro Council in Resolution No. 18-4902. The City shall obtain all applicable permits and licenses from local, state or federal agencies or governing bodies related to the Project.

(a) Use of Grant Funds. The City shall use the Grant Funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the Revised Milestones as set forth in this Agreement. In the event that unforeseen conditions require adjustments to the Project scope, approach, or schedule, the City shall obtain Metro's prior written approval before implementing any revisions to the Project.

(b) Consultant Contract(s). After the Project Managers have selected the consultant team and completed a schedule of Revised Milestones as described above in section 3, the City shall enter into a contract(s) with the selected consultant team to complete the Work as described in the Revised Milestones. The contract(s) entered into by the City shall reference this Agreement, including the schedule of Revised Milestones set forth in Revised Exhibit C.

(c) Submittal of Grant Deliverables. Within 30 days after completing each Revised Milestone, the City shall submit to Metro all required deliverables for the Revised Milestone, accompanied by an invoice describing in detail its expenditures as needed to satisfy fiscal requirements. Deliverables must be submitted to Metro separately and sequentially; the City shall not submit additional deliverables and invoices to Metro for later milestones until Metro has reviewed and approved all prior deliverables under paragraph 5 of this Agreement.

5. Metro Responsibilities. Metro's funding commitment set forth in this Agreement shall be fulfilled solely through CET funds; no other funds or revenues of Metro shall be used to satisfy or pay any CET grant commitments. Metro shall facilitate successful implementation of the Project and administration of Grant Funds as follows:

(a) Review and Approval of Grant Deliverables. Within 15 days after receiving the City's submittal of deliverables as set forth in Revised Exhibit C, Metro's Project Manager shall review the deliverables and either approve the submittal, or reply with comments and/or requests for further documentation or revisions that may be necessary. Metro shall have sole discretion in determining whether the deliverables submitted are satisfactory in meeting the grant objectives and requirements.

(b) Payment Procedures. Upon Metro Project Manager's approval of deliverables, invoices and supporting documents, subject to the terms and conditions in this Agreement, Metro shall reimburse the City for its eligible expenditures for the applicable deliverable as set forth in Revised Exhibit C within 30 days.

6. Project Records. The City shall maintain all records and documentation relating to the expenditure of Grant Funds disbursed by Metro under this Agreement, as well as records and documentation relating to the financial match being provided by the City for the Project. Records and documents described in this section shall be retained by the City for three years from the date of completion of the project, expiration of the Agreement or otherwise required under applicable law, whichever is later. The City shall provide Metro with such information and documentation as Metro requires for implementation of the grant process. The City shall establish and maintain books, records, documents, and other evidence in accordance with generally accepted accounting principles, in sufficient detail to permit Metro or its auditor to verify how the Grant Funds were expended, including records demonstrating how City matching funds were expended. Metro and its auditor shall have access to the books, documents, papers and records of the City that are directly related to this Agreement, the Grant Funds provided hereunder, or the Project for the purpose of making audits and examinations.

7. Audits, Inspections and Retention of Records. Metro and its representatives shall have full access to and the right to examine, during normal business hours and as often as they deem necessary, all City records with respect to all matters covered by this Agreement. The representatives shall be permitted to audit, examine, and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls and other matters covered by this Agreement. All documents, papers, time sheets, accounting records, and other materials pertaining to costs incurred in connection with the Project shall be retained by the City and all of their contractors for three years from the date of completion of the Project, or expiration of the Agreement, whichever is later, to facilitate any audits or inspection.

8. Term. Unless otherwise terminated under paragraph 9, this Agreement shall be effective on the last date it is executed by the parties below, and shall be in effect until all milestones and deliverables have been completed, all required documentation has been delivered, and all payments have been made as set forth in Revised Exhibit C.

9. Termination. Metro may terminate this Agreement and cancel any remaining Grant Fund payments upon a finding by the Metro Chief Operating Officer that the City has abandoned its work on the Project or is otherwise not satisfying its obligations under this Agreement regarding the requirements of the grant.

10. Amendment. This Agreement may be amended only by mutual written agreement of the Parties.

11. Other Agreements. This Agreement does not affect or alter any other agreements between Metro and the City.

12. Waiver. The Parties hereby waive and release one another for and from any and all claims, liabilities, or damages of any kind relating to this Agreement or the Grant Funds.

13. Authority. City and Metro each warrant and represent that each has the full power and authority to enter into and perform this Agreement in accordance with its terms; that all requisite action has been taken by the City and Metro to authorize the execution of this Agreement; and that the persons signing this Agreement have full power and authority to sign for the City and Metro, respectively.

Metro

City of Portland
Bureau of Planning and Sustainability

By: _____
Martha Bennett
Metro Chief Operating Officer

By: _____
Joe Zehnder
Interim Bureau Director

Date: _____

Date: _____

Approved as to Form:

Approved as to Form:

By: _____
Nathan Sykes
Acting Metro Attorney

By: _____
City Attorney

Date: _____

Date: _____

Attachments:

Exhibit A – City’s Grant Request
Exhibit B – Request for Proposals
Exhibit C – Schedule of Milestones

Project: SW Corridor Equitable Housing Strategy – Implementation Priorities

Funding Requested: \$ 330,000

Matching Contributions: \$ 85,000

Clear development outcomes

1. Clearly describe the proposed project and the specific goals to help facilitate development in your community. *(Limit your response to page 1.)*

This project will help achieve the three primary goals of the Southwest Corridor Equitable Housing Strategy (EHS), a 2017/18 Portland/Tigard grant project:

- 1) Commit early financial resources to address the near-term housing crisis and long-term needs.**
- 2. Prevent residential and cultural displacement.**
- 3. Increase choices for new homes for all household types and incomes.**

With the strategy, Portland and Tigard have set affordable and market rate housing targets for the SW Corridor in advance of the significant public investment in light rail. Specifically, the draft target is to build 3,000 new homes along the corridor between 2018 and 2028; 2,000 market rate homes and a minimum of 1,000 of those new homes affordable for low-income households with incomes between 0-60% of the area median income.

This project will begin implementing some of the strategy's key initiatives in the Portland portion of the corridor; prioritizing publicly controlled sites for construction of affordable housing, land uses and urban design supportive of equitable housing near stations, inter-jurisdictional partnership for equitable Transit-Oriented Development (TOD), and community stewardship during the implementation of the strategy. Goals for the project include:

- **Portland City Council adoption of two TOD station area plans** (Barbur Transit Center and South Portland/Gibbs) to include updated urban design plans, and increased zoning code entitlements. In South Portland the existing historic district guidelines would be updated and improved as necessary to promote equitable development. Plans in these two areas will inform an agreement with the Oregon Department of Transportation regarding the future of two opportunity sites in their control.
- **Pre-development site analysis** ultimately leading to the construction of hundreds of new units of housing. The opportunity sites include several already in public ownership (Ross Island Bridgehead parcels, Barbur Transit Center, and the PCC parking lot) and other private parcels that could potentially be acquired by the City, Metro, or by TriMet as part of (or in tandem with) the light rail project. Because not all of these sites have been acquired, some pre-development analysis would be done with more generic site templates in order to make them implementable on more than one site.
- **Formation of an inter-jurisdictional Equitable TOD Workgroup** to execute the responsibilities detailed in the pending Memorandum of Understanding between TriMet, City of Portland, Washington County, City of Tigard, and Metro being developed to coordinate equitable TOD along the Corridor. This grant work will be coordinated with those agencies through that MOU. Grant funds will be used to increase TriMet's staff capacity to coordinate this work and plan for affordable housing on some of the remnant parcels likely to be designated as excess after the light rail is construction is complete.
- **Formation of a Community Preservation and Engagement Workgroup** composed of community leaders, nonprofit developers, and organizational partners working on anti-displacement initiatives in the corridor. This group will advise project decisions, build organizational relationships, and help the City and its public partners to deepen ties with communities vulnerable to displacement pressures.

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2. Provide a high-level description of the scope of work and general timeframe to complete the project. What are the project elements, the deliverables you envision, and the outcomes you seek to achieve? *(Limit your response to page 2.)*

1) Station area planning for equitable TOD (Quarter 1 2019 - Quarter 1 2020). This element will include urban design plans, interagency agreements, improved zoning entitlements in two station areas (South Portland/Gibbs and Barbur Transit Center), updating and improving historic design guidelines in the South Portland Historic District, and coordination with TriMet's Station Optimization Study.

Deliverables	Outcomes
<ul style="list-style-type: none">Urban design reportsWest Portland Town Center PlanSouth Portland Historic Design GuidelinesDraft City-ODOT agreement	<ul style="list-style-type: none">City Council adoption of refined zoning in both station areas, and refreshed historic design guidelines in South Portland.ODOT and City leadership agreement on development options at state-owned opportunity sites

2) Affordable housing opportunity sites pre-development analysis (Quarter 1 2019 – Quarter 4 2019). This work will build on concept and feasibility analysis now being conducted by the Housing Development Center for BPS and the Housing Bureau, at five sites. Funded work will refine two of these site plans (design concepts and housing programming), conduct due diligence (ex. Phase I analysis), quantify infrastructure needs, and propose a phased site-specific development and funding plan. Several sites are publicly owned. Others are being explored for acquisition by the Housing bureau. The City will coordinate closely with Home Forward and the Community Partners for Affordable Housing (CPAH) as they consider parcels and existing buildings for affordable housing. TriMet is expected to acquire land for the light rail project, some of which could be available for re-use after the project is built. Generalized templates will be used so information will be relevant to a variety of sites. If property is acquired during the grant period, we will incorporate the site into this scope.

Deliverable: Two site specific pre-development reports and funding strategies	Outcome: A pipeline of affordable housing projects eligible for current and proposed new public funding sources
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3) Implement Memorandum of Understanding (Quarter 1 2019 – Q1 2020). This element supports an Equitable TOD Workgroup implementing the anticipated MOU between the Cities of Tigard and Portland, Washington County, TriMet, and Metro. Funds will support new TriMet staff capacity (an intern or entry level TOD professional) to coordinate this workgroup and participate in the planning for affordable housing projects.

Deliverables	Outcomes
<ul style="list-style-type: none">Executed MOUWorkgroup action plan	<ul style="list-style-type: none">Agency TOD systems and policies in placeIncreased organizational capacity to meet the needs of marginalized communities

4) Community capacity building (Quarter 1 2019 – Quarter 1 2020). This element supports the formation of a Community Preservation and Engagement Workgroup of community leaders to advise project decisions, build organizational relationships, and develop deeper ties with community members. This group will build on the success of the organizations who conducted community engagement throughout the Portland/ Tigard housing strategy. Work will be tightly coordinated with Momentum Alliance's work funded through the SW Equitable Development Strategy pilot projects.

Deliverables	Outcomes
<ul style="list-style-type: none">Engagement of residents at risk of displacementCommunity meetingsCommunity leadership cohort focused on equitable TODEquity analysis of station area and opportunity site plans	<ul style="list-style-type: none">Increased community capacity to shape the development of station areas to meet the needs of low-income households and communities of color

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3. How will you know if the project is successful? *(Limit response to top half of page 3)*

Success will be achieved for station areas and site-specific planning (project elements 1 and 2) when:

- Private sector developers understand the station areas' development goals and have confidence in the public sectors' support.
- The City understands the impact of code and design requirements on station area build out and identify potential code barriers to achieving both urban design and housing production goals.
- The City identifies market factors that support or prevent desired development goals at both the station area level and site-specific.
- Partners better understand site limitations, design constraints and code factors affecting the feasibility of desired development outcomes on opportunity sites and identify redevelopment achievable approaches for a pipeline of affordable housing projects.
- The City and partners identify and develop tools and incentives needed to facilitate development partnerships and identify the additional resources and potential pathways to access needed capital.

Success will be achieved for community engagement and institutional coordination (project elements 3 and 4) when:

- The City and its partners have systems in place to plan and implement equitable TOD and the organizational capacity to better meet the needs of marginalized communities.
- Community partners have the resources and capacity to help shape the development of station areas that meet the needs of low-income households and communities of color.
- New and existing affordable housing resources are prioritized and deployed to achieve the housing targets in the SW Corridor Equitable Housing Strategy.

Advances and complements regional goals and policies

4. Describe how the project will help to advance racial equity in the metro region. *(Limit response to bottom of page 3)*

The project will advance one of the SW Corridor Equitable Housing Strategy goals. These draft goals have associated strategies with explicit "Commitments to racial equity" spelled out. Specifically:

- **Prioritize funding for culturally specific organizations** to develop affordable rental housing and reduce the racial wealth gap through homeownership opportunities. Pre-development activities will be conducted with an eye toward development and ownership by these types of organizations.
- **Create homeownership opportunities.** One affordable TOD project dedicated for first time low-income homeowners will be included in development programming with a focus on reducing the racial homeownership and wealth gap.
- **Invest in family sized homes.** Two and three-bedroom homes will be included in the development programming with a focus on larger family sizes for immigrant and refugee families.
- **Invest in housing for those in greatest need.** Homes affordable to households with incomes between 0-30% MFI will be included in development programming.
- **Use best practices of inclusive and equitable engagement** during planning processes. Practices to increase knowledge, capacity, and authority of communities of color will be used during station area planning. Engagement in the West Portland Town Center will focus on the Somali, Kurdish, and Iraqi households living near the Islamic Center of Portland.
- **Operationalize Portland Comprehensive Plan anti-displacement and equitable housing policies through station area plans.**

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5. Describe how this project will help to facilitate development while advancing established regional planning and development goals and outcomes. Consider how the project will help to implement the 2040 Growth Concept, its alignment with the Urban Growth Management Functional Plan, and the Six Desired Outcomes stated in the Regional Framework Plan. *(Limit your response to the top half of page 4.)*

As the region becomes more and more diverse, the benefits and burdens of growth should be distributed more equitably. Accordingly, the Southwest Corridor must offer housing opportunities for households all income levels. Housing development at the two target station areas will help achieve the first of the Six Desired Outcomes by putting people in a location where they have better access to transportation choices, have a lower carbon footprint, and more easily meet their everyday needs. Because these two stations are near OHSU and PCC, more workforce housing choices and improved access will also advance economic prosperity.

Site specific pre-development work touches on the sixth Desired Outcome by advancing a “project pipeline”, so that Portland and other agency and nongovernmental partners are prepared to move forward with several affordable or mixed income housing projects along the new light rail line, before it opens. Further, the project is particularly aligned with the key policy areas of the Regional Framework Plan:

- 1.1 Compact Urban Form
- 1.3 Housing Choices and Opportunities
- 1.8 Developed Urban Land

The area around the Barbur Transit Center is a designated Town Center in the 2040 Plan, and the Ross Island Bridgehead is within walking distance of the Central City. More detailed station area planning at these two locations will provide a framework for the City to consider increasing zoning entitlements. The recently-adopted 2035 Comprehensive Plan established higher density mixed use designations in the West Portland Town Center, but zoning changes to fully implement that designation have not yet been made. In the Ross Island Bridgehead area, it is likely that some zoning boundaries will need to be refined as streets are re-aligned. This will ensure opportunity parcels have clear uncomplicated entitlements. The project will also facilitate modernization of the South Portland Historic Design Guidelines (applicable in the South Portland National Historic District). These forty-year-old standards may otherwise be a barrier to sensitive infill in that district.

Aligns with local goals/maximizes community assets

6. How will the project create opportunities to accommodate your jurisdiction’s expected population and employment growth? *(Limit your response to the bottom half of page 4.)*

The SW Corridor station areas within Portland together have a zoned capacity to accommodate over 5,000 housing units over the next 20 years. The South Portland station area has a zoned capacity for more than 2,000 new units, and the Barbur TC stations area has capacity for over 1,000 new units. This project could increase that zoned capacity and catalyze development in key sites before light rail service is introduced.

Portland’s portion of the corridor also links some of the region’s largest employers and educational institutions; Portland State University, Oregon Health Science University, National University of Natural Medicine, and Portland Community College Sylvania. Planning for housing options that meet the needs of these institution’s employees is an economic imperative to maintain their competitiveness to retain a quality workforce.

Station area planning will look at what amount and mix of commercial uses are needed to create “complete communities,” and what housing types are needed to support those uses. Commercial development will bring new jobs and business opportunities to the corridor, helping to meet the City’s employment goals.

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7. Describe why you propose to take on this particular project at this time. How does the project relate to previous actions, goals, policies or strategies already identified or implemented by your jurisdiction or other project partners? *(Limit your response to top half of page 5.)*

This project must be done ahead of the transit project and resulting market speculation. Plans will give developers the confidence and clarity about what the station area build-out should achieve. Opportunity sites primed for development will result in a development pipeline front-loaded with affordable housing that create choices available earlier for lower income households who cannot compete in the market.

This project builds on past studies and plans. The Barbur Concept Plan identified key nodes along the corridor including both future station areas proposed for planning. The 2035 Comprehensive Plan followed by formally incorporating the Metro West Portland Town Center designation into Portland's land use plan. Those actions have created momentum, and interest among stakeholders to take next steps toward implementation.

An Equity and Housing Needs Assessment conducted as part of the SW Corridor EHS found:

1. The area's population is growing, with strong growth in communities of color
2. The current and future need for affordable housing and services is large but not insurmountable^[1]
3. The future will bring more multi-family housing throughout the corridor, but the current zoning and housing stock in Portland station areas is weighted toward single-family housing
4. Lack of funding has resulted in fewer organizations working in the corridor to meet the housing needs

In response to this analysis and at the direction of SW Corridor Equity and Housing Advisory Group we developed the following draft strategies which this project will implement:

1. Execute an interagency equitable TOD Memorandum of Understanding
2. Develop one TOD-scale (100+ homes) affordable multi-family building in each station area
3. Incentivizing equitable TOD through zoning
4. Form a SW Portland Urban Renewal Area
5. Form a lasting community-centered organizational structure to champion and implement the strategy

8. How would the project leverage aspects of the existing community fabric such as key development sites or urban form? How would it complement existing assets, facilities, or amenities such as historic districts, employment centers, natural features, parks or transit? *(Limit your response to bottom half of page 5.)*

South Portland:

- A South Portland Historic District update will modernize 40-year-old regulations, improve alignment with current urban design objectives, and preserve historic character.
- The Ross Island Bridgehead reconfiguration will to remove barriers to walkability, and free up land for station area development. This grant will provide further pre-development analysis on those parcels.

West Portland Town Center

- Station area planning will support better pedestrian connections for the 18 unregulated affordable apartment buildings, the Islamic Center of Portland and Markham Elementary School, all located in the watershed of the potential station area but on the other side of Interstate 5.
- A mixed-income mixed-use project at the Barbur TC would increase transit ridership, stimulate development of the Town Center, and increase activity in the surrounding commercial district. This grant will support further financial, legal, and design analysis of this opportunity, with ODOT.

Generally

- Urban design will improve access to potential transit stations, and support ongoing light rail station design.
- Workforce housing and transportation improvements in South Portland and around the West Portland Town Center will support major employers at OHSU and NUNM and PCC. Opportunity sites being analyzed are at each of potential light rail station along the corridor which have multi-family residential zoning.

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Team roles and capacity

9. Complete the table to clearly describe the roles and responsibilities of the applicant and each of the key project partners to accomplish the goals of the project. Also include consultant expertise needed. *(Add or adjust rows as needed but please limit table to page 6.)*

This project will rely on a variety of professionals with different sets of expertise. They include: economists, real estate market experts, development and financing consultants, community-based organization professionals, transportation planners, urban planners, and urban designers and architects.

E. Collaboration and Partnership

Jurisdiction or partner	Project role and responsibilities
Portland Bureau of Planning and Sustainability (Ryan Curren)	<ul style="list-style-type: none"> • Project direction and management • Urban design and land use planning • Technical research and code analysis • Community engagement lead • Opportunity sites co-lead
Portland Housing Bureau (Program Coordinator will report to Matthew Tschabold)	<ul style="list-style-type: none"> • Opportunity sites co-lead • Identify affordable housing resources • Policy analysis of land use plans
Prosper Portland (Justin Douglas)	Urban Renewal Area due diligence and analysis
Portland Bureau of Transportation (Teresa Boyle)	<ul style="list-style-type: none"> • Station area and opportunity site planning participant • Analysis of station area mobility infrastructure needs
Community partners- Muslim Educational Trust, Community Partners for Affordable Housing, Fair Housing Council of Oregon, Community Alliance of Tenants, UniteOregon, OPAL, HomeForward, Momentum Alliance, and others	<ul style="list-style-type: none"> • Advisors to station area planning and affordable housing site planning • Engagement of low-income households and communities of color • Equity consultative services to project • Fair housing education for the broader community
TriMet (David Unsworth)	Equitable TOD Workgroup lead and coordination (includes station area planning and opportunity sites analysis)
Metro (TBD)	<ul style="list-style-type: none"> • Equitable TOD Workgroup participant • Opportunity site analysis participant
Consultants	<ul style="list-style-type: none"> • Facilitation and public event planning • Station area development analysis • Opportunity site pre-development analysis • Urban design and land use planning • Historic design guidelines

10. Describe the skills, experience and availability of the lead staff person who will manage all aspects of the grant project and oversee the project team's collaboration and consultant work. (Limit your response to top half of page 7.)

Ryan Curren is a Project Manager for the City of Portland Bureau of Planning and Sustainability where he is leading the development of the SW Corridor Equitable Housing Strategy. His work focuses on where affordable housing policy and racial equity intersect with land use, economic development, and transit policy. His skills include managing complex community planning processes, racial equity and housing policy analysis, and real estate development. Half of his time will be dedicated to this project along with a full time Planning Assistant.

Prior to this position he was a Senior Community Development Specialist for the Seattle's Office of Housing where he provided policy, planning and pre-development analysis for the administration and investment of the city's housing resources. He managed a community development strategy in Southeast Seattle light rail station areas funded by a HUD Sustainable Communities Challenge Planning Grant and launched Seattle Equitable Development Initiative. Before that, Curren was the Senior Economic Development Analyst for the City of Seattle's Office of Economic Development and a research analyst for former Seattle Mayor Norm Rice at the University of Washington's Center for Civic Engagement.

Likelihood of implementation

11. What governing bodies or private parties will have to act to ultimately implement the project, and what is the extent of their authority to make policy or commit investments? Describe the roles the key project partners will have to play over time in order to fully and successfully implement the project in order to realize the envisioned development benefits in your community. (Limit your response to bottom half of page 7.)

The full Portland City Council supported crafting a Southwest Corridor Equitable Housing Strategy, and sees it as a necessary precursor to a light rail project. They are poised to adopt the strategy this summer and take early action to implement the key recommendations outlined in this proposal. They have the authority to adopt new land use regulations at station areas, approve the use of City housing funds for key opportunity site development, enter the City into a MOU with jurisdiction partners, and package resources for the ongoing support of a community-centered structure to steward the EHS.

The Portland Planning and Sustainability Commission is a vocal champion of the EHS and is taking an active role in the implementation phase with a particular emphasis on removing barriers to development at station areas, prioritizing publicly controlled land for affordable housing, and priming opportunity sites for early development. They can approve station area plans and associated regulatory changes.

The opportunity sites include several already in public ownership (Ross Island Bridgehead parcels, Barbur Transit Center, and the PCC parking lot). PCC has expressed a strong interest in exploring development options for affordable housing on their parking lot. ODOT has been less engaged in redevelopment discussions on their two properties. However, this project will enable the City to begin developing a proposal for an agreement with ODOT about the future redevelopment of their properties.

The anticipated TOD MOU will coordinate jurisdictions' acquisition activities as opportunities arise. Our analysis on private parcels that could potentially be acquired by the City, Metro, or by TriMet as part of (or in tandem with) the light rail project would be done with more generic site templates in order to make them implementable on more than one site. PHB is in the position to provide gap financing should any of these sites become viable development opportunities (i.e. a feasible development plan exists and a development sponsor with capacity is interested). Metro may also play a funding role through their Metro TOD Program and a regional housing bond should Metro refer and voters approve a bond measure in November.

12. Identify and describe the potential opportunities and threats that could affect the successful implementation of this project. *(Limit your response to top half of page 8.)*

Within the grant period there are many more opportunities to enhance the project than there are threats to derail it. Opportunities include:

- A privately owned site is purchased by a project partner, allowing for our conceptual analysis to be used to accelerate that site's development timeline.
- New philanthropic resources are attracted from organizations interested in the supporting some of the community-driven development and engagement activities.
- New organizational partners become active in the corridor and/or existing institutional partners become more engaged as they identify opportunities for alignment with their missions.

The overriding threat to implementation of the EHS and this project's subset of implementation strategies is if a lack of political and/or community support manifests for the light rail project. This would dampen support for the station area plans and potential new development at opportunity sites. We believe this project is necessary regardless of light rail decision given the regional significance of the Town Center, and the dearth of affordable housing options in SW relative to other geographies.

Public involvement

13. What community members or stakeholders will be most affected by the implementation of the project's development outcomes? Discuss how the public (including neighbors, businesses, property owners and other key stakeholders) and historically marginalized communities (including low-income and minority populations) will be involved in the project. Be specific about the practices or methods you intend to use. *(Limit your response to bottom half of page 8.)*

Three groups will be impacted by project outcomes: the general population in South Portland and near the West Portland Town Center, low income renters in the region, and the established West Portland Town Center Muslim community, who are predominately renter and immigrant households. The project will engage these three populations. A more complete engagement plan will be developed in the early project stages.

The City will build on the EHS public involvement strategies, which engaged hundreds of people from underrepresented communities. Involvement will be designed to help increase community capacity to effectively engage the project's major land use planning and housing development projects. Localized advisory groups for the West Portland Town Center and South Portland Station Areas may be appropriate. The City and its partners will connect with existing networks and co-host meetings with community-based organizations to get constituent feedback on project goals and recommendations. The Fair Housing Council of Oregon is also willing to provide fair housing trainings to neighborhood associations and other organizations.

A Community Preservation and Engagement Workgroup composed of community leaders will advise project decisions, build relationships, and develop deeper ties with community members. A portion of the project budget is reserved for grants for leadership development and direct engagement of low-income residents and communities of color through leadership development cohort(s), hosting community meetings or "living room" discussions, and surveys or focus groups. For example, during SW Corridor Equitable Housing Strategy the City awarded a \$60,000 grant to the Community Alliance of Tenants and small \$2,500 stipends to CPAH, Muslim Educational Trust, OPAL, and Unite Oregon to directly engage lower income tenants in the corridor.

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Finally, the City will continue to collaborate with Metro and TriMet to support the High-Capacity Transit project public involvement. We will coordinate with the SW Corridor Public Involvement Team to engage residents, businesses, property owners, and key stakeholders.

14. Identify any committees that will be engaged in the project. Describe how the committee members will be selected, the extent of their involvement and their scope of authority for making decisions regarding project goals, process, or implementation. *(Limit your response to top half of page 9.)*

Building off of the highly engaged activity of the SW Corridor Equity and Housing Advisory Group members we will solicit interest from those organizations wishing to participate in this implementation phase through the Community Preservation and Engagement Workgroup and/or the station area advisory groups. Similar to the grant award process for the EHS, the workgroup will be limited to organizations whose mission is to work with or serve low-income residents and communities of color working on housing issues. The workgroup will have decision making authority as to how the grant funding is distributed to other members as we only anticipate making one award to a lead applicant. They will develop their collective scope of work outside of the parameters we describe in questions 9 and 13 of this application. At least one representative will sit on the station area advisory groups. The workgroup will have advisory responsibility on station area goals and recommendations and housing funding and programming goals for the opportunity sites.

Station area advisory group participation will be limited to organizations and individuals in the SW corridor. A variety of perspectives will be recruited including from renters, homeowners, business owners, historic preservationists (South Portland), neighborhood associations, human service providers, developers, and funders to name a few. They will advise on station area goals and recommendations.

Both structures described above will have regular interactions with jurisdiction staff on the Equitable TOD Workgroup throughout the project. The frequency and scope of these interactions still needs to be determined.

15. Describe how the public process and both the committee and/or community input will be used to strengthen the project outcomes and increase likelihood of implementation. *(Limit your response to bottom half of page 9.)*

The Equitable TOD Workgroup agencies collectively possess the majority of the resources and authority to bring those opportunity sites concepts to reality. Through a process of negotiation and compromise toward our shared goals we will advance sites into a pre-development phase to increase their likelihood of attracting a development sponsor and securing funding.

Community Preservation and Engagement Workgroup (CPEW) and station area advisory groups will both provide advice on station area goals and recommendations though through different means, with different perspectives, and at different levels of detail. The CPEW will use an equity lens and vet their recommendations through methods that directly engage low-income residents and people of color. The advisory group members will each represent their own perspectives and the groups recommendations will represent the plurality of opinions. Both groups input are valuable and will be heavily weighted as staff package the project deliverables and authorizing bodies (Council and PSC) deliberate approving station area plans and site development proposals. Both groups support will greatly increase the likelihood of implementation.

Jurisdiction track record

16. Describe any similar planning and development projects (CET/CPDG or other) that have been implemented in your jurisdiction in the last 5 years and how that experience will be applied to this project. How successful have these projects been in delivering the proposed outcomes? *(Limit your response to top half of page 10.)*

SW Corridor Equitable Housing Strategy (2017-18)

The Bureau of Planning and Sustainability has delivered all proposed outcomes of the EHS as described in the intergovernmental agreement with Metro. During this ongoing strategy development process with the City of Tigard, BPS has developed an in-depth knowledge of the demographics, population needs, land uses, and the existing housing market within the proposed project area. Working with affordable housing organizations and real estate professionals during this project also deepened the bureau's understanding of how affordable housing is financed. This will provide a running start to the pre-development work proposed for opportunity sites and the Transit Oriented Development area plans proposed for the two station areas.

Similarly BPS staff have developed a positive working relationship with the owners of the publicly owned opportunity sites included in the current grant application as well as organizations engaging low-income households and communities of color within the area. Such existing relationships improve the bureau's ability to immediately work effectively with opportunity site stakeholders and community organizations on project goals.

Mixed Use Zoning Project (2013) and Improving Multi-Dwelling Development (2015)

Both the Mixed Use Zoning and the Multi-Dwelling Development projects engaged economic and design consultants to provide conceptual development plans and financial feasibility analyses. Experience in the administration of the contracts individually and the interaction between these two disciplines have provided BPS staff with a greater understanding of the relationship between market forces and ensuing design. One result of this experience is a greater understanding of what types of projects will be successful in attracting private investment and what sort of intervention is necessary to support affordable housing types not otherwise supplied by the private market. This experience will be valuable during the current grant request in crafting support for the opportunity sites and formulating tactics that will promote equitable housing elsewhere in the study area.

17. What project management lessons learned or best practices will be applied to this project? *(Limit your response to bottom half of page 10.)*

The Bureau of Planning and Sustainability's finance section and its individual grant project managers have administered nine prior CPDG/Equitable Housing/ 2040 Planning and Development Grants. Through ongoing communication and feedback from Metro Staff, BPS has improved its ability to accurately track and report on grant related expenditures and document completion of project deliverables in a manner that meets Metro's reporting standards.

Another lesson learned during our Bureau's administration of previous grant projects is the necessity to assign realistic timeframes to project phases and deliverables schedules. This is particularly true when projects include participation by outside non-profit organizations or volunteer community organizations. The collaborative nature of this proposed project will require ample time for jurisdictional partners to review project deliverables.

Engagement with under-represented communities is becoming a core competency for BPS. Personal relationships between city staff and community organizations are developed project by project, meeting by meeting. Tools such as translation services, stipends, food, and childcare options are now regularly included in community outreach efforts to reach populations previously excluded from earlier outreach efforts. Contracting with community based organizations accountable to communities of color and low-income households has proven to not only improve project outcomes but also build BPS staff's skills in bringing government and private sector resources to bear to meet the needs of these populations.

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18. If implementation of any prior CET/CPDG grant projects has not been successfully completed, please describe why. If your organization has never received a CET or CPDG grant, please state “not applicable.” *(Limit your response to top half of page 11.)*

Not applicable

Replicable best practices

19. Consideration will be given to applications that demonstrate best practices that can be easily replicated elsewhere. Discuss how lessons learned from the project could be applied to other projects in your community or in other parts of the region. *(Limit your response to bottom half of page 11.)*

The SW Corridor Equitable Housing Strategy provided a few best practices which Metro and other partners have now adopted. Metro and Home Forward are looking to replicate and/or conduct deeper analysis based on the PSU report commissioned by BPS analyzing “naturally occurring affordable housing” in the SW corridor. Metro used the BPS housing gaps analysis methodology to provide data for every jurisdiction in the Metro region. The stipend and grant structure we used to fund community based organizations to engage low-income households and communities of color highly informed Metro’s SW Equitable Development Strategy (SWEDS) Pilot Project grant structure. We anticipate this next phase of implementation will also produce best practices that can be replicated in other place-based planning and development efforts.

The MOU between jurisdictions to coordinate affordable housing development activities is a best practice used in other cities such as Seattle. The Equitable TOD Workgroup will use this experience to also explore a set of shared equitable TOD policies that agencies can adopt and apply across their jurisdictions. This work will be highly coordinated Metro’s continued planning activities through SWEDS.

The Community Preservation and Engagement Workgroup is based on best practices of inclusive community engagement; reimburse the expertise of organizations with accountable relationships with those most impacted by development activities, create transparent government decision making processes that can be shaped to meet the needs of those impacted communities, build the capacity of these organizations and leaders in these communities to strengthen their ability to influence development processes. Our hope is the organizations who choose to participate in this group will also participate in the SWEDS process exploring the formation of a multi-sector (not just housing) collaborative structure of organizations that champion and work on solutions for equitable TOD across the region.

Finally, refined zoning tools in the two station areas could be an opportunity for the City to develop a template for how to plan for more complete communities in Metro 2040-designated places. The City’s goal is to develop a “complete community” in each station area, contributing to a full range of commercial and community services along the corridor. We will do an economic assessment (market research) and community engagement to understand what combination of residential and commercial zoning could best support that outcome. Other jurisdictions may be able to replicate that approach in the future in other regional centers and station areas.

METRO CONTRACT 935491 - EXHIBIT A

Grant leverage and project budget

Budget templates

Use the two Excel spreadsheet templates provided to outline the estimated project costs and committed matching funds for the project. Indicate estimated costs for hours of work directly related to your project for applicant personnel, consultants, and personnel of any key project partners. Also indicate other direct project expenses and overhead/indirect project costs. You may leave blank any rows that do not apply, and add more specific line item descriptors as needed.

Budget narrative

For each category of personnel costs, explain the tasks each is expected to complete (i.e. design development, construction estimates, public involvement, technical research, code analysis). Use actual salaries for staff. Use market averages or bid estimates for consultant services. Clearly describe methodologies used for estimating all other costs.

(If necessary, applicants may use up to three pages for the budget narrative, for a total of 14 pages overall. Depending on the complexity of the project and level of staffing, most applicants will likely be able to provide the requested information regarding the budget methodology in just a page or two.)

This grant proposal includes a 25% match from the City, \$25,000 in cash for consultant services for station area planning, and a \$60,000 in-kind match in personnel time (for BPS staff managing this project and providing in-house urban design and community engagement services).

Consultant budgets were informed by bid estimates provided by consultants on similar projects being conducted for BPS. Staff costs are based on actual hourly salaries, estimated percent of FTE for one year (Q1 2019 through Q4 of 2019) and a 50% overhead cost. Hourly salaries and overhead costs are provided in the budget templates.

\$45,000	Consultant contract: Historic guidelines update <ul style="list-style-type: none">• Review existing historic guidelines and materials used to support district creation• Update historic resource inventory in the district• Conduct research on best practices for guidelines• Coordinate with BPS on community outreach• Prepare report with recommended updated guidelines
\$65,000 (\$40,000 grant and \$25,000 match)	Consultant contract: Economic, land use, and urban design. Create a development program and land use analysis for West Portland Town Center <ul style="list-style-type: none">• Analyze existing commercial services, walkability, and housing types• Refine urban design concepts, with BPS support• Identify the gaps in mobility infrastructure and housing types that could support transit ridership and development of a full range of commercial and community services.• Coordinate with BPS and facilitator on community outreach• Prepare a report with recommended land use changes and potential infrastructure investments
\$15,000	Consultant contract: Facilitation of West Portland Town Center planning process <ul style="list-style-type: none">• Develop scope and timeline for an advisory group• Develop agendas and materials and facilitate four quarterly advisory group meetings
\$15,000	Consultant contract: Urban Renewal Area due diligence <ul style="list-style-type: none">• High level analysis of the commercial environment along the corridor• Engage small business owners to determine needs• Prepare report with recommended uses of potential URA funds for business development Note: Preliminary analysis of URA capacity was already done in 2017.
\$50,000	Consultant contract: Pre-development analysis for two opportunity sites

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	<ul style="list-style-type: none"> Review and refine past conceptual development analysis of five opportunity sites (development programming, design, costs, funding sources, etc...) in order to identify which two are best positioned to be developed in the near term Conduct due diligence (ex. Phase I analysis, survey, appraisal), quantify infrastructure needs, and propose a development and funding plan for two sites.
\$110,000 (\$50,000 grant and \$60,000 match)	<p>Applicant staff:</p> <ul style="list-style-type: none"> BPS project manager (.4 FTE). <ul style="list-style-type: none"> Project direction and management City's Equitable TOD Workgroup lead Planning Assistant (.6 FTE). <ul style="list-style-type: none"> Advisory group(s), community partners, and jurisdictional coordination Station area planning research Community Outreach and Engagement Planner (.1 FTE). <ul style="list-style-type: none"> Community engagement plan design and coordination Community Preservation and Engagement Workgroup lead City Planner II (.2 FTE) <ul style="list-style-type: none"> Station area planning and historic design guidelines coordination Urban Design City Planner II (.1 FTE) <ul style="list-style-type: none"> Station area and opportunity sites urban design
\$50,000	<p>Partner staff:</p> <ul style="list-style-type: none"> Portland Housing Bureau Program Coordinator (.2 FTE) <ul style="list-style-type: none"> Co-lead opportunity site analysis and identify development funding sources. Analyze land use policies in station area plans TriMet TOD staff (.5 FTE) <ul style="list-style-type: none"> Lead the Equitable TOD Workgroup
\$60,000	<p>Community engagement contracts: Form a Community Preservation and Engagement Workgroup</p> <ul style="list-style-type: none"> Center priorities of low-income households and communities of color in the planning and implementation process Host one community meeting at each station area Conduct equity analysis of project proposals Host up to three fair housing workshops for the broader community
\$5,000	Direct costs related to at least one City-hosted community event in each station area



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2040 Planning and Development Grants (Cycle 6 - 2018)

METRO CONTRACT 935491 - EXHIBIT A

City of Portland Southwest Corridor Equitable Housing Strategy

Provide a high-level summary describing the project, anticipated work to be completed, and desired outcomes.

This project builds off the current Southwest Corridor Equitable Housing Strategy (EHS) scheduled for adoption by the Tigard and Portland city councils this summer. Funding would implement priorities of the housing strategy to increase housing choice, prevent residential displacement, and commit early housing resources in advance of planned light rail service. Work to be completed in 2019 includes:

Portland City Council adoption of two TOD station area plans (Barbur Transit Center and South Portland/Gibbs) to include urban design plans and increased entitlements. In South Portland the historic district guidelines would be updated. Plans in these two areas will inform an agreement with the Oregon Department of Transportation regarding the future of two sites in their control.

Pre-development site analysis leading to the construction of hundreds of new units of housing. Opportunity sites include several already in public ownership (Ross Island Bridgehead parcels, Barbur Transit Center, and the PCC parking lot) and other private parcels that could be acquired by the City, Metro, or by TriMet as part of the light rail project. Analysis done on private parcels would be done with generic templates to make them implementable on more than one site.

Formation of an inter-jurisdictional Equitable TOD Workgroup to execute the responsibilities detailed in the pending Memorandum of Understanding between TriMet, City of Portland, Washington County, City of Tigard, and Metro. Grant work will be coordinated with those agencies through that MOU. Grant funds will be used to increase TriMet's staff capacity to lead this work.

Formation of a Community Preservation and Engagement Workgroup composed of community leaders, nonprofit developers, and organizational partners working on anti-displacement initiatives in the corridor. This group will advise project decisions, build organizational relationships, and engage communities vulnerable to displacement pressures.

What is the location and/or geographic reach of the project? Provide a brief description.

This project takes place within the City of Portland within the ½ mile buffer area around the SW Barbur alignment of the SW Max Line future light rail alignment.

Additional focus is applied to two station areas located around SW Gibbs and around the West Portland Town Center (Barbur Transit Center) as shown on the attached map. Opportunity site analysis will occur on sites at each of the potential station areas in Portland.

See attached location Map.

Provide demographic information including ethnicity, age, and income of the neighborhood or community that will benefit from the project. Include the data source, and describe how the project geography relates to the data provided.

The Southwest Corridor includes approximately 117,000 people of which approximately 92,000 identify as white and 25,000 as people of color. The area has grown 14 percent since 2000. Population growth in the corridor is being driven by some communities of color, with growth rates two to five times that of the overall population creating a more racially integrated community. According to the ACS the average annual growth rate in the white population was 0.7% while the corresponding growth rate by race was 5.7% black, 2.0% Asian and 2.3% for Hispanic/Latino populations. Through our partners' extensive community engagement with East African and Hispanic/Latino households we know many of these households moved to the corridor seeking some of the last low-cost market rate housing in the city.

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People of color and those with lower incomes within the corridor experience disparities across numerous quality of life indicators. While 56% of white households within the corridor own their home, home ownership rates fall to 20% and 25% for black and Hispanic/Latino households respectively. 52% of all households in the corridor are renters and over 40% of those renters are housing cost burden, spending more than 30% of their income on housing costs. 59% of the black renters and 45% of the Hispanic/ Latino renters are housing cost burdened leaving them vulnerable to displacement.

While the overall corridor's \$73,000 annual median household income is high, racial disparities are striking. Whites and Asians have approximately double the median income of Black and Hispanic/Latino households. The corridor's poverty rate of 7% is level with the rate in the city.

The corridor's population is young. The largest age group of people are between the ages of 20-34. The second largest population are ages 55-64. Youth under 19 years old make up approximately 21 percent of the population with the largest group being those age 15-19.

Data Source: American Community Survey.



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Metro
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2040 Planning and Development Grants (Cycle 6 - 2018)

City of Portland Southwest Corridor Equitable Housing Strategy

Prior CPDG/Equitable Housing/2040 Planning and Development Grant Awards

	Project title/purpose	Grant amount	Date initiated (mm/yyyy)	Date completed (mm/yyyy)	Still underway?
1.	Rossi Farms Site Specific Development Plan: Create predevelopment feasibility & market analysis and masterplan that integrates the 30 acre E Portland Rossi Farm site with abutting parks; promotes family friendly affordable housing and transit supportive, walkable design.	\$112,500	4/2018		<input checked="" type="checkbox"/> Yes
2.	Expanding Opportunities for Affordable Housing in Faith Communities: Partner with faith-based institutions to develop affordable housing on surplus properties. Create a model to identify, assess and engage congregations and communities in a collaborative process to create equitable housing on institutional properties	\$125,000	4/2018		<input checked="" type="checkbox"/> Yes
3.	Equitable Housing Strategy for SW Corridor: A unified strategic approach to housing for Barbur Blvd. corridor including housing targets, proposals for affordable housing finance and development tools, recommendations for organizational structure(s) and prioritized opportunity sites.	\$100,000	2016	present	<input checked="" type="checkbox"/> Yes
4.	N/NE Community Development Pathway 1000 Initiative: Aid in planning, identification of underdeveloped properties and other strategies to mitigate, prevent and reverse residential and small business displacement in N/NE Portland.	\$250,000	2015	present	<input checked="" type="checkbox"/> Yes
5.	82nd Avenue Study-Understanding Barriers to Development and Design: Investigation into barriers to development along eastside corridor with consideration of specific key opportunity areas.	\$200,000	2015	present	<input checked="" type="checkbox"/> Yes
6.	Improving Multi-Dwelling Development: Revising the City's Multi-dwelling zone regulations outside the Central City, fostering better new development that reflects neighborhoods distinct characteristics and resident needs.	\$310,500	2015	present	<input checked="" type="checkbox"/> Yes
7.	Building Healthy Connected Communities along Powell/Division Corridor: A collaboration with Gresham and Metro to improve transit service, promote private sector development, stabilize neighborhoods and provide resources for placemaking along the Powell-Division corridor.	\$450,000	2015	present	<input checked="" type="checkbox"/> Yes
8.	Mixed Use Zoning Project: Develop new mixed-use zoning regulations and map to implement Center and Corridors concepts described in new City of Portland Comprehensive Plan 2035.	\$425,000	2013	2016	<input type="checkbox"/> Yes
9.	Powell-Division Transit and Development Project: Collaborate with METRO and Gresham to bring new	\$377,000	2013	2017	<input type="checkbox"/> Yes

METRO CONTRACT 935491 - EXHIBIT A

regional transit and transit supporting development to
SE and East Portland and Gresham.

Total

\$2,350,000

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Project budget summary				
PERSONNEL COSTS	Financial match	In kind match	2040 Grant funds	TOTAL
Consultants				
Historic guidelines update			\$ 45,000	\$ 45,000
Station area land use and development analysis	\$ 25,000		\$ 40,000	\$ 65,000
Station area planning facilitation			\$ 15,000	\$ 15,000
Urban Renewal Area analysis			\$ 15,000	\$ 15,000
Opportunity site pre-development analysis			\$ 50,000	\$ 50,000
Applicant staff				
Management Analyst (.25 FTE at \$62/hour)		\$ 16,000	\$ 16,000	\$ 32,000
Planning Assistant (.5 FTE @ \$28/hour)		\$ 15,000	\$ 15,000	\$ 30,000
City Planner II (.2 FTE) @ \$61/hour)		\$ 15,000	\$ 10,000	\$ 25,000
Urban Design City Planner II (.1FTE @ \$61/hour)		\$ 8,000	\$ 5,000	\$ 13,000
Community Outreach and Engagement Planner (.1 FTE @ \$51/hour)		\$ 6,000	\$ 4,000	\$ 10,000
Partner staff				
Portland Housing Bureau Program Coordinator (.2 FTE @ \$49/hour)			\$ 20,000	\$ 20,000
TriMet TOD staff (.5 FTE @ \$28/hour)			\$ 30,000	\$ 30,000
Total for planning services	\$ 25,000	\$ 60,000	\$ 265,000	\$ 350,000
OTHER PROJECT COSTS				
Direct costs				
Public events			\$ 5,000	\$ 5,000
Community engagement and capacity building			\$ 60,000	\$ 60,000
Overhead/indirect costs*				
Total for other costs			\$ 65,000	\$ 65,000
TOTAL PROJECT COSTS	\$ 25,000	\$ 60,000	\$ 330,000	\$ 415,000

* Staff related overhead costs are calculated at 50% of compensation and included in the personnel costs

METRO CONTRACT 935491 - EXHIBIT A

Breakdown of costs by project milestones					
PROJECT MILESTONE (element and activities)	Grant applicant personnel costs	Partner(s) personnel costs	Consultant fees	Other project costs	TOTAL
Element 1: Station area planning for equitable TOD					
Historic guidelines update			\$ 45,000		\$ 45,000
Station area land use and development analysis			\$ 65,000		\$ 65,000
Station area planning facilitation			\$ 15,000		\$ 15,000
Urban Renewal Area analysis			\$ 15,000		\$ 15,000
Direct costs - public events				\$ 5,000	\$ 5,000
BPS staff and overhead*	\$ 60,000				\$ 60,000
					Total - \$205,000
Element 2: Implement Inter-jurisdictional Memorandum of Understanding					
TriMet TOD staff and overhead*		\$ 30,000			\$ 30,000
BPS staff and overhead*	\$ 15,000				\$ 15,000
					Total - \$45,000
Element 3: Affordable housing opportunity sites pre-development analysis					
Opportunity site predevelopment analysis			\$ 50,000		\$ 50,000
PHB Housing Bureau Program Coordinator and overhead*		\$ 20,000			\$ 20,000
BPS staff and overhead*	\$ 20,000				\$ 20,000
					Total - \$90,000
Element 4: Community engagement and capacity building					
Community Preservation and Engagement Workgroup grants				\$ 60,000	\$ 60,000
BPS staff and overhead	\$ 15,000				\$ 15,000
					Total - \$75,000
TOTAL COSTS	\$ 110,000	\$ 50,000	\$ 190,000	\$ 65,000	\$ 415,000
Overhead/Indirect					
GRAND TOTAL	110,000	50,000	190,000	65,000	415,000

* Staff related overhead costs are calculated at 50% of compensation and included in the personnel costs

METRO CONTRACT 935491 - EXHIBIT A

Breakdown of applicant and partner(s) matching contributions				
lead applicant has other key partners contributing matching resources.				
Applicant jurisdiction or partner organization	In kind contributions: personnel costs	Financial Contributions personnel costs	In kind contributions: other costs	Financial Contributions other costs
Applicant staff				
Management Analyst (.25 FTE at \$62/hour)	\$ 16,000			
Planning Assistant (.5 FTE @ \$28/hour)	\$ 15,000			
City Planner II (.2 FTE) @ \$61/hour)	\$ 15,000			
Urban Design City Planner II (.1FTE @ \$61/hour)	\$ 8,000			
Community Outreach and Engagement Planner (.1 FTE @ \$51/hour)	\$ 6,000			
Consultants				
Station area land use and development analysis				\$ 25,000
TOTAL MATCH COMMITTED				

METRO CONTRACT 935491 - EXHIBIT A

e this table only if	
TOTAL	
\$	16,000
\$	15,000
\$	15,000
\$	8,000
\$	6,000
\$	25,000
\$	85,000



Office of Mayor Ted Wheeler
City of Portland

April 18, 2018

Martha Bennett
Chief Operating Officer
600 NE Grand Avenue
Portland, OR 97232-2736

Dear Ms. Bennett,

Thank you for this opportunity to compete for Cycle 6 Metro 2040 Planning and Development Grant funding. Resources provided to the City of Portland under the Metro Community Planning and Development (CPDG) Grant Program allow the City to undertake projects across Portland that prepare neighborhoods and corridors for growth and remove barriers to development.

The City shares Metro's grant program focus on equitable housing and economic opportunity in the region. As further described in the formal grant applications our proposals target these goals with our community partners.

Accordingly, please consider the following three planning and pre-development project proposals as part of the Cycle 6 Metro Planning and Development Grant program:

• BPS - Rosewood Equitable Development Plan	\$300,000
• PP - 102 nd & Pacific Development Project: Gateway Transit Center	\$100,000
• BPS - Southwest Corridor Equitable Housing Strategy	<u>\$330,000</u>
	TOTAL: \$730,000

Thank you for your consideration.

Sincerely,

Ted Wheeler
Mayor

CC: Susan Anderson, Director, Bureau of Planning and Sustainability
Kimberly Branam, Executive Director Prosper Portland



April 19, 2018

Martha Bennett
Chief Operation Officer
Metro
600 NE Grand Ave.
Portland, OR 97232

Subject: City of Portland 2040 Planning and Development Grant Application

Dear Ms. Bennett:

This fall, the Metro Council is expected to select a Locally Preferred Alternative for the Southwest Corridor Light Rail Transit project – an approximately 11-mile extension of light rail to Southwest Portland neighborhood centers and Tigard and Tualatin. This regional project will include significant local, state, and federal investment to achieve enormous multi-modal transportation benefits to the region in furtherance of the 2040 Growth Plan. TriMet strongly supports the City of Portland's application for 2040 Planning and Development Grant funds to complement this significant project and maximize its benefits to the Portland region.

TriMet has been an active partner with local and regional agencies to support the Southwest Equitable Housing Strategy for the Southwest Corridor and will continue to do so as we lead the design and construction phase of the light rail project. While TriMet's land acquisition and subsequent disposition of remnant parcels associated with the federally-funded light rail project are required to follow Federal Transit Administration (FTA) requirements, TriMet is optimistic about the role we can play in supporting the Southwest Equitable Housing Strategy.

TriMet believes the requested grant funds will better support an inter-jurisdictional Equitable TOD Workgroup to achieve the land use-transportation integration that is critical to the overall success of this significant regional project.

Kind Regards,

A handwritten signature in blue ink, appearing to read "Steve Witter", with a long, sweeping horizontal line extending to the right.

Steven D. Witter
Executive Director, TriMet Capital Projects and Construction



April 23, 2018

Metro 2040 Grant Screening Committee
Metro
600 NE Grand
Portland, OR 97232

Dear Screening Committee,

On behalf of the Fair Housing Council of Oregon, I am pleased to support the City of Portland's application for a Metro 2040 Planning and Development Grant. I am encouraged to see the City quickly implement some of the recommendations in the SW Corridor Equitable Housing Strategy to increase housing choices for all members of our community and get ahead of displacement pressures as our region moves closer to making much needed light rail service a reality in the corridor.

One of FHCO's major activities is to educate the public on fair housing law and illegal housing discrimination. The SW Corridor Equitable Housing Strategy and this next phase of proposed work is highly complementary to ours.

As an organization, we recognize the vital role that providing members of our community an expanded understanding of the history of fair housing plays in remedying the continuing impacts of disparities, especially for communities of color. FHCO knows that foresight in planning public infrastructure investments is critical in ensuring those investments will serve all members of our community. We look forward to working with the City and other community partners to bring a fair housing lens to this important work.

FHCO shares Metro's commitment to race and social equity so we are excited at the prospect of your grants funding Portland's work to address long-standing disparities in housing choices in SW Portland. More affordable housing choices coupled with the Southwest Corridor transit project are critical to our region's continued prosperity and growth that truly benefits all our communities.

Sincerely,

A handwritten signature in black ink, appearing to read "Allan Lazo". The signature is fluid and cursive, with the first name "Allan" and last name "Lazo" clearly distinguishable.

Allan Lazo
Executive Director
Fair Housing Council of Oregon



METRO CONTRACT 935491 - EXHIBIT A

COMMUNITY PARTNERS
FOR AFFORDABLE HOUSING

P.O. Box 23206 * Tigard, OR 97281-3206 * cpahinc.org

Tel: 503.293.4038 * Fax: 503.293.4039 * TTY/VCO: 800.735.2900

April 18, 2018

Metro 2040 Grant Screening Committee
Metro
600 NE Grand
Portland, OR 97232

Dear Screening Committee,

Community Partners for Affordable Housing (CPAH) is pleased to support the City of Portland's application for a Metro 2040 Planning and Development Grant. It is important that the City of Portland following through on their commitment to ongoing inclusive engagement and community capacity building, taking early action to prioritize sites, and using land use tools to support more housing choice near stations. We are especially eager to learn from and coordinate with the public agencies analyzing opportunity sites that can be developed over the long-term as the transit project is built out.

Our hope is that our region will make smart investment decisions in both affordable housing and transit that benefit rather than displace low-income households and communities of color. I look forward to continuing this work with the City.

CPAH is funded through a SW Equitable Development Strategy pilot program grant to look at sites in the corridor that can be developed in the relative near term. Both these bodies of work are important to ensure a robust pipeline of new affordable housing development.

Thank you for creating these opportunities.

Sincerely,

Rachael Duke
Executive Director
Community Partners for Affordable Housing

METRO CONTRACT 935491 - EXHIBIT A

April 20, 2018

Metro 2040 Grant Screening Committee
Metro
600 NE Grand
Portland, Oregon 97232

Dear Screening Committee,

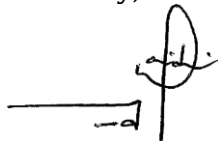
On behalf of Home Forward and the Muslim Educational Trust, we are pleased to submit this letter in support of the City of Portland's application for a Metro 2040 Planning and Development Grant. We look forward to working with the City of Portland and its other community and institutional partners to implement some of the key strategies developed through the SW Corridor Equitable Housing Strategy (EHS) process.

Our organizations are working together through a SW Equitable Development Strategy pilot program grant to engage the Muslim community in SW Portland and identify opportunities for preserving unregulated affordable housing. Our work will be tightly coordinated with the City of Portland's proposed project as they conduct planning at station areas and tee up key opportunity sites for new affordable housing. Together we will work to both address today's housing crisis and plan to meet the future housing need in the corridor.

We are especially supportive of Portland's proposal for ongoing inclusive community engagement throughout the implementation of the EHS and coordination with institutional partners to advance equitable transit-oriented development. It will take all partners working together and maintaining meaningful relationships with the most impacted communities in the corridor if we hope to achieve the ambitious housing goals laid out in the EHS.

Portland's proposed project is critical to the equitable growth of a corridor set to receive a once-in-a-lifetime investment in high capacity investment that truly benefits all. We are pleased to support such a worthy project.

Sincerely,



Wajdi Said
President
Muslim Educational Trust



Michael Buonocore
Executive Director
Home Forward

METRO CONTRACT 935491 - EXHIBIT A

April 20, 2018

Metro 2040 Grant Screening Committee
600 NE Grand
Portland, Oregon 97232

Dear Screening Committee,

OPAL Environmental Justice Oregon and Community Alliance of Tenants are supportive of the City of Portland's application for a Metro 2040 Planning and Development Grant. Portland's proposed project will continue to support the intentional community engagement that our organizations have initiated with households vulnerable to displacement (existing low-income and rental households, immigrant communities and communities of color) throughout the implementation of the SW Corridor Equitable Housing Strategy (EHS). This is critical to achieving the strategy's stated anti-displacement goals, those articulated in Portland's 2030 Comprehensive Plan, and a major priority of our organizations in serving the needs of our constituencies. Low-income renters are most vulnerable to housing instability when significant transportation investments encourage market speculation of their homes. With few protections from no-fault lease terminations and rising rents, people are forced to either bear the hardship of exorbitant increases or migrate across the region in search of what they can afford. In many cases, a no-fault notice begins the cycle of housing instability and possible homelessness that is hard to break out of.

Throughout the EHS process we have already developed relationships with communities in the corridor that have the most to gain from new transit investment but will also be the most directly impacted by the increase in the cost of living associated with the corridor's growth. Portland's proposed station area planning, opportunity site analysis, and jurisdictional coordination are an opportunity for us to deepen these relationships and ensure the results are informed by and meet the needs of these communities. Early and proactive approaches, as this funding will capacitate, will educate community members on the planned developments in the SW Corridor and prepare them to engage in the decision making processes. Investments in empowering experiences of engagement will undoubtedly impact their lives and shape our region for generations to come.

The EHS goals are ambitious and require all partners working together. Portland's proposed project is one important part of the collective effort needed to stabilize existing residents burdened by today's housing crisis, and will also prepare the corridor to grow equitably over the long-term. We are pleased to continue this challenging but necessary work.

Sincerely,



Huy Ong
Executive Director
OPAL Environmental Justice Oregon



Katrina Holland
Executive Director
Community Alliance of Tenants



April 19, 2018

Martha Bennett
Chief Operating Officer
Metro
600 NE Grand
Portland, OR 97232

Re: City of Portland 2040 Planning and Development Grant Application

Dear Ms Bennett:

The City of Tigard has partnered with the City of Portland on creation of a Southwest Equitable Housing Strategy for the Southwest Corridor. This project, supported by a previous Metro grant, provides valuable guidance to our cities as we work to ensure that the Corridor provides adequate access to housing for all people, regardless of income, race, family status, or disability.

In order to achieve our equitable growth goals, we need to invest now in our planning and development initiatives. The City of Portland's proposal to perform in-depth station-area planning in advance of light rail is the kind of proactive work that will be needed if we are to prevent displacement and ensure diverse and equitable communities along this major transportation corridor.




We believe this work will inform and support our own work to provide equitable housing solutions and we fully support the City of Portland's application.

Best Regards,



Kenny Asher
Director of Community Development

Southwest Corridor
Equitable Housing Strategy

-  Proposed Light Rail Stations
-  SW Corridor Proposed Alignment
-  SW Corridor Proposed Alignment - half-mile buffer

City of Portland, Oregon
Ted McCaskey, Mayor, c/o Susan Anderson, Director

SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

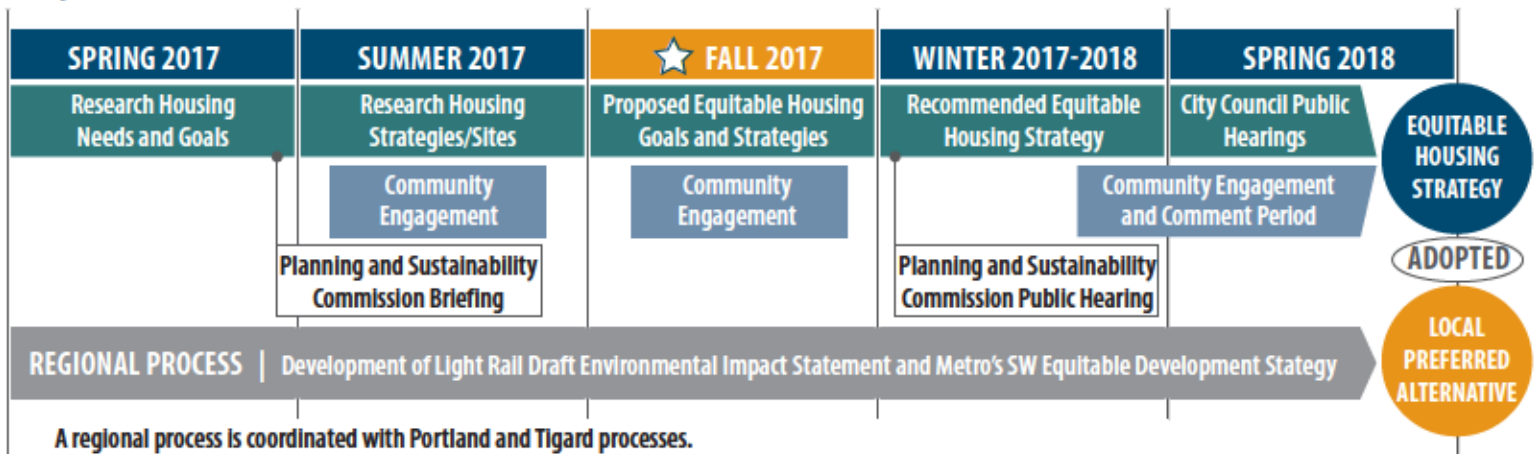
Project Overview



Planning is underway for a light rail line in the SW Corridor. This multibillion-dollar infrastructure investment will attract additional private and public investments, bringing more jobs and businesses, improved community services and housing options to the area.

With a grant from Metro, the cities of Portland and Tigard are developing a housing strategy that aligns public investments in transit with our values: inclusion, equal access to opportunity, and diversity in our communities. A unified, strategic approach to housing for the entire corridor will leverage more housing investment dollars, ensuring that people — regardless of income, race, ethnicity, family status or ability — have a range of choices of where to live.

Project timeline



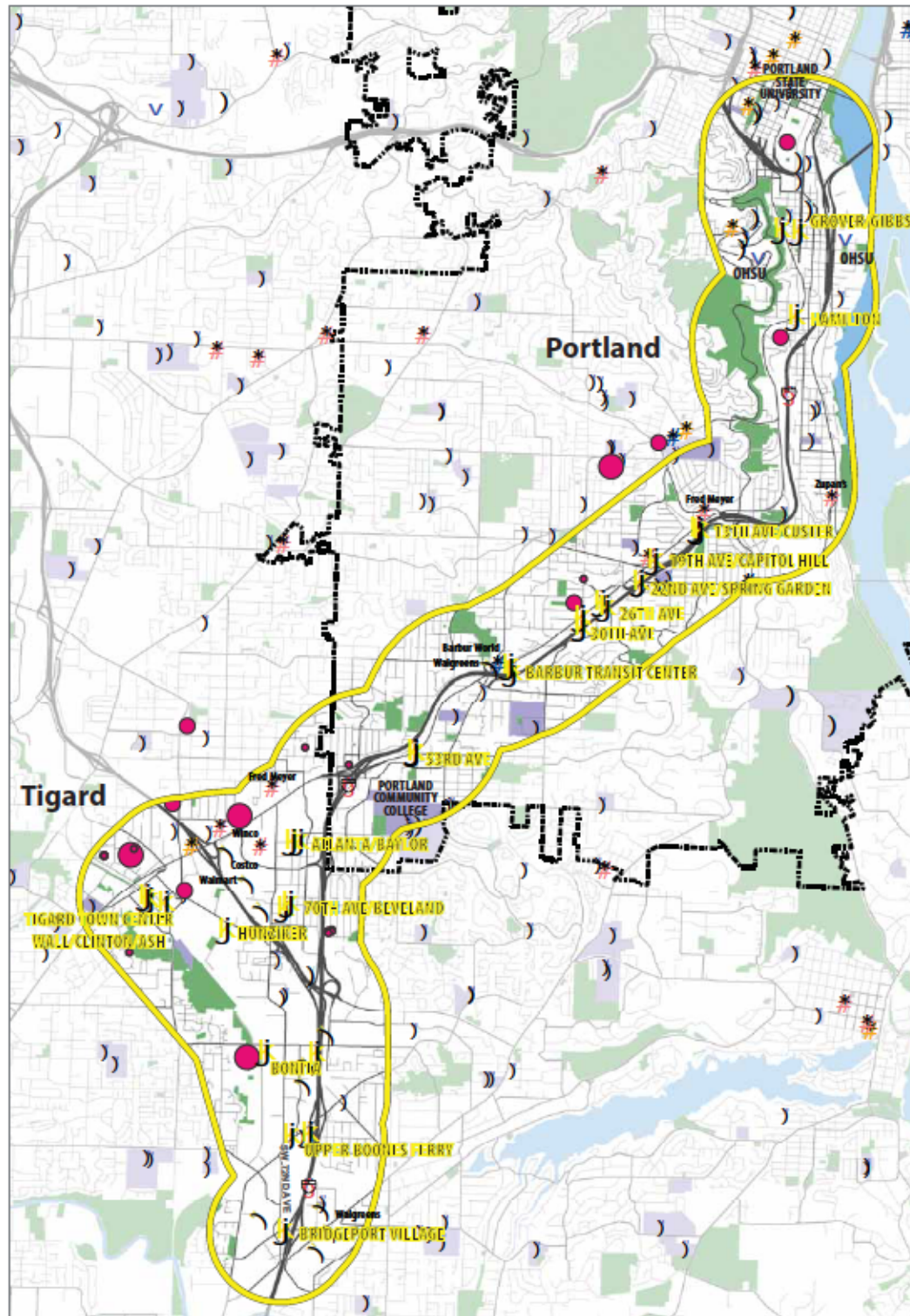
www.portlandoregon.gov/bps/equitablehousing



SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

Affordable Housing and Community Amenities near Future Light Rail



LEGEND

- Potential light rail stations
- Hospitals
- K-12 schools
- Post-secondary schools
- Major businesses
- Large chain grocery stores
- Small independent grocery
- Farmer's markets

Affordable Housing Regulated Units:

- 1 – 21
- 22 – 55
- 56 – 122

- SW Barbur Alignment – half-mile buffer
- Parks and/or natural areas
- School lands
- City boundary



0 1
Miles

City of Portland, Oregon | Bureau of Planning and Sustainability
Geographic Information System

The information on this map was derived from City of Portland GIS databases. Care was taken in the creation of this map but it is provided "as is". The City of Portland cannot accept any responsibility for errors, omissions or positional accuracy.

www.portlandoregon.gov/bps/equitablehousing



SW Corridor Equitable Housing Strategy

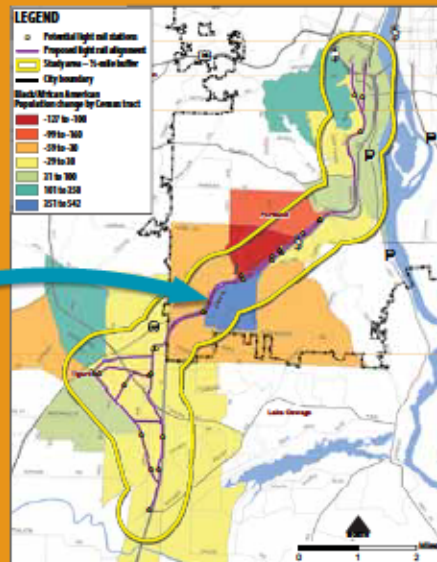
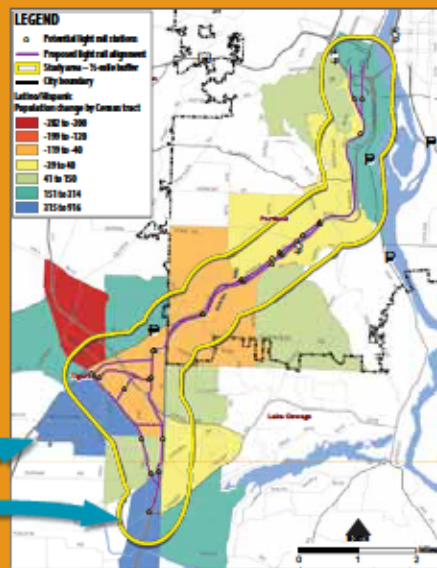
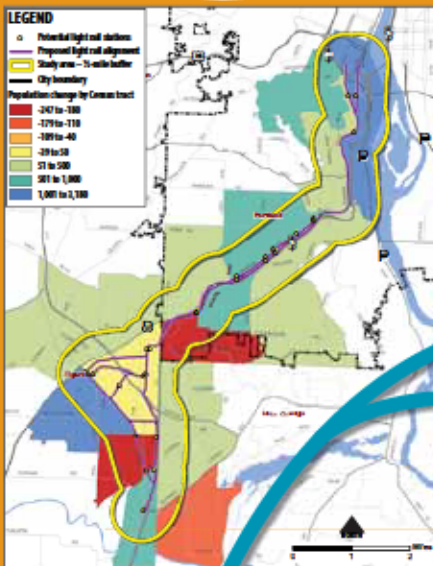
BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

Population Growth and Diversity

The population of the SW Corridor is growing at a similar pace as that of the Portland region, increasing by just over 14,000 people since 2000. The population is also becoming more racially diverse.

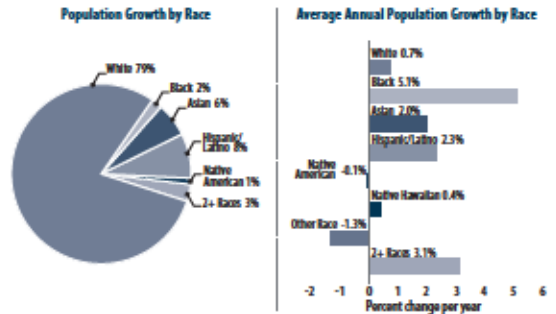
While the area is still predominantly white (roughly 92,000), the greater rates of growth in most communities of color is creating a more racially integrated community. Today, there are approximately 25,000 people of color in the area.

Total population growth in the SW Corridor



More **Latinos** are living in Tigard near the Portland/County line, and more **Black** households are living in and around West Portland Town Center.

SW Corridor Population Growth and Diversity

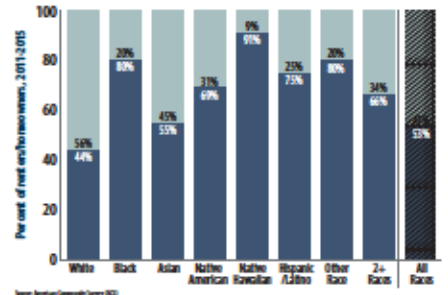


Source: American Community Survey (ACS)

Housing by Race

Regionwide, white people have higher incomes and greater wealth than people of color. This results in more opportunities for home ownership. In the SW Corridor, white people are more likely to own a home and less likely to be renters.

SW Corridor Renter/Homeowner Occupancy by Race and Ethnicity



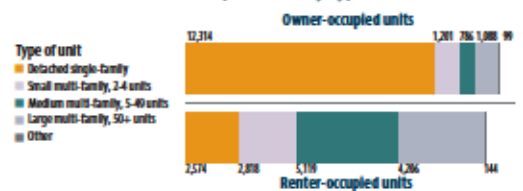
Source: American Community Survey (ACS)

Housing Diversity

Currently, there is a balance between renter- and owner-occupied housing in the SW Corridor. However, there is a much greater share of multi-family housing among renter-occupied units.

More multi-family housing is expected as the corridor grows and the demand to live in walkable neighborhoods near the new light rail increases.

Occupied Units by Type



Source: U.S. Census Bureau, 2010-2011 ACS 5-year estimates. Data are for the SW Corridor study area and are not necessarily comparable to other areas.

www.portlandoregon.gov/bps/equitablehousing

SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

Race, Disability and Income

People of color, people with disabilities and those with lower incomes live in the SW Corridor and experience disparities across numerous quality-of-life indicators.

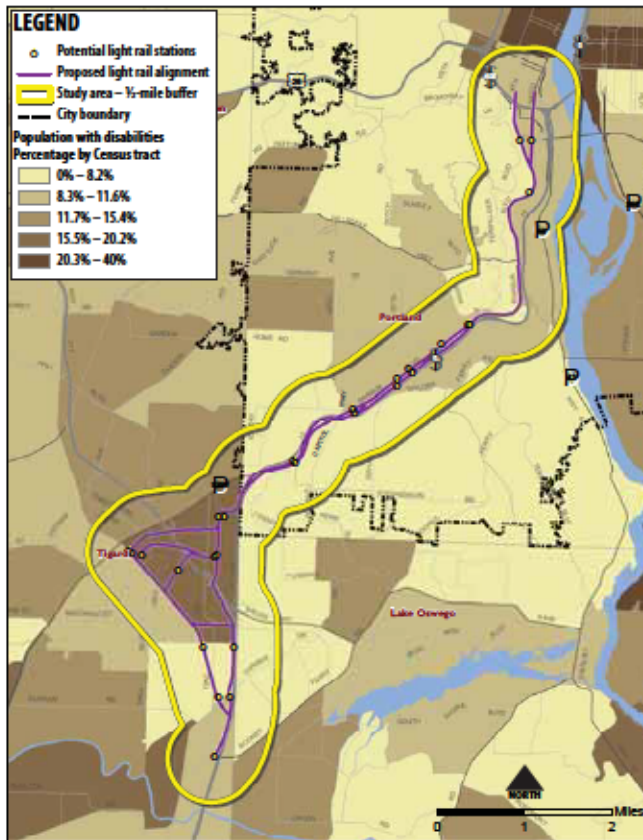
Housing Cost Burden by Race

Cost-burdened households spend 30 percent or more of their income on housing costs. Severely cost-burdened households spend 50 percent or more of their income on housing costs. As with regionwide trends, racial disparities exist in the corridor with housing cost burden by race. (See *Housing Needs* for data.)



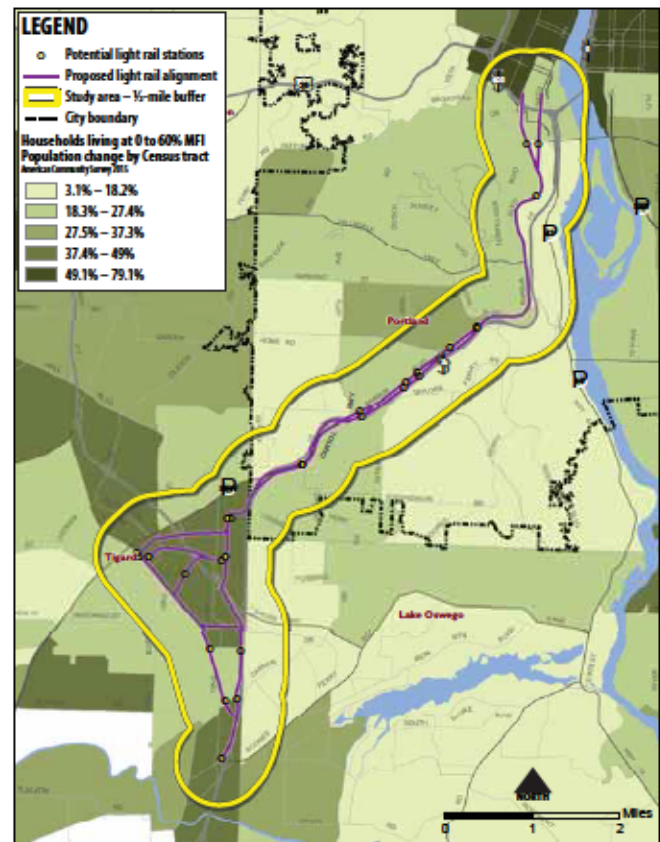
People with Disabilities

In addition to communities of color and other marginalized populations, people with disabilities are also vulnerable to rising housing costs.



Median Family Income

Another indicator of an area's vulnerability to displacement due to housing costs is the percentage of households with incomes below 60 percent of the median family income – or MFI. The U.S. Department of Housing and Urban Development (HUD) determines MFI for each metropolitan area. The 2017 MFI for the Portland/Vancouver/Hillsboro region is considered \$74,700 for a family of four.



Regional Median Income (MFI), 2017

Household Size	30%	60%	100%
1	\$15,690	\$31,380	\$52,290
2	\$17,940	\$35,880	\$59,760
4	\$22,410	\$44,820	\$74,700

www.portlandoregon.gov/bps/equitablehousing

SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

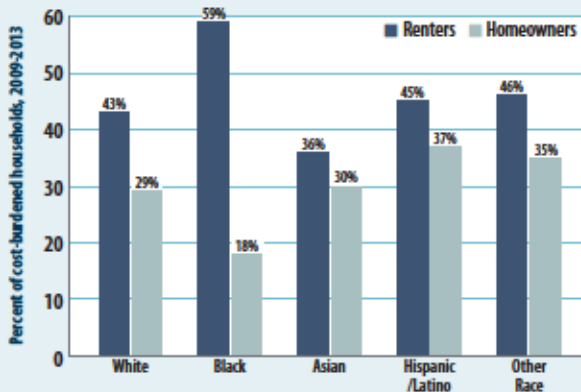
Housing Needs in the SW Corridor

There is significant and growing need for affordable housing and services to help people living in the SW Corridor. Of all rental households in the corridor making less than 80 percent median family income (MFI), 3,458 are paying more than 50 percent of their income on housing costs, with nearly 2,000 of those living on less than 30 percent of the MFI.

This severe housing cost burden leaves these households vulnerable to displacement pressures as housing costs continue to rise.

SW Corridor Cost-burdened Households by Race and Ethnicity

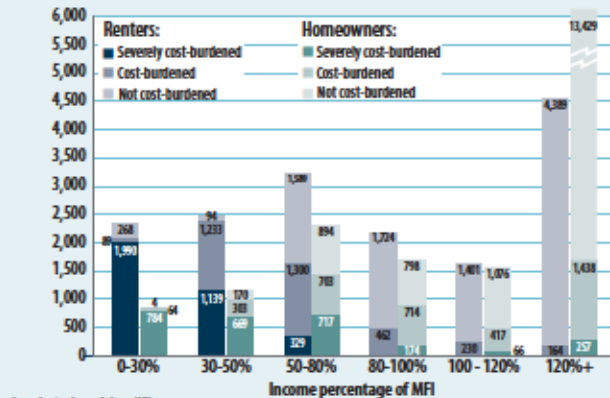
Households spending more than 30 percent of income on housing, 5-year ACS estimate – 2011-15



Source: American Community Survey (ACS)

SW Corridor Cost-burdened Renters and Homeowners

by 2010-14 Median Family Income (MFI)



Source: American Community Survey (ACS)

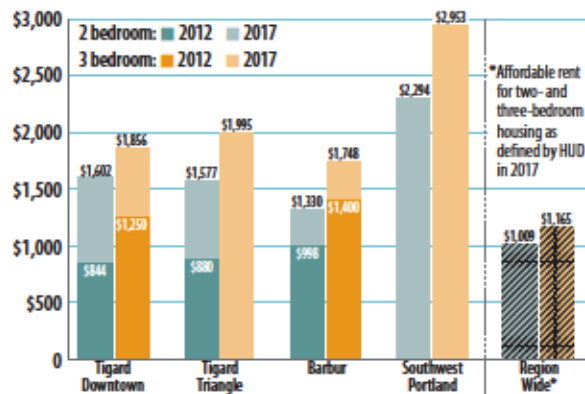
Rents and Land Values

Rents and land values are rising in the SW Corridor, making it harder for developers to create market rate and affordable housing and more challenging for lower income households to find and keep a home in the area.

Over the past five years, rents along mid-Barbur in Portland have increased 31 and 27 percent for two- and three-bedroom apartments, respectively. During that same period, rents in downtown Tigard have increased 56 and 51 percent for two- and three-bedroom apartments.

Rising land values in the area have contributed to increased rents and home values, particularly in areas closer to Portland's city center.

SW Corridor Average Rents for Two- and Three-bedroom Units

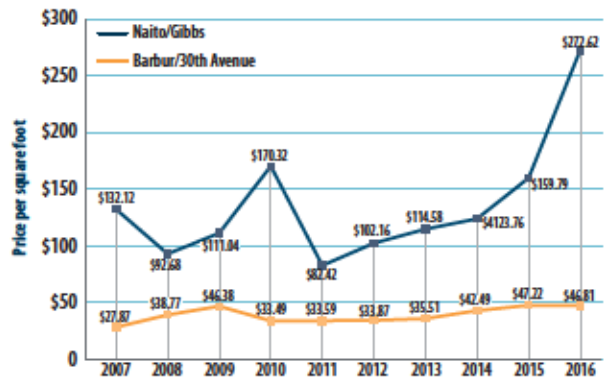


Source: HUD 2017. Affordable for 60% MFI

*Affordable rent for two- and three-bedroom housing as defined by HUD in 2017

10-Year Average Land Sales in Two Potential SW Corridor Station Areas*

Lots 5,000 square feet and larger, selling for \$10 per square foot or more



Source: Multnomah County, padmapper.com, apartmentfinder.com, apartmentwatch.com

* Station areas are defined as a 10-minute walk from the proposed station.

www.portlandoregon.gov/bps/equitablehousing



SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

Naturally Occurring Affordable Housing (NOAH)

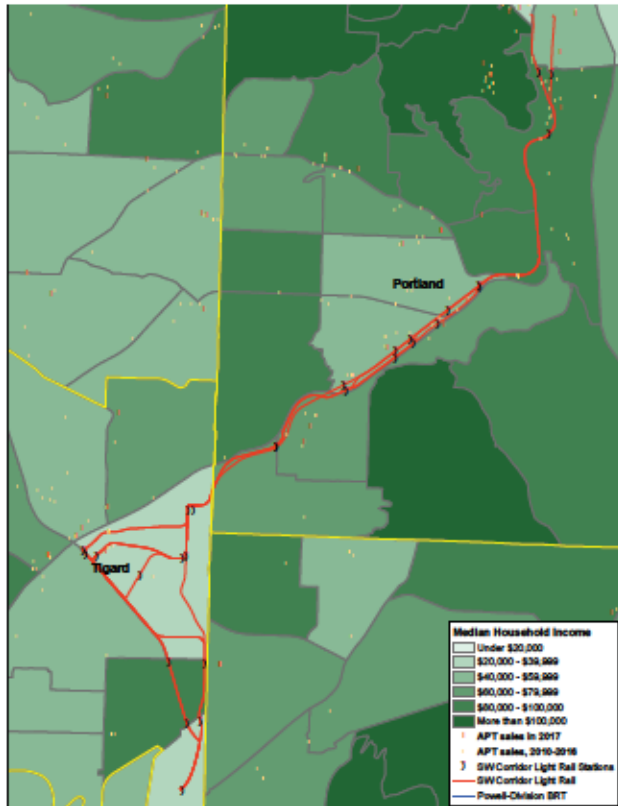
Naturally Occurring Affordable Housing, or NOAH, is lower cost rental housing without subsidies from the government or other entities. Units that qualify as NOAH are generally in the one- to three-star range. (See the rating description to the right)

Currently, there are 327 NOAH apartment buildings in the SW Corridor containing 11,422 units.

Sale of Apartment Buildings

The more affordable two- and three-star apartments account for 70 percent of all units and 93 percent of existing apartment buildings along the corridor.

Since 2006, 94 percent of apartment building sales have been two- and three-star buildings, or 78 percent of all unit sales. As buildings are upscaled, low-income renters and renters of color are vulnerable to displacement. Two-thirds of NOAH sales are in the low-income areas; nearly 40 percent are in racially diverse areas.

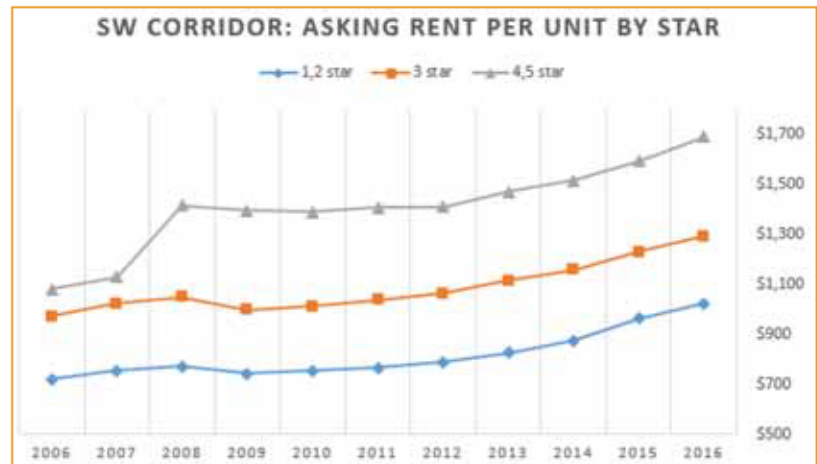


SOLD 2006-17 UNITS BUILDINGS		STAR RATING AND DESCRIPTION	
0	0	★ Possibly functionally obsolete. May require significant renovation.	 
2,335	129	★★ Purely functional with little or no landscaping or exterior spaces.	 
1,792	31	★★★ Average aesthetics and finishes, with a few shared facilities and spaces; modest landscaping.	 
801	6	★★★★ Higher end finishes, representing recent trends and standards in design.	 
353	4	★★★★★ Luxury end of multi-family construction.	 
5,281	170	TOTAL NUMBER OF UNITS AND BUILDINGS SOLD 2006-17	

Source: CoStar Multi-Family Property Database

Rents for more affordable apartments are rising

Meanwhile, rents are increasing in these lower quality apartments. Between 2006-17, rents for two-star units have risen 36 percent, from \$754 to \$1,023. During the same period, three-star apartments have increased by 28 percent, from \$1,011 to \$1,292.



Source: CoStar Multi-Family Property Database

www.portlandoregon.gov/bps/equitablehousing

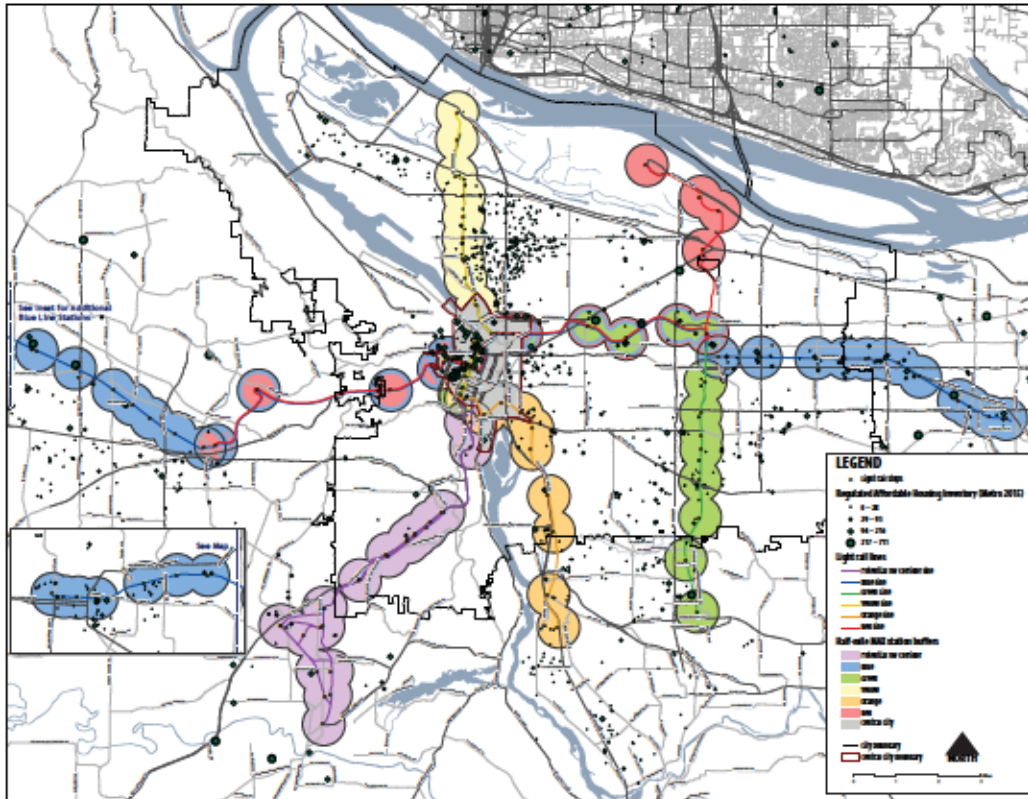

SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

Affordable Housing Near MAX Lines

According to Metro, regulated housing is housing that is made affordable through public subsidies and/or agreements or statutory regulations that restrict or limit residents' income levels and/or rents. Put another way, regulated affordable housing generally provides housing for households that otherwise could not afford adequate housing at market rates.

Regulated affordable housing is not "naturally occurring affordable housing" (NOAH), which is supplied by the private market rather than subsidized and regulated by the government.



All light rail lines/station areas in relation to regulated affordable housing

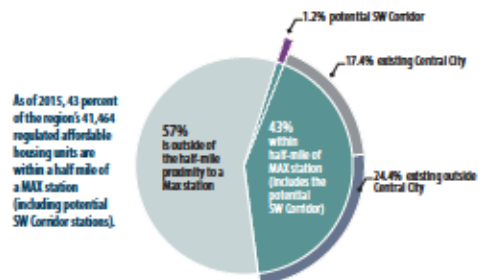
Source: Oregon Metro, Inventory of Regulated Affordable Housing, 2015

Making Affordable Housing Successful

Regulated affordable housing located close to transit can help reduce the cost burdens associated with housing and transportation because residents either don't need to own a car or depend on one as heavily.

In Portland, 43 percent of the region's regulated affordable housing is located within half mile of an existing or planned MAX station. However, only 502 of these units (or a mere 1.2 percent of all regulated housing) is within a half mile of the proposed SW Corridor area outside of the Central City.

Regulated Affordable Housing Near MAX Stations
Units within half mile of a station throughout the region



As of 2015, 43 percent of the region's 41,464 regulated affordable housing units are within a half mile of a MAX station (including potential SW Corridor stations).

metro.org/ahh



www.portlandoregon.gov/bps/equitablehousing



SW Corridor Equitable Housing Strategy

BRINGING MORE HOUSING CHOICES AND OPPORTUNITY TO SOUTHWEST PORTLAND AND TIGARD

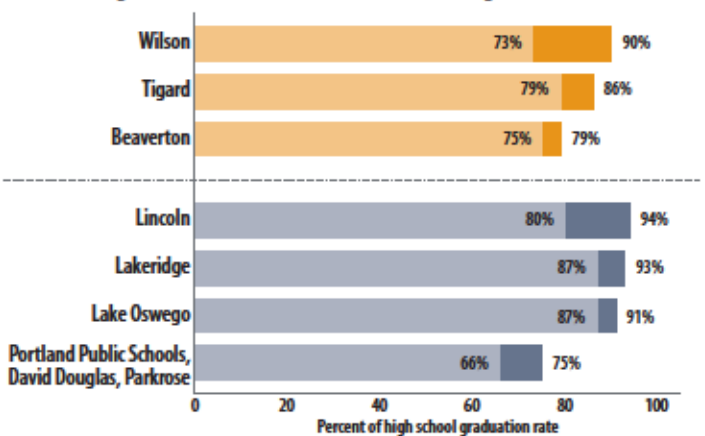
Jobs, Education and Commute Times

The SW Corridor is conveniently located for families and workers. It is flush with high-quality jobs and some of the best schools in the region.

- ▶ SW Corridor is home to 121,000 jobs.
- ▶ The average salary is \$60,000.
- ▶ Eighty-eight percent of SW residents commute less than 40 minutes daily (that's both ways!).
- ▶ High schools in the area have graduation rates 10 to 20 percent above the regional average.

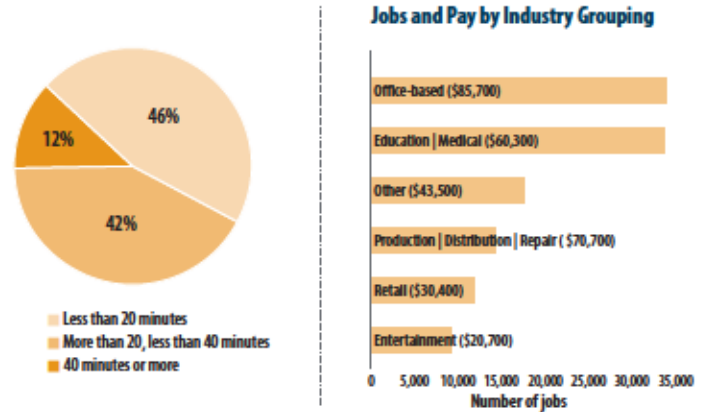
SW Corridor On-time, Four-year High School Graduation Rates

SW Corridor High Schools: 2010 2016 Metro Area High Schools: 2010 2016



Source: Oregon Department of Education

SW Corridor Jobs, Pay and Travel Times to Work Census Tracts 2011-15



Source: American Community Survey (ACS)

In short, the SW Corridor is a great place to live, work and raise a family.

And more people should be able to afford living in such an amenity-rich area — close to jobs, transit, schools, parks and community gathering places.

Location, location, location!

Where people live has a big impact on how their life unfolds, and that varies tremendously by neighborhood. Part of an inclusive community is having safe and affordable housing choices near transit, quality schools and good jobs.

Housing choice — especially for low-income communities and communities of color — is a critical component of an equitable and prosperous region.

Our work helps ensure that all people have a range of choices about where to live and more opportunities to give back to their neighborhoods.



www.portlandoregon.gov/bps/equitablehousing



Metro Contract 935491 – Exhibit B

Consultant Services for Southwest Corridor Area and Opportunity Site Planning

INTRODUCTION

The City of Portland, Bureau of Planning and Sustainability, in collaboration with community partners, develops creative and practical solutions to enhance Portland's livability, preserve distinctive places, and plan for a resilient future. To help advance this, planning is underway for light rail in the SW Corridor from Downtown Portland to Tualatin. The project area generally encompasses a 1/2-mile buffer around Highway 99W/Barbur Boulevard in Portland between South Portland and SW 65th Avenue; and in Tigard, the Tigard Triangle and downtown Tigard around and near the probable alignments of the light rail investment. Light rail will continue on to Bridgeport Village.

This multi-billion-dollar infrastructure investment will attract additional private and public investments that would bring more jobs, businesses, improved community services, and housing options to the area. In partnership with Metro, the cities of Portland and Tigard developed a SW Corridor Equitable Housing Strategy (EHS) to leverage this once-in-a-life time investment in public transit with housing policies and key investments. A comprehensive housing strategy for the whole corridor will help ensure housing options along the new light rail line meet the needs of and are affordable to a wide range of household types and incomes. Area and site planning around future light rail stations are early implementation activities to help achieve the EHS's housing goals.

BACKGROUND

The planning for the light rail is underway. Major decisions for the transit route and station locations were made by Metro, Trimet, and the local cities through the adoption of the Local Preferred Alternative (LPA) in the fall of 2018. TriMet and Metro will conduct a station optimization study in 2019 to refine station locations and alignment choices.

Station locations and station area planning in the Portland portion of the corridor are strongly informed by the Barbur Concept Plan. The plan, adopted in 2013, identified key nodes for development and infrastructure along Barbur Boulevard.

The 2035 Comprehensive Plan, adopted in 2018, provides more policy direction and development entitlements for the SW Corridor. The West Portland Town Center was formally designated as a town center. Some parcels along Barbur Boulevard were provided greater development entitlements. Numerous new race and social equity growth policies are included in the Comprehensive Plan. A "Healthy Connected Communities" framework was also included which considers a holistic approach to land use planning. This framework and the relevant equity policies will drive planning in the SW Corridor.

At the direction of the Portland City Council the Bureau of Planning and Sustainability and the Portland Housing Bureau developed a housing strategy for the corridor in partnership with the City of Tigard. The Tigard and Portland city councils adopted the EHS in July and October of 2018 respectively. This housing strategy is nested within the SW Corridor Equitable Development Strategy (SWEDS), a broader planning effort led by Metro that addresses workforce and economic development needs in addition to housing. The SWEDS process will continue throughout 2019.

METRO CONTRACT 935491 – EXHIBIT B

Continued

In 2019 BPS will begin implementing some of the EHS's key initiatives in the Portland portion of the corridor. Major tasks of this work include:

1. Area planning around two future light rail stations (West Portland Town Center and South Portland/Gibbs) to include updated urban design plans, infrastructure plans, and increased zoning code entitlements. In South Portland the existing historic district guidelines will be updated and improved to promote equitable development. In the West Portland Town Center a health equity analysis and equitable community development action plan will provide the foundation of the town center plan. Plans in these two areas will inform an agreement with the Oregon Department of Transportation regarding the future of two opportunity sites in their control. A Community Advisory Group will guide the planning process.
2. Development concept analysis on opportunity sites already in public ownership (Ross Island Bridgehead parcels, Barbur Transit Center, and the Portland Community College parking lot).
3. Forming an inter-jurisdictional Equitable Transit-Oriented Development (TOD) Workgroup to execute the responsibilities detailed in the Memorandum of Understanding between TriMet, City of Portland, Washington County, City of Tigard, and Metro developed to coordinate equitable TOD along the Southwest Corridor.
4. Forming a Community Preservation Workgroup composed of community leaders, nonprofit developers, and organizational partners working on anti-displacement initiatives in the corridor. This group will advise project decisions, build organizational relationships, and help the City and its public partners to deepen ties with communities vulnerable to displacement pressures.

The scope for this solicitation is to add consultant capabilities to the BPS team to deliver tasks 1 and 2 (except for the historic design guidelines work in South Portland). More detail on Tasks 1 and 2 are found below.

SCOPE OF WORK

The City of Portland is seeking proposals from individuals, firms, teams or consultants, hereafter called "Proposer(s)", with demonstrated experience in one or more of the following areas:

1. Experience with neighborhood level holistic planning in the areas of land use, urban design, housing, economic development, transportation, and infrastructure.
2. Experience with market studies, development concept designs, estimating construction costs, and financial feasibility analysis of development concepts.
3. Experience with incorporating racial equity and public health considerations into decision making, especially in regard to policies and investments that drive neighborhood level change.
4. Experience working with and facilitating an advisory group of external stakeholders including community-based organizations.

METRO CONTRACT 935491 – EXHIBIT B

Continued

Task 1: Area planning for equitable outcomes

This project will provide actionable plans that sequence public and private investments to prevent displacement while improving economic opportunities and increase zoned capacity to catalyze development with public benefits in key sites before light rail service is introduced.

Area plans will be guided by the vision for an equitable Portland in the Portland Plan and will operationalize the equity policies in the Comprehensive Plan. Area plans will provide a roadmap to eliminating known race and social disparities through Portland’s “Healthy and Connected Communities” framework.

Within the context of meeting our growth targets, plans will round out the “Healthy Connected Communities” framework to emphasize inclusive growth from the ground up, using community informed priorities. We will look at what amount and mix of commercial uses are needed and what housing types are needed to support those uses. We will plan for the social and physical infrastructure that leads to improved public health outcomes, community stability and economic mobility foremost (i.e. safe active transportation options, affordable housing, affordable commercial space, cultural space, educational opportunities, and access to quality jobs) as well as other community identified equity issues.

These issues will be emphasized at the start of the planning process and as early actions in implementation before land use changes and major infrastructure projects are complete. In addition, land use and zoning code changes will ensure increases in development capacity result in public benefits. Some parcels in the study area are not yet zoned to the level allowed by the Comprehensive Plan. The potential zoning changes could be triggered when regional funding for the transit is secured and land and buildings for affordable housing have been purchased.

Project Deliverables	Outcomes
<ul style="list-style-type: none">• “Healthy Connected Communities” analysis; health equity, urban design/land use, economic, and infrastructure reports• West Portland Town Center Plan with accompanying:<ul style="list-style-type: none">○ Equitable community action plan supportive of anti-displacement actions in the EHS○ Proposed plan district regulations and zoning changes○ Street design and pedestrian and bike system improvements proposed as Transportation System Plan amendments○ Infrastructure needs○ Analysis in support of creation of full service commercial district• South Portland Plan<ul style="list-style-type: none">○ Historic design guidelines (by another consultant)○ Limited zoning changes• Coordination with SWEDS and TriMet station optimization study and light rail Environmental Impact Statement process	<p>City Council adoption of areas plans and updated historic design guidelines in South Portland.</p> <p>Increased capacity of under-represented groups to shape plans and development outcomes</p>

METRO CONTRACT 935491 – EXHIBIT B

Continued

Task 2: Development concept analysis on publicly owned opportunity sites

This work will build on development concepts and feasibility analysis currently being conducted at three specific parcels for BPS and the Portland Housing Bureau (PHB). Work under this task will refine two of these site development concepts (design concepts and housing programming), conduct due diligence (ex. quantify infrastructure needs), and propose a phased site-specific development and funding plan. The work will be closely coordinated with Prosper Portland, PHB, as well as Home Forward and the Community Partners for Affordable Housing as they consider parcels and existing buildings for affordable housing in the corridor.

Project Deliverable: <ul style="list-style-type: none">• Market study report• Pro-forma analysis• Two site specific concept development feasibility reports with recommended development and funding strategies	Outcome: ODOT and City leadership agreement on development options at state-owned opportunity sites
---	---

PROJECT FUNDING

The cumulative total of all contracts awarded as a result of this RFP shall not exceed \$150,000 for the eighteen (18) month term of the contract.

The City intends to award one or two contracts in the service categories listed below.

No	Service Category Description	Maximum Number of Contracts to be Awarded	Maximum Contract Amount (EACH CONTRACT)
I	Area planning	1	\$100,000
II	Opportunity site analysis	1	\$50,000

The City may award multiple contracts per service category, and the number of contracts awarded in each service category shall be at the sole discretion of the City. The City prefers, but is not obligated to, award all contracts to one firm. Proposers wishing to submit proposals for multiple service categories may submit one proposal for multiple service categories. However, the combined proposal submitted must meet the RFP evaluative criteria for each service category. A proposal for all service categories must state that it is for all categories.

On-Call Consultant Services for Historic Preservation

INTRODUCTION

The City of Portland, Bureau of Planning and Sustainability (BPS) is seeking proposals for various professional services on an as-needed basis. These as-needed services are referred to as “on-call services”, and generally include work with short deadlines, scopes that may need to be developed quickly, and/or requiring expertise currently unavailable in-house. Task Orders will be issued to successful Proposer(s) under these on-call services contracts as individual project needs are identified.

The on-call services will support the BPS Historic Resources Program in upcoming years. BPS may award one or more qualified firms with contracts of up to \$100,000 to perform a variety of historic preservation work ranging from development of historic district design guidelines to survey of potential historic resources, documentation of historic places to research to recommendations related to cultural resources. Tasks will be completed on an as-needed and as-funded basis over a three-year period following awarding the contract(s). The first task will be for updating the South Portland Historic District Design Guidelines in 2019.

BACKGROUND

The City intends to award up to three on-call services contract(s) in the service categories listed below. The City may, but is not obligated to, award up to the maximum number of contracts per category as indicated. Successful Proposers may be called upon to provide consulting services and/or undertake fixed-term projects. The services requested under these on-call services contracts will be small to medium in scope. Projects may range from a few hundred dollars up to \$100,000 subject to specific needs and budget availability in any given year.

The City may award multiple contracts per service category, and the number of contracts awarded in each service category shall be at the sole discretion of the City. In order to receive a contract, Proposers must receive scores that place them in the top scoring for the specific service category. Proposers who submit proposals for multiple service categories may be awarded a contract in multiple service categories. A Proposer wishing to be considered for contracts in multiple service categories must submit a proposal in each service category for which they wish to be considered.

The Bureau of Planning and Sustainability’s historic resources program provides information, guidance, and policy expertise to citizens, property owners, elected leaders, and other community partners interested in designating, protecting, and adaptively reusing Portland’s historic places. Program staff advance preservation-related planning projects, liaise with state and federal agencies, manage historic resource protection programs, and provide technical assistance to all Portlanders. The selected consultant(s) will report to Brandon Spencer-Hartle, Historic Resources Program Manager.

SCOPE OF WORK

The City of Portland is seeking proposals from individuals, firms, teams or consultants, hereafter called “Proposer(s)”, with demonstrated experience in one or more of the following service categories to perform work on as-needed basis:

METRO CONTRACT 935491 – EXHIBIT B

Continued

1. Historic District Design Guidelines and Standards
2. Historic Resources Survey and Inventory.
3. Historic Building, District, and Place Documentation
4. Cultural Resource Documentation and Preservation.

PROJECT FUNDING

The total not-to-exceed amount of each individual contract shall be \$100,000 per year for the three (3) year term of the contract. The cumulative total of all contracts awarded as a result of this RFP shall not exceed \$300,000.

Services are requested as the need arises, therefore there is no guarantee of work to be assigned under any resulting contract, or that the total dollar limit of any contract will be reached. The cost for services performed under any Task Order may vary depending upon the amount of work estimated for that particular project. However, under no circumstance will the individual Task Order amount exceed \$100,000, including task order amendments, unless authorized by the Bureau Director.

TASK ORDERS

Work performed under any resulting contract(s) must be authorized via a written Task Order (sample attached as Exhibit B) signed by the City and the successful Proposer. The scope of work, schedule, deliverables, and compensation for each project will be defined in the Task Order prior to commencement of the work. Any change to the scope of work, schedule, deliverables, and compensation must be agreed upon by the City and the successful Proposer in writing as an amendment to the Task Order.

Task Orders for each service category will be negotiated on a rotational basis. In the event the City and a successful Proposer cannot reach a favorable agreement on the maximum compensation for a specific Task Order, the City shall terminate negotiations and commence negotiations with the next successful Proposer from the rotational list. Continual difficulties in negotiating compensation caps or repeated unavailability or inability to perform Task Orders may result in removal of a successful Proposer from the rotation list and cancellation of the successful Proposer's contract with the City.

In the event that the contract maximum amount is reached prior to the end of the contract term, that successful Proposer will be removed from the on-call rotation list.

Following the execution of each Task Order, the City's Project Manager will work directly with the successful Proposer for the duration of the project unless otherwise noted on the Task Order.

The initial Task Order for on-call services will be \$40,000. The task will be for updating the South Portland Historic District Design Guidelines in 2019.

METRO CONTRACT 935491- EXHIBIT C

SW Corridor Equitable Housing Strategy

Project Milestones, Deliverables, and Disbursement of Grant Funds

Project milestone and specified grant deliverables		Date due*	Matching contributions	Grant payment
1	Execution of grant IGA a) Preparation of project documents and negotiations b) Signed IGA document	Jan. 31, 2019	BPS staff: \$ 0	0
2	Project startup a) Determine RFP reviewers who will select consultant b) Public Involvement Plan c) RFP for consultants released after review by Metro project liaison d) List of advisory group(s) members including Metro project liaison e) Agreement on project performance measures	Feb. 28, 2019	BPS staff: \$ 5,000	0
3	Consultant and grant awards a) Finalize consultant(s) selection and contract(s) b) Community grants award letters	April 30, 2019	BPS staff: \$15,000	\$30,000
4	Background and existing conditions a) Background report(s) (public health and Healthy Connected Communities analysis of existing conditions, infrastructure plans and gaps analysis) b) Fair housing curriculum for community groups	July 31, 2019	Consultants: \$25,000 BPS staff: \$15,000	\$45,000

Exhibit C

Continued

5	Discussion Drafts (Staff) a) Draft of West Portland Town Center Plan with accompanying action plan b) Draft of South Portland Station Area Plan with accompanying updated South Portland Historic Design Guidelines and zoning refinements c) Two site specific pre-development reports and funding strategies d) Summary of notes and themes from community workshops and advisory committee meetings - to include discussion of how the project is considering public health outcomes and racial equity impacts	Jan. 31, 2020	BPS staff: \$25,000	\$75,000
6	Recommended Plans a) Recommended West Portland Town Center Plan and action plan b) Recommended South Portland Station Area Plan with accompanying updated South Portland Historic Design Guidelines and zoning refinements c) Recommended site specific pre-development reports and funding strategies d) Summary of notes and themes from community workshops and advisory committee meetings - to include discussion of how the project is considering public health outcomes and racial equity impacts	April 30, 2020		\$50,000

Exhibit C

Continued

7	Agreements and actions a) Affordable Housing Memorandum of Understanding for Interagency Action Plan b) Summary or community engagement grant outcomes and preservation work group activity c) Present proposed area plans for adoption to the Planning and Sustainability Commission and Portland City Council d) Action on City-ODOT agreement for Barbur Transit Center and Ross Island Bridgehead redevelopment	June 30, 2020		\$30,000
GRANT PROJECT COMPLETION <ul style="list-style-type: none"> • All grant project deliverables submitted by grantee and approved by Metro • All required fiscal documentation submitted or retained on file as appropriate • Final reporting on grant performance measures submitted and approved by Metro 			Total Grantee Match	Total Grant Funding
			Project staff: \$ 60,000 Consultants: \$25,000 TOTAL: \$ 85,000	Consultants: \$165,000 Engagement: \$60,000 Events: \$5,000 TOTAL: \$230,000

NOTE: Due dates are intended by the parties to be hard estimates of expected milestone completion dates. If the City anticipates that a due date cannot be met due to circumstances beyond its control, it shall inform Metro in writing no later than ten (10) days prior to the due date set forth above and provide a revised estimated due date. Metro and the City shall mutually agree upon revisions to the milestone due dates set forth in this agreement.