

**CONSTRUCTION EXCISE TAX GRANT  
INTERGOVERNMENTAL AGREEMENT  
Metro – City of Portland  
South Portal Partnership Plan Project**

This Construction Excise Tax Grant Intergovernmental Agreement ("CET Grant IGA") is effective on the last date of signature below, and 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, 97232-2736 ("Metro"), and the City of Portland ("the City"), located at Portland Transportation, 1120 SW 5<sup>th</sup> Ave, Suite 800, Portland, OR 97204, collectively referred to as "Parties."

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, which the local jurisdictions then remit to Metro pursuant to Construction Excise Tax Intergovernmental Agreements to Collect and Remit Tax ("CET Collection IGAs") entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, the City submitted a CET Grant Request ("Grant Request") to Metro and Metro has awarded Two Hundred and Fifty Thousand Dollars (\$250,000) for the South Portal Partnership Plan Project ("Project"), and the parties wish to set forth the funding amounts, timing, procedures and conditions for receiving grant funding from the CET fund for the Project.

NOW THEREFORE, the Parties hereto agree as follows:

1. Metro Grant Award. Metro shall provide CET grant funding to the City for the Project as described in the City's CET Grant Request, attached hereto as Exhibit B and incorporated herein ("Grant Request"), in the amounts and at the milestone and deliverable dates as set forth in Exhibit A attached hereto and incorporated herein ("Deliverables Schedule"), subject to the terms and conditions in this Agreement.
2. City Responsibilities. The City shall perform the Project described in the Grant Request and as specified in this Agreement and in Exhibit A, subject to the terms and conditions specified in this Agreement. The City shall obtain all applicable permits and licenses from local, state or federal agencies or governing bodies related to the Project, and the City shall use the CET funds it receives under this Agreement only for the purposes specified in the Grant Request and to achieve the deliverables and/or milestones set forth in Exhibit A.
3. Payment Procedures. Within 30 days after the completion of each deliverable/milestone as set forth in Exhibit A, the City shall submit to Metro an invoice describing in detail its expenditures as may be needed to satisfy fiscal requirements. Within 30 days of receiving the City's invoice and supporting documents, and 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 Exhibit A. Metro shall send CET payments to:

The City of Portland  
Attention: Grants Office  
1120 SW 5<sup>th</sup> Ave, Suite 1250  
Portland, OR 97204

4. Funding Provisions.

(a) CET Funds. Metro's funding commitment set forth in this Agreement shall be fulfilled solely through the programming of CET funds; no other funds or revenues of Metro shall be used to satisfy or pay any CET Grant funding commitments. The parties recognize and agree that if the CET is ever held to be unenforceable or invalid, or if a court orders that CET funds may no longer be collected or disbursed, that this Agreement shall terminate as of the effective date of that court order, and that Metro shall not be liable in any way for funding any further CET grant amounts beyond those already disbursed to the City as of the effective date of the court order. In such case the City shall not be liable to Metro for completing any further Project deliverables as of the date of the court order.

(c) 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 CET in excess of the liability limitations set forth herein.

5. Project Records. The City shall maintain all records and documentation relating to the expenditure of CET Grant funds disbursed by Metro under this Agreement. The City shall provide Metro with such information and documentation as Metro requires for implementation of the CET 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 CET Grant 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 CET grant moneys provided hereunder, or the Project for the purpose of making audits and examinations.

6. 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 and Exhibit A. Such 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. This Agreement shall be effective on the date it is executed by both parties, and shall be in effect until all deliverables/milestones have been achieved, all required documentation has been delivered, and all payments have been made as set forth in Exhibit A, unless terminated earlier pursuant to this Agreement.

9. Amendment. This CET Grant IGA may be amended only by mutual written agreement of the Parties.

10. Other Agreements. This CET Grant IGA does not affect or alter any other agreements between Metro and the City.

11. 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 City and Metro to authorize the execution of this Agreement; and that the person signing this Agreement has full power and authority to sign for the City or Metro, respectively.

Metro

The City of Portland

By: Martha Bennett

By: Charlie Hales

Title: Metro Chief Operating Officer

Title: Mayor

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Attachments:

Exhibit A – Deliverables Schedule  
Exhibit B - City's Grant Request

APPROVED AS TO FORM

*James H. Van Dyke*  
CITY ATTORNEY 1/25/13

## Exhibit A

### CET Grant IGA METRO – City of Portland South Portal Partnership Plan Project Milestone Schedule for Release of Funds

<u>Milestone #:</u>	<u>Deliverable</u>	<u>Date Due*</u>	<u>Grant</u>
	<u>Payment</u>		
1.	<b>Execution of CET Grant IGA</b> Deliverable: Executed CET Grant IGA	1/30/13	\$ 27,790
2.	<b>South Portal Partnership Plan Stakeholder Process Commencement</b>  a) Partner Plans Assessment b) Traffic Analysis c) Development Market and Real Estate Analysis d) Development Opportunities and Feasibility Report e) Multi-Modal Opportunities and Constraints Report f) Electronic Survey and Mapping	4/3/13	\$28,589
3.	<b>South Portal Partnership Plan Stakeholder Recommendations</b> a) Partnership Meetings b) Public Open House c) Design Team Collaboration and Workshop d) Alternative Development and Assessment e) Preferred Alternative/ROW Alignments f) Phasing and Implementation Report g) Preferred Design and Implementation Plan	11/30/13	\$118,621
4.	<b>Resolution to City Council to Adopt Recommendations</b>	1/31/14	\$75,000
<b>TOTAL REIMBURSABLE AMOUNT</b>			<b>\$ 250,000</b>

\*If the Grant contained any Funding Conditions, Grantee shall demonstrate satisfaction with those conditions at the applicable milestone or deliverable due dates.

\* 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; and Metro and the City shall mutually agree upon a revision to the milestone due dates set forth in this Agreement. This revision shall be in writing between the City's Project Manager and Metro's Planning and Development Grant Project Manager.

- The project budget totals \$250,000. While grant payment amounts are linked to milestones/deliverables for monitoring and fiscal management, variations among or changes to budgets for milestones/deliverables, which do not affect the total reimbursable amount, shall not require a formal IGA amendment, but shall be noted in written revisions between the City's Project Manager and Metro's Planning and Development Grant Project Manager. A formal IGA amendment shall only be required if the total reimbursable amount is increased or the anticipated completion for the final deliverable is beyond January 31, 2014.

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**Exhibit B**

**City's CET Grant Request**

*[attached]*



Metro

**Construction Excise Tax (CET) Planning Grants  
Cover Sheet**Exhibit D  
185883Check one:  
☐ Letter of Intent  
☒ Full Application

Project Name	South Waterfront: South Portal Partnership Plan	Applicant Organization	City of Portland: Bureau of Transportation
Contact Name	Ross Swanson, Capital Projects Manager II	Address	1120 SW 5th Ave., Portland, OR
Phone	503 823-6829	Fax	503 823-7371
Email	ross.swanson@pdxtrans.org	Fed. Tax ID #	93-6002236

Fiscal Agent Organization (if different from applicant) Same as Above

Contact Name	Ross Swanson, Capital Projects Manager II	Address	
Phone		Fax	
Email			

## Project Location Description (25 words or less)

South Waterfront District: At the intersection of S.W. Macadam Avenue and Bancroft Street. Includes public and private property located between OR Highway 43 and the Willamette River.

## Project Summary (50 words or less)

This project will provide a comprehensive stakeholder process to refine the preferred design alternative for the South Portal Project, which will improve multi-modal access to the South Waterfront District. Refinement is necessary to reduce risks for area developers and allow progress on the Lake Oswego to Portland transit project.

Construction Excise Tax Grant funding request \$ 250,000

Total project cost \$ 400,000

If submitting more than one proposal, please rank this proposal in order of priority

7

Metro Council  
District of Project

6

We, the undersigned, attest that to the best of our knowledge the information in this application is true and that all signatories have authorization to submit this grant application to Metro's Construction Excise Tax Planning Grants Program.

## Applicant

Organization Name City of Portland, Bureau of Transportation

Printed Name Ross Swanson, Capital Projects Manager II

Signature

Date 1-28-10

## Fiscal Agent

Organization Name City of Portland, Bureau of Transportation

Printed Name Susan D. Keil, Director

Signature

Date 1-29-10

To ensure complete letter of intent or full application, please see SECTION 2 of the CET Application Handbook for a complete list of necessary documents for submittal.



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SPACE HOLDER FOR MAYOR'S LETTER



## **SOUTH WATERFRONT: SOUTH PORTAL PARTNERSHIP PLAN CET GRANT – NARRATIVE**

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### **PROJECT DESCRIPTION**

The South Waterfront District in the City of Portland is expected to experience tremendous growth in the coming years. By the year 2030, it is anticipated this area will support 15,720 jobs and 6,446 households. This high density mixed-use development is the highest density classification in the City of Portland and the Metro area. Densities of this magnitude must provide connectivity to their surroundings, in order to flourish sustainably. The City has undertaken transportation studies that are focused on balancing the area's land-use and transportation goals to create a District that will rely on a multi-modal network of transportation options and achieve a 50% mode-split at full development. The proposed transportation network for the north and central parts of the South Waterfront District is clearly defined. However, the south end requires more definition and design evaluation in order to facilitate pending development opportunities.

The South Portal Partnership Plan's goal is to provide a collaborative public/private stakeholder process to help refine the locally preferred design and implementation strategy for the South Portal of the South Waterfront District. Expanding on earlier work, concurrent planning and private development proposals, the refinement plan will narrow three key site specific transportation modes critical to the success of District development. These areas are:

- future connections to SW Macadam Avenue (OR 43)
- multi-modal connections to the Willamette Greenway Trail (to the north & south)
- integration of a potential Lake Oswego streetcar (proposed in Lake Oswego Portland Transit Project)

Goals for the refinement are:

- inform interconnectivity of the streetcar, motor vehicles, pedestrians and bikes at the south end of the South Waterfront District and plan access to the Willamette Greenway Trail, SW Bancroft, Moody, Bond, and Macadam Avenues
- define future development parcels within and adjacent to the project boundary
- provide future city right-of-way delineations and centerline elevations necessary for developers' proposals and the Lake Oswego Portland Transit Project to move forward with reduced project risk
- prepare phasing and implementation strategies for both public and private project elements

### **SITE DESCRIPTION**

The South Portal Partnership Plan area is located at the southern end of the South Waterfront District and comprises a 130-acre sub-area of Portland's Central City District. The site is also within the larger North Macadam Urban Renewal District and, therefore is eligible for tax increment funding opportunities. The proposed project area boundaries are between the Willamette River Greenway Trail and SW Macadam Avenue (OR 43), and from the current SW Bancroft Street alignment at the north end to SW Hamilton Court at the south end.



The current land-use within the proposed project area is large warehouse buildings and low density office use. The site area is zoned CXd (commercial with a design overlay) and can be redeveloped to the highest density use available within the Portland Metro area. The project proposes to extend the existing north end urban street grid to the south and provide multi-modal connectivity while maintaining developable parcels.

## BACKGROUND

The South Waterfront District is planned for significant redevelopment over the next decade. Historically the district has been home to low density and heavy industrial land uses supported by limited transportation, sewer, and water infrastructure.

The 1996 North Macadam Street Plan identified the district's southern portal connection as the key transportation deficiency limiting the district's potential growth. Multiple studies have confirmed this deficiency and identified the need for a more detailed infrastructure plan. Between 2003 and 2006, the Portland Bureau of Transportation worked with district stakeholders and the Oregon Department of Transportation on an alternatives analysis to improve the safety and capacity of south access to South Waterfront, and accommodating a streetcar line to Lake Oswego. The findings of this analysis resulted in a South Portal conceptual design.

The South Portal design concept proposes modifications to improve multi-modal access to and from the district, extend the existing urban street grid, accommodate a streetcar alignment, improve a SW Macadam Avenue intersection, provide bicycle and pedestrian facilities and connections to the Willamette Greenway Trail. Although the conceptual design provided a guide to developing various transportation modes in the district, it has been limited by not taking a more in-depth look at adjacent private development and implementation details.

Although the 2006 South Portal design concept has been shown on adopted street plans, there has been a lack of progress in implementing improvements compared to other portions of the South Waterfront District. Both the north and central portions of the district have benefited from available financing resources and adjacent property owner partnerships. The Central portion of the district benefited from Oregon Health Science University's (OHSU) desire to expand its campus, and the northern end of the district is now benefiting from the Portland to Milwaukie Light Rail Project. Partnerships between public and private interests catalyzed these areas. At the south end of the district, development interests and resources have been minimal, until recently. However, without the additional clarity on how transportation improvements and development proposals will intersect, it is difficult to encourage progress on either.

Recent development interest in the south end of the South Waterfront District emphasizes the need for greater design and implementation clarity. Some of the public and private projects looking for direction are:

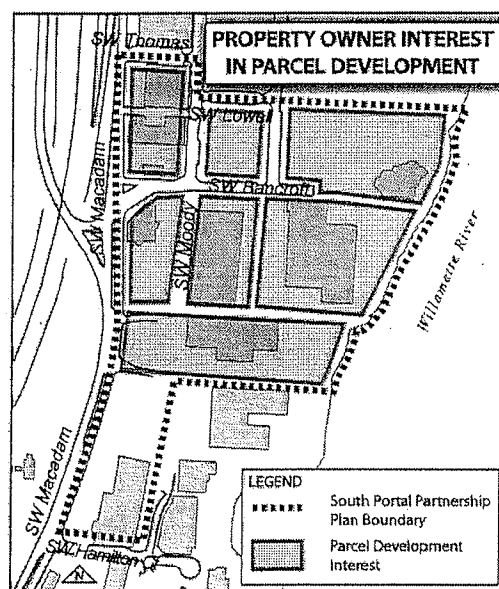
**Lake Oswego Portland Transit Project** – Metro, TriMet, and the Cities of Portland and Lake Oswego are preparing an Environmental Impact Statement (EIS) looking at transit options for a corridor connecting the two cities. This study includes a look at potential streetcar alignments through the South Waterfront District, including the area of the South Portal. Because of the uncertainty regarding the alignment, phasing, and implementation issues, two separate alternatives are being studied for the EIS in the South Portal area. Even

with two alternatives, there are still substantial unknowns, and every uncertainty identified on a project carries with it an element of risk that becomes quantifiable in budget dollars.

**Willamette Greenway Trail Project** – Along with the Lake Oswego Transit Study, a bicycle and pedestrian trail is proposed along the streetcar alignment. In the southern end of the South Waterfront District, Metro has proposed that pedestrians and bicycles will be accommodated on city street facilities.

**Private Development Proposals** – Within the proposed South Portal Partnership project boundary there are up to seven property owners investigating development on their parcels. They have expressed interest in the future of the transportation system. Evolution of the transportation and infrastructure systems does have impacts on development potential and timing for their sites. The lack of a detailed infrastructure implementation and phasing strategy has hindered these parcel developments.

In order to realize the needs of project stakeholders, the South Portal Partnership Plan proposes to engage them in a process modeled after the recently completed North District Partnership Plan. The North District Partnership was a process that worked with adjacent parcel owners to strategize a path for development and public infrastructure improvements at the north end of South Waterfront District. These strategies for public/private implementation, that were mutually agreed upon by private and public interests, will help catalyze transportation and land use goals in the District.



The proposed South Portal Partnership Plan will answer some key questions for the Lake Oswego Portland Transit Project, the Willamette Greenway Project and private development opportunities. Resolving current uncertainties about the implementation of transportation infrastructure in the area, will allow stakeholders to move forward in a strategic and efficient timeline.

## EVALUATION CRITERIA

### ■ Expected Development Outcomes

**Reason for expected development outcomes within two years.** This process prepares private property owners to better develop their parcels on their timelines. The future reconstruction of the District's south portal will increase roadway capacity and introduce urban development infrastructure needs, such as fiber optic, sewer, storm water and water, to render large parcels developable. Incorporating the planned alignment for future high capacity transit ensures adequate capacity for that service and cultivates a dense mixed use urban character.

However, there are issues with how, what and when the extended urban street grid would be implemented as private interests develop. Many of the adjacent property owners have approached the city with pre-development applications, but have been frustrated about the

lack of certainty or an implementation plan for infrastructure improvements. Some examples are the:

- Benz Spring Parcel
- Bank Building at SW Bancroft and SW Macadam
- Discovery Center site

Although uncertainty of street locations and elevations have stalled individual development plans, there is still a continued interest in redevelopment potential by adjacent property owners within the South Portal Partnership Plan boundary. Without a clear plan for succession and engineering details at the south portal, any future private development plan would continue to be met with permitting and design frustrations. Moving forward with any individual proposals risks creating future conflicts for the surrounding transportation network and other parcels in question. For these reasons refinement of the South Portal design concepts has been identified as a necessary step to promote district development.

By working collectively with public and private interests in the south portal area, the proposed South Portal Partnership Plan could quickly and effectively reach a design determination that all parties could use to move projects forward effectively. The consensus on project design and implementation will enable adjacent property owners to develop their parcels with the certainty that other private parties and public agencies will complete the full package over time. If successful, this process could also result in a public/private development agreement, providing further certainty to all parties.

**Reason for expected development outcomes within five years.** This process prepares private property owners to create transit oriented developments adjacent to the Lake Oswego Portland Transit Project concurrent with its construction. Currently, Metro, TriMet, the Cities of Portland and Lake Oswego are preparing an EIS for the Lake Oswego Transit Study. This study includes a look at potential streetcar alignments through the South Waterfront District, including the area of the south portal. The project is analyzing two alignment options for the transit corridor - one with the current South Portal street network and one without. The second alignment has the potential to preclude future South Portal improvements but is being studied because of the lack of clarity and detail in the project implementation. The existing and proposed street extensions need greater planning on reconciling differences with regard to private parcel access and development. No clear direction presents complications and risks for private property owners wanting to anticipate public infrastructure in their development plans and for the Lake Oswego Portland Transit Project. It is in the public's interest to answer these questions about the South Portal to prevent excessive costs and/or collateral rebuilding by future projects.

The construction date for the Lake Oswego Portland Transit Project is anticipated in four years (2012). If the streetcar rail project is located within the extension of the South Waterfront street network, development permits would be sure to follow based on previous streetcar project experience. A concise, well thought out plan that accounts for both the streetcar and adjacent development is a necessary and pragmatic step to reduce risks and help assure that in five years the pending developments (public and private) maintain affordability.

**Reason for expected development outcomes based on community readiness and commitment.** The City of Portland, as well as property owners in the South Waterfront District, have continued to demonstrate their commitment to furthering high density transit oriented development in the area. Up to seven existing property owners have expressed recent

interest in the development potential of their individual parcels - including hiring architects, planners and developers to create feasibility studies of these parcels. By moving forward with this next step of planning, the stakeholders in collaboration with the City of Portland will refine the following future considerations:

- right-of-way location, size and scale suitable for access and development
- parcel size and scale for development
- urban form of the south entrance of the district
- vision of a diverse, urban and multi-modal district
- connections to the Willamette Greenway Trail

### ■ Regional Significance

Completion of the proposed South Portal Partnership planning effort will benefit the regional goals by helping to create a vibrant community with an eye toward sustainable development and economic growth. The high density building patterns along with the multiple transit options further the regional effort to minimize global warming contributions.

The project's impacts go beyond its boundary and will be felt in a much greater context. The following is a brief explanation of how the project scope of work impacts the larger context:

- To the north of the proposed project area, the District's development and growth is moving ahead with construction of new high density towers and amenities that will increase access needs for the District. The continued success of the District relies heavily on how and when the South Portal Partnership Plan can be implemented.
- To the south of the proposed project area, the north end of the Johns Landing neighborhood depends on positive progression of Highway 43 traffic and the future of the Lake Oswego Portland Transit Project. The South Portal Partnership Plan will provide a better vision for how these connectivity issues are addressed.
- The Willamette River Greenway project is directly to the east end of the proposed project area, and as a public trail amenity, the trail serves the entire community with connections to the 40 Mile Loop. Public pedestrian and bike connections to the Greenway from the southern end of the district have been shown and assumed in planning level maps. But the site specific realities need further study in order to secure a suitable connection.
- The South Waterfront District has always been planned to play a key role in the regions sustained economic competitiveness. Designed around sustainable transit and infrastructure, the District is projected to support over 15,000 jobs by 2030, which will help achieve and sustain the Metro regions economic and transportation goals. Current employers in the District include OHSU, one of the largest in the region.



The South Waterfront District represents the Portland Central City's largest supply of remaining vacant land. Without the reconstruction of the SW Bancroft/Macadam intersection, the motor vehicle capacity of the District's south portal is projected to fail at 40% of the district's build out capacity. It is projected that in 2030 this location will serve 46% of inbound and 34% of outbound trips associated with the South Waterfront District, which would

severely limit the district's growth potential unless remedied. The projected development constraint would hinder approximately 7,200 jobs and 3,800 housing units. This becomes an issue of how well the Central City can benefit and share the burden of growth and change to the region. Most likely, any development lost because of access constraints would spread to less urban regions of the metro area, where alternative transportation systems are more limited. Consequently, this would hamper the region's ability to meet its sustainability goals.

At its core, the South Portal Partnership Plan is about creating safe and reliable transportation options for a vibrant district, the Central City and, therefore, the metro region. This is critical to the future economic viability, sustainability and quality of life for our region.

#### ■ Location

The South Waterfront District is located within the City of Portland's designated Central City. The Portland Central City serves as the hub of business and cultural activities in the region. It has the most intensive form of development for both housing and employment. The South Portal Partnership Plan would provide direction for improvements to foster the multi-modal transit and development potential within the South Waterfront District. As stated earlier, growth in the area is anticipated to contain 15,720 jobs and 6,446 households by 2030. In the 2002, Portland City Council adopted the South Waterfront District Plan, which recommended:

*...complete the development of the South Waterfront by infusing the district with a rich mix of urban-scale offices, housing, hotels, parks and retail uses in this riverfront district. The area will be served by a multi-modal transportation system and may serve as a transit hub for south downtown. Redevelopment in the district is meant to serve as a catalyst for the creation of a larger science and technology-based economy in the Central City and is meant to embrace the presence of the river, contributing to its health and enjoyment South Waterfront is one of eight sub districts in Portland's Central City Plan District.*

#### ■ Best Practices Model

This process continues the great example set recently by the South Waterfront North District Partnership. This process will demonstrate that a city initiated public-private partnership can provide clear direction and a preferred alternative to upcoming local and regional transit projects. Collaboration better ensures that adjacent property owners create adjacent transit oriented developments that realize the full potential of the transit investment. This process can be a model for other local communities working to adapt development and infrastructure plans for upcoming transit projects.

Given the financial and physical constraints of the existing South Portal conceptual design, the collaboration of public and private entities proposed in the South Portal Partnership Plan will allow for the discussion and design of an innovative alternative. A design that aspires to meet the goals of all parties – a transportation improvement that provides efficient access in and out of South Waterfront, affordable design that accommodates multiple modes of transportation, including streetcar, and maximizes parcel development potential.

#### ■ Matching/Leverage Potential

**Matching Potential** - The South Portal Partnership Plan is within the North Macadam Urban Renewal District and therefore eligible for tax increment financing, pending approval by the Portland Development Commission (PDC). Although future design and construction

funding has not been committed at this time, PDC is supportive of the proposed South Portal Partnership Plan and recognizes its importance to promoting development in the area. PDC will be a significant partner in the process and, upon approval, would advance development in the area.

For this CET Grant, the Portland Development Commission and Portland Bureau of Transportation have identified \$125,000 in local match funds.

**Leverage** - Future engineering and construction funding sources:

The South Portal project has been identified in the 2035 RTP as a financially constrained project and is eligible for future federal transportation dollars. To create dedicated local match the City of Portland has identified the South Portal project eligible for both the citywide Transportation System Development Charge (TSDC) and the North Macadam TSDC. What has been identified as Phase 2 of the South Portal Partnership Plan, and is not included in the CET Grant funding request, is a future 10% engineering effort. It is estimated to cost approximately \$120,000, and is to be paid for by the City of Portland. Phase 1 of the project would leverage Phase 2, because design consensus is needed prior to beginning the engineering.

■ **Equity**

Given the significant scale of development that has occurred since the South Waterfront District's inception and the future projected growth, this area has and will generate a large amount of the CET revenue for the region. To date, the district has not received any of the CET grant awards.

■ **Collaborations**

The proposed project partners include the Portland Bureau of Transportation (PBOT), the Portland Development Commission (PDC) and TriMet.

**Partner Contacts**

- PBOT – project management lead, consultant procurement and management and transportation operations review  
Ross Swanson, 503-823-6829, ross.swanson@pdxtrans.org
- PDC – project management, economic analysis review and support, public outreach and liaison for adjacent parcel owners  
Geraldene Moyle, 503-823-3420, moyleg@pdc.us
- TriMet – liaison and review for Lake Oswego Portland Transit Project  
Joe Recker, 503-962-2893, reckerj@trimet.org

**Other Participants**

- Oregon Department of Transportation (ODOT) – operations, forecasting and review for Hwy 10
- Private Property Owners/Urban Renewal Advisory Committee (URAC) – input and review of plans with regard to private development opportunities
- Portland Parks & Recreation (PP&R) – input and review for Willamette Greenway Trail
- Portland Bureau of Planning and Sustainability – input and review for land-use, urban design and greenway connections
- METRO – liaison and review for Lake Oswego Portland Transit Project

## ■ Proposed Milestones

### Task 1. Project Management

### Task 2. Information Analysis

- a. Partner Plans Assessment
- b. Traffic Analysis
- c. Development Market and Real Estate Analysis

Milestone (Deliverable): **Development Opportunities & Feasibility Report**

Milestone (Deliverable): **Multi-Modal Opportunities and Constraints**

### Task 3. Survey

Match Deliverable: Electronic Survey and Mapping

### Task 4. Public Involvement

- d. Partnership Meetings
- e. Public Open House

Milestone (Deliverable): **Public Open House**

### Task 5. Planning/Design

- f. Design Team Collaboration and Workshop
- g. Alternative Development and Assessment
- h. Preferred Alternative/ROW Alignments
- i. Phasing and Implementation Report

Milestone (Deliverable): **Preferred Design & Implementation Plan**

## ■ Project Management

Ross Swanson, Capital Projects Manager II (Project Point of Contact)

Portland Bureau of Transportation

Phone: 503-823-6829 E-mail: ross.swanson@pdxtrans.org

Geraldene Moyle, LEED AP, AICP Senior Project Manager

Portland Development Commission

Phone: 503-823-3420 E-mail: moyleg@pdc.us



## **SOUTH WATERFRONT: SOUTH PORTAL PARTNERSHIP PLAN CET GRANT - BUDGET DOCUMENTS**

### **BUDGET NARRATIVE**

The scope of work will be a combination of tasks primarily associated with physical planning efforts. A more in-depth public process will also be included to bring a mutual understanding of development needs for both public and private stakeholders.

Consultants will provide services for project work while working in close association with the agencies. The financial match portions for the scope of work would be for Task 2. Survey and for all project overhead. This has been deemed appropriate (see Evaluation Criteria - Leverage section above) as Phase 2 of the South Portal Partnership would require a ground survey in order to meet the goals of the project.

The first table shows the anticipated costs for each project task. The second table is a task breakdown of agency staff by hours. Included in this table are the individual staff titles and wages anticipated to participate in the project.

**TABLE 1 - ANTICIPATED PROJECT COSTS**

<b>Project Task</b>	<b>Personnel Costs</b>	<b>Financial Match</b>	<b>CET Grant Request</b>	<b>TOTAL</b>
<b>Task 1: Project Management</b>				<b>\$12,000.00</b>
	Agency staff		\$12,000.00	
<b>Task 2: Information Analysis</b>				<b>\$70,000.00</b>
	Agency staff		\$10,000.00	
	Consultants		\$60,000.00	
<b>Task 3: Survey</b>				<b>\$75,000.00</b>
	Agency staff	\$5,000.00		
	Consultants	\$70,000.00		
<b>Task 4: Public Involvement</b>				<b>\$70,000.00</b>
	Agency staff		\$20,000.00	
	Consultants		\$50,000.00	
<b>Task 5: Planning/Design</b>				<b>\$111,000.00</b>
	Agency staff		\$36,000.00	
	Consultants		\$75,000.00	
<b>Staff Contingency</b>			\$12,000.00	
	<b>SUB-TOTAL</b>	<b>\$75,000.00</b>	<b>\$275,000.00</b>	<b>\$350,000.00</b>
<b>Other Costs</b>				
<b>Overhead/Indirect Costs</b>		\$50,000.00		
<b>Total Project Costs</b>		<b>\$125,000.00</b>	<b>\$275,000.00</b>	<b>\$400,000.00</b>

TABLE 2 – ESTIMATED AGENCY STAFF HOURS & WAGES

Project Task	Staff Position	Wage	Time (Hrs.)	Cost
<b>Task 1: Project Management</b>				
PBOT	Project Manager II	\$74.23	72	\$5,344.56
	Senior Admin Specialist	\$48.91	40	\$1,956.40
	Project Manager III	\$74.92	12	\$899.04
PDC	Senior Project Manager	\$78.21	48	\$3,754.08
			<b>Task Total</b>	<b>\$11,954.08</b>
<b>Task 2: Information Analysis</b>				
PBOT	Project Manager II	\$74.23	16	\$1,187.68
	Project Manager III	\$74.92	4	\$299.68
	Engineer of Record	\$79.82	22	\$1,756.04
	Traffic Engineer	\$68.54	30	\$2,056.20
	Signal Engineer	\$68.54	8	\$548.32
	ROW Agent II	\$46.57	24	\$1,117.68
	Permitting Engineer	\$80.54	10	\$805.40
PDC	Senior Project Manager	\$78.21	12	\$938.52
	Central City Dev. Mgr.	\$84.66	12	\$1,015.92
			<b>Task Total</b>	<b>\$9,725.44</b>
<b>Task 3: Survey</b>				
PBOT	Project Manager II	\$74.23	14	\$1,039.22
	Survey Engineer	\$70.08	24	\$1,681.92
	Mapping Tech	\$55.37	40	\$2,214.80
			<b>Task Total</b>	<b>\$4,935.94</b>
<b>Task 4: Public Involvement</b>				
PBOT	Project Manager II	\$74.23	72	\$5,344.56
	Senior Admin Specialist	\$48.91	60	\$2,934.60
	Traffic Engineer	\$68.54	30	\$2,056.20
	Project Manager III	\$74.92	20	\$1,498.40
PDC	Senior Project Manager	\$78.21	72	\$5,631.12
	Central City Dev. Mgr.	\$84.66	32	\$2,709.12
			<b>Task Total</b>	<b>\$20,174.00</b>
<b>Task 5: Planning/Design</b>				
PBOT	Project Manager II	\$74.23	60	\$4,453.80
	Project Manager III	\$74.92	24	\$1,798.08
	Engineer of Record	\$79.82	60	\$4,789.20
	Traffic Engineer	\$68.54	72	\$4,934.88
	Signal Engineer	\$68.54	24	\$1,644.96
	ROW Agent II	\$46.57	32	\$1,490.24
	Permitting Engineer	\$80.54	24	\$1,932.96
	Other Bureau Specialists	varies	lump sum	\$10,000.00
PDC	Senior Project Manager	\$78.21	40	\$3,128.40
	Central City Dev. Mgr.	\$84.66	24	\$2,031.84
			<b>Task Total</b>	<b>\$36,204.36</b>
<b>Agency Staff Sub-total</b>				<b>\$82,993.82</b>
<b>12% Contingency</b>				<b>\$12,006.18</b>
<b>Staff Planning Services Total</b>				<b>\$95,000.00</b>

Construction Excise Tax Planning Grants Program

F2 - Match Form

**Instructions:** If your "Match Source" is a professional or technical service received as "In Kind," use the market average or actual salary or bid for that individual or service. Use the "Notes" field to document methodology.

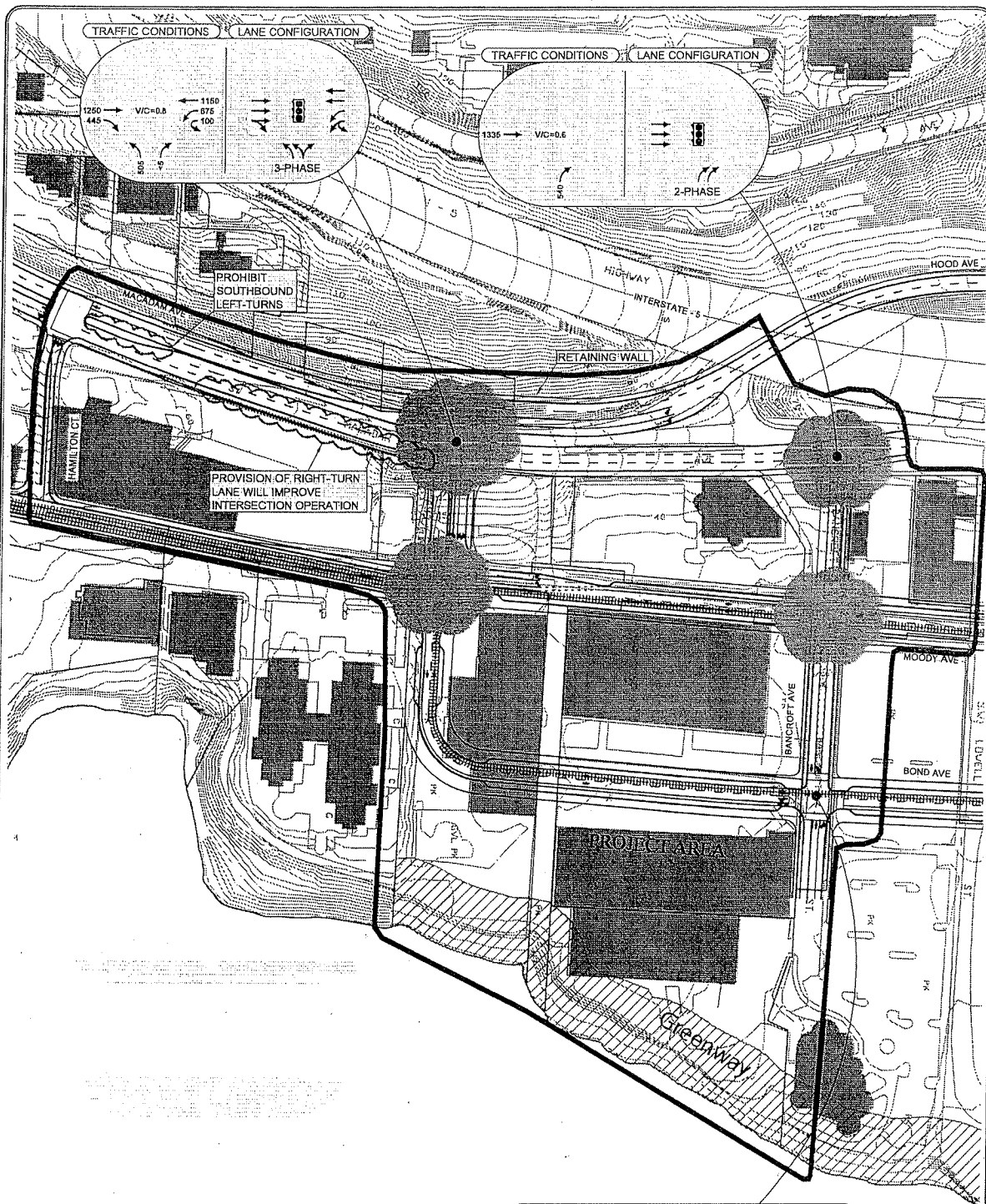
Match Source	Choose One		Choose One		Amount	Notes
City of Portland - PDC tax increment funding	<input checked="" type="radio"/> Financial	<input type="radio"/> In Kind	<input checked="" type="radio"/> Pending	<input type="radio"/> Secured	\$ 125,000.00	survey and mapping , project overhead
Trimet	<input type="radio"/> Financial	<input checked="" type="radio"/> In Kind	<input checked="" type="radio"/> Pending	<input type="radio"/> Secured	\$	Lake Oswego Transit Study staff and engineering. Time TBD
Oregon Department of Transportation	<input type="radio"/> Financial	<input checked="" type="radio"/> In Kind	<input checked="" type="radio"/> Pending	<input type="radio"/> Secured	\$ 1,280.00	Traffic analysis and modeling on HWY 43. 16 hours. market rate
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	
	<input type="radio"/> Financial	<input type="radio"/> In Kind	<input type="radio"/> Pending	<input type="radio"/> Secured	\$	

Total \$ 126,280.00

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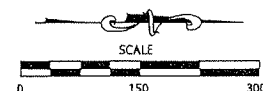
**SOUTH WATERFRONT: SOUTH PORTAL PARTNERSHIP PLAN  
CET GRANT – SUPPLEMENTAL ATTACHMENTS**



## Proposed South Portal Project Boundary

NOTE: This drawing is for discussion purposes only. Lane configurations and road alignments will be revised and finalized during the next design phase.

LEGEND	
	- SIGNALIZED INTERSECTION
	- CRITICAL MOVEMENT $V/C \geq 1.0$
	- CRITICAL MOVEMENT $0.9 \leq V/C < 1.0$
	- CRITICAL MOVEMENT $V/C < 0.9$



J. Scott Andrews  
Commission Chair

Bertha Ferrán  
Commissioner

John C. Mohlis  
Commissioner

Steven Straus  
Commissioner

Charles A. Wilhoite  
Commissioner

Sam Adams  
Mayor

Bruce A. Warner  
Executive Director

Ross Swanson, RLA  
Project Manager / Landscape Architect  
Portland Office of Transportation  
1120 S.W. 5th Ave., Suite 800  
Portland, OR 97204

RE: CET Grant proposal

Dear Ross:

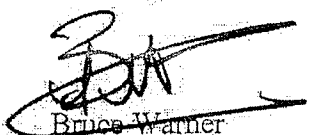
On behalf of the Portland Development Commission (PDC), I want to express the support of our agency for the Construction Excise Tax (CET) Planning Grant proposal for the South Waterfront: South Portal Partnership Plan project.

The City of Portland and the Portland Development Commission recently adopted the Economic Development Strategy: a Five-Year Plan for Promoting Job Growth and Economic Growth, our approach to becoming the most sustainable economy in the world. The Five-Year Plan will direct the investment necessary to grow employment in the city by 10,000 jobs over the next five years and establishes a set of priorities to guide the city's job creation work during the critical period ahead.

The full development of the South Waterfront District is important to accomplishing regional economic development goals and is key to implementing the City's strategy by providing business-supportive commercial space and related amenities for higher-education institutions, workforce development providers, and private sector partners located in and around the district. Projected to support 15,720 jobs and 6,446 households by the year 2030, this district is intended to be one of the highest density, mixed-use areas of the City of Portland and the Metro region.

Within the district, the South Portal Partnership Plan project is critical to improving the safety and capacity of multi-modal access at one of two critical access points to the district and the Central City. The CET proposal also combines public and private resources to align goals and support transportation improvements and redevelopment in South Waterfront and the City.

Sincerely,



Bruce Warner  
Executive Director  
Portland Development Commission



www.pdc.us

222 Northwest  
Fifth Avenue  
Portland, OR  
97209-3859

tel: 503.823.3200

fax: 503.823.3368

TTY: 503.823.3366



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January 28, 2010

Ross Swanson, RLA  
Project Manager / Landscape Architect  
Portland Office of Transportation  
1120 S.W. 5th Ave., Suite 800  
Portland, OR 97204  
(503) 823-6829

Re: CET Grant Proposal  
South Waterfront: South Portal Partnership Plan

Dear Ross:

I am writing to express TriMet's support for the Construction Excise Tax (CET) Planning Grant proposal for the South Waterfront: South Portal Partnership Plan Project.

This South Portal Partnership Plan Project is critical to reaching a higher level of certainty regarding the future street network for both the Lake Oswego to Portland (LOPT) project and for adjacent property owners interested in redevelopment. It is my understanding that adjacent property owners have expressed interest in redevelopment, but could not yet proceed due to the insufficient level of design for the extended street network. The LOPT Project has also been challenged by this uncertainty and therefore the DEIS is carrying two design options through the South Waterfront District – one that uses the future street network with insufficient design specificity and another that operates in the existing ROW at a grade that will be inconsistent with the future street network. A decision on a Locally Preferred Alternative for the LOPT project is anticipated in fall 2010, with construction expected as early as 2012. Thus, the South Portal Partnership Plan Project must be initiated soon to help the streetcar alternative advance in concert with adjacent development in a way that accurately anticipates future right-of-way needs and design.

The South Waterfront District is projected to support 15,720 jobs and 6,446 households by the year 2030, making it one of the highest-density, mixed-use areas of the City of Portland and the Metro region. This district's success in meeting growth projections will depend, in part, on our ability to provide the necessary infrastructure. The South Portal Partnership Plan Project provides the next step in providing that necessary infrastructure.

Cordially,

A handwritten signature in black ink, appearing to read "Neil McFarlane".

Neil McFarlane  
Executive Director, Capital Projects

January 27, 2010

Ross Swanson, RLA  
Project Manager / Landscape Architect  
Portland Office of Transportation  
1120 S.W. 5th Ave., Suite 800  
Portland, OR 97204  
(503) 823-6829

Re: CET Grant Proposal  
South Waterfront: South Portal Partnership Plan

Dear Ross:

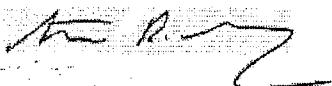
As the Chair of the North Macadam Urban Renewal Advisory Committee (NMURAC), I am writing to express our support for the Construction Excise Tax (CET) Planning Grant proposal for the South Waterfront: South Portal Partnership Plan project.

The South Waterfront District comprises a significant part of the North Macadam Urban Renewal Area and is the focus of most of the development that has occurred within the URA over the past ten years. Projected to support 15,720 jobs and 6,446 households by the year 2030, this district is intended to be one of the highest density, mixed-use areas of the City of Portland and the Metro region.

With limited access points, the success of this area relies on a clearly defined multi-modal transportation network. The recently completed North Macadam Transportation Development Strategy confirmed the South Portal as one of two major gateways that serve the area and identified the need to further the design of this project.

The refinement of the infrastructure necessary at this location is essential to the success of the district and requires a public-private partnership as outlined in the grant application to ensure that the infrastructure designed meets the needs of all transportation modes and provides for adequate and appropriate development parcels.

Sincerely,



Steve Gray  
North Macadam Urban Renewal Advisory Committee Chair