

30005083

**CONSTRUCTION EXCISE TAX GRANT
INTERGOVERNMENTAL AGREEMENT****Metro – City of Portland
Improving Multi-Dwelling Development Project**

This Construction Excise Tax Grant Intergovernmental Agreement (“Agreement”) 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 (“Metro”), and the City of Portland (“City”), located at 1900 SW 4th Avenue, Portland OR, 97201, 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 entered into separately between Metro and the local collecting jurisdictions; and

WHEREAS, the City has submitted a CET Grant Request (“Grant Request”) for the Improving Multi-Dwelling Development Project (“Project”); and

WHEREAS Metro has agreed to provide the City CET Grant funding for the Project in the amount of \$310,500, subject to the terms and conditions set forth herein, 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 Grant Request, attached hereto as Exhibit B and incorporated herein, in the amounts and at the milestone and deliverable dates as set forth in Exhibit A attached hereto and incorporated herein, 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 and subject to the “funding conditions” recommended by the Metro Chief Operating Officer and adopted by the Metro Council in Resolution No. 15-4640. 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:

City of Portland
Bureau of Planning and Sustainability
Attention: Anthea Tan
1900 SW 4th Avenue, Ste 7100
Portland, OR 97201

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.

(b) 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.

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, as well as records and documentation relating to the financial match being provided by the City for the Project. 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, 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 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.

7. 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.

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

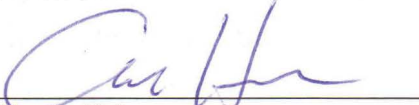
9. Other Agreements. This Agreement does not affect or alter any other agreements between Metro and the City.

10. 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 person signing this Agreement has full power and authority to sign for the City or Metro, respectively.

Metro

City of Portland

By: 
Martha J. Bennett

By: 
Charlie Hales

Title: Metro Chief Operating Officer

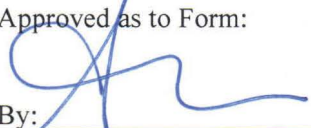
Title: Mayor

Date: 4/19/16

Date: 3.23.16

Approved as to Form:

Approved as to Form:

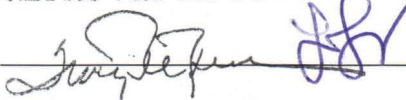
By: 
Alison R. Kean

By: _____

Title: Metro Attorney

Title: ~~CITY ATTORNEY~~ APPROVED AS TO FORM

Date: 4/15/16

Date: 
CITY ATTORNEY

Attachments:

Exhibit A – Milestones and Deliverables Schedule
Exhibit B – City's Grant Request

Exhibit A

IGA for Community Planning and Development Grants funded with CET Portland – Improving Multi-Dwelling Development Project

Milestones and Deliverables Schedule for Release of Funds

Milestone	Deliverable	Date Due*	Grant Payment
1	Execution of CET Grant IGA. a) Signed IGA document	March 31, 2016	\$0
2	Project Initiation and Preliminary Existing Conditions a) Preliminary progress report. b) Public Involvement Plan, addressing topics such as: <ul style="list-style-type: none"> • Project and advisory groups, including roles and meeting frequency; • Identification of key stakeholder groups and corresponding outreach approaches; and • Public outreach and involvement strategies. c) Detailed work plan and schedule (refining grant application scope of work). d) Initial draft of Existing Conditions Assessment, including: <ul style="list-style-type: none"> • <u>Analysis of policy objectives</u> for multi-dwelling housing to inform refinement of project goals and objectives; • <u>Process assessment</u> of existing regulatory and non-regulatory tools, amenity bonus system; • <u>Review of recent development outcomes</u> and assessment in relationship to growth, design, residential livability and other policy objectives; and • <u>Review of block patterns and street connectivity</u>, focusing on East Portland. e) First meeting of project advisory committee, with review and discussion of project goals and objectives. f) Initial draft of performance measures for monitoring success of project goals and outcomes. g) Consultant selection, including potential RFP for project consultants, for design, economic analysis,	August 31, 2016	\$28,000

	and facilitation services identified in project grant request.		
3	Completion of Existing Conditions Assessment a) Progress report b) Final Existing Conditions Assessment, including: <ul style="list-style-type: none"> • <u>Analysis of policy objectives</u> for multi-dwelling housing to inform project goals and objectives. • <u>Process assessment</u> of existing regulatory and non-regulatory tools, amenity bonus system. • <u>Review of recent development outcomes</u> and assessment in relationship to growth, design, residential livability and other policy objectives. • <u>Review of block patterns and street connectivity</u>, focusing on East Portland. • <u>Best practices research</u>, with focus on approaches to transitioning from suburban to more pedestrian-oriented street and block patterns. c) Stakeholder sessions (residents, builders, developers, designers, community groups, etc.). d) Neighborhood walks to obtain community feedback on existing on multi-dwelling development. e) Advisory committee briefing and review, providing input on issues to address in Concept Plan and implementation approaches.	November 31, 2016	\$108,680
4	Concept Plan and Code Amendments Discussion Draft a) Mid-point progress report b) <u>Concept Plan Report</u> - components include: <ul style="list-style-type: none"> • <u>Concepts for development standards and site design</u>, to serve as a basis for development regulations and other implementation tools. • <u>Preferred block structure and street system outcomes</u>, meeting multi-modal connectivity and urban design objectives. • <u>Development prototypes</u>, integrating objectives for housing design and street system outcomes. • <u>Analysis of economic feasibility</u> of development prototypes and code concepts. • <u>Performance measures refinement</u>. c) <u>Code Amendments Discussion Draft Report</u> d) Community meetings on Concept Plan and Code Amendments Discussion Draft Report f) Advisory committee briefings and review	June 30, 2017	\$158,300

	e) Planning and Sustainability Commission briefing		
5	Planning and Sustainability Commission and City Council Hearings and Adoption a) Final progress report (with identification of performance measures and how City will share best practices) b) <u>Proposed Draft Code Amendments Report</u> c) <u>Recommended Draft Code Amendments Report</u> d) Public hearings e) City Council adoption of Code Amendments	November 30, 2017	\$15,520
TOTAL REIMBURSABLE AMOUNT			\$310,500

*If the Grant contained any Funding Conditions, Grantee shall demonstrate satisfaction with those conditions at the applicable milestone or deliverable due dates. Conditions related to financing and transportation choices shall be met in Milestones 4 & 5 respectively.

* 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.

Match: City of Portland in-kind match \$188,750 (38% of total project cost)

EXHIBIT B

Community Planning and Development Planning Grant Cover Sheet

Check one:
☐ Letter of Intent
☒ Full Application

Project Name	Improving Multi-Dwelling Development	Applicant Organization	City of Portland
Contact Name	Alexandra Howard	Address	1900 SW 4th Ave, Suite 7100, Portland, OR, 97201
Phone	503-823-7849	Fax	
Email	alexandra.howard@portlandoregon.gov	Fed. Tax ID #	93-6002136

Fiscal Agent Organization (if different from applicant)

Contact Name	<input type="text"/>	Address	<input type="text"/>
Phone	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>		

Project Location Description (25 words or less)

Multi-dwelling zones in the East Portland Pattern Area, which includes all areas east of I-205, as well as Cully and Brentwood-Darlington; and multi-dwelling zones in Centers and Corridors.

Project Summary (50 words or less)

Reduce barriers to achieving better quality multi-dwelling development and healthy neighborhoods through improved regulations that lead to site and building designs that promote livability and health; result in more efficient and predictable permitting; and aid in the acceptance of new development.

CPDG funding request

\$

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

Metro Council District of Project

Total project cost


\$

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 Community Planning and Development Grants Program.

Applicant

Organization Name City of Portland

Printed Name Mayor Charlie Hales

Signature 

Date 5/29/2015

Fiscal Agent

Organization Name

Printed Name

Signature

Date

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



Office of Mayor Charlie Hales
City of Portland

May 27, 2015

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

Dear Ms. Bennett,

The City shares the Metro Council's goals for encouraging good planning that readies land for development, removes barriers to investment and improves livability, while promoting equity and climate smart communities. Metro's Community Planning and Development Grant program is instrumental in helping local jurisdictions plan and implement projects to meet these shared regional and City of Portland goals.

We greatly appreciate the grants we have been awarded in the past through Community Planning and Development Grant program. From the Powell-Division Transit and Development Project, to the Mixed Use Zones Project and the Barbur Concept Plan, these grants have helped us complete great work to benefit Portlanders and the region.

I am pleased to submit the following planning and development project applications for your consideration.

1. **Improving Multi-Dwelling Development**
New Standards and Regulatory Improvement
2. **Powell Division Corridor - Building Transit and Healthy Connected Communities**
Community Development and Station Area Design
3. **82nd Avenue Study – Understanding Barriers to Development and Design**
Mixed Use and Employment Site Designs and Road Cross-Section and Access Analyses
4. **N/NE Community Development - Pathway 1000 Initiative**
Complementing Portland Housing Bureau's N/NE Neighborhood Housing Strategy
5. **Improving the Design Review System**
Improving Infill Development Outcomes and Building Support for Infill

We look forward to receiving feedback from Metro staff on these projects. Please do not hesitate to contact Bureau of Planning and Sustainability staff with any questions.

Sincerely,

Charlie Hales

Mayor

CC: Susan Anderson, Director, Planning and Sustainability
Joe Zehnder, Chief Planning, Bureau of Planning and Sustainability

Application: Improving Multi-Dwelling Development: *New Standards and Regulatory Improvement*

Project Narrative

A. Project Description

According to the new Comprehensive Plan, 80% of the approximately 120,000 new housing units developed in Portland by 2035 will be in multi-dwelling buildings. It is important for residents and neighborhoods and that we get this major addition to the city right, and that we meet city goals for equitable and complete, healthy neighborhoods, economic prosperity and climate resilience.

The proposed CPDG project will address barriers to achieving better quality multi-family development and healthy, connected neighborhoods. Barriers will be addressed through the creation of new, more effective and efficient development standards. This includes regulations that are clearer about desired design outcomes. These changes will ease the development process for property owners; provide greater certainty for neighbors and developers; increase clarity about site and building design outcomes; and support healthy living by design. To best manage growth in coming years, and to protect and promote livability for all, multi-dwelling development must serve Portlanders better than it does today.

The project description provided below identifies the geographic focus areas for this work, current barriers to development, why this project is significant, and contributing and related projects. It also includes a proposed scope of work and proposed project milestones.

Focus Areas

This work will focus areas on areas of Portland that are expected to see notable amounts of growth and include a significant amount of multi-dwelling zoning, and that have concentrations of low-income residents and households with children. This project will focus on multi-dwelling zoning in two large areas of Portland.

- *Centers and Corridors* – The 2035 Proposed Draft Comprehensive Plan for Portland expands on the regional centers and corridors growth strategy through the addition of a new Town Center at Division and 122nd Ave and multiple new Neighborhood Centers across the City. The plan also identifies a select group of major streets as Civic Corridors and Neighborhood Corridors. These four area types will support much of Portland's population growth between now and 2035. While centers and corridors are generally zoned mixed use, some parts of centers and corridors are zoned for multi-dwelling residential. A map of Centers and Corridors is provided with this application.
- *East Portland Multi-Dwelling Residential Areas* – East Portland has larger concentrations of multi-dwelling zoning than any area of the City. Recent analyses completed for the Comprehensive Plan also show that it has significant growth potential. East Portland is home a significant percentage of Portland's youth population, as well as concentrations of communities of color and low-income households.

Current Barriers to Development

There are many recognized barriers to quality development in multi-dwelling zones in Portland. A list of key barriers is provided below.

- Development standards that are inappropriate for the size and shape of sites commonly found in East Portland neighborhoods
- Impractical or difficult to administer connectivity standards that result in incomplete and/or unfairly levied infrastructure requirements
- Land division and other rules that result in poorly configured site plans
- Insufficient requirements for shared open space and other family-friendly amenities
- Standards that are both inflexible and off-target in terms of promoting site planning that can meet neighborhood and development needs.

Project Name: Better Multi-Dwelling Development Project

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- Development standards that do not promote articulated building designs with visual relief and variation.

These barriers reduce the quality and acceptance of multi-dwelling buildings in many parts of Portland. In East Portland, the barriers described above yield a haphazard pattern of development that does not support walkability. The results are a disconnected and incomplete street network, unnecessary loss of trees, and development that seems too dense. Poor connectivity makes it difficult for residents to access transit, education and commercial services; and increasing reliance on personal automobiles to conduct daily tasks and errands, which does not support regional goals for walkability and climate resilience.

In all parts of Portland other barriers result in housing that has few amenities for residents, including sufficient and individual common open spaces, sufficient storage, and other spaces that would improve the quality of life of residents. Development standards also often result in boxy buildings with minimal articulation and variation in the facades.

Project Significance

Portland is forecast to add at least 120,000 dwelling units by 2035. Projections indicate that 80 percent of these units will be in multi-dwelling buildings. Many of those buildings will be along mixed use corridors and main streets, but around one-quarter of that growth will be in multi-dwelling residential zones.

Centers and Corridors – These areas are the bedrock of the Portland Metro region’s growth plan. Portland’s Center and Corridors, including numerous historic main streets have seen significant development in recent years. While that development has successfully forwarded local and regional objectives for healthy, connected neighborhoods, the designs of the buildings have often resulted in notable community frustration. Portland remains deeply committed to the regional growth plan and would like to use this grant opportunity to refine the development standards in multi-family zones in Centers and Corridors to better meet community design desires, while supporting compact growth and main street investment. As the most populous city in the region and the state, Portland must figure out how to grow in these areas while maintaining livability and community satisfaction.

East Portland – As noted above, 80 percent of Portland’s anticipated growth will be housed in multi-dwelling buildings that are located in both mixed use and multi-dwelling zoning. While mixed-use zoning is well-distributed along Portland’s major streets, nearly 35 percent of all multi-dwelling zoning, or nearly 3,000 acres, is located in East Portland. East Portland is also home a large percentage of Portland youth, communities of color and low-income populations. It is essential to improve regulations to support the development of neighborhoods that increase safety and access to opportunity in East Portland.

In the 1990s East Portland experienced a significant housing boom that radically altered the East Portland landscape. Across East Portland, narrow and deep lots were divided and developed to include a variety of multi-dwelling and single-family attached housing. Often, lots were divided into flag lots. Flag lots housed single-family, as well as large multi-family buildings. In addition, other properties were developed with private streets. These two development approaches, as well as a lack of minimum site size requirements and the interplay of myriad standards contributed to the perpetuation of a minimal pedestrian, bike and vehicle through routes in East Portland. In addition, the interplay of development standards often resulted in projects for which it was not defensible to require needed infrastructure improvements. Through this project, the City of Portland would like to take a deep look at how development standards work, or do not work together, to stifle the creation of complete, healthy and walkable neighborhoods in East Portland.

Barriers to development will be reduced through development regulations that lead to more efficient and predictable permitting, as well better design outcomes and buildings that are more pleasant and healthy to live in. Specifically, the new regulations will promote better design in terms of site planning, livability and safety. They will be written with the intention of better supporting the health of residents of the buildings and in the surrounding neighborhoods through

Project Narrative

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increased walkability, improved share open space, and through the creation of development standards that improve the relationship between buildings and the streets. These things will better support community health, and community acceptance of new development.

Scope of Work

The City's multi-dwelling development standards have produced successful results in some situations but have failed in others. While the same codes apply citywide, the conditions in multi-dwelling areas vary widely—lot patterns, lot sizes, topography, connectivity and other infrastructure. What might work in Inner Portland neighborhoods, with their uniform lot and block patterns, may not be as successful in East Portland, with its differing block patterns and often deep lots. Current code can also produce significantly different results on similar types of development based on how the land division code interacts with zoning.

The proposed project will review the results of application of these codes and develop recommendations to improve the site design, healthy living, connectivity and general quality of new multi-dwelling development. It will consider whether and how the code should vary in response to different conditions across the city. It will evaluate the impact any code changes may have on the likelihood and cost of development of new housing

1. Project Goals and Outcomes

- Establish project-specific goals and outcomes for the work funded by the grant, including a clear definition of what the concept document, regulatory changes and or guidelines are intended to achieve. Goals and outcomes may differ by geography.

2. Existing Conditions Assessment

- Review current outcomes and how they vary by geography. Design outcome assessments should consider building and site design and the relationship to the street; and how spaces are used.
- Use existing background information such as the Infill Design Toolkit, Courtyard Housing Design Competition, Comprehensive Plan Background Reports, the Powell-Division Housing Field Study (under completion), East Portland Review and documents developed to support the Mixed Use Zones Project.
- Assess the level of density developed by zone to determine if property owners are developing to maximum density, or if they are developing far below maximum density, and what types of buildings are being constructed in different zones.
- Assess the difference in standards for street connectivity, public improvements and parking for properties that are subdivided compared to properties that are developed as apartments or condominiums.
- Assess existing code standards and identify potential loopholes and conflicts between sections based on text and review of land development projects.

3. Block, Lot Pattern and Connectivity Assessment in East Portland

- Complete a thorough assessment of block and lot patterns in East Portland to understand challenges and opportunities to develop an approach to promote connectivity.
- Develop an understanding of which regulations most impact the block and lot pattern today.
- Identify and document barriers to achieving pedestrian, bike and vehicle connections through development.
- Identify potential new types of connections to help meet the area's needs for greater pedestrian and bicycle connectivity

4. Site and Building Planning and Design

- Identify setbacks and transitions between buildings of the same and different zones and in different geographies (for example, within residential areas versus mixed-use corridors), considering needs for

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privacy, relationships to the street, CPTED issues and accessible design issues. Coordinate work with Age-Friendly Cities work.

- Develop recommendations for open areas, landscaping, tree preservation, on-site stormwater management, storage, and parking/vehicle areas, based on geography.
- Consider options for minimum site development sizes in different geographies.
- Assess master planning options.

5. Process Assessment

- Review current amenity bonus program to assess which bonuses are used and where they are used, building on recent research completed for the Mixed Use Zones Project and work completed by BPS' Central City team.
- Develop recommendations for revisions to the amenity bonus system.
- Assess the process for completing a multi-dwelling development project, including the existing of special overlays, plan districts or other processes that alter the basic approval process.
- Assess whether it may be beneficial to recommend discretionary processes or specific community design standards for multi-dwelling zones.

6. Real Estate Analysis

- Assess concept and draft code proposals for changes to identify likely real estate impacts, including potential costs to development and increased marketability of units as a result of proposed amendments.

7. Concept Development and Proposed Draft Code Amendments

- Based on items one through six, and informed by public engagement, develop a concept plan for the multi-dwelling regulatory changes. The concept plan should include detailed recommendations for changes to City regulations.
- Based on feedback on the concept plan, develop proposed code amendments and guidelines for consideration for the public and the Planning and Sustainability Commission.

8. Public Engagement

- Establish a project advisory committee with clearly defined roles and responsibilities
- Engage residents in focus areas to understand specific needs and concerns, but build upon extensive outreach that has already been completed in the past for projects such as The Portland Plan, the Comprehensive Plan and East Portland Action Plan. Outreach should focus on developing solutions to identified concerns.

Work completed for this project will result in a package of development standard amendments that will be presented to the Planning and Sustainability Commission. This project will lead up to, but will not include the formal legislative approval process. The formal legislative approval process will continue after July 2017.

B. Project Site Description

The project site includes all multi-dwelling designated properties in East Portland, multi-dwelling properties within the proposed and existing Neighborhood and Town Center boundaries in the 2035 Comprehensive Plan, and all multi-dwelling designated properties on proposed Neighborhood and Civic Corridors on the proposed 2035 Comprehensive Plan. A project site map is provided in the Supplemental Attachments section of this application.

The site area for this project is large and varied and covers areas with demographic and economic conditions that reflect the variation throughout the city. These properties are currently designated residential and have development of a wide range of ages, densities and quality. East Portland was identified as an area of specific focus because the area is home to

Project Narrative

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many households with children, low-income households and communities of color; and there is significant growth potential in East Portland. Centers and Corridors were selected as the other focus area because they are locations for future growth.

C. Project Background

This project will build on recent projects such as the Comprehensive Plan; and the Mixed Use Zones Project and the Powell-Division Transit and Development Project, which were both funded through Community Planning and Development Planning Grants.

East Portland Action Plan – It will also help implement actions to the following support strategies in the East Portland Action Plan:

- HD.1 Improve the design and quality of new housing structures
- HD.5 Improve regulations and implementation of City code to increase benefit and reduce impacts
- T.2 Increase safety and convenience of walking throughout East Portland
- T.5 Improve the unimproved local streets in East Portland

Powell-Division Transit and Development Project – Through the Community Planning and Development Grant for the Powell-Division Transit and Development Project, the Bureau of Planning and Sustainability was able to conduct an in-depth housing field survey of multi-dwelling buildings within walking distance of major station opportunity areas. This research documents existing conditions of multi-family buildings along the Powell-Division corridor and will provide valuable background information that will inform the creation of new multi-dwelling development standards.

Mixed Use Zones Project – A core component of the Mixed Use Zones Project, which was also funded by a Community Planning and Development Grant, was the development of building standards that promote community-accepted designs on Centers and Corridors. Lessons learned and work completed through the Mixed Use Zones Project can, in part, be applied to multi-dwelling development on Centers and Corridors. This will provide the space needed to focus deeply on creating East Portland-specific revisions to the multi-dwelling development standard, while still meeting community needs for multi-dwelling designs in other areas of Portland.

D. Evaluation Criteria

Expected Development Outcomes – This project will encourage the development of better multi-dwelling buildings and complexes. These improvements include useable outdoor space, basic on-site amenities to help residents meet their daily needs and site designs that promote a walkable and bikeable public realm. The project will also identify ideal minimum site sizes for different multi-dwelling zones to promote the development of a more regular streetscape and to minimize flag lots and other development patterns that inhibit the development of a permeable street grid in East Portland.

The project will leverage community support that can help it show results more quickly. The East Portland Action Plan (EPAP), which has active on-going community support, calls for the City and developers to improve the design and quality of new housing. This project will be developed in close coordination with East Portland residents and will help achieve outcomes identified in EPAP. The project also helps will draw on the community through the Neighborhood Prosperity Initiatives in the Jade District and Division Midway Alliance. These groups have been able to grow their capacity to mobilize local residents to participate in projects that will affect their neighborhoods.

The project will affects a good deal of new development forecast by 2035, Especially in East Portland, much of this land is near existing or future high capacity transit. The Blue and Green MAX lines provide excellent transit oriented development opportunities, as will the new Powell-Division high capacity bus service, which will provide direct access to

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the Jade District and Division-Midway, further supporting economic development and increasing access to services in these two neighborhood hubs.

City of Portland, Bureau of Planning and Sustainability staff will be responsible for working with the community, the consultant team and other City bureaus, such as the Portland Bureau of Transportation to create new development standards and regulations. City of Portland staff will be responsible for taking the new regulations through the legislative process.

Regional Significance – Portland is projected to grow by approximately 120,000 households between now and 2035. Single-dwelling zones, including single-family attached housing will only accommodate about 20 percent of that new growth. The rest of the projected household growth will be in multi-dwelling and mixed use buildings. It is crucial to make sure that the development of those new residential buildings support health and livability through good quality site and building design. Similarly, it is important to ensure that the standards that govern site design are closely coordinated with transportation plans, so that residents have walkable and bikeable neighborhoods that promote active living.

Thoughtfully governed and developed multi-dwelling zones will foster a more pleasant public realm, which will help people feel more comfortable walking, biking and taking transit. This in turn, will contribute to reductions in carbon emissions and other pollutants. Better walking, biking and transit environments will translate to a greater number of pedestrians and bicyclists in commercial districts, which will help support the expansion and development of local commercial districts, promoting business district success.

This project focuses on improving the quality and design of multi-dwelling neighborhoods in East Portland. East Portland is home to many families with children, lower-income households and concentrations of communities of color. Improving the indoor and outdoor environment is critical to promoting equity in the city and the region.

Centers, Corridors and Station Communities and Main Streets in the 2040 Growth Concept – Work completed through this project will directly help further development in Gateway Regional Center, Lents Town Center and Station Area Communities along the Blue and Green MAX lines, and along the Division St and 122nd Ave Main Street and Corridor segments, Stark St, Glisan St and Powell Blvd Corridor segments in East Portland. There are also multi-dwelling zones adjacent to the 82nd Ave Main Street and Corridor, which, when developed will help make 82nd Ave a more vibrant Main Street and Corridor. Real estate market analyses and economic assessments completed for the Powell-Division Transit and Development Project will be used to inform the proposed project.

Other Locations – One primary objective of this project is to support the development of healthy multi-dwelling housing for households of all incomes. Much of Portland's multi-family zoning is concentrated in East Portland, which is home to concentrations of communities of color, low-income households and a large youth population. However, many of the housing developments in East Portland do not include outdoor play areas and are not designed to promote health. Portland staff recently worked with Multnomah County and health partners to develop the Healthy Housing Handbook (www.healthyhousingpdx.com) to provide recommendations for how to improve the quality of existing multi-dwelling housing, particularly in East Portland. This project provides an opportunity to evaluate how and to what extent those recommendations can be codified in the City development standards. This project does not affect any employment or industrial properties.

The City of Portland is addressing gentrification and displacement through avenues such as scoping a multi-dwelling and upgrade preservation program, exploring the implications of supporting just cause over no cause evictions, and is seeking to capitalize a housing land bank. This project is focused on improving the outcomes and livability of multi-dwelling development. While the project will assess likely implications for housing construction cost, a specific

Project Narrative

Page 6 of 8

Project Name: Better Multi-Dwelling Development Project

Applicant: City of Portland

affordable housing development task is not included in this work. Affordability impacts will be considered during the assessment of potential new standards and very likely affordable housing will be supported through revisions to amenity bonuses.

This project does not directly interface with the N/NE Community Development Project, although in places where multi-dwelling zoning exists in the N/NE Community Development Project, regulatory changes that result from this project may alter development standards. The N/NE Community Development project will be focused on delivering needed housing as quickly as possible, while meeting community needs and supporting desired social and economic outcomes.

Best Practices – The lessons learned through this project can be applied to multi-family areas in other parts of Portland and throughout the region. For example, the methodology used to create context-responsive development standards in East Portland could also be applied to areas in other parts of the Portland and the region. Additionally, the conditions in East Portland are similar to conditions in West Gresham and in Aloha in Washington County. The process methodology and findings could be shared with Gresham and other agencies in the region that have semi-rural properties that are transitioning to a more urbanized residential development pattern.

Leverage – New, East Portland-focused multi-dwelling development standards will provide a clear community vision for the multi-dwelling housing. These new standards can be used to guide housing development in station area communities in East Portland, particularly in conjunction with the Powell-Division Transit and Development Project. The Powell-Division Transit and Development Project is about to enter the Project Development phase with the Federal Transit Administration. The City of Portland will soon allocate \$1,000,000 in City funds to support this regional transit project. Additional funds will be provided by other agencies involved with the project.

Matching Fund/Potential – The City of Portland will provide a more than ten percent local match with in-kind support in the form of staff hours and materials and services.

Growth Absorption – Portland is projected to grow by 120,000 households, much of which will be in multi-dwelling housing. This project provides a means to accommodate that growth in a way that forwards growth absorption in and near centers and corridors in Portland.

Public Involvement – Given the diversity of households in the project area, public involvement for this project will take a non-traditional approach. Staff will actively with community organizations that are active in the area, including the Jade District and Division Midway Alliance, IRCO, Latino Network, PAALF, Russian Address LEP and neighborhood outreach. Outreach will include focus groups with translated materials, and information provided at community events and discussions, in addition to larger workshops.

Governing Body – The City of Portland will implement this project through the legislative process. Concept and discussion drafts will be shared with the community and the Planning and Sustainability Commission at meetings, events and at work sessions. Following this outreach, the Planning and Sustainability Commission will receive a Proposed Draft for review and discussion at a minimum of one public hearing, which would follow additional outreach. After Planning and Sustainability Commission review, the City Council will review and decide upon the Recommended Draft at a public hearing. Standards developed through this process will be implemented through City Code and the Zoning Code or through guidelines, as appropriate. No outcomes associated with this project are subject to public voting requirements.

Capacity of Applicant – The City of Portland and the Bureau of Planning and Sustainable has a successful track record of completing work supported through Community Planning and Development Grants, including the Powell-Division Transit and Development Project, the Barbur Concept Plan and the Mixed Use Zones Project. The staff and consulting skills

Project Name: Better Multi-Dwelling Development Project

Applicant: City of Portland

required to complete this project include: regulatory analysis; urban design, site, and architectural analysis; illustration and graphic design; real estate analysis and community involvement skills.

E. Collaborations

Staff will work with local community organizations including Jade District, Division-Midway Alliance and the East Portland Action Plan to ensure that community visions are furthered through this project, but these organizations will not be asked for financial or in-kind contributions in support of this grant.

F. Proposed Project Milestones and Deliverables

- | | |
|------------------|--|
| 1. January 2016 | Adoption of the IGA between Metro and the City of Portland |
| 2. March 2016 | Establishment of Advisory Committee |
| 3. April 2016 | Establishment of Project Goals and Outcomes |
| 4. June 2016 | Completion of Conditions Assessments (scope of work items two and three) |
| 5. November 2016 | Concept Plan and Real Estate Assessment |
| 6. May 2017 | Draft Code |
| 7. June 2017 | Adoption of new code |

G. Project Management

Alexandra Howard, Project Coordinator

Bureau of Planning and Sustainability

alexandra.howard@portlandoregon.gov

503-823-7849

Project Name: Better Multi-Dwelling Development Project
Applicant: City of Portland

Application: Improving Multi-Dwelling Development: New Standards and Regulatory Improvement

Budget Narrative

APPLICANT PERSONNEL

Principal Planner – Eric Engstrom (manager Comprehensive Planning Group at BPS, 19 years experience, Masters PSU)

In-kind match: \$27,750

Hourly rate (salary and benefits): \$112

Estimated time: 248 hours over 18 months

- Oversight and strategic direction
- Communications

Senior Planner - TBD

In-kind match: \$95,000

Hourly rate (salary and benefits): \$60

Estimated time: 1540 hours over 18 months

- Project management
- Grant compliance
- Contract management
- Analysis
- Outreach and engagement

City Planner II (Limited Duration) - TBD

Grant request: \$120,000

Hourly rate (salary and benefits): \$52

Estimated time: 2307 hours over 18 months

- Existing conditions research and analysis
- Regulatory review
- Concept development and review
- Outreach and engagement
- Logistics
- Advisory committee staff
- Code development

City Planner II/Urban Design – Lora Lillard (LA/Urban Designer, 7 years experience BPS, Masters UW)

Grant request: \$50,000

Hourly rate (salary and benefits): \$53

Estimated time: 943 hours over 18 months

- Lot and block pattern assessment
- Site and building design review
- Develop site and building design concepts

Project Name: Better Multi-Dwelling Development Project

Applicant: City of Portland

- Code development
- Outreach and engagement

City Planner II/District Liaison – Leslie Lum (North District Planner, Urban Designer, Affordable housing program experience, PM for Healthy Housing Study 2013, Masters Cal State Polytechnic)

In-kind match: \$66,000

Hourly rate (salary and benefits): \$52

Estimated time: 1269 hours over 18 months

- Outreach and engagement
- Community liaison
- Existing conditions analysis
- Code development

Senior Transportation Planner – April Bertelsen

Grant request: \$33,000

Hourly rate (salary and benefits): \$75

Estimated time: 440 hours over 18 months

- Existing conditions
- Regulatory review
- Assessment of street patterns, pedestrian and bike connectivity needs
- Street improvement requirements review

CONSULTANT AND OTHER PARTNERS

Design, Real Estate and Facilitation Services

Grant request: \$100,000

- Analyze, map and illustrate existing conditions, including neighborhood, site and building design conditions
- Develop illustrations showing existing design conditions, including challenges and opportunities as background for developing design and code concepts to promote healthy, walkable neighborhoods
- Create illustrations to communicate design concepts with the community
- Design and facilitate public engagement
- Identify feasible site sizes to support the desired scale and development needed to support complete, walkable communities
- Organize and facilitate public outreach and engagement
- Review staff-developed regulatory changes
- Assess real estate market conditions and develop pro-forma analysis to provide advice on potential minimum site size recommendations and on the costs and benefits of potential concepts and regulatory changes

Events and translation services

Grant request: \$7500

- Translate materials into appropriate languages
- Provide live translation services

Budget Narrative

Page 2 of 3

Project Name: Better Multi-Dwelling Development Project

Applicant: City of Portland

- Conduct focus groups or event sponsorships with community partners to reach underserved or underrepresented populations

Construction Excise Tax Planning Grant Program

Project Budget Form

Budget Form

PROJECT COSTS

1) Estimate the hours of work directly related to your project for agency personnel, consultants, and non-profit personnel. You can delete rows that do not apply and/or add more for specific descriptors.

2) Explain the tasks each is expected to complete *in the budget narrative* (i.e., design development, construction estimates, public involvement, technical research, code analysis, etc.).

Personnel Costs	Financial Match	In-Kind Match	CET Grant Request	TOTAL
Agency staff		188,750	203,000	391,750
Consultants			100,000	100,000
Non-profit staff				
Other, please list: Translation and outreach			7,500	7,500
Total for Planning Services		188,750	310,500	499,250

Other Costs				
Overhead/Indirect costs - these can only be used as match				
Total for Other Costs				

TOTAL PROJECT COSTS		188,750	310,500	499,250
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Note: See pages 27-29 of the CET Application Handbook for detail instructions.

Community Planning & Development Grant 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
General Fund	<input type="radio"/> Financial	<input checked="" type="radio"/> In Kind	<input type="radio"/> Pending	<input checked="" type="radio"/> Secured	\$ 188,750.00	
	<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	\$	
	<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 \$ 188,750.00

ORDINANCE NO. 187137

*Authorize application to Metro Regional Government for a package of five grants for a total amount of \$1,559,500 as part of the Community Planning and Development Grant program (Ordinance)

The City of Portland ordains:

Section 1. The Council finds:

1. The Portland City Council shares the Metro Council's goals for smart planning that readies land for development, removes barriers to private investment for development, improves regional livability and promotes equity.
2. Staff in the Bureau of Planning and Sustainability has reviewed the grant program, coordinated with other City bureaus and agencies, submitted initial letters of intent to Metro in April 2015, and received feedback on five potential proposals in April 2015.
3. The Bureau of Planning and Sustainability (BPS) seeks a grant of \$310,500 for the 'Better Multi-Dwelling Development Project.' City of Portland matching funds in the amount of \$188,750 will be provided by BPS in the form of salary, benefits, and materials and services in the FY 2015-16 and FY 2016-17 budgets of BPS. If the grant is awarded and accepted, this work will improve development outcomes in multi-dwelling zones, including supporting better street connectivity and pedestrian-oriented design in East Portland, and open space and amenities in multi-dwelling zones citywide.
4. BPS seeks a grant of \$539,000 for the 'Building Complete Communities along the Powell-Division Corridor Project.' City of Portland matching funds in the amount of \$172,850 will be provided by BPS in the form of salary, benefits, and materials and services in the FY 2015-16 and FY 2016-17 budgets of BPS. This grant will be a joint City of Portland-City of Gresham grant application. The amounts listed above apply only to work that will be completed by the City of Portland, should this grant be awarded and accepted. If this grant is awarded and accepted, the work will complement, inform and contribute to the Portland Bureau of Transportation's (PBOT) work on the regional Powell-Division Transit and Development Project, and support collaboration with the Portland Development Commission and community organizations to promote equitable transit oriented development. This grant will also support a portion of PBOT's work on this project.
5. BPS seeks a grant of \$365,000 for the '82nd Avenue - Development Readiness Project.' City of Portland matching funds in the amount of \$121,000 will be provided by BPS in the form of salary, benefits, and materials and services in the FY 2015-16 and FY 2016-17 budget of BPS. This work will complement the Oregon Department of Transportation's (ODOT) Avenue of Roses Implementation Plan and will identify remedies to barriers to employment and mixed-use investment on 82nd Ave and support roadway design analysis that will contribute to ODOT's project. It will also support a portion of PBOT's work on this project.
6. BPS seeks a grant of \$200,000 for the Pathway 1000 Implementation Strategy. City of Portland matching funds in the amount of \$33,000 will be provided by BPS in the form of

salary, benefits and services in the FY 2015-16 and FY 2016-17. This project will support community-driven work to develop affordable housing and inclusive community development in North and Northeast Portland. The Portland Community Reinvestment Initiative will be collaborator on this project.

7. The Bureau of Planning and Sustainability (BPS) seeks a grant of \$145,000 for the 'Design Review Process and Outcome Improvement Project'. City of Portland matching funds in the amount of \$29,000 will be provided by BPS in the form of salary, benefits, and materials and services in the FY 2015-16 and FY2016-17 budget of BPS. This project will assess the outcomes of the design review process and include recommendations for revisions to the process to improve efficiency, clarity and the quality of development.
8. Charges for indirect overhead cannot be paid for with Metro Regional Government Community Planning and Development grant funds.

NOW THEREFORE, The Council directs:

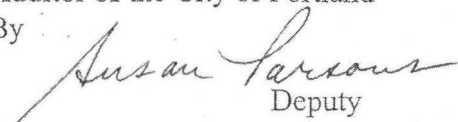
- a. The Mayor is hereby authorized to make application to the Metro Regional Government Community Planning and Development Grants program for a package of five grants in the amount of \$1,559,500.
- b. The Mayor is authorized to provide such information and assurances as are required for the grant period.
- c. The Mayor hereby authorizes a waiver of overhead for any Community Planning and Development Grants awarded to the City of Portland by the Metro Regional Government during the 2015 grant application cycle.
- d. The OMF Grants Office is authorized to perform all administrative matters in relation to the grant application, grant agreement or amendments, requests for reimbursement from the grantor, and to submit required online grant documents on the Mayor's behalf.
- e. Local match in the amount of \$544,600 will be provided by in the form of salary, benefits, and materials and services in the FY 2015-16 and 2016-17 budget of the Bureau of Planning and Sustainability, if all grants that are applied for under this ordinance are awarded and accepted.

The Council declares that an emergency exists because grant applications are due no later than June 1, 2015. Therefore this ordinance shall be in full force and effect from and after its passage by the Council.

Passed by the Council: **MAY 27 2015**

Mayor Charlie Hales
Prepared by: Alexandra Howard
Date Prepared: May 13, 2015

Mary Hull Caballero
Auditor of the City of Portland
By


Deputy

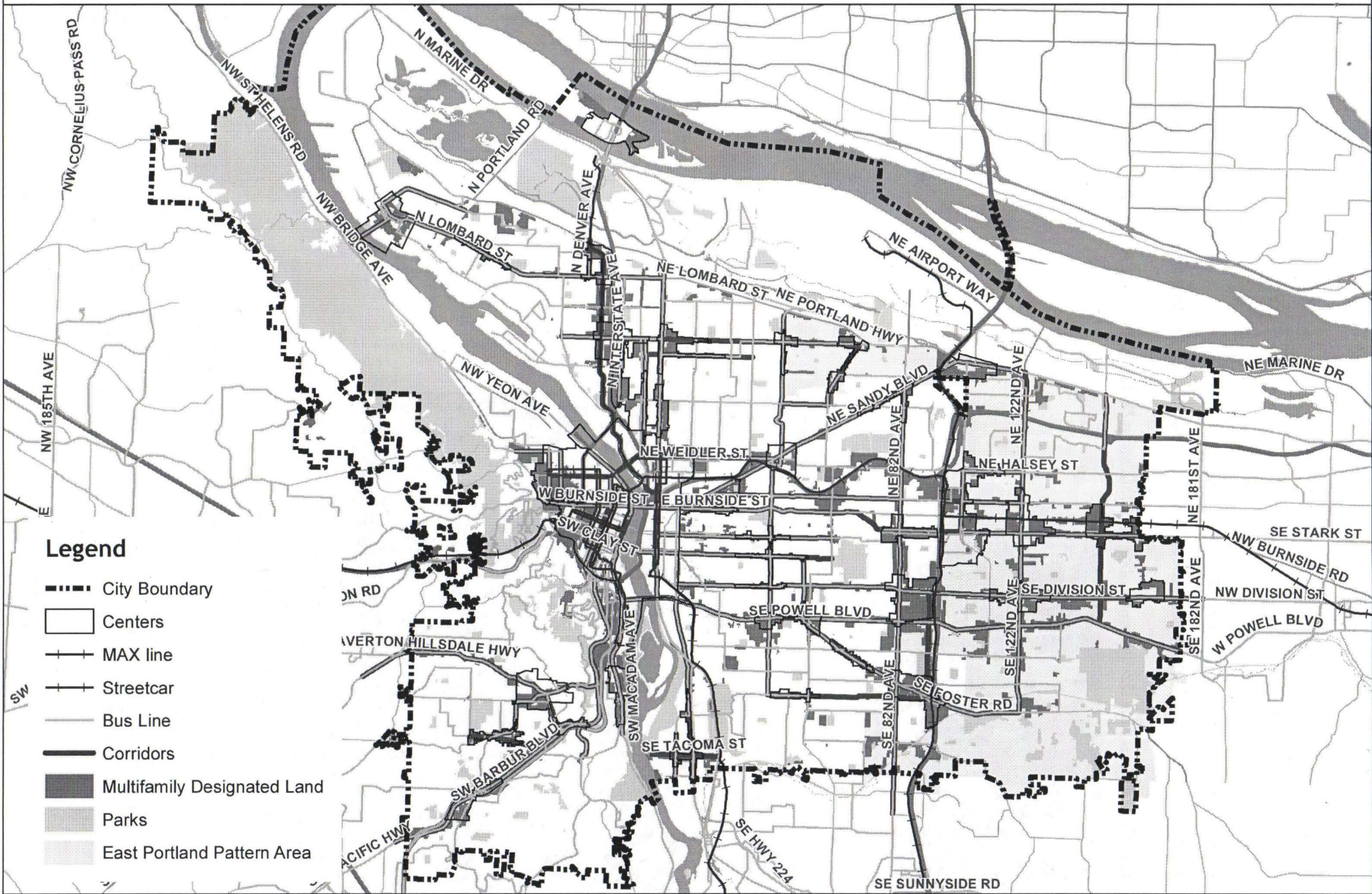
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Agenda No.
ORDINANCE NO. 187137
 Title

*Authorize application to Metro Regional Government for a package of five grants for a total amount of \$1,559,500 as part of the Community Planning and Development Grant program (Ordinance)

INTRODUCED BY Commissioner/Auditor: Charlie Hales	CLERK USE: DATE FILED <u>MAY 22 2015</u>
COMMISSIONER APPROVAL Mayor—Finance and Administration - Hales Position 1/Utilities - Fritz Position 2/Works - Fish Position 3/Affairs - Saltzman Position 4/Safety - Novick	Mary Hull Caballero Auditor of the City of Portland By: <u>Susan Parsons</u> Deputy
BUREAU APPROVAL Bureau: BPS <u>Joe Lehner</u> Bureau Head: Susan Anderson	ACTION TAKEN:
Prepared by: Alexandra Howard Date Prepared: May 13, 2015	
Impact Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/>	
Portland Policy Document If "Yes" requires City Policy paragraph stated in document. Yes <input type="checkbox"/> No <input type="checkbox"/>	
City Auditor Office Approval: required for Code Ordinances	
City Attorney Approval: required for contract, code, easement, franchise, comp plan, charter	
Council Meeting Date May 27, 2015	

AGENDA	FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:	
TIME CERTAIN <input type="checkbox"/> Start time: _____ Total amount of time needed: _____ (for presentation, testimony and discussion)		YEAS	NAYS
CONSENT <input checked="" type="checkbox"/>	1. Fritz	1. Fritz	✓
REGULAR <input type="checkbox"/>	2. Fish	2. Fish	✓
Total amount of time needed: 0 (for presentation, testimony and discussion)	3. Saltzman	3. Saltzman	✓
	4. Novick	4. Novick	✓
	Hales	Hales	✓



Legend

- City Boundary
- Centers
- ++ MAX line
- ++ Streetcar
- Bus Line
- Corridors
- Multifamily Designated Land
- Parks
- East Portland Pattern Area

May 29, 2015

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

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 error, omissions or positional accuracy.

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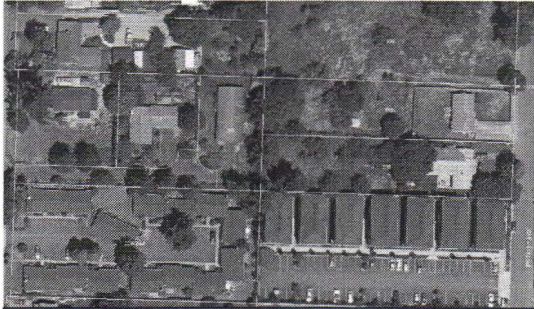
Bureau of Planning and Sustainability
Innovation. Collaboration. Practical Solutions.
City of Portland 30005083
Charlie Hales, Mayor • Susan Anderson, Director



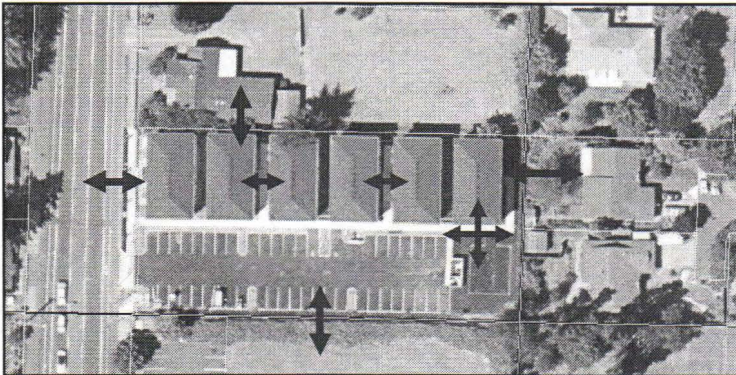
Improving Multi-Dwelling Development

Images of Existing Conditions: Site Design, Building Orientation and Open Space

Examples of Poor Site Design and Building Orientation Outcomes in East Portland

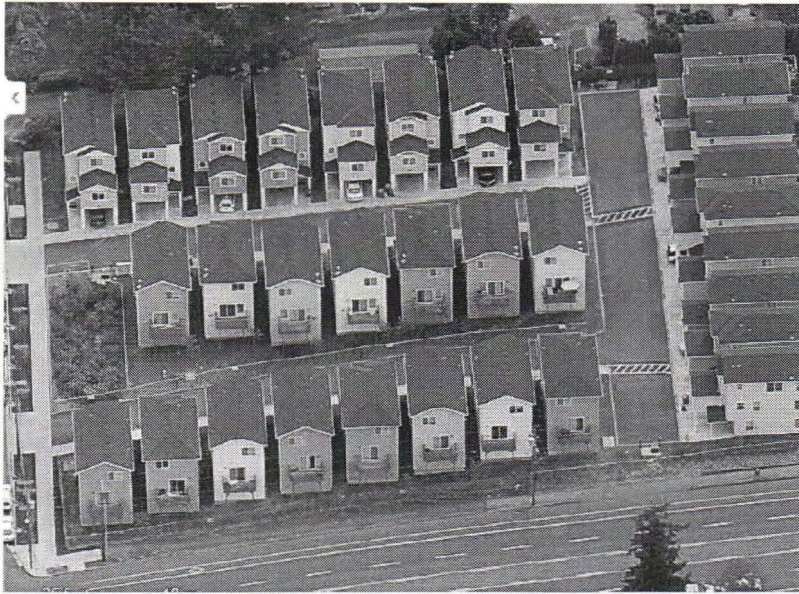


Common East Portland lot layout – variety of lot sizes and mix of old/new development with minimal amenities.



Above: Multi-dwelling development approved through the Community Design Standards. These standards require pitched roofs and front porches, but do not address site design issues such as connections to open space and privacy.

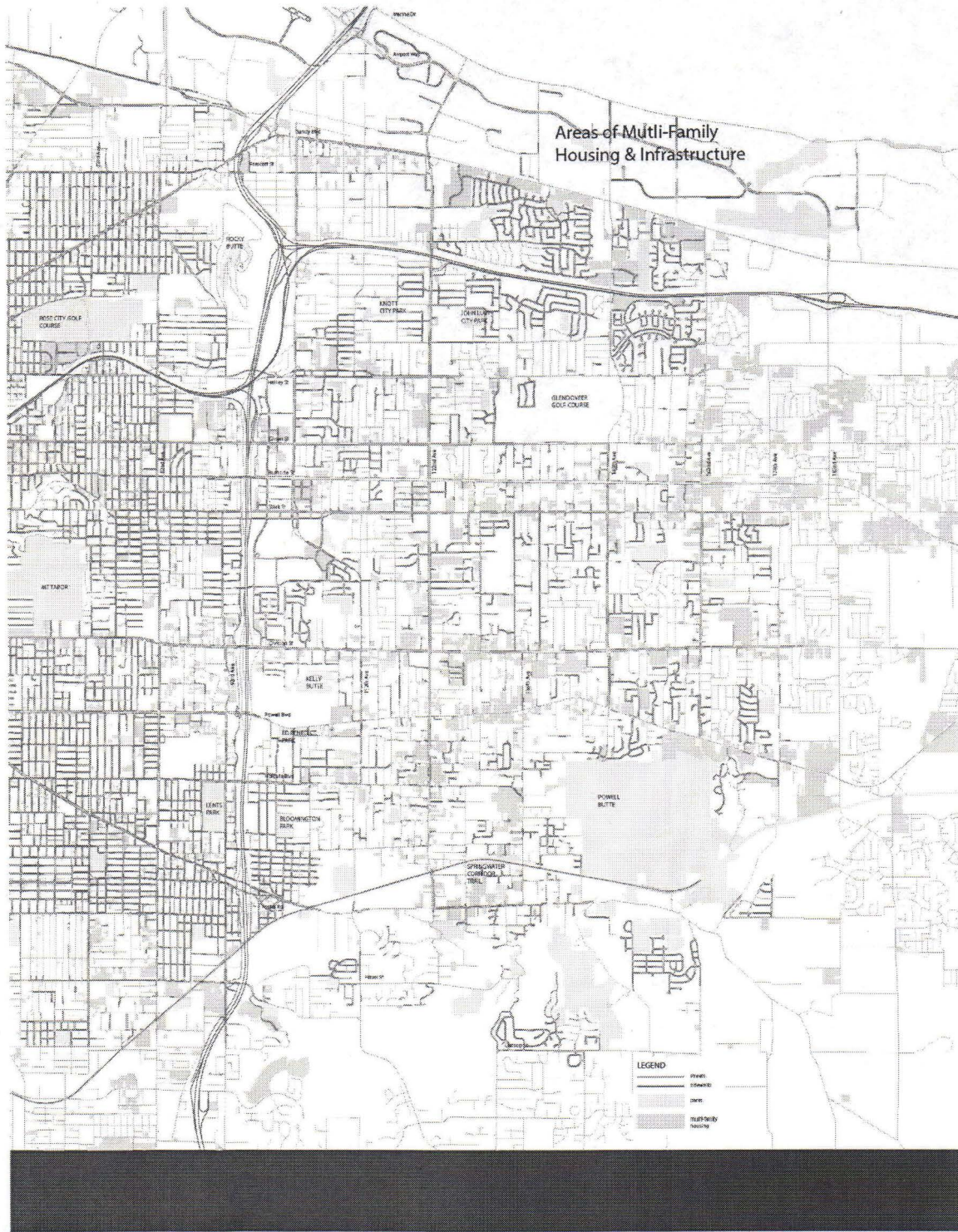
Project Name: Better Multi-Dwelling Development Project
Applicant: City of Portland



Multi-dwelling development on SE 122nd Avenue accessed by shared driveways instead of streets. Similar development involving a land division would trigger requirements for street-oriented entrances, street trees and other features. Also note lack of useable open space (unbuilt green area is a fenced stormwater facility).

Project Name: Better Multi-Dwelling Development Project
Applicant: City of Portland

Multi-dwelling Development and Street/Sidewalk Layout in East Portland
(Areas in red denote streets with sidewalks. Many streets in East Portland lack sidewalks.)



Project Name: Better Multi-Dwelling Development Project
Applicant: City of Portland

Examples of Limited Open Space in Inner Portland



Multi-dwelling buildings throughout the city often lack sufficient private and shared open space. Many new code standards are being developed through the Mixed Use Zones Project. Those concepts can be incorporated into multi-dwelling zone regulations throughout the city.



Healthy Housing Solutions – Open Space Layout

Healthy Housing Solutions

- A** Pedestrian paths create linkages throughout the site, not just from the parking lot to units
- B** Fencing and benches create privacy and provide a transition between public and private areas.
- C** Pervious pavers help with natural stormwater filtration.
- D** Existing unused grass areas are transformed into private garden plots and/or community garden plots.
- E** Slatted wood fences and vegetative living walls screen outdoor spaces to allow some visibility and light.
- F** Operable windows and skylights provide daylight to the community room and visibility to the common open space.
- G** The community room is a large flexible space for cooking, doing laundry, holding meetings or hanging out.
- H** A variety of benches are scattered throughout the apartment site.
- I** Common open space adjacent to apartment buildings allows parents, older siblings, and other community members to watch over youngsters while attending to other activities.
- J** The common open space is located along the pedestrian path and close to the driveway.
- K** The common open space is fenced and separated from auto traffic to provide a safe and manageable play area. Bollards, trees and bioswales separate pedestrians and automobiles.
- L** Large canopy trees and vegetation provide shade, habitat and air filtration. Bioswales capture roof stormwater and surface runoff from impervious surfaces.

