



2040 Planning and Development Grants Application Handbook

Cycle 6 | February 2018

Grant timeline and key dates

Feb. 1, 2018	Metro begins to accept draft Letters of Intent.
Feb. 12 - March 8	Scheduling of required pre-application conferences with Metro staff. Required draft Letter of Intent due to Metro no later than March 8. Early submission of draft Letter of Intent is strongly encouraged.
March 23	Deadline to submit final Letters of Intent.
April 20	Deadline to submit Full Application.
May – June	Staff/screening committee evaluations and recommendations.
July – Aug.	Metro Council action to award grants.
Aug. – Jan. 2019	Negotiation of inter-governmental agreements (IGAs) between Metro and grantees; procurement/selection of project consultant teams; finalization of project scopes, milestones, and timelines.
Feb. 2019	Grant application Cycle 7 to begin.

Metro staff contacts

Applications and general information:

Laura Dawson-Bodner

503-797-1756

laura.dawson-bodner@oregonmetro.gov

Projects within the urban growth boundary:

Lisa Miles

503-797-1877

lisa.miles@oregonmetro.gov

Projects in urban reserves and new urban areas:

Tim O'Brien

503-797-1840

tim.o'brien@oregonmetro.gov

Table of contents

Grant program overview

Program history, purpose and goals.....	1
Eligible applicants.....	1
Eligible project types.....	1
Additional requirements.....	2
Funding availability and investment priorities.....	3
Application review process.....	3
Grant evaluation criteria.....	5
Grant awards and intergovernmental agreements.....	6

Application process and instructions

Accessing ZoomGrants.....	9
Project information	9
Draft letter of intent	9
Pre-application conferences.....	9
Final letter of intent.....	10
Full grant application instructions.....	10

Grant application questions and templates

ZoomGrants questions, tables and uploads	14
Project narrative template.....	17
Budget table templates	29

Sample project approaches

Urban reserve and new urban area planning.....	32
Strategy or policy development.....	33
Investment strategies and financial tools.....	35
Area-specific redevelopment planning.....	37
Site-specific development or redevelopment.....	39
Equitable housing projects and policies.....	41

Additional resources and information

2040 household forecast	45
2035 employment forecast	46
Climate smart communities	47
Public engagement resource guide	49
Suggested resources and links	55
Grants screening committee	57

Grant program overview

HISTORY, PURPOSE AND GOALS

Metro's 2040 Planning and Development Grants program supports a range of local planning projects and activities. The grants help remove barriers to private investment in development, promote planning activity that makes land ready for development, and help to implement the Portland region's long term plan for livability, outlined in the 2040 Growth Concept. The program, formerly known as the Community Planning and Development Grants (CPDG) Program, has been in place since 2006. Prior grant cycles have awarded over \$22 million to fund more than 90 projects across the region.

Grant funds are generated from a regional excise tax on construction permits issued within the Metro service district. The tax is assessed at 0.12 percent of the total value of the improvements for which a permit is sought. Permits valued below \$100,000 and those issued to 501(c)(3) nonprofits for affordable housing projects are exempt from the tax. Permits for construction valued at more than \$10 million are assessed a flat fee of \$12,000.

ELIGIBLE APPLICANTS

Local governments (cities and counties) within Metro's service district may submit applications. They may apply as sole applicants, or in partnership with other government entities or private, non-profit or community-based organizations. Other local governments, as defined in ORS 174.116, may apply for a grant in partnership with a city or county within the Metro service district.

Neighboring jurisdictions embarking on similar community planning and development planning projects are encouraged to coordinate or combine their projects. If two or more government entities apply for one grant, one must be lead for the application and only one application for the project should be submitted. Up to 4 project letters of intent and 3 full grant applications may be submitted per jurisdiction during each grant cycle. Metro is not eligible to apply for or receive grant funds.

ELIGIBLE PROJECTS

2040 Planning and Development Grants support planning and pre-development activities that remove barriers to development, are necessary to make land ready for development and help enable existing developed sites to be ready for redevelopment. Eligible planning projects include the activities required for the physical, economic and community development of a specific geographic area. Proposed projects must help to advance established regional development policy goals and outcomes expressed in the 2040 Growth concept, the Urban Growth Management Functional Plan, and in the following six desired outcomes stated in the Regional Framework Plan adopted by the region to guide future Planning:

- People live, work and play in vibrant communities where their everyday needs are easily accessible.
- Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
- People have safe and reliable transportation choices that enhance their quality of life.

- The region is a leader on climate change, minimizing contributions to global warming.
- Current and future generations enjoy clean air, clean water and healthy ecosystems.
- The benefits and burdens of growth are distributed equitably.

Funds from 2040 Planning and Development Grants cannot be used as support for general planning budgets, to cover the costs of development implementation or construction, or for the operation of programs or projects. Reimbursement of planning activities conducted prior to signing of a grant intergovernmental agreement is also ineligible, although applicants can describe previous investments to illustrate community readiness for the proposed project. Eligible project expenses include local government staff support directly related to the project, consultant work on the project and overhead directly attributable to the project. The budget section provides more information on appropriate project-related expenses. The following list shows the broad range of project types that could be eligible for grant funding:

Urban reserve and new urban area planning. Planning for future development of new urban areas on land currently designated Urban Reserves (or in areas recently brought into the Urban Growth Boundary) to facilitate the future development of complete communities and comply with Title 11 of the Urban Growth Management Functional Plan.

Strategy or policy development. Development and adoption of action plans, strategic initiatives, code refinements, incentives, streamlined review and other development-related policy work that will meaningfully increase community readiness for development or identify and reduce barriers to development, redevelopment and infill.

Investment strategies and financial tools. Exploration and development of investment strategies and financial tools and incentives to facilitate development, redevelopment, and infill, such as urban renewal districts, enterprise zones, tax abatements, or collaborative capital improvement plans.

Area-specific redevelopment planning. Strategic planning, concept design and feasibility for redevelopment and infill of specific areas or districts.

Site-specific development or redevelopment. Concept/schematic design and feasibility analyses for site-specific development projects, equitable housing projects and public-private partnerships.

Equitable housing projects and policies. Any approach or combination of approaches that will facilitate the development of equitable housing throughout the region. Metro’s working definition of ‘equitable housing’ is diverse, quality, physically accessible, affordable housing choices with access to opportunities, services, and amenities.

ADDITIONAL REQUIREMENTS

- A match of at least 10 percent is required. This match can be in the form of either in-kind or direct financial contribution by the applicant or partners who are actively engaged in leveraging financial or in-kind services to the project.
- The governing body serving as lead applicant must confirm their resource commitment and support for the project by resolution.

- Partnerships are encouraged to promote creativity in project funding and demonstrate local commitment to the project. All key partners collaborating on the project and providing direct or in-kind financial support or other leveraged resources should clearly describe their role and contribution to the proposed project with a letter of commitment. The local approval process for these letters will vary, depending on local procedures for securing approval from the local governing body.

FUNDING AVAILABILITY AND INVESTMENT PRIORITIES

Up to \$2 million in grant funds will be available for the 2018 grant cycle. In order to most effectively address barriers to development and to advance the 2040 Growth Concept, the Metro Council establishes a policy emphasis for each grant cycle to help align the grant program with current trends and issues affecting development in the metro region.

Presently, the region continues to have a crisis in adequate housing supply, especially for residents with lower incomes. Multiple tools, strategies, and approaches are needed to provide more equitable housing throughout the region. Complementary strategies for employment growth, redevelopment and land readiness are also important to address other current regional growth and development issues. The policy and investment emphasis for the 2018 grant cycle is as follows:

- 25% of grant funds will be targeted for qualified concept planning and comprehensive planning projects in urban reserves or new urban areas.
- 50% of grant funds will be targeted for qualified projects that will facilitate implementation of 'equitable development' projects inside the Urban Growth Boundary, which may include but are not limited to:
 - Planning or pre-development work for equitable housing (diverse, physically accessible, affordable housing choices with access to opportunities, services, and amenities);
 - Planning or pre-development work for projects that will advance quality of life outcomes for marginalized communities, such as quality education, living wage employment, healthy environments, and transportation;
 - Facilitation of development-related efforts in partnership with a community organization whose primary mission is to serve communities of color;
 - Planning or pre-development for projects that will serve a specific neighborhood or geography with a high percentage of residents that are people of color or historically marginalized communities;
 - Planning for public and private developments, investments, programs and policies that will be enacted to meet the needs of communities of color and reduce racial disparities, taking into account past history and current conditions.
- 25% of funds will be targeted for qualified projects to facilitate development in centers, corridors, station areas and employment/industrial areas.
- In the event that there are insufficient qualified applications within any one funding category, grant funds may be awarded to qualified applications in any other category.

Every application must demonstrate how it will effectively meet all of the grant evaluation criteria and significantly advance regional policies and goals in order to be successful. The screening committee will first review applications seeking funding under the equitable development target category; those that do not, in the opinion of the committee, have a sufficiently strong equitable development emphasis to merit funding under that category will be added to the general pool of applications for projects in centers, corridors, station areas, and employment/industrial areas and evaluated alongside those applications based on their relative overall merit.

It should be noted that even those applications not specifically seeking consideration under the equitable development category are still required to address how they are advancing equity as part of demonstrating their alignment with the regional goals and policies. Further details regarding all of the grant evaluation criteria are provided in subsequent sections below.

APPLICATION REVIEW PROCESS

Staff review. Metro staff will review project Letters of Intent. Letters of Intent will be screened by staff to ensure that applicants and projects meet all criteria for program eligibility and will merit further consideration of a full application. Any jurisdictions submitting the maximum 4 allowed letters of intent will be notified which 3 of the 4 projects have been approved to submit a full application. Staff will review full applications and forward all complete applications to the grant screening committee, along with an assessment of each application's relative strengths and weaknesses. Applications not submitted and completed by the deadline will not be reviewed; incomplete applications will not be evaluated.

Grant screening committee. The 2040 Grant Screening Committee, appointed by the Metro Chief Operating Officer (COO), will review and score the applications after the initial screening by staff. Metro code establishes the Screening Committee membership to include six to nine private and public sector representatives with experience in a range of areas relating to urban planning, real estate, and economic development. In evaluating the grant applications, the screening committee will first review applications that seek consideration under the equitable development category; those that do not have a sufficiently strong equitable development emphasis to merit funding in that category will be then be added to the general pool of applications and evaluated based on their relative overall merits. The screening committee will bring their professional judgment and common sense to applying the criteria, allocating resources from each funding target and determining what projects best meet all criteria, including regional policy priorities and equitable development objectives, and therefore warrant funding.

Metro Chief Operating Officer (COO) recommendation. The Metro COO will review the screening committee recommendation, and will forward the recommendation to the Metro Council. The Metro COO may also submit a separate recommendation to the Metro Council.

Metro Council review and approval. Following the Metro COO's submission of the recommendations to the Metro Council, one or more members of the screening committee will be available to present the committee's recommendations to the Metro Council and answer questions. The Metro Council will review the recommendations and funding requests and make a final selection of applications and grant funding levels to be awarded funds.

GRANT EVALUATION CRITERIA

Grant applications of all types will be evaluated based on the following criteria.

Clear development outcomes. Proposal presents a compelling project concept with specific, impactful outcomes to facilitate development. Performance measures are clearly articulated.

Advances and complements regional goals and policies. Proposed project will support Metro's established regional policy goal of advancing racial equity. Project will also help to advance established regional development goals and outcomes expressed in the 2040 Growth Concept, the Urban Growth Management Functional Plan, and the Six Desired Outcomes stated in the Regional Framework Plan, adopted by the region to guide future planning (see page 1).

Aligns with local goals and/or maximizes community assets. Proposed project will help realize community plans and goals, accommodate expected population and employment growth, and/or maximize existing community assets such as public transit, parks, natural features, historic districts and employment areas.

Likelihood of implementation. Relevant key stakeholders (property owners, policy makers, jurisdictions, service providers, etc.) have committed full support for the project goals and timelines, will be meaningfully involved in guiding the project, and have the capacity and authority to implement actions/investments as needed to bring the project to fruition. Opportunities and threats to project commitments are identified.

Public involvement. Proposal incorporates best practices for public involvement; strategies for meaningfully engaging neighbors, businesses, property owners and key stakeholders, including historically marginalized communities and residents with lower incomes are clearly articulated and well-conceived; proposal indicates how public input will be used to strengthen the project outcomes, and/or increase the likelihood of successful implementation.

Team roles and capacity. Roles and responsibilities of the applicant county or city, as well as any additional partners have been clearly defined; proposed staff has skill sets, experience and appropriate available time needed to successfully manage all aspects of the grant project and oversee the work of the consultant team or teams on behalf of the project partners.

Jurisdiction track record. Applicant has proven capability to successfully implement community development projects, especially past Planning and Development Grants; prior grants have fully delivered expected products and outcomes according to the approved schedule of milestones; any grant projects still underway are on track and/or scheduled for completion prior to initiation of proposed project.

Grant leverage. Extent to which partners have committed additional in-kind or direct financial contributions to the project beyond the minimum ten percent match that is required.

Replicable best practices. Proposed project will develop best practices that could be replicated in other locations. (Note: This criterion may not be applied to all projects.)

GRANT AWARD AND INTERGOVERNMENTAL AGREEMENTS

Projects selected to receive grant funding will work with Metro staff to develop an intergovernmental agreement (IGA) that will establish the agreed-upon scope of work, budget, expected milestone and deliverable completion dates and grant payment dates. Project consultant teams, contracts, work scopes, deliverables and project timelines will be finalized prior to execution of the IGA. Grantees must enter into an IGA with Metro within six months of grant award. Metro reserves the right to reprogram the awarded funds if the IGA is not completed within that timeframe.

Grant funding will be distributed in incremental payments made at the completion of the project's major milestones as set forth in the IGA. Grantees will submit progress reports documenting the completion of the work tasks and milestones prior to receiving payment. Progress reports must also document the financial contributions that were included as a match or leverage in the grant application and described in the proposed budget.

Grantees must work closely with the Metro staff liaison for their projects, and include them in the appropriate advisory committee(s) for the project. Metro requires that grantees meet Federal non-discrimination requirements on projects. Grantees are expected to complete the project within the period stated in the IGA, or within the period agreed upon in an amended IGA. Metro retains the right to terminate a grant award if the milestones set forth in the IGA are not met.



Instructions for grant applicants

Instructions for grant applicants

ACCESSING ZOOMGRANTS

Metro accepts grant applications via the online system ZoomGrants. Applicants may access ZoomGrants and register with the system via the link on the 2040 Grants web page, oregonmetro.gov/2040grants or connect directly at <https://zoomgrants.com/gprop.asp?donorid=2199&limited=1722>.

If you have questions about ZoomGrants, you may use the help button at the top of each ZoomGrants page. For more information, visit ZoomGrants University at <https://zoomgrants.zendesk.com/hc/en-us> or contact the ZoomGrants help desk at Questions@ZoomGrants.com.

To ensure you receive emails from Metro regarding your grant application, please add the email address Notices@ZoomGrants.com to your “safe senders list.” A confirmation email will be sent by ZoomGrants once a letter of intent or full application has been submitted. If you do not receive a confirmation, contact Laura Dawson-Bodner by phone at 503-797-1756 or by email Laura.dawson-bodner@oregonmetro.gov.

PROJECT INFORMATION

In the online application, please enter contact information for the applicant, the organization (jurisdiction) and contact information for the person who is to serve as the primary point of contact for your application. You may also provide email addresses of additional project team members who would like to receive electronic notifications and updates regarding the grant application.

DRAFT LETTER OF INTENT: REQUIRED BEFORE MARCH 8

All potential applicants are required to submit a project summary and draft Letter of Intent as they start to develop their project application. The project summary requests basic information about your application including organization and contact information. The Letter of Intent has seven brief narrative questions. Please refer to the attachments at the end of this section that show the questions and the available space allotted for your answers. **Early submission of draft Letter of Intent is strongly encouraged.**

Upon submittal of a draft Letter of Intent, Metro staff will schedule required pre-application conference with applicants to discuss their projects. Metro staff will contact the applicant upon receipt of the draft letter to coordinate scheduling. Applicants must submit a draft Letter of Intent no later than March 8.

PRE-APPLICATION CONFERENCES: SCHEDULED FEBRUARY 12 – MARCH 20

Pre-application conferences will be scheduled on a first-come, first-served basis. Applicants will have the opportunity to receive feedback from Metro staff on how to strengthen the grant application, ensure it meets eligibility requirements, and make it more competitive. The information contained in the draft letter of intent will enable Metro to determine the most appropriate technical staff to attend the pre-application conference. The information will also help Metro staff to efficiently prepare for the conference in order to provide useful feedback to the applicant.

Applicants need not have every member of their anticipated project team available attend the pre-application conference, but it is recommended that representatives of any key project partners plan to attend. Please note that due to scheduling and staff time limitations, any jurisdictions planning to submit more than one application must submit their draft letters of intent for all projects at one time, so that one longer conference can be arranged that will address all projects in their jurisdictions. Following the pre-application conference, applicants will have the ability to further edit their letter of intent prior to the final submission deadline.

FINAL LETTER OF INTENT: DEADLINE MARCH 23

All interested applicants must complete and submit the project summary and final Letter of Intent by March 23 in order to be eligible to submit a full application. Metro staff will screen letters of intent for completeness and basic program eligibility. Grant applicants will be notified if their application has been accepted as eligible, and their Letter of Intent has been approved, at which point they will have access to begin completing the full application in ZoomGrants.

FULL GRANT APPLICATION INSTRUCTIONS: DEADLINE APRIL 20

ZoomGrants questions and table

There are 3 short answer questions and one table that applicants are required to complete by directly entering their response into ZoomGrants under the “Short Questions” and “Prior Grants” tabs.

Project narrative

The Project Narrative Template is a fillable Word document available for download from ZoomGrants (see Library or the Required Uploads tab) or on the program web page oregonmetro.gov/2040grants. The form allows applicants to format their responses (with headings, bullets, tables etc. as desired) within the space allotted for each answer. Responses to the questions should make a convincing case that the application meets the intent of the grant program and has the necessary commitments, partnerships and resources in place to achieve the expected outcome within the budget and schedule proposed. In developing your project approach and narrative, it may be helpful to review the sample project approaches provided in the ‘Additional resources and information’ section of this handbook. Applicants should respond to all questions as thoughtfully and succinctly as possible, and address each component of every question. However, it is not necessary to use the full space allotted for each answer. Once complete, a PDF of the Project Narrative Form must be uploaded into ZoomGrants under the “Required Uploads” tab.

Budget narrative

Project budgets should be clear, cost-effective and consistent with the approach and deliverables described in the project narrative. The budget narrative (part of the overall Project Narrative Form described above) should explain the expected project costs, including the share that will be funded by the grant and the share funded by the required 10% match. The budget narrative facilitates review of the level of effort and cost for the tasks and improves understanding of the key areas of focus in the proposal. The narrative is essential for grant reviewers to analyze whether the estimated budget supports the proposed project and is reasonable. The budget narrative and the line item summary for the budget should include costs for

personnel, consultants and overhead/indirect costs. An application submitted by more than one local government (e.g., two cities, or city and county) should explain which entity will serve as the lead jurisdiction, and clearly show personnel and overhead/indirect costs for each local government.

Preparing budget tables

Applicants should prepare the project budget tables provided in the Required Project Budget Template Excel workbook available for download from ZoomGrants (see Library or the Required Uploads tab) or on the program web page oregonmetro.gov/2040grants. Applicants must identify all resources that will support the proposed elements of the project. The following expenses are considered eligible expenses for grant consideration:

- Local government staff support directly related to project
- Consultant work on project
- Overhead directly attributable to project.

Project costs that are not eligible for grant funding may be included in the overall project budget and covered as part of the applicant's or other partners' matching contributions.

Personnel costs. List salary or wage expenses for lead applicant's staff positions directly related to the proposed project under "applicant staff." Costs for staff of other project partners should be shown as separate line item(s) labeled by partner name. The budget narrative should list each staff position title, the position's salary, estimated time to be devoted to the project and a description of the activities to be performed by the person. The budget narrative should identify whether these costs will be covered by the grant funding or used as match.

Consultant services. It is expected that the applicant will ensure that the scope of work developed by a consultant after a grant award will closely correspond to the scope of work described in the grant application. The budget narrative should list and describe all consultant services.

Direct project costs. List any direct costs specific to the project such as project materials, printing, meeting supplies or room rentals, etc. or other expenses specific to the work of the project.

Overhead/indirect costs. Overhead costs are intended to include expenses incurred by the organization for indirect costs that are identifiable and benefit the project. Depending on the relationship of the cost to the project, overhead costs might include accounting and financial resources and systems, management, planning or support resources and systems, and space and other equipment. All overhead costs must directly relate to the successful completion of the project.

Required uploads

The following required and some optional materials must be individually uploaded to the Required Uploads tab in ZoomGrants.

Project narrative. Refer to instructions above to complete the Project Narrative Template. Save as a PDF before uploading into Zoomgrants.

Project budget tables. Refer to additional instructions above. Complete the tables in the Required Project Budget Template excel workbook provided. Save budget tables as a PDF document prior to uploading into Zoomgrants.

Applicant letter of commitment. Letter should describe partner support for the project and explicitly confirm commitments of in-kind or financial resources, and outline any actions the jurisdiction pledges to take to support project implementation. The formal approval process for these letters will vary, depending on the official procedures for securing approval from the local governing body. Include with the letter a resolution from the applicant governing body that confirms support for the project and explicitly authorizes budget commitment of in-kind or financial resources to the project.

Project partner letter(s) of commitment. Include a letter of commitment from each project partner. Letters should describe partner support for the project, explicitly confirm commitments of in-kind or financial resources, and outline any actions the jurisdiction pledges to take to support project implementation. The formal approval process for these letters will vary, depending on the official procedures for securing approval from particular organization, entity, or local governing body.

Location map. Provide vicinity map(s), site maps, or aerial photos as applicable to show the location of the project and project boundaries. Include up to 3 pages of maps as needed.

Project images (optional). Applicants may include an additional PDF of up to 4 pages containing site photos, project plans, design images or other supplemental graphic material.

Additional letters of support (optional). Applicants may include up to 5 additional letters of support, if desired.

Combined Application PDF (required). Combine all application “required upload” materials listed above into one PDF attachment, ordered in the sequence listed; upload this combined PDF file under the Required Uploads tab. Please note: ZoomGrants allows document uploads to be up to 4mb in size. In the event your completed combined application PDF exceeds 4mb and it is not possible to reduce the file size, the combined application PDF may be split into two documents, with the location maps, optional images and additional letters of support in the second document.



Application Materials

ZoomGrants application questions and tables

PLEASE NOTE: This outline of the ZoomGrants questions and required responses is provided as a convenience to applicants. Responses to the following short questions and tables for the letter of intent phase and the full application phase must be entered directly into ZoomGrants online.

GENERAL INFORMATION (enter responses directly into ZoomGrants)

Project Title

Amount Requested \$ _____

Matching Contributions \$ _____

Applicant Information

Organization Information

Official Primary Contact

Additional contacts for this application

Brief project description (1-2 sentences)

LETTER OF INTENT (enter responses directly into ZoomGrants)

1. Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development. Indicate below if you believe your project merits consideration for targeted funds.
 - This project has a primary emphasis on equitable development.
2. Indicate the primary type of work the proposed project would include. [check one]
 - Urban reserve and new area planning
 - Strategy or policy development
 - Investment strategies and financial tools
 - Area-specific redevelopment planning
 - Site-specific development or redevelopment
 - Equitable housing projects and policies
3. List all key project partners (including the grant applicant) and their anticipated contributions. Please include dollar amounts, roles, skills/qualifications, etc. Please also indicate whether the contributions are confirmed. Key project partners have authority for implementing outcomes and/or will be providing financial or in-kind contributions to the project. [2000 characters]
4. What are the expected project activities and deliverables? Please respond with a list. [2000 characters]

5. What are the expected development outcomes in the community, both short and long term, that you anticipate will result from this project? [2000 characters]
6. How will the project advance racial equity in the metro region? How will the project advance or complement the region's planning and development goals and policies? [4000 characters]
7. How will the project create opportunities to accommodate your jurisdiction's expected population and employment growth? [2000 characters]
8. Metro Council district(s) of project. Check all that apply.
 - District 1 – Shirley Craddick
 - District 2 – Seat presently vacant
 - District 3 – Craig Dirksen
 - District 4 – Kathryn Harrington
 - District 5 – Sam Chase
 - District 6 – Bob Stacey
9. Please indicate which of the 2040 urban design components will be part of the focus of this project. Check all that apply.

<input type="checkbox"/> Central City	<input type="checkbox"/> Main Street
<input type="checkbox"/> Regional Center	<input type="checkbox"/> Corridor
<input type="checkbox"/> Town Center	<input type="checkbox"/> Employment/Industrial Area
<input type="checkbox"/> Neighborhood Center	<input type="checkbox"/> Neighborhood
<input type="checkbox"/> Station Community	<input type="checkbox"/> Urban Reserve

FULL APPLICATION

Short questions (enter responses directly into ZoomGrants)

1. Provide a high-level summary describing the project, anticipated work to be completed and desired outcomes. [2000 characters]
2. What is the location and/or geographic reach of the project? Provide a brief description. Under the "Required Uploads" tab, please also provide the required location map or maps showing where the project and/or participating communities are located and project boundaries, if applicable. [2000 characters]
3. Provide demographic information including ethnicity, age, and income of the neighborhood or community that will benefit from the project. Include the data source, and describe how the project geography relates to the data provided. [2000 characters]

Prior Grants (enter responses directly into ZoomGrants)

Complete the table provided listing all prior CPDG/Equitable Housing/2040 Grants that Metro has awarded to your city or jurisdiction since 2013. Indicate name/description, dollars awarded, date initiated, date complete, and indicate if project is still underway. If you are unsure of grants in years past, lists of prior awards may be found on Metro's website.

Required Uploads

Under the "Required Uploads" tab in ZoomGrants, upload the following required and optional documents in PDF format. Each upload may be up to 4mb in size.

Project narrative. Save as PDF of no more than 14 pages and upload.

Project budget tables. Complete three budget tables, save in PDF format and upload.

Applicant letter of commitment. Upload PDF of letter along with governing body resolution as appropriate.

Project partner letter(s) of commitment. Upload letter(s) of commitment from each additional project partner (if any).

Location map. Upload up to 3 pages in PDF format.

Project images (optional). If desired, upload one additional PDF document of up to 4 pages containing site photos, project plans or design images or other supplemental graphic material.

Additional letters of support (optional). If desired, upload up to 5 additional letters of support in PDF format.

Combined application PDF (required). Combine all application materials listed above into one PDF attachment, ordered in the sequence listed; upload this combined PDF file under the Required Uploads tab. Please note: ZoomGrants allows document uploads to be up to 4mb in size. In the event your completed combined application PDF exceeds 4mb and it is not possible to reduce the file size, the combined application PDF may be split into two documents, with the location maps, optional images and additional letters of support in the second document.

Project narrative template

Project:

Funding Requested: \$

Matching Contributions: \$

Note to applicants: All questions and headings are to remain in their current locations in this template. In the space provided after each question, you may use text, bullet lists, tables or other formatting as desired or appropriate to improve the clarity and legibility of your response. Please be succinct; is not necessary to use all of the space provided. Please use 11 point black text, and limit your response to the space allotted for each question. Refer to the evaluation criteria on page 4 of the Handbook, also in ZoomGrants in the “Library” tab.

Clear development outcomes

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

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

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

Advances and complements regional goals and policies

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

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

Aligns with local goals/maximizes community assets

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

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

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

Team roles and capacity

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

Jurisdiction or partner (include lead staff names)	Project role and responsibilities

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

Likelihood of implementation

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

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

Public involvement

13. What community members or stakeholders will be most affected by the implementation of the project's development outcomes? *(Limit your response to bottom half of page 8.)*

14. Discuss how the public (including neighbors to the project, businesses, property owners and other key stakeholders) and historically marginalized communities (including low-income and minority populations) will be involved in the project. Please be specific about the practices or methods you intend to use. *(Limit your response to top half of page 9.)*

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

Jurisdiction track record

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

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

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

Replicable best practices

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

Grant leverage and project budget

Budget tables

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

Budget narrative

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

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

(Note: Budget narrative is not limited to space shown above; two additional pages are available in the form)

Sample project approaches

To aid in project development, the following pages describe potential project approaches for each of the eligible grant project types. While not intended as prescriptive scopes of work, each of these samples are provided as a reference, outlining possible elements to be considered in putting together a project scope of work and project deliverables.

As part of the application, grant applicants should develop a thorough approach and suggested scope of work, and calculate project budgets accordingly. Depending on the involvement of consultant teams in the project, it is understood that the scope of work may be adjusted once a consultant team is selected to incorporate any recommended revisions suggested by the team. The exact scope of work for each project will ultimately be defined prior to execution of the grant IGA.

Sample project approach

Urban reserve and new urban area planning

Planning for future development of new urban areas on land currently designated Urban Reserves or in areas recently brought into the Urban Growth Boundary to facilitate the future development of complete communities and comply with Title 11 of the Urban Growth Management Functional Plan.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended solely for concept planning in Urban Reserve areas or comprehensive planning for areas brought into the UGB. The projects shall specifically address how they will seek to comply with Urban Growth Management Functional Plan Title 11 and how this planning will spur development activity. *Note:* Award of a grant for this project type should not be interpreted as a commitment by Metro to add the Urban Reserve area to the UGB in the next growth management decision. Activities for (and in compliance with) Title 11 might include:

- Concept planning
- Comprehensive planning
- Public investment strategies to address planning and implementation needs

TYPICAL DELIVERABLES

- Existing conditions report
- Concept Plan: land use, transportation system, infrastructure size and costs, natural resource protection, financing and funding for public facilities /services
- Urban service and annexation agreements (as needed)
- Title 11 compliance report
- Planning Commission package
- Council / Board action

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Land use, transportation, and infrastructure planning
- Engineering: multi-modal transportation, civil
- Real estate economics, financing
- Urban design
- Community involvement and business outreach
- Real estate transactions (optional)
- Architecture (optional)
- Environmental Services

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Jurisdictions adopt Functional Plan Title 11 compliant concept plan or comprehensive plan
- Jurisdictions have a feasible financing and funding plan for public facilities and services that meet planning and implementation needs
- Annexation of land into city and/or service providers
- Jurisdictions adopt comprehensive plan and zone designations

Sample project approach

Strategy or policy development

Development and adoption of action plans, strategic initiatives, code refinements, incentives, streamlined review and other development related policy work that will meaningfully increase community readiness for development or identify and reduce barriers to development, redevelopment, and infill.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended for implementation analysis and planning to establish an action plan, permit and review processes, and/or policy framework that proactively facilitates desired development, redevelopment, and reinvestment in 2040 Growth Concept Centers, Employment and Industrial Areas, Corridors, Main Streets, and Station Communities, and for projects of regional significance. Scale of this type of project is variable, but should be designed to achieve strategic focus on short and mid-term development outcomes. These projects are suitable for areas that already have well-established vision and direction for the desired development and redevelopment. These types of projects may result in policies that are jurisdiction-wide or include several neighborhoods or areas.

Action and policy planning activities to advance implementation might include:

- Analysis and simplification of land use, development, transportation, parking studies/analysis, and design codes and policies
- Assessment and strategies for streamlining reviews for desired development
- Assessment of policy framework and incentive strategies for desired development
- Processes and policy structure to develop multi-jurisdiction infrastructure investment strategies
- Collaborative action planning with property owners, community members and public partners
- Equity and displacement analyses and strategies
- Community education and dialogue
- Historic resource inventory and preservation policies/codes

TYPICAL DELIVERABLES

- Project Charter and Community Involvement Strategy
- Policy / code recommendations
- Recommendations and strategies to retain businesses and residents vulnerable to displacement
- Code and policy revisions
- Revised and streamlined review processes
- Prioritized list of infrastructure investments and/or multi-jurisdiction capital improvement program for an area
- Fiscal impact analysis of proposed changes
- Implementation phasing strategy, project schedule, specific next steps
- Planning Commission and Council/Board Actions

Strategy or policy development | cont.

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Process design and management
- Engineering - transportation and civil
- Land use and development planning
- Community and/or business outreach
- Code writing
- Public finance (optional)
- Real estate economics or development (optional)

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Jurisdictions develop coordinated policies to promote establishment or support of walkable, transit supportive neighborhoods, corridors, centers and main streets
- Jurisdictions develop coordinated policies to promote employment-rich districts with good access and amenities that support industrial and employment area functions and employees.
- Jurisdictions develop capital improvement plan and phasing and financing strategy to support desired development outcomes including addressing historic inequities in public investments
- Jurisdictions identify and remove code and policy barriers to achieving desired development
- Jurisdictions understand impact of code and design requirements on project feasibility
- Jurisdictions understand fiscal impacts of proposed changes
- Jurisdictions identify and develop tools and incentives needed to facilitate public-private and intergovernmental partnerships

Sample project approach

Investment strategies and financial tools

Exploration and development of investment strategies and financial tools and incentives to facilitate development, redevelopment, and infill, such as urban renewal districts, enterprise zones, tax abatements or collaborative capital improvement plans.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended for implementation analysis and planning to establish financial tools and strategies that directly facilitate desired development, redevelopment, and reinvestment in 2040 Growth Concept Centers, Employment and Industrial Areas, Corridors, Main Streets, and Station Communities, and for projects of regional significance. Scale of this type of project is variable and may be prescribed by the rules of the financial instruments(s) being pursued. Planning for financial tools and investments should be designed to achieve strategic focus on short and mid-term development outcomes. These investment projects are suitable for areas that already have well-established vision and direction for the desired development and redevelopment.

Investment planning activities that address needs for implementation could include:

- Market analysis
- Financial gap analysis and feasibility testing
- Analysis and/or establishment of financial incentives or infrastructure financing tools, such as Vertical Housing Tax Credits, urban renewal districts, Local Improvement Districts, Enterprise Zones, tax abatement zones, etc.
- Assessment of potential incentives
- Analysis of infrastructure needs and financing alternatives
- Community and stakeholder outreach and marketing of financial tools
- Strategies to retain businesses and residents vulnerable to displacement
- Commissions and Council/Board Actions

TYPICAL DELIVERABLES

- Project Charter and Community Involvement Strategy
- Prioritized list of infrastructure investments and/or multi-jurisdiction capital improvement program for targeted area
- Financing strategy
- Implementation phasing plan, project schedule, specific next steps
- Business retention and recruitment actions
- Equity and displacement analyses and strategies
- Fiscal impact and/or feasibility analysis
- Ordinances, or plans required to implement specific financial tools
- Commissions and Council/Board Actions

Investment Strategies and Financial Tools | cont.

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Real estate development, economics, financing
- Fiscal impact and public finance expertise
- Implementation and action planning
- Cost estimating
- Community involvement and/or business outreach

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Jurisdictions develop coordinated strategy for investments to support or achieve higher density, employment-rich districts, equitable housing, and/or walkable and transit supportive development
- Jurisdictions develop capital improvement plan and phasing and financing strategy for improvements
- Jurisdictions develop strategies for addressing or responding to historic inequities
- Additional resources and potential pathways to access needed capital are identified
- Private partners identify redevelopment approaches that could be achievable
- Jurisdictions understand impact of code and design requirements on project feasibility
- Jurisdictions identify potential code barriers
- Jurisdictions identify and develop tools and incentives needed to facilitate public-private partnerships
- Jurisdictions identify market factors that support or prevent desired development goals

Sample project approach

Area-specific redevelopment planning

Strategic planning, concept design, and feasibility for redevelopment and infill of specific areas or districts.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended for implementation analysis and planning for development and redevelopment pursuant to the 2040 Growth Concept. For 2040 Centers, this type of planning might include strategies to promote pedestrian-friendly, higher density development. For commercial and mixed-use Corridors, this type of planning might include strategies to “restructure the strip” for human-scaled infill development and multi-modal transportation options. For Station Areas this type of planning may include strategies to realize transit-supportive development and pedestrian connections. For Industrial and Employment Areas this type of planning might include freight movement and access plans, green infrastructure, and sustainability strategies. These types of planning are provided as illustrative examples and are not intended to limit the activities that could be undertaken to promote development and redevelopment within the 2040 Growth Concept areas.

Scale of this type of project is variable, but should be designed to achieve strategic focus on short and mid-term development outcomes and to include areas with the greatest concentration of private property owners actively investing or seeking to redevelop in near term. At the small end, planning could be completed for a commercial or mixed-use node at a transit station. Examples of larger-scale area planning could include the entirety of an employment district, typical mixed-use suburban downtown, etc. Area planning to facilitate development, redevelopment, reuse, or otherwise maximizing property use might include one or more of the following activities:

- Market analysis and gap assessment
- SWOT or asset-based opportunity analysis
- Engagement of a diverse community in planning and decision-making
- Analysis of development code and policies
- Parking plans and shared parking strategies
- Economic and business recruitment and retention strategic plans
- Equity and displacement analyses/ strategies
- Infrastructure planning and financing
- Transportation strategies to facilitate desired development activities
- Development prototype and feasibility testing
- Strategies to help development meet environmental goals or regulations
- Placemaking strategies to activate public spaces, encourage active civic life, and celebrate the heritage of the area

TYPICAL DELIVERABLES

- Charter and Community Involvement Strategy
- Market study, analysis
- Policy / code recommendations
- Strategies to retain small businesses and residents vulnerable to displacement
- Recommendations on appropriate and timely resource development
- Analysis and plans for implementation of financing or incentive tools
- Prioritized list of infrastructure investments and/or capital improvement program specific to the district, including attention to addressing historic inequities in public investment
- Implementation phasing strategy, project schedule, specific next steps
- Fiscal impact analysis
- Commissions and Council/Board Actions

Area-specific Redevelopment Planning | cont.

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Real estate economics, financing
- Engineering: multi-modal transportation, civil
- Planning: redevelopment strategies, transportation, code, CIP
- Urban design
- Community involvement and business outreach
- Architecture (optional)
- Real estate transactions (optional)

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Jurisdictions develop coordinated strategies for investment to support or achieve higher density development in walkable, retail-supportive neighborhoods, corridors, centers and main streets
- Jurisdictions develop coordinated strategies for investment that promotes employment-rich districts with good access and amenities for industrial and employment area functions and employees
- Jurisdictions develop capital improvement plan and phasing and financing strategy for improvements with consideration given to addressing historic inequities in public investments
- Additional resources and potential pathways to access needed capital are identified
- Private partners identify redevelopment approaches that could be achievable
- Jurisdictions understand impact of code and design requirements on project feasibility
- Jurisdictions identify potential code barriers
- Jurisdictions identify and develop tools and incentives needed to facilitate public-private partnerships

Sample project approach

Site-specific development or redevelopment planning

Concept/schematic design and feasibility analyses for site-specific development projects, equitable housing projects and public-private partnerships.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended for feasibility analysis of a specific property or group of properties with private or public property owners who are ready to re/develop. The scale of project could be for a single redevelopment site that is critical to the jurisdiction's development goals, or it could involve multiple properties with multiple property owners clustered in the same area. This type of project is not suited for neighborhood- or district-scale planning. Proposed sites should be focused on high impact projects in terms of placemaking, economic development or equitable housing.

Projects may facilitate making specific, high priority properties ready for development, redevelopment, expansion, or reuse, through investigating and testing physical, policy, and funding options. This type of project is intended to be used for properties in 2040 Centers, Employment and Industrial Areas, commercial/mixed-use corridors, Main Streets, and Station Communities, and for projects of regional significance. Property feasibility analyses will be completed in order to fully utilize existing industrial, commercial and/or mixed-use properties and buildings within the UGB, spur new jobs and amenities, improve market readiness, and attract private redevelopment and investment. **These projects are most appropriate when the jurisdiction or a project partner has site control.**

Planning for development, redevelopment, building expansions, adaptive reuse or otherwise maximizing property use might include one or more of the following activities:

- Property investigation such as land surveys, appraisals, initial environmental investigations, etc.
- Assessment for seismic retrofit and/or occupancy change
- Analysis of infrastructure and utility capacity for redevelopment
- Community conversations about the project
- Architectural research and concept design
- Development code, plan, and process assessment
- Market analysis
- Cost estimating
- Financial feasibility analysis
- Funding, phasing and implementation strategies

TYPICAL DELIVERABLES

- Project Management and Community Involvement Plan
- Architectural and engineering studies
- Market study, analysis
- Preliminary cost estimates
- Draft development budget and financial pro forma projections; summary of funding requirements and likely sources
- Development phasing strategy, schedule
- Policy/code recommendations
- Commissions and Council/Board Actions

Site-specific development or redevelopment planning | cont.

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Architecture
- Structural engineering
- Real estate economics and/or development
- Cost estimating
- Environmental testing, surveying, appraising, and/or similar site investigation (per site needs)
- Business outreach (optional)
- Real estate transactions (optional)
- Urban design or streetscape planning (optional)

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Private partners better understand site limitations, design constraints and code factors affecting feasibility of desired development outcomes
- Jurisdictions understand impact of code and design requirements on project feasibility
- Jurisdictions and private partners identify redevelopment achievable approaches that meet development goals
- Jurisdictions identify potential barriers to meeting development goals
- Jurisdictions identify and develop tools and incentives needed to facilitate public-private partnerships
- Additional resources and potential pathways to access needed capital are identified

Sample project approach

Equitable housing projects and policies

Any approach or combination of approaches that will facilitate the development of equitable housing throughout the region. Metro’s working definition of “equitable housing” is diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities.

Other project types may also be used for Equitable Housing projects: (1) Urban Reserve and New Urban Area Planning (2) Strategy or Policy Development, (3) Investment Strategies and Financial Tools, (4) Area-specific Redevelopment Planning, (5) Site Specific Development or Redevelopment.

PURPOSE / TYPICAL PROBLEMS TO BE SOLVED

This type of project is intended for policy development, planning, feasibility analyses and/or jurisdiction-wide exploration of opportunities for development of a range of affordable and equitable housing.

Through investigating and testing physical, policy, and funding options these projects facilitate making properties and communities ready for priority equitable housing projects and policies. This type of project is available for use in all areas within the region’s Urban Growth Boundary.

Planning for development, redevelopment, building expansions, adaptive reuse or otherwise maximizing availability of equitable housing might include one or more of the following activities:

- Assessments and development of code, policy, zoning and review processes for “missing middle” housing types such as cottage clusters, well-designed townhomes and rowhomes, duplexes integrated into low-density neighborhoods, ADUs, live/work, courtyard apartments and other modestly scaled multi-dwelling housing types
- Planning for retrofitting neighborhoods to accommodate a range of housing affordability in walkable, income diverse and otherwise amenity-rich communities
- Feasibility analysis for development or redevelopment of equitable housing
- Architectural research and concept / schematic designs Cost-benefit analysis of financial/incentive tools
- Funding, phasing and implementation strategies
- Assessments and development of code, policy, zoning and/or review processes that actively promote equitable distribution of affordable housing throughout the region
- Market research to understand the gap between housing supply and housing needs, including needed types and affordability levels
- Site identification, land acquisition strategies, and feasibility analyses for “missing middle” and affordable housing
- Equity and displacement analyses and strategies that inform equitable housing development, redevelopment and infill strategies
- Community conversations that inform equitable housing development, redevelopment and infill strategies

Equitable Housing Projects and Policies | cont.

TYPICAL DELIVERABLES

- Project Management and Community Involvement Plan
- Architectural and engineering studies
- Market study
- Preliminary cost estimates
- Financial feasibility studies
- Community education and communication materials
- Draft development budget and financial pro forma projections; summary of funding requirements and likely sources
- Development phasing strategy and schedule
- Policy/code recommendations
- Recommendations and strategies to retain residents vulnerable to displacement
- Commission and Council/Board Actions

TYPES OF PROFESSIONAL SKILLS / CONSULTANTS NEEDED

- Project management
- Architecture and engineering
- Real estate economics and/or development
- Land use and policy planning
- Housing policy planning
- Environmental testing, surveying, appraising, cost estimating, and/or similar (as per site needs)
- Code writing (optional)
- Real estate transactions (optional)
- Urban design (optional)

EXAMPLES OF EXPECTED COMMUNITY OUTCOMES

- Jurisdictions develop coordinated strategies for investment to promote or achieve equitable housing
- Private partners and jurisdictions better understand site limitations, design constraints and code factors affecting feasibility of desired equitable housing outcomes
- Jurisdictions develop capital improvement plan and phasing and financing strategy for public improvements needed to support equitable housing, including addressing historic inequities in public investments
- Additional resources and potential pathways to access needed capital are identified
- Jurisdictions and private partners identify equitable housing approaches that could be achievable
- Jurisdictions understand impact of code and design requirements on project feasibility
- Jurisdictions identify and develop tools and incentives needed to facilitate development of equitable housing
- Jurisdictions identify market factors that support or prevent equitable housing goals



Additional resources and information

Household forecast

2040 HOUSEHOLD DISTRIBUTED FORECAST

Created: July 12, 2016

Based on jurisdiction TAZ review accepted by Research Center

City household estimates prorated with 2015 PSU population estimates and Census household size imputations. Estimates and forecasts are bounded by today's city limits.

2015 Households	FINAL 2040 Household Forecast
--------------------	-------------------------------------

INSIDE Metro UGB

Clackamas County

Gladstone	4,481	4,877
Happy Valley	5,344	10,219
Johnson City	270	278
Lake Oswego	15,760	17,648
Milwaukie	8,677	10,151
Oregon City	12,682	16,206
Rivergrove	180	195
West Linn	9,723	10,962
Wilsonville	9,553	11,706
Uninc. Clackamas + formerly Damascus	38,652	56,425
Uninc. Clackamas County / future city annex.	35,068	45,143
Damascus / area within 2015 city boundary	3,585	11,281
Clackamas County inside UGB total *	105,323	138,666

Multnomah County

Fairview	3,771	4,243
Gresham	38,412	45,785
Maywood Park	307	327
Portland	261,804	381,913
Troutdale	5,657	6,544
Wood Village	1,367	1,557
Uninc. Multnomah County /future city annex.	7,247	15,789
Multnomah County inside UGB total *	318,565	456,159

Washington County

Beaverton	37,808	47,100
Cornelius	3,234	4,908
Durham	777	854
Forest Grove	8,432	13,190
Hillsboro	34,468	47,227
King City	2,005	3,222
Sherwood	6,639	7,454
Tigard	19,585	28,291
Tualatin	10,653	11,362
Uninc. Washington County /future city annex.	79,218	112,605
Washington County inside UGB total *	202,819	276,213

TOTAL inside today's Metro UGB	626,707	871,038
---------------------------------------	----------------	----------------

OUTSIDE Metro UGB (including urban reserves/ future UGB adds)

Rural Cities	15,255	22,151
Uninc. Clackamas County / future city annex.	31,677	39,092
Uninc. Multnomah County /future city annex.	3,923	5,193
Uninc. Washington County /future city annex.	9,574	23,844
TOTAL outside Metro UGB	60,429	90,280
Tri-county TOTAL	687,136	961,318

* Cities in multiple counties are tabulated to the county of majority.

Employment forecast

2040 EMPLOYMENT DISTRIBUTED FORECAST

Created: July 12, 2016

Based on jurisdiction TAZ review accepted by Research Center

City employment prorated to match 2015 job estimates from QCEW data and OED county estimates. Estimates and forecasts are bounded by today's city limits.

2015 Employment	FINAL 2040 Employment Forecast
--------------------	--------------------------------------

INSIDE Metro UGB

Clackamas County

Gladstone	2,700	4,231
Happy Valley	2,858	10,363
Johnson City	8	13
Lake Oswego	19,381	25,265
Milwaukie	12,764	17,376
Oregon City	14,100	22,534
Rivergrove	9	13
West Linn	4,541	6,199
Wilsonville	18,495	26,168
Uninc. Clackamas + formerly Damascus	46,886	76,672
Uninc. Clackamas County / future city annex.	45,554	71,731
Damascus / area within 2015 city boundary	1,333	4,941
Clackamas County inside UGB total *	121,742	188,834

Multnomah County

Fairview	2,919	6,180
Gresham	35,459	51,998
Maywood Park	16	20
Portland	434,723	559,848
Troutdale	7,893	14,274
Wood Village	2,227	4,190
Uninc. Multnomah County /future city annex.	487	3,585
Multnomah County inside UGB total *	483,724	640,096

Washington County

Beaverton	57,053	78,471
Cornelius	2,696	4,594
Durham	1,436	1,785
Forest Grove	6,442	9,359
Hillsboro	74,379	114,123
King City	709	1,143
Sherwood	5,463	8,416
Tigard	46,041	63,919
Tualatin	27,342	38,596
Uninc. Washington County /future city annex.	45,040	78,078
Washington County inside UGB total	266,600	398,484

TOTAL inside today's Metro UGB	872,066	1,227,414
---------------------------------------	----------------	------------------

OUTSIDE Metro UGB (including urban reserves/ future UGB adds)

Rural Cities	13,926	24,229
Uninc. Clackamas County / future city annex.	14,960	20,946
Uninc. Multnomah County /future city annex.	2,576	4,527
Uninc. Washington County /future city annex.	6,772	11,936
TOTAL outside Metro UGB	38,234	61,638
Tri-county TOTAL	910,300	1,289,052

* Cities in multiple counties are tabulated to the county of majority.

Climate Smart Communities

SHORT LIST OF CLIMATE SMART ACTIONS



BACKGROUND

The Climate Smart Communities project responds to a 2009 legislative mandate to develop and implement a regional strategy to reduce per capita greenhouse gas emissions from cars and small trucks by 2035. In 2014, after a four-year collaborative effort, community leaders shaped a Climate Smart Strategy that exceeds the state mandate while supporting local city and county plans that have already been adopted in the region. When implemented, the strategy will also deliver significant public health, environmental and economic benefits to households and businesses in the region.

WORKING TOGETHER TO DEVELOP SOLUTIONS FOR OUR COMMUNITIES AND THE REGION

Building on existing activities and priorities in our region, the project partners developed a *Toolbox of Possible Actions* that recommends immediate steps that can be taken individually by local, regional and state governments to implement the Climate Smart Strategy. The toolbox does not mandate adoption of any particular policy or action, and instead was developed with the recognition that existing city and county plans for creating great communities are the foundation for reaching the state target and some tools and actions may work better in some locations than others. The toolbox emphasizes the need for diverse partners to work together in pursuing those strategies most appropriate to local needs and conditions.

The toolbox includes some regional actions that produce particularly high returns on investment, and require local and regional officials to work together. Seeing the opportunity to act quickly, the Metro Policy Advisory Committee (MPAC) and the Joint Policy Advisory Committee on Transportation (JPACT) identified three toolbox actions that are key for the region to work together on in the near term:

NEAR TERM CLIMATE SMART ACTIONS

<p>Action 1</p>	<p>Advocate for increased federal, state, regional and local transportation funding for all transportation modes as part of a diverse coalition, with top priorities of maintaining and preserving existing infrastructure, and implementing transit service enhancement plans and transit-supportive investments.</p> <p><i>This action will advance efforts to implement adopted local city and county plans, transit service plans, and the Regional Transportation Plan.</i></p>
<p>Action 2</p>	<p>Advocate for federal and state governments to advance Oregon’s transition to cleaner, low carbon fuels, and more fuel-efficient vehicle technologies.</p> <p><i>This action will accelerate the fuel and vehicle technology trends assumed in the state target.</i></p>

<p>Action 3</p>	<p>Seek opportunities to advance local and regional projects that best combine the most effective greenhouse gas emissions reduction strategies.</p> <p><i>This action will implement adopted regional, city and county policies or plans and identify locally tailored approaches that integrate transit and active transportation investments with the use of technology, parking and transportation demand management strategies to show how these strategies, if implemented together, can achieve greater cost-effectiveness and greenhouse gas emissions reductions than if implemented individually.</i></p> <p><i>The action means the region will seek seed money for demonstration projects that leverage (1) local, regional, state and federal resources and (2) state and regional technical assistance to plan for and implement community demonstration projects that combine the following elements:</i></p> <ul style="list-style-type: none"> • <i>investments in transit facility and/or service improvements identified in TriMet Service Enhancement Plans or the South Metro Area Regional Transit (SMART) Master Plan, including community-based services that complement regional service, such as the GroveLink service in Forest Grove</i> • <i>local bike and pedestrian safety retrofits that also improve access to transit, schools and activity centers</i> • <i>investments in transportation system management technologies, such as traffic signal timing and transit signal priority along corridors with 15-minute or better service, to smooth traffic flow and improve on-time performance and reliability</i> • <i>parking management approaches, such as bicycle parking, preferential parking for alternative fuel vehicles, and shared and unbundled parking</i> • <i>transportation demand management incentives or requirements to increase carpooling, biking, walking and use of transit</i> • <i>optimize built road capacity through improved geometric design and other operational improvements to address bottlenecks and improve traffic flow on existing multi-modal arterials.</i> <p><i>Seed funding could be sought from multiple sources, such as the Regional Flexible Funding Allocation process, Metro’s 2040 Planning and Development Grant program, Oregon’s Transportation Growth Management grant program, and federal grant programs.</i></p>
----------------------------	---

PARTNERSHIPS TO IMPLEMENT EARLY ACTIONS CAN DRIVE POSITIVE CHANGE

Adoption of the Climate Smart Strategy presents an opportunity for the region to work together to continue demonstrating leadership on climate change while addressing the need to step up funding to implement our adopted local and regional plans. Working together on these early actions presents an opportunity to lay a foundation for addressing our larger shared challenges through a collaborative approach. The actions recommended are achievable, but require political will and collaboration among regional partners to succeed.

This collaborative effort will require full participation from MPAC, JPACT, and the Metro Council, and also the region’s cities and counties, transit agencies, port districts, parks providers, businesses, non-profits as well as state agencies, commissions and the Oregon Legislature.

Public engagement resource guide



INTRODUCTION

This guide is a resource for 2040 Planning and Development Grant recipients to support efforts to conduct meaningful opportunities for the public to be involved in the local planning process. The guide provides examples of the tools and techniques that grantees may use to communicate with and receive input from the public. Metro’s full Public Engagement Guide at oregonmetro.gov/public_engagement_guide or contact Metro staff with further questions.

BEST PRACTICES FOR INCLUSIVE PUBLIC ENGAGEMENT

Effective public engagement takes careful planning. The first step is to identify the purpose of the program or project and the anticipated level of public engagement. A well-defined objective for each phase of the program or project is important to identify the appropriate engagement tools and activities.

IDENTIFYING PARTICIPANTS

Before a program or project-specific engagement plan is developed, a stakeholder analysis should be conducted to identify the viewpoints and interests of those impacted by the project and to ensure meaningful

Public engagement purpose statements:

- The purpose of this project is...
- This project will result in...
- The purpose of public engagement for this project is to...
- Members of the public who should be engaged are...
- The public engagement will be successful if...

involvement of all people regardless of race, color, national origin or income. This necessitates identifying a broad range of participants, including:

- business leaders
- community- and faith-based organizations, neighborhood associations and civic organizations
- underrepresented populations in which demographic, geographic, or economic characteristics impede or prevent their access to public services

Underrepresented populations include those with limited English proficiency, diverse cultural backgrounds, low-income, disability, seniors and youth. To identify underrepresented communities for your project it is helpful

to:

- compile and map data from the U.S. Census Bureau, school districts and other available sources
- field check and determine gaps in data by reviewing results with local cities and counties, community organizations, neighborhood associations and civic organizations.

After developing a scope and budget, a program- or project-specific public engagement plan should be created.

Based on the desired project outcome and identified key audiences, the specific engagement plan will include the tools and techniques to achieve the outcome, describe how follow-up with audiences and participants will occur, and identify success measures for each outreach strategy.

Public engagement resource guide

IDENTIFYING PUBLIC ENGAGEMENT TECHNIQUES

There are many methods to engage people— everything from written information to booths at farmer's markets and online surveys to listening posts. Most tools can be adapted to the needs of specific populations and some can provide feedback about whether a population is being adequately engaged. See Appendix B for more information.

WORKING WITH ADVISORY COMMITTEES

Depending on the level of public engagement the project has identified, advisory committees made up of representative stakeholders can provide advice and input into the planning and decision-making process. A committee can also be a forum for developing consensus or compromise on controversial issues, developing criteria for project decisions and communicating project information to their communities.

MILESTONES, DELIVERABLES AND EVALUATION

With a wide range of stakeholders involved, it is important to monitor and evaluate a project, identify issues, measure success and adjust plans accordingly throughout the process.

Developing a timeline with key milestones, target dates, engagement activities and results will keep the project on track. This will also help with evaluating the project's outcomes. At the conclusion of an engagement process, use quantitative and qualitative metrics to evaluate outcomes, report back to the public and improve future engagement projects.

PUBLIC ENGAGEMENT CHECKLIST

Developed project purpose articulation

Clarity around project purpose and outcomes is fundamental to crafting an appropriate, meaningful and efficient public engagement strategy.

Performed a stakeholder analysis

Appropriate interested and affected groups should be identified and contact information maintained in order to share project information, updates at key decision points and opportunities to engage and comment.

Developed a project and budget, a program- or project-specific public engagement plan.

The public engagement plan should identify key decision makers, a project timeline, the level of public engagement and role of public input in decision-making.

Identified appropriate public engagement techniques and tools

Identified appropriate participation techniques (see Appendix B) based on communication objectives for each step in the process.

Identified project milestones, deliverables and a plan for evaluation.

Monitored and evaluated the process, identified issues, measured success and adjusted plans accordingly throughout the process.

Identified project milestones, deliverables and plan for evaluation.

Monitored and evaluated the process, identified issues, measured success and adjusted plans accordingly throughout the process.

To engage communities that have a limited ability to speak English, consider the following:

- build relationships and trust with communities that have a limited ability to speak English through partnerships with community-based organizations
- speak the language or find a trusted community leader to speak on your behalf
- use culturally specific images and limited text to help convey the message.

Public engagement resource guide

PUBLIC ENGAGEMENT TECHNIQUES AND TOOLS					
The following is a menu of communication tools to engage the public in programs, activities and services.				IAP2 Spectrum of Public Participation	
Technique or Tool	Description	INFORM	CONSULT	INVOLVE	COLLABORATE
WRITTEN AND GRAPHIC INFORMATION TO BUILD AWARENESS AND UNDERSTANDING					
Project mailing list	Database to communicate with the interested parties, stakeholders, partners, elected officials, members of committees and boards and the general public	●			
Public meeting notice	Online web calendar for advance notices of council and committee meetings and program or project events. Each meeting agenda includes the date and time of the next meeting, nondiscrimination, language assistance and ADA notice as well as TTY/TDD phone number	●			
E-newsletter	Email updates to the project mailing list to announce events or at project milestones, sometimes with a request to provide comments about a program or project	●	●		
Fact sheet	Periodic updates provided to target audiences in written form or posted on the website	●			
Good neighbor letter	Letters to program or project "neighbors" to provide project updates and announcements	●			
Flyer or brochure	Written updates that are handed out or posted in community locations to provide a project overview, project updates, refer people to the project website or highlight project milestones and offer the opportunity to participate or comment	●			
Postcard	Mailed cards used to announce meetings, events or comment periods or offer project updates	●	●		
Promotion through partners	Prepared material, email or web content that can be forwarded by cities, counties, agencies, community organizations, or public venues such as libraries, places of worship and other project partners in order to increase reach when inviting participation or seeking public comment	●			
Billing insert	Coordination with cities and counties to send out a notice of event, public comment opportunity or survey in monthly utility bills	●	●		
Web link agenda tags	Web link or other quick note about an upcoming event, public comment opportunity or survey that can be added to an email signature or the bottom of upcoming agendas	●	●		
ONLINE ENGAGEMENT					
Website	Information on programs, projects and services as well as engagement opportunities	●	●	●	<input type="checkbox"/>
Social media	Twitter and Facebook sites to connect with the public, build awareness and share engagement opportunities	●	●	●	●
Cross-link websites	Highlights about an event, comment opportunity or survey on a related page websites of cities, counties, agencies, community organizations or other project partners	●	●	●	●
Survey	Provides a way to share views and help shape projects by responding to short surveys and/or viewing aggregate results to see how others have responded	●	●	●	●

Public engagement resource guide

Technique or Tool	Description	INFORM	CONSULT	INVOLVE	COLLABORATE
IN-PERSON ENGAGEMENT					
Open house	Opportunity to drop in to see program or project information, talk to staff and offer informal or formal feedback at a location that is accessible by transit and to persons with disabilities and at a time that is convenient	●	●	●	
Public meeting	Face-to-face interaction and discussion with staff and/or elected officials to learn about programs, projects or services and provide input at a location that is accessible and a time that is convenient	●	●	●	●
Community presence	Participation in community events at faith-based organizations, community centers, grocery stores, farmers markets or other gathering places to share information, answer questions and request public input on programs or projects	●	●	●	●
Speakers bureau targeted presentations	Presentations by staff or elected officials to neighborhood, business and civic groups around the region to share information and obtain input	●	●	●	●
Stakeholder engagement	Targeted opportunities for discussion and feedback from interested parties such as community and environmental organizations, academic advisors, economic development interests, business and community leaders and representatives of other state or local agencies	●	●	●	●
Stakeholder interviews	To improve the baseline understanding of target audiences and inform communication planning, the project team may conduct one-on-one or group interviews with a broad range of stakeholders	●	●	●	●
Focus groups	Facilitated discussions held with randomly selected participants to learn about key issues, understand values and interests or test messages	●	●	●	●
Discussion groups	Facilitated forum for individuals to discuss various topics	●	●	●	
Townhalls	Informal public meeting or event open to community members and held at a location easily accessible by transit and by persons with disabilities at a time that is convenient, where community members may voice their opinions and ask questions.	●	●	●	<input type="checkbox"/>
Workshops or trainings	Class or series of classes in which a small group of people learn about a project or program	●	●	●	<input type="checkbox"/>
Community Summit	A public event that brings together stakeholders representing the diverse perspectives of the region to evaluate engagement practices from the previous year, share local community information and advice on priorities and engagement strategies for upcoming policy initiatives. May hold community summits on specific projects or topic areas as well.	●	●	●	<input type="checkbox"/>
VISUAL COMMUNICATION					
Maps	Create maps that communicate spatial and other complex information visually (data sources: census, modeling, roadway and transit network, sidewalk/bike/trail network, parks and natural areas locations and more)	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charts, graphs and tables	Create charts, graphs or tables to illustrate complex information in a way that is easily understandable to the public and regional decision-makers.	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diagrams and graphic illustrations	Diagrams and graphic illustrations visually illustrate timelines, complex process or decision-making structures, proposed choices and their associated tradeoffs and analysis results	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Public engagement resource guide

Technique or Tool	Description	INFORM	CONSULT	INVOLVE	COLLABORATE
VISUAL COMMUNICATION (CONTINUED)					
Photographs	An extensive photo library offers access to images that clarify meaning and make reports and analysis more visually appealing	●	☐	☐	☐
Map-based online public comment	Enabling a map with project locations and descriptions to connect to local project information and a form for taking public comments, in English and/or multiple languages	●	●	●	☐
Envision tool	The tool allows users to “paint the landscape” by allocating different building types across a study area to create a land use scenario. Users can build as many scenarios as they would like and test them against each other. The tool allows real-time evaluation of each scenario’s impact on land use, housing, sustainability, transportation, and economic conditions	●	●	●	☐
Interactive web pages with surveys	Specially-created, web-based interactive tools that ask community members to make choices between different options by visually demonstrating the options’ tradeoffs allows for participants to make choices and then explain those choices in a follow-up survey where they can also offer advice for the project or program decision-making	●	●	●	●
INVOLVING LIMITED ENGLISH PROFICIENT POPULATIONS, COMMUNITIES OF COLOR, LOW-INCOME HOUSEHOLDS, ELDERLY, YOUTH AND PERSONS WITH DISABILITIES					
Relationship-building	Partnership with business, civic, faith-based and community organization leadership to reach underrepresented populations, provide targeted translated materials or announce public engagement opportunities	●	●	●	☐
Technical assistance contracts	Technical assistance contracts may be awarded to community organizations to conduct engagement activities, reach underrepresented populations or to help better inform a project	●	●	●	●
Audience research and analysis	Demographic and four-factor LEP analysis, community assessment and stakeholder interviews to understand different populations, abilities to speak English and cultural preferences so that engagement tools selected for public outreach are inclusive, accepted and accessible: mobile applications or text messages, online, word of mouth, radio, etc. (data sources: census, American Community Survey, schools)	●	●	●	☐
Plain language	Materials clearly written in plain language with a minimum of technical terms to enable people with limited English proficiency or low literacy to participate and comment	●	●	●	☐
Language assistance	In-person interpreters, a telephone language line or translated materials that communicate with people with limited English proficiency	●	●	●	☐
Alternative formats	Braille, sign language or communication aids at public meetings, upon request	●	●	●	☐
Multicultural media	Distribution of news releases to multicultural media to describe the project, explain timeline, highlight opportunities for involvement and comment, discuss culturally relevant issues and frame intended outcomes as they relate to culturally specific audiences	●	●	●	☐
Text messaging alerts	The act of typing and sending a brief, electronic message between two or more mobile phones or fixed or portable devices over a phone network	●	☐	☐	☐
Barrier removal	Locations that are easily accessible by transit and accessible for people with disabilities, child care, space for wheelchairs, designated seating for persons with hearing or vision impairments, and other accommodations upon request	●	●	●	☐

Public engagement resource guide

Technique or Tool	Description	INFORM	CONSULT	INVOLVE	COLLABORATE
MEDIA					
Press release	Proactive coordination with TV, radio, newspaper, blogs, community, multicultural media and other media outlets to describe the project, explain its timeline, highlight opportunities for involvement and comment, discuss relevant issues and frame intended outcomes	●	●	<input type="checkbox"/>	<input type="checkbox"/>
Newsfeed	Story to be shared with newspaper, radio and TV, blogs, social media for the purpose of generating coverage	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Media calendar listings	Event information sent to newspaper, radio, TV, blogs and social media that have some kind of calendar listing or web calendar to which they can post it to increase visibility	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal notice radio public service announcement (PSA)	Newspaper ads or legal notices, especially in community-based papers, and radio ads or PSAs are used to announce project milestones or request formal public comment and refer recipients to detailed project information online	●	●	<input type="checkbox"/>	<input type="checkbox"/>
Public access cable	Live broadcast for Council meetings that are repeated on Community Access Network, Portland Community Media, Metro East Community Media (MCTV), Tualatin Valley Television (TVCTV) and Willamette Falls Television at various times throughout the week.	●	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER TOOLS OR TECHNIQUES TO CONSIDER TO INCREASE PARTICIPATION					
Incentives	Incentives may be provided to increase participation at open houses or public events such as providing free food and drinks, snacks or free childcare. Incentives such as gift cards can increase participation in filling out survey or providing feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Suggested resources and links

Metro 2016 report: Opportunities and Challenges for Equitable Housing. In 2016, Metro’s Equitable Housing Initiative researched equitable housing tools and strategies from our region and around the country and engaged stakeholders to develop a shared understanding of challenges and opportunities. That work is summarized in a report exploring the nature of the region’s housing challenge and providing a four-part strategic framework to respond.

oregonmetro.gov/sites/default/files/EquitableHousingReport-20160122.pdf

Metro Urban Growth Report. Oregon law requires that every six years the Metro Council evaluate the capacity of the Portland region’s urban growth boundary to accommodate a 20-year forecast of housing needs and employment growth. The Urban Growth report includes forecasts for population, residential demand and employment growth through 2035; analysis of residential development trends; assessments of local comprehensive plans; and estimates of land available for development.

oregonmetro.gov/urban-growth-report

Metro 2040 Growth Concept. Adopted by the Metro Council in 1995, the 2040 Growth Concept describes a 50-year vision for growth in the Portland metropolitan area. oregonmetro.gov/2040-growth-concept

MetroMap. This is Metro’s web mapping service where you can view and print maps or data specific to your area of interest. MetroMap allows you to view map-based information about a location of your choice. View information on parcel and tax assessment, zoning, political boundaries, planning, flood plain and special districts. The results can be displayed in text-only format or on a map.

gis.oregonmetro.gov/metromap

Regional Equity Atlas. Using maps, policy analysis and community-based research, the Equity Atlas assesses how well different populations across the four-county Portland-Vancouver region can access key resources necessary for meeting their basic needs and advancing their health and well-being.

equityatlas.org.

HUD Affirmatively Furthering Fair Housing data and mapping tool. Affirmatively Furthering Fair Housing (AFFH) is a legal requirement that federal agencies and federal grantees further the purposes of the Fair Housing Act. This obligation to affirmatively further fair housing has been in the Fair Housing Act since 1968. In 2015, the Department of Housing and Urban Development (HUD) adopted a new AFFH rule to provide an effective planning approach to aid program participants in taking meaningful actions to overcome historic patterns of segregation, promote fair housing choice, and foster inclusive communities that are free from discrimination. HUD’s AFFH resource guide includes a publicly available data and mapping tool with summary data on race/ethnicity, national origin, housing choice vouchers and housing burden. www.hudexchange.info/resource/4867/affh-data-and-mapping-tool

Suggested resources and links

HUD Location Affordability Portal. Housing and transportation costs consume about half of the average household budget, but transportation costs are difficult to track and account for. HUD's Location Affordability Portal provides estimates of household housing and transportation costs at the neighborhood level to help consumers, policymakers and developers make more informed decisions about where to live, work and invest. locationaffordability.info

Fair Housing Council of Oregon's summary of regulatory barriers. FHCO has compiled specific strategies local governments can employ to ensure that outdated, exclusionary and unnecessary regulations don't block the construction or rehabilitation of affordable housing. fhco.org/information-for-jurisdictions/removal-of-regulatory-barriers

Local consolidated plans. All jurisdictions that receive federal Community Planning and Development (CPD) block funds are required to complete a consolidated plan every five years to assess their affordable housing and community development needs and market conditions, and to make data-driven, place-based investment decisions. The consolidated planning process serves as the framework for a community-wide dialogue to identify priorities that align and focus funding from the block grant programs: Community Development Block Grants (CDBG), HOME Investment Partnerships Program, Emergency Solutions Grant (ESG) Programs, and Housing Opportunities for Persons with AIDS (HOPWA) Program. Grantees report on accomplishments and progress toward Consolidated Plan goals in the Consolidated Annual Performance and Evaluation Report (CAPER). hudexchange.info/programs/consolidated-plan/consolidated-plan-process-grant-programs-and-related-hud-programs

Local comprehensive plans. Oregon law requires each city and county to adopt a comprehensive plan and the zoning and land-division ordinances needed to put the plan into effect. Plans must be consistent with the Statewide Planning Goals. Plans are reviewed for such consistency by the state's Land Conservation and Development Commission (LCDC). Based on Statewide Planning Goal 10, each comprehensive plan is required to have a Housing Element, as described here: oregon.gov/LCD/docs/goals/goal10.pdf

Metro State of the Centers Atlas. Metro's State of the Centers Atlas provides a comparative snapshot of land use and transportation conditions in centers to establish a framework for evaluating further development and investments. gis.oregonmetro.gov/stateofthecenters

Grant screening committee

2040 Planning and development grants screening committee

ROLE OF GRANT SCREENING COMMITTEE

The Screening Committee supports the objectives of the 2040 Planning and Development Grant program by leveraging the experiences, expertise and insight of its members to give a quality assessment on the development potential of each grant request. Screening Committee members are not directly responsible for managing application activities or for project success. Screening Committee members will:

- adhere to program selection criteria when conducting assessments
- evaluate and judge the development potential of each application
- be able to make assumptions about the development implications of proposed projects
- vote and make funding recommendations on grant requests.

The Committee shall advise and recommend to the Metro Chief Operating Officer the ranking and recommended grant amounts, and whether to grant a full, partial or no award. Upon reviewing the recommendations, the COO will forward her own grant recommendations, along with the recommendations of the Committee, to the Metro Council for final grant decisions in a public hearing.

COMMITTEE MEMBERSHIP

Members of the committee, including the committee chair, are selected by the Metro COO. The committee will be composed of six to nine individuals representing a variety of expertise from public and private interests, plus one non-voting Metro Councilor to serve as a Metro Council liaison. A committee member may have more than one area of expertise. The committee will be composed of individuals with the following expertise:

- Economic development
- Urban planning
- Real estate and finance
- Infrastructure finance relating to development or redevelopment
- Local government
- Urban renewal and redevelopment
- Business and commerce
- Neighborhood association or community planning commission with an understanding of community livability issues
- Environmental sustainability relating to development or redevelopment
- Social equity relating to community planning, development and redevelopment.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Stay in touch with news, stories and things to do.

oregonmetro.gov/news

Follow oregonmetro



Metro Council President

Tom Hughes

Metro Councilors

Shirley Craddick, District 1

Vacant, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

Auditor

Brian Evans

600 NE Grand Ave.
Portland, OR 97232-2736
503-797-1700