

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS
Sitting/Acting as HACC Board
Policy Session Worksheet

Presentation Date: June 13, 2017 **Approx. Start Time:** 11 AM **Approx. Length:** 30 Min.

Presentation Title: Metro 2040 Community Planning and Development Grants

Department(s): H3S/Housing Authority of Clackamas County (HACC); and Department of Transportation and Development (DTD)

Presenters: Richard Swift, Director H3S, Chuck Robbins, Housing Authority Director, and Karen Buehrig, Transportation Planning Manager

Other Invitees: Barbara Cartmill, Director DTD, Mary-Rain O'Meara and Angel Sully, Housing Authority, and Catherine Grubowski-Johnson, Economic Development Manager

WHAT ACTION ARE YOU REQUESTING FROM THE BOARD?

1. Approval to apply for two grants through the Metro 2040 Community Planning and Development funding opportunity. The first project is to complete a Master Plan of the Hillside Public Housing community in Milwaukie (HACC Project), and the second project to complete Park Ave Development and Design Standards (DTD Project).
2. Assignment of a Jurisdictional "Priority Ranking" for the applications to authorize the Board of County Commissioners to sign Letters of Support to be submitted with the grant applications and to place a resolution of support on the consent agenda for June 29th, 2017.

EXECUTIVE SUMMARY:

Background

In April, 2017, Metro Regional Government released a funding notice for "2040 Planning and Development Grants". Eligible applicants for these funds are local governments (cities and counties) within Metro's service district. Grant applications are due to Metro no later than June 30th, 2017 and grant awards will be made to projects that promote planning activity and lead to activities that make land ready for development. The Housing Authority of Clackamas County and the Transportation and Development Department (DTD) are seeking Board approval and a priority ranking to submit two separate applications.

HACC project- Hillside Master Plan Proposal

Fifty percent (50%) of the funding available through the Metro 2040 Grant program is designated for projects that facilitate "equitable development," either by having a strong emphasis on development that serves historically marginalized communities and/or by promoting equitable housing.

The Housing Authority of Clackamas County (HACC), in partnership with the City of Milwaukie, seeks to submit a proposal requesting \$214,000 in funds to complete a Master Plan for the Hillside Public Housing community in Milwaukie.

Funds requested will go towards completion of the following deliverables:

- Outreach/Communications (public involvement) Strategy
- Detailed site analysis
- Development capacity and market analysis
- Preferred Concept Design
- Financial Feasibility and Pro Forma Analysis
- Financing Plan for Federal, State, and local funding applications
- Economic Impact Analysis for job creation and economic opportunities

The expected development outcomes from the completion of the Master Plan for the Hillside public housing community are the construction of a mixed use, mixed income community that preserves and rebuilds existing affordable housing at the site, while creating opportunities for expanded housing choice and typology.

Additional development outcomes include improved pedestrian and transit access on the site, potential for commercial uses such as the HACC administrative headquarters, and other uses.

HACC will use the Master Plan to leverage federal, state and local funding opportunities including the Rental Assistance Demonstration (RAD) program for Public Housing properties, Low Income Housing Tax Credits (LIHTC), and New Markets Tax Credits (NMTC). Each of these funding programs require significant site planning, community engagement, and financial feasibility modeling in order to be competitive.

DTD Project – Park Avenue Development and Design Standards

The Park Avenue Development and Design Standards project focuses on an inclusive public engagement process to create development and design standards for the Park Avenue Station area that implement the Community Values and Guiding Principles of the McLoughlin Area Plan related to economic vitality, inclusiveness, sustainability and design. The project includes an assessment of neighborhood livability and economic diversity in the neighborhoods surrounding the Park Avenue Station.

The Long Range Planning program has been working with community members appointed by MAP-IT to develop a grant application for a project that implements project LU-4 on the Long Range Planning 2017-2018 work program. The proposal is requesting \$250,000 in grant funds and will be supported by in-kind match from DTD and Business and Economic Development.

Funds requested will go towards completion of the following deliverables:

- Public engagement plan - Inclusive and comprehensive plan that involves residents, property owners, developers, community partners, and investors.
- Assessment and analysis report.
- Neighborhood economic and livability assessment.
- Development feasibility analysis.
- Implementation plan:
 - Prioritized strategies / policies to deliver results consistent with community values and principles.
 - Metrics and other tools to define and ensure implementation of long-term goals.
 - Process framework / template for planning future nodes along McLoughlin Blvd.
- Framework to measure performance and refine zoning to respond market economics.
- Preparation of approval ready materials for zoning and other policy changes to support redevelopment.

Request for Priority Ranking and Resolution of Support for applications

The full application to Metro is due on Friday, June 30th. As part of the full application process, Metro requests each jurisdiction to establish a “priority ranking” for multiple proposals submitted from the same City or County.

The HACC project directly addresses the affordable housing need in Clackamas County and matches closely with the emphasis on the Metro 2040 Grant program for projects focused on equitable housing / development. The DTD project includes elements related to equitable development, and also falls within the Metro 2040 grant focus area of projects within Station Areas and Corridors. Each project undertakes needed activities to facilitate development. With its strong emphasis on affordable housing, staff suggest that HACC project receive a first priority ranking, with DTD project coming in at a second priority ranking.

In addition, the governing body serving as lead applicant must also confirm their resource commitment and support for the project by resolution. Staff recommends that a Resolution of Support for both applications be placed on the June 29th BCC Business meeting agenda.

Expected Actions for both applications:

June 13, 2017	BCC Study Session requesting priority ranking, Letter of Support, and Approval to Apply
June 30, 2017	Application due to Metro
Fall, 2017	Award decision from Metro
Spring, 2018	Execute IGA with Metro (if funds awarded)

FINANCIAL IMPLICATIONS (current year and ongoing):

Is this item in your current budget? YES NO

HACC will provide in-kind staff match of approximately \$45,400 and up to \$25,000 in cash match towards consultant fees. If Metro awards funds for the Hillside Master Plan process, grant activities will begin in the next fiscal year.

DTD will provide a \$20,000 in-kind match. In addition, Business and Economic Development will provide a \$25,000 in-kind match as well. This project would occur in the next fiscal year.

What is the funding source?

1. Metro, Regional Construction Excise Tax
2. Housing Authority of Clackamas County
3. General Fund – DTD Planning and Zoning staff time
4. Business and Economic Development funds

STRATEGIC PLAN ALIGNMENT:

- How does this item align with your Department’s Strategic Business Plan goals?
 - By 2022, two thousand (2,000) housing units, affordable to lower and moderate income households, will be built and occupied within Clackamas County

- 35% of the planning projects underway will be related to land use issues such as employment land, UGB or Urban Reserves.
- How does this item align with the County's Performance Clackamas goals?
 - Ensure safe, healthy and secure communities
 - Build public trust through good government
 - Grow a vibrant economy

LEGAL/POLICY REQUIREMENTS: N/A

PUBLIC/GOVERNMENTAL PARTICIPATION: Part of grant/project

OPTIONS:

- 1) Authorize the Housing Authority and DTD to apply for the 2040 Community Planning and Development Grant for the Hillside Master Plan and the Park Ave Development and Design Standards; Assign a Jurisdictional Ranking for the Hillside Master Plan application as first and the Park Ave Development and Design Standards as second, and authorize the signature of Letters of Support from the Board of County Commissioners for the applications as well as prepare a resolution of support to be placed on the June 29th, 2017 Business meeting agenda.
- 2) Direct the Housing Authority and DTD not to submit an applications; do not assign a Jurisdictional Ranking; and do not authorize Letters of Support.
- 3) Support the applications but assign a different jurisdictional ranking.

RECOMMENDATION:

HACC and DTD respectively recommend the approval of Option 1.

ATTACHMENTS:

- a. Hillside Master Plan: Letter of Intent, 2040 Community Planning and Development Grant
- b. Hillside Master Plan: Project Budget
- c. Park Ave Development and Design Standards: Letter of Intent for the 2040 Community Planning and Development Grant
- d. Lifecycle Form for the Park Ave Development and Design Standards project

SUBMITTED BY:

Division Director/Head Approval _____

Department Director/Head Approval _____

Department Director/Head Approval _____

County Administrator Approval _____

For information on this issue or copies of attachments, please contact Chuck Robbins @ 503-655-8591



Metro

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Metro
 Planning and Development
 2040 Planning and Development Grants
 6/30/2017 deadline

Housing Authority of Clackamas County Hillside Master Plan for Housing Opportunity

\$ 213,938.00 Requested

Project Contact
 Mary-Rain O'Meara
momeara@clackamas.us
 Tel: 503-650-3140

Additional Contacts
 FloresA@milwaukieoregon.gov

Housing Authority of
 Clackamas County

13930 S Gain Street
 Oregon City, OR 97206

Executive Director
 Chuck Robbins
chuckrob@clackamas.us

Telephone 503-650-3140

Fax 503-655-8676

Web <http://www.clackamas.us/housingauthority/>

Summary Questions

1. Brief project description (one-two sentences)

The Hillside Master Planning project will lead to a site design and financial feasibility analysis for redevelopment of a public housing community in Milwaukie, OR.

2. Amounts

213,938 Grant funds requested

70,400 Estimated match

284,338.00 TOTAL

Letter of intent

1. Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development, either by serving historically marginalized populations or by providing equitable housing.

Indicate below if your project has such an emphasis and you believe your project merits consideration for targeted funds.

This project has a primary emphasis on equitable development.

Not Applicable

2. Metro anticipates that, for some applications, it may be beneficial to use more than one project type or approach to achieve development in an area. Check all types of work the proposed project would include.

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 indicate whether the contributions are confirmed.

Key project partners have authority for implementing outcomes and/or making financial or in-kind contributions to the project.

The key partners for the Hillside Master Plan project are the Housing Authority of Clackamas County (HACC) and the City of Milwaukie. The Housing Authority is the Grant Applicant, and will serve as the project management lead for the Master Plan, coordinating procurement, consultant teams, resident engagement and project deliverables. HACC is contributing 500 hours of in-kind staff time and \$25,000 towards consultant fees. The HACC Housing Development team is skilled at large scale project management involving multiple consultants and stakeholders. Property Managers and Resident Services staff at the agency have extensive experience and knowledge of the residents who live at the Hillside community, and will serve as a key stakeholder group for the Master Plan.

The City of Milwaukie is committing in-kind Community Development staff expertise, ensuring that development goals align with affordable housing production benchmarks for the City, and serving as a liaison to the broader community of stakeholders. The City will take an active role in the facilitation and convening of the Technical Advisory Committee for the project, in addition to assisting with the analysis and development of plan features that impact surrounding sites, including transportation and infrastructure components. The City of Milwaukie has committed and confirmed \$12,400 of in-kind staff time towards the planning process.

4. What are the expected project activities and deliverables? Please respond with a list.

The expected main project activity for this proposal is the completion of a Master Plan for the Hillside community in Milwaukie, Or.

Deliverables:

- Outreach/Communications (public involvement) Strategy
- Detailed site analysis
- Development capacity and market analysis
- Preferred Concept Design
- Financial Feasibility and Pro Forma Analysis
- Financing Plan for Federal, State, and local funding Applications
- Economic Impact Analysis for job creation and economic opportunities

5. What are the expected development outcomes anticipated in the community?

The expected development outcomes from the completion of the Master Plan for the Hillside public housing community are the construction of a mixed use, mixed income community that preserves and rebuilds existing affordable housing at the site, while creating opportunities for expanded housing choice and typology. Additional development outcomes include improved pedestrian and transit access on the site, potential for commercial uses such as the HACC administrative headquarters, and other uses.

HACC will use the Master Plan to leverage federal, state and local funding opportunities including the Rental Assistance Demonstration (RAD) program for Public Housing properties, Low Income Housing Tax Credits (LIHTC), and New Markets Tax Credits (NMTC). Each of these funding programs require significant site planning, community engagement, and financial feasibility modeling in order to be competitive.

6. How will this project advance or complement regional goals and policies? Refer to the Six Desired Outcomes set forth in the Regional Framework Plan. If you do not believe all six desired outcomes apply

to your project, explain why.

The Six Desired Outcomes are available at the Library tab.

The Housing Authority has established Guiding Values for Housing Development that the Hillside Master Plan and subsequent redevelopment directly align with:

1. Increase and improve the supply of quality affordable housing dispersed throughout the County.
2. New developments will include a range of housing types, affordability levels and services.
3. We will prioritize access to housing for those most vulnerable.
4. Incorporate meaningful public participation in all planning processes.
5. Developments will contribute to the long term financial sustainability of the agency.
6. Develop high performing, well designed, sustainable and resilient buildings and communities.
7. Build new housing in high opportunity areas to foster engaged and connected communities.

This project directly advances the objectives of the Six Desired Outcomes of the Regional Framework Plan:

1) People live, work and play in vibrant communities where their everyday needs are easily accessible.

The Hillside Master Plan will lay the foundation for community revitalization that will provide stable, affordable housing options within a central Milwaukie location with good access to transportation and other amenities.

2) Current and future residents benefit from the region's sustained economic competitiveness and prosperity.

Stable, affordable housing is key to economic success and educational achievement. By planning for the preservation and expansion of housing options in the Hillside community, the project will ensure that families will have increased options for economic and academic success.

3) People have safe and reliable transportation choices that enhance their quality of life.

The Hillside community is the highest priority redevelopment project for HACC due to its proximity to both Trimet Bus and Max lines. As compared to other sites owned by HACC, Hillside presents the greatest access to multi-modal transportation. A key feature of the Master Plan will be to examine existing transit access and site improvements that can be made to increase these options.

4) The region is a leader on climate change, on minimizing contributions to global warming.

The Hillside Master Plan will examine the potential of increased density of housing on the site, and lead to enhanced land utilization. Ensuring affordable housing opportunities that are in close proximity to transit and services reduces the overall reliance and use of vehicles that pollute and contribute to global warming.

5) Current and future generations enjoy clean air, clean water and healthy ecosystems.

The master plan will include an analysis of sustainability features for the site including expansion of the community garden, renewable energy sources, bioswales and other ecological design components.

6) Equity exists relative to the benefits and burdens of growth and change to the region's communities.

The City of Milwaukie faces a demand for affordable housing options that is not currently met by supply. As the population of the city increases, this demand will continue to grow. The Housing Authority has a waiting list of applicants for public housing and Section 8 vouchers that exceeds 4,000 units. The Hillside Master Plan for Housing Opportunity will look at enhanced utilization of a valuable public asset to preserve and increase housing options that allow for equitable delivery of a scarce resource.

7. How will the project create opportunities to accommodate your jurisdiction's expected population and employment growth?

HACC currently has a waiting list of 4,228 households seeking a Public Housing Unit or Section 8 Voucher from the Agency. Because the waiting list is only opened periodically and a limit is placed on new applicants, these numbers are reflective of a small percentage of the actual need for affordable housing in Clackamas County.

The City of Milwaukie recently completed a Housing Needs analysis which determined a shortage of 1,100 housing units along a spectrum of affordability. Redevelopment of the Hillside site presents a significant opportunity for the City of Milwaukie to realize production of new units in a mixed income community.

A construction project of this scale will involve federal, state and local funds and create numerous jobs for the Milwaukie community. The Housing Authority will actively engage residents of public housing in job training opportunities through a

Section 3 component of the project. Partnership with the Clackamas Workforce Partnership during the planning and implementation phases will serve as a valuable resource for the development of employment opportunities.

Full application

1. Metro Council district(s) of project. Check all that apply.

- District 1 – Shirley Craddick
- District 2 – Carlotta Collette
- District 3 – Craig Dirksen
- District 4 – Kathryn Harrington
- District 5 – Sam Chase
- District 6 – Bob Stacey

2. Project ranking: Rank this application by stating "This application is ranked _ of _ application(s) submitted by this jurisdiction."

-no answer-

3. Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development, either by serving historically marginalized populations or by providing equitable housing.

Indicate below if your project has such an emphasis and you believe your project merits consideration for targeted funds.

- This project has a primary emphasis on equitable development
- Not applicable

4. Provide a short summary describing the project, anticipated work to be completed and desired outcomes.

-no answer-

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

In the "Uploads" section of this application, please also provide the required location map or maps showing where the project and/or participating communities are located and project boundaries, if applicable.

-no answer-

6. Please indicate which of the 2040 urban design components will be part of the focus of this project. Check all that apply.

- Central city
- Regional center
- Town center
- Neighborhood center (City of Portland)
- Station community
- Main street
- Corridor
- Employment/industrial area
- Neighborhood
- Urban reserve

7. Metro anticipates that, for some applications, it may be beneficial to use more than one project type or approach to achieve development in an area. Check all types of work this application seeks to include.

- 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

Budget

Tables

Prior CET/CPDG/Equitable Housing Grant Awards

Project name / brief description of the project purpose (1-3 sentences)	Date initiated/completed
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
Total	

Uploads

Documents Requested *

Required? Attached Documents *

Location and/or program reach (up two pages, map and/or text): Provide a location map or maps that shows where the project and/or participating communities are located within the region. Include project boundaries if applicable. Max. 4MB per doc.

✓

Project narrative: Complete the template using 11 point font. Save the document as a PDF and upload. Max. 4 MB per document.

✓

[download template](#)

Project budget tables: Complete the 3 budget tables using the excel template. Save the 3 tables in PDF format and upload. Maximum 4MB per document.

✓

[download template](#)

Letters of endorsement/commitment (1 from the applicant and from each project partner): Letters need to describe partner support including actions and financial commitments. See the grant handbook for more details. Max. 4MB per document.

✓

[Letter of Commitment City of Milwaukie](#)

Project images (optional): A PDF file of up to 4 pages containing photos, images or pertinent graphic

material. Maximum 4MB per document.

Additional letters of support (optional): Up to 5
additional addition letters of support, in PDF
format. Maximum 4MB per document.

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Hillside Redevelopment: Master Plan Budget
Metro 2040 Planning and Development Grants

Development Financial Feasibility Assessment and Plan

Task 1: Needs Assessment

Staff	Hours	Rate	Total
Project Manager	74	\$	105 \$ 7,770
Finance Director	18	\$	131 \$ 2,358
Executive Director	9	\$	147 \$ 1,323
TOTAL	101		\$ 11,451

Task 2: Project Financial Analysis

Staff	Hours	Rate	Total
Project Manager	37	\$	105 \$ 3,885
Finance Director	9	\$	131 \$ 1,179
Executive Director	9	\$	147 \$ 1,323
TOTAL	55		\$ 6,387

Task 3 : Development Sources and Uses

Staff	Hours	Rate	Total
Project Manager	18	\$	105 \$ 1,890
Finance Director	37	\$	131 \$ 4,847
Executive Director	9	\$	147 \$ 1,323
TOTAL	64		\$ 8,060

TOTAL Cost Development Feasibility: \$ 25,898

Architecture and Engineering

Task	Total Cost
Task 1: Site Survey+ Assessments	\$ 44,040
Task 2: Program Investigation and Preliminary Project Goals	\$ 22,200
Task 3: Design Workshop	\$ 52,800
Task 4: Develop Preferred Concept Plan	\$ 59,000

TOTAL Cost Architecture and Engineering \$ 178,040

Economic Consulting

Economic Impact Analysis (Implan) \$ 10,000.00

TOTAL Cost Economic Consulting \$ 10,000.00

Health Impact Assessment Consultant

Consultant \$ 25,000

TOTAL Cost Health Impact Assesment \$25,000

TOTAL Consultant Costs: \$ 238,938

Metro Ask \$ 213,938

Financial Match

	Hours	Rate	Total
HACC Development Project Manager	500	66 \$	33,000
City of Milwaukee Comm. Development Director	50	140 \$	7,000
City of Milwaukee Development Project Manager	60	90 \$	5,400
Consultant Fees: HIA	166	150 \$	25,000
TOTAL MATCH		\$	70,400
Percent of Ask			29%



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Metro
 Planning and Development
2040 Planning and Development Grants
 6/30/2017 deadline

Clackamas County - DTD Park Avenue Development and Design Standards

\$ 250,000.00 Requested

Project Contact

Karen Buehrig
karenb@clackamas.us
 Tel: 503 742-4683

Additional Contacts

lorrainego@clackamas.us

Clackamas County - DTD

150 Beaver Creek Road
 Oregon City, OR 97045

Telephone 503 742-4683

Fax

Web www.clackamas.us

Transportation Planning Supervisor

Karen Buehrig
karenb@clackamas.us

Summary Questions

1. Brief project description (one-two sentences)

This project is an inclusive public engagement process to create development and design standards for the Park Avenue Station area. Implementing the McLoughlin Area Plan, it includes an assessment of neighborhood livability and economic vitality.

2. Amounts

250000	Grant funds requested
50000	Estimated match
300,000.00	TOTAL

Letter of intent

1. Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development. either by serving historically marginalized populations or by providing equitable housing.

Indicate below if your project has such an emphasis and you believe your project merits consideration for targeted funds.

This project has a primary emphasis on equitable development.

Not Applicable

2. Metro anticipates that, for some applications, it may be beneficial to use more than one project type or approach to achieve development in an area. Check all types of work the proposed project would include.

- ⊖ 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 indicate whether the contributions are confirmed.

Key project partners have authority for implementing outcomes and/or making financial or in-kind contributions to the project.

Project Management Team -- Roles -- Skills/Qualifications -- Financial Contribution

Clackamas County Grant recipient; Governing body of area in question Confirmed

- Planning & Zoning Planning, outreach, grant development and writing \$25,000 (In Kind)
- Business & Economic Development Grant development; outreach; development consulting \$25,000 (In Kind)

Metro Grant provider

McLoughlin Area Plan Implementation Team (MAP-IT)

-- Coordination, outreach, grant support, communications; County-recognized community group with representatives from local CPOs and business alliance -- In-kind

Community Organizations - Stakeholders in the project

Clackamas CPO

Jennings Lodge CPO

McLoughlin Area Business Alliance (MABA)

Oak Grove Community Council

Oak Lodge Legacy

Urban Green

4. What are the expected project activities and deliverables? Please respond with a list.

The funds will be used for consultants to manage the project, facilitate public and stakeholder engagement, and draft development and design standards.

Activities:

- a) Engage the community in the Park Ave Station area.
- b) Create an implementation strategy, building on past documents and reports from the area, and other studies.
- c) Identify sites for development, and model the impact of proposed development and design standards on the feasibility of community-supported development.
- d) Explore projects, tools and strategies to maximize long-term affordability, sustainability, productive local economy, retain living-wage work, improved community health and collaboration.
- e) Consider potential impacts to surrounding neighborhoods due to population growth, traffic, rising values and redevelopment; work to minimize negative impacts and benefit livability.
- f) Develop metrics to ensure what is implemented meets community goals.

Deliverables

- a) Public engagement plan: Inclusive and comprehensive plan, that involves residents, property owners, developers, community partners, investors, and:
 - i. Facilitates an inclusive process to plan, develop and implement a vibrant node at Park Avenue
 - ii. Employs focus groups to discuss standards and incentives.
- b) Assessment and analysis report: With current zone designations, and past documents to identify language to promote development.
- c) Recommendation: Zoning and other policy changes to support redevelopment.
- d) Development feasibility analysis: Actual or hypothetical project sites to test economic viability of proposed standards.

e) Implementation plan:

- i. Prioritized strategies / policies to deliver results consistent with community values and principles.
 - ii. Metrics and other tools to define and ensure implementation of long-term goals.
 - iii. Process framework / template for planning future nodes along McLoughlin.
- f) Framework: To measure performance and refine zoning to respond market

5. What are the expected development outcomes anticipated in the community?

Overall: Community and business-supported development and design standards to implement community goals.

Business and property development

- a. New local job and housing options in mixed-use, mixed-income, multi-modal, healthy developments.
- b. More chances for all residents and community members to own businesses and property, and have access to a healthy life.
- c. Encourage and enhance habitat restoration, green infrastructure, and opportunities to access nature and open space.

Neighborhoods

- a. Create development and design standards to protect and preserve surrounding neighborhoods.
- b. Improve buffering of surrounding neighborhoods from parking overflow, pollution, development pressure and gentrification.
- c. Provide diverse multi-family housing to address various income levels.
- d. Provide accessible, essential services, open space, living wage work, local resilient infrastructure and overall health and livability for area residents.

Community building

- a. Establish community identity, and a gateway to Oak Lodge and the greater McLoughlin area.
- b. Implement an innovative, inclusive public engagement process to enhance community relations and increase participation across the demographic spectrum.
- c. Assemble tools for inclusive community involvement elsewhere on the boulevard in the future.

Accessibility

- a. Improved safe access to and performance of public transit
- b. Support increased bike/pedestrian connectivity and access to services

Sustainability & Resilience

- a. Enhanced production of local resources.
- b. Introduce civic ecology concepts to enhance ecological health (including climate change risk mitigation), robust urban habitat and natural open space.

6. How will this project advance or complement regional goals and policies? Refer to the Six Desired Outcomes set forth in the Regional Framework Plan. If you do not believe all six desired outcomes apply to your project, explain why.

The Six Desired Outcomes are available at the Library tab.

- A. People live, work and play in vibrant communities where their everyday needs are easily accessible.
 - a. Enable a significant new supply of mixed-income housing, to attract family-wage jobs and a mix of businesses.
 - b. Design standards to help create public gathering places, green buildings, parks and, restored open spaces.
 - c. Support public transit access to light rail and bus lines, and trails where people can bike and walk.
 - d. Identify actual or hypothetical housing and employment sites to model the viability of proposed development and design standards in the real world.

B. Current and future residents benefit from the region's sustained economic competitiveness and prosperity.

The project is designed to create development and design standards that:

- a. Promote creative, high quality buildings
- b. Address local and regional housing and employment needs
- c. Allow for various economic scales and mix of uses
- d. Promote accessibility to surrounding developments, services, parks and open spaces
- e. Support open space and green development
- f. Incorporate active transportation and connectivity to the greater region

C. People have safe and reliable transportation choices that enhance their quality of life.

- a. Leverage proximity to light rail, bus service and the Trolley Trail.
- b. support safe, comfortable accommodations and prioritize multi-modal travel.

D. The region is a leader in minimizing contributions to global warming.

- a. Help minimize global warming by reducing dependence on motorized vehicles.
- b. Encourage compactness, renewable energy and green development.
- c. Inspire thoughtful standards for climate-friendly development.

E. Current and future generations enjoy clean air, clean water and healthy ecosystems.

- a. Civic ecology focus on natural landscaping, open space and habitat; reduce impervious surfaces and urban heat island effect while capturing and reducing air and water pollution.
- b. Allow for new, mixed-income and market-rate housing near light rail station to support safe and convenient regional transit access and reduce pollution associated with motor vehicles.
- c. Support Farmer's Markets and local grocers to promote regional production.
- d. Enable and encourage new businesses to close resource loops.
- a. Promote mixed-use developments to support recent investments that allow watersheds and habitat corridors to be focal points.

F. The benefits and burdens of growth and change are distributed equitably.

- a. Encourage redevelopment of under-utilized commercial land and minimize residential displacement to help ensure the character of the surrounding neighborhoods is not negatively impacted.
- b. Encourage retention of diversity of current population (age, income, culture, language, education level, abilities, etc.) and address the needs of disadvantaged communities.
- c. Address the need to retain affordable housing, and recommend how to minimize residential displacement in neighborhoods adjacent to and surrounding Park Avenue.

7. How will the project create opportunities to accommodate your jurisdiction's expected population and employment growth?

A. Develop design and development standards to enable opportunities to repurpose the underdeveloped, underutilized commercial corridor, which has excellent transit service and great potential for increased mixed-use residential and employment use.

B. Review parking requirements in current design and development standards to leverage existing transit investments, and ensure properties can develop to their maximum allowed use in accordance with market demand.

C. Facilitate outreach and research to identify market expectations and opportunities, and enable partnerships with developers, investors, property owners and local businesses.

D. Explore and discuss opportunities to expand housing choices and employment along the corridor through development of models through an inclusive public outreach process.

E. Use the development and design standards developed for the Park Avenue station area as a template for other locations along the corridor, to provide opportunities to accommodate population and employment growth.

Full application

1. Metro Council district(s) of project. Check all that apply.

- District 1 – Shirley Craddick
- District 2 – Carlotta Collette
- District 3 – Craig Dirksen
- District 4 – Kathryn Harrington
- District 5 – Sam Chase

District 6 – Bob Stacey

2. Project ranking: Rank this application by stating "This application is ranked _ of _ application(s) submitted by this jurisdiction."

-no answer-

3. Metro has targeted 50% of grant funds for qualified projects within the urban growth boundary that have a primary emphasis on equitable development. either by serving historically marginalized populations or by providing equitable housing.

Indicate below if your project has such an emphasis and you believe your project merits consideration for targeted funds.

- This project has a primary emphasis on equitable development
- Not applicable

4. Provide a short summary describing the project, anticipated work to be completed and desired outcomes.

-no answer-

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

In the "Uploads" section of this application, please also provide the required location map or maps showing where the project and/or participating communities are located and project boundaries, if applicable.

-no answer-

6. Please indicate which of the 2040 urban design components will be part of the focus of this project. Check all that apply.

- Central city
- Regional center
- Town center
- Neighborhood center (City of Portland)
- Station community
- Main street
- Corridor
- Employment/industrial area
- Neighborhood
- Urban reserve

7. Metro anticipates that, for some applications, it may be beneficial to use more than one project type or approach to achieve development in an area. Check all types of work this application seeks to include.

- 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

Budget

Tables

Project name / brief description of the project purpose (1-3 sentences)	Date initiated/completed
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
Total	

Uploads

Documents Requested *

Required? Attached Documents *

Location and/or program reach (up two pages, map and/or text): Provide a location map or maps that shows where the project and/or participating communities are located within the region. Include project boundaries if applicable. Max. 4MB per doc.



Project narrative: Complete the template using 11 point font. Save the document as a PDF and upload. Max. 4 MB per document.



[download template](#)

Project budget tables: Complete the 3 budget tables using the excel template. Save the 3 tables in PDF format and upload. Maximum 4MB per document.



[download template](#)

Letters of endorsement/commitment (1 from the applicant and from each project partner): Letters need to describe partner support including actions and financial commitments. See the grant handbook for more details. Max. 4MB per document.



Project images (optional): A PDF file of up to 4 pages containing photos, images or pertinent graphic material. Maximum 4MB per document.

Additional letters of support (optional): Up to 5 additional addition letters of support, in PDF format. Maximum 4MB per document.

* ZoomGrants™ is not responsible for the content of uploaded documents.

Application ID: 82984

Grant Application Lifecycle Form

Use this form to track your potential grant from conception to submission.

Sections of this form are designed to be completed in collaboration between department program and fiscal staff.

** CONCEPTION **

Note: The processes outlined in this form are not applicable to disaster recovery grants.

Section I: Funding Opportunity Information - To be completed by Requester

Application for: Subrecipient funds Direct Grant
 Lead Department: Transportation and Development Grant Renewal? Yes No

Name of Funding Opportunity: 2040 Planning and Development Grants
 Funding Source: Federal State Local: Metro
 Requestor Information (Name of staff person initiating form): Karen Buehrig
 Requestor Contact Information: x4683 karenb@clackamas.us
 Department Fiscal Representative: Diedre Landon
 Program Name or Number (please specify): Long Range Planning
 Brief Description of Project:

The Park Avenue Development and Design Standards project focuses on implementing an inclusive public engagement process to create development and design standards for the Park Avenue Station area that incorporate the Community Values and Guiding Principles of the McLoughlin Area Plan related to economic vitality, inclusiveness, sustainability and design. The project includes an assessment of neighborhood livability and economic diversity in the neighborhoods surrounding the Park Avenue Station.

Name of Funding (Granting) Agency: Metro

Agency's Web Address for Grant Guidelines and Contact Information:

<http://www.oregonmetro.gov/tools-partners/grants-and-resources/2040-planning-and-development-grants>

OR

Application Packet Attached: Yes No

Completed By: Karen Buehrig, Transportation Planning Supervisor June 6 2017
 Date

**** NOW READY FOR SUBMISSION TO DEPARTMENT FISCAL REPRESENTATIVE ****

Section II: Funding Opportunity Information - To be completed by Department Fiscal Rep

Competitive Grant Non-Competing Grant/Renewal Other Notification Date: Fall 2017
 CFDA(s), if applicable: _____
 Announcement Date: 4/20/2017 Announcement/Opportunity #: _____
 Grant Category/Title: 2040 Planning and Development Grants Max Award Value: \$250,000
 Allows Indirect/Rate: _____ Match Requirement: 10%
 Application Deadline: 6/30/2017 Other Deadlines: _____
 Grant Start Date: Fall 2017 Other Deadline Description:
 Grant End Date: 12/31/2018
 Completed By: 12/31/2018
 Pre-Application Meeting Schedule: Pre-application meeting with Metro was held on May 11, 2017

Section III: Funding Opportunity Information - To be completed at Pre-Application Meeting by Dept Program and Fiscal Staff

Mission/Purpose:

1. How does the grant support the Department's Mission/Purpose/Goals?

The project supports the Performance Clackamas goals of : Build public trust through good government; Grow a vibrant economy; and Ensure safe, healthy and secure communities

2. How does the grant support the Division's Mission/Purpose/Goals? (If applicable)

The project supports plan development (updates to the Zoning & Development Ordinance), coordination and public engagement services to residents; businesses; County decision-makers so they can plan and invest based on a coordinated set of goals and policies that guide future development.

3. What, if any, are the community partners who might be better suited to perform this work?

If successful, the majority of the grant funds will be spent on a consultant to perform the work. DTD staff will be managing this contract.

4. What are the objectives of this grant? How will we meet these objectives?

The objectives of the grant program are to address barriers to development and to advance the 2040 Growth Concept. Projects are expected to undertake concept planning and comprehensive planning projects in urban reserves or new urban areas OR facilitate 'equitable development' within the Urban Growth Boundary OR facilitate development in centers, corridors, station areas and employment/industrial areas.

5. Does the grant proposal fund an existing program? If yes, which program? If no, what should the program be called and what is its purpose?

The grant proposal does not fund an existing program -- this is a project specific grant.

Organizational Capacity:

1. Does the organization have adequate and qualified staff? If yes, what types of staff are required?

If no, can staff be hired within the grant timeframe?

The organization does have adequate and qualified staff to manage a consultant to undertake the proposed project.

2. Is there partnership efforts required? If yes, who are we partnering with, what are their roles and responsibilities, and are they committed to the same goals?

Yes, there will be a partnership effort required with the McLoughlin Area Implementation Team (MAP-IT). We have been developing the grant application in conjunction with four residents appointed by MAP-IT. MAP-IT will play a key role in working with the consultant team to implement the inclusive and comprehensive Public Engagement Plan that will be implemented as a part of this project.

3. If this is a pilot project, what is the plan for sunseting the program or staff if it does not continue (e.g. making staff positions temporary or limited duration, etc.)?

This is not a pilot project.

4. If funding creates a new program, does the department intend that the program continue after initial funding is exhausted? If so, how will the department ensure funding (e.g. request new funding during the budget process, discontinue or supplant a different program, etc.)?

The funding will not create a new program

Collaboration

1. List County departments that will collaborate on this award, if any.

Three county departments have been involved in collaboration on this grant application: Transportation and Development; Business and Community Services and Public and Government Affairs.

Reporting Requirements

1. What are the program reporting requirements for this grant?

The County must submit progress reports and any deliverables to Metro on a quarterly basis.

2. What is the plan to evaluate grant performance? Are we using existing data sources? If yes, what are they and where are they housed? If not, is it feasible to develop a data source within the grant timeframe?

The grant will be evaluated on the deliverables submitted and the ability to make the proposed changes to the ZDO to implement the development and design standards created during the process.

3. What are the fiscal reporting requirements for this grant?

Grant funding will be distributed in incremental payments made at the completion of the project's major milestones. 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.

Fiscal

1. Will we realize more benefit than this grant will cost to administer?

Yes, the benefits that could be realized from grant will be greater than the cost to administer.

2. What other revenue sources are required? Have they already been secured?

No other revenue sources are required for this project. Staff time programmed in Road Fund (Fund 215) will be used to satisfy the match requirements of this grant.

3. Is there a match requirement? If yes, how much and what type of funding (CGF, Inkind, Local Grant, etc.)?

These grant funds will be matched with in-kind hours from staff at DTD and BCS.

4. Is this continuous or one-time funding? If one-time funding, how will program funding be sustained?

This is a one-time funding request - project specific. It is not funding the creation of an ongoing program.

5. Does this grant cover indirect costs? If yes, is there a rate cap? If no, can additional funds be obtained to support indirect expenses and what are they?

Grant covers indirect costs. There is no cap, however, a high rate can affect competitiveness of the grant as it drives up costs while not increasing deliverables. Grant is paid in task based installments. Per Lisa Miles @ Metro

Program Approval:

Name (Typed/Printed) Date Signature

**** NOW READY FOR PROGRAM MANAGER SUBMISSION TO DIVISION DIRECTOR****

Section IV: Approvals

DIVISION DIRECTOR OR ASSISTANT DIRECTOR (or designee, if applicable)		
Name (Typed/Printed)	Date	Signature

DEPARTMENT DIRECTOR		
Name (Typed/Printed)	Date	Signature

IF APPLICATION IS FOR FEDERAL FUNDS, PLEASE SEND COPY OF THIS DOCUMENT BY EMAIL TO FINANCE (FinanceGrants@clackamas.us). ROUTE ORIGINAL OR SCANNED VERSION TO COUNTY ADMIN.

Section V: Board of County Commissioners/County Administration

*(Required for all grant applications. All grant **awards** must be approved by the Board on their weekly consent agenda regardless of amount per local budget law 294.338.)*

For applications less than \$150,000:

COUNTY ADMINISTRATOR	Approved: <input type="checkbox"/>	Denied: <input type="checkbox"/>
Name (Typed/Printed)	Date	Signature

For applications greater than \$150,000 or which otherwise require BCC approval:

BCC Agenda item #: Date:

OR

Policy Session Date:

County Administration Attestation

**County Administration: re-route to department contact when fully approved.
Department: keep original with your grant file.**