Build it Together: a TOOLKIT for neighborhood association organizing and advocacy for accountable development
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The Toolkit includes strategies for general neighborhood engagement and more specific advice about how the neighborhood can anticipate and influence development processes. The Background Documents contain existing conditions, opportunities and constraints, and a public engagement report. The Cathedral Waterfront Plan is the final document of three main reports produced during this project. Finally, the Appendices contain more detailed background information on various topics mentioned in the three documents, as well as a glossary of terms and printable information.

This toolkit is designed to assist the Cathedral Park Neighborhood Association (CPNA) and residents in taking those challenges head on. From January to June 2015, students from the Portland State University Master in Regional and Urban Planning program engaged the community in order to identify desired development outcomes for the 15 acre Steel Hammer Site in particular and in the process charted a strategy for engaging more community members in future Neighborhood Association activities.

This Toolkit is dedicated to helping community members engage with each other and with development processes. The aim is to provide the CPNA board and members with methods for continuing to proactively engage in the Steel Hammer Site redevelopment, and to expand CPNA capacity to include a wide range of people in future advocacy efforts. Most will apply to other Portland neighborhoods as well.

Part One of the Toolkit includes strategies for engaging the community through Neighborhood Association activities, including both outreach and meeting processes. Part Two of this Toolkit includes methods for engaging with the development process as a community, including examples of other community development activism and identifying leverage points in a negotiation. Part Three includes tools for analysis that can be helpful both within the community and when negotiating on their behalf.

Our neighborhoods are changing. New construction and transportation projects, changes in the jobs and housing markets, and environmental impacts can all alter the quality of life within a community, or even a family’s ability to stay in their community at all. Neighborhood advocacy groups are often the best witnesses to the ways that their own communities are changing in response to development. However, there are many challenges to actively engaging residents and influencing the impacts of development.
The Cathedral Park Neighborhood is poised for new development on several sites, and now is the perfect moment for Cathedral Park residents to get involved. This Toolkit has information on best practices and tools that the Cathedral Park community can use in influencing new development proposals in the neighborhood.

Making change in our communities is not always easy. But a clear plan of action, bringing people to the table, and accurate data make success much more likely. The diagram below shows a process framework that began when a developer thought of proposing a new development in the neighborhood. The framework illustrates in a series of steps—things that the Cathedral Park neighbors are doing for the Steel Hammer Site. The steps apply to what CPNA should do to build community capacity ahead of time in order to negotiate with the developers to influence other imminent developments.
Finally, Part One includes some resources on how the CPNA can build partnerships and develop relationships with other organizations to further its interests. The CPNA can use these resources to build relationships with groups working in nearby neighborhoods, or even across the City or region to solve existing problems on particular issues, such as the no-whistle zone, or air quality. It includes a directory of contact details for
- Local businesses,
- Faith and issue-based community organizations,
- Local resources, and
- Other neighborhood associations.

Part One includes strategies for engaging the community and building excitement around anticipated development through Neighborhood Association activities, including both outreach and meeting processes. It begins with an overview of community engagement methods ranging from tabling to conducting focus groups and charrettes.

Part One also includes some great tips to ensure that CPNA engages the broader, diverse community and pro-actively reaches out to all CPNA members. This section of the toolkit has:
- Strategies to organize inclusive community meetings,
- Contact details of community engagement resources from the City of Portland, Multnomah County, non-profits and other community organizations, and
- Precedent studies and examples of other Portland neighborhoods that have had some success in implementing inclusive community engagement events.

Part One: Community Engagement

Broadly, Part One of this toolkit ties closely with the steps that the CPNA and the neighbors must be taking in anticipation of future developments. It has resources that the CPNA can use while a developer is still making plans for the site or is in the initial stages of purchasing land. To be ready with community vision plans for a particular site or around a certain development, CPNA and neighbors must organize community engagement efforts to articulate larger community priorities for that part of the neighborhood.

Part One includes strategies for engaging the community and building excitement around anticipated development through Neighborhood Association activities, including both outreach and meeting processes. It begins with an overview of community engagement methods ranging from tabling to conducting focus groups and charrettes.

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- Precedent studies and examples of other Portland neighborhoods that have had some success in implementing inclusive community engagement events.
**PART TWO: ACCOUNTABLE DEVELOPMENT**

Broadly, Part Two of this toolkit ties closely with the steps that the CPNA must be taking to build and apply leverage while negotiating with the developer. It also ties in with evaluating and monitoring the agreement that the CPNA, neighbors, the developer and other agencies may enter regarding the development.

Part Two explains the kinds of leverage that CPNA and the community can use at the negotiation table with the developer.

- Case studies and precedent examples highlighting the categories of tools that other communities have used to secure responsible development practices are discussed.
- A scorecard for neighbors that helps in evaluating whether the proposal meets community priorities
- This section has clearly outlined the ways in which the CPNA and the community can insert themselves in the development process to influence the development. It has more details on categories of leverages or tools that range from regulatory tools that the City provides (testimonies at land use reviews, design review etc.) to funding leverages that the CPNA has as a neighborhood association.

This section also has tips on evaluating and monitoring the agreement that the CPNA, neighbors, the developer and other agencies may enter regarding the development. Monitoring an agreement is a key step to foster the long-term outcomes that benefit the community. This is where the CPNA and the broader community play an important role in making sure that a signed agreement plays out as envisioned.
PART THREE: ANALYSIS TOOLS

Part Three has analysis tools that will help the CPNA to continually engage its members throughout the development process. These tools for analysis can be helpful both within the community and when negotiating on its behalf.

The CPNA can use the resources in this section to track demographic shifts in the neighborhood, track site ownership and permitting processes, and also anticipate changes in regulations. This section covers pro forma and related tools that the CPNA can use to verify financially how much room the developer has to incorporate some of the community priorities.

Part Three of the toolkit has some negotiation tools that the CPNA can use while negotiating with developers on behalf of its members. One of the key aspects for this negotiation is to get to the underlying interest and have an open line of communication. Read this section in detail to find the difference between a position and the interest behind a position taken at the negotiation table. It also has some tips on preparation that the CPNA can use to find out what their “Best Alternative to Negotiated Agreement” is before negotiating with the developer.
Part 1. Community Engagement
Even for a small community like Cathedral Park, satisfying community engagement can be a challenging endeavor. Below are methods for generating community interest throughout the entire community and for communicating about changes in the neighborhood and the evolving goals of residents.

**BRANDING**

Though a significant investment, some neighborhoods and districts choose to raise awareness of neighborhood efforts by first signalling where people are with telephone pole banners, signs, or murals. Building a sense of place and identity can encourage people to bring their energy into shaping that place's future. This also means that when faced with a meeting notice, their response is more likely to come from a place of recognition and belonging.

**ADDITIONAL RESOURCES**

PGE policy and information on utility pole signs

Neighborhood Notes series on neighborhood branding

Paint Our Town! How to Create a Mural in Portland, Oregon
http://www.racc.org/sites/default/files/MuralZinePDF11-6%20%283%29.pdf

RACC Public Arts Mural Program:
http://www.racc.org/public-art/mural-program

A mural celebrating Mt. Scott Arleta
MEDIA

CPNA has an active Facebook account and reaching people on this social media platform is often a matter of convincing people to click on, like, and share CPNA posts. Continuing to regularly share useful resources and updates in between major meetings or events can go a long way in this effort. Pictures and links also attract eyes and clicks, and stick in people’s memory. Reaching people who will repost messages to their own networks is also very important--this can include sharing your message with people who manage other groups.

The St. Johns Review seeks submissions at least nine days before publication, and is published on a biweekly basis--meaning that posting a special notice may need at least 23 days of advanced planning, and that is if people are expected to pick up the paper and attend a meeting that same day. Plan submissions for special meetings early.

The Cully Neighborhood welcome sign

A utility pole design for the North Tabor neighborhood
EMAIL

In addition to existing lists, sharing information with other organizations by email can draw more eyes to an event. Since people often skim through emails, include a key action item or event in the subject line and be succinct. Make sure to include links to important websites or documents and to include calendar links to allow readers to easily add events to their calendar from the text of the email.

FLYERS

Printed flyers can reach new people, and also serve as a continuing reminder about an upcoming event. Plan events a month or two ahead of time, so that details can be included in posters that go out two to three weeks before an event. Flyers are also a chance for CPNA to get their brand out and to use creativity and personality to pique interest.

DOOR-KNOCKING

Want to really meet your neighbors? Inviting people to Neighborhood Association meetings by going door-to-door is a great way to strike up chitchat, and begin to develop a relationship with people who live in your community. During the Cathedral Waterfront process, a team of three people was able to reach approximately seventy doors in an hour, either leaving a flyer in the doorframe, or sharing a brief personal invitation. These conversation are also an opportunity to hear some initial thoughts about the neighborhood.

There are approximately 1,830 households within the CPNA boundaries. While 59% are homeowners, outreach should target involvement from all residents including renters. One approach would be to divide the neighborhood into 12 sections, with the goal to do one door-knocking night a month. By making it a monthly event, CPNA invites existing members to go out into the neighborhood. While keeping track on a map, members can head out in pairs with stacks of flyers. If you keep snowballing new active neighborhood association members to come out and say hello to their neighbors, you can cover more ground each month. With monthly events lasting just two to three hours each, even with only one team of three people, it should be possible to reach every single door in the Cathedral Park neighborhood with a personal invitation to participate in neighborhood association activities at least once in the next year. With more people, or more intensive time allotted (perhaps a focus in warm summer evenings), that time could be drastically reduced.

Some people find it intimidating to walk up a stranger’s door and interrupt them, and that is understandable. Providing a brief script or role-playing with new doorknockers can help break down that fear. Having a line to start with is also helpful, such as, “Hi, I’m inviting people to a meeting next Tuesday, and I wanted to make sure you knew about it.” When you are inviting people to something, and not asking something from them, people usually get a little friendlier.
To kick off the Cathedral Waterfront Planning process, the CW team used a survey that was conducted in person during events, outside the local library, and online. Offering a survey in person offers unique opportunities to engage people who are not part of the organization’s existing network and build awareness of ongoing efforts.

A quality survey should be focused on a particular end goal, and yield answers that will be usable in informing next steps or project decisions.

**SURVEYING**

**TABLING**

Attending an existing event is a great way to draw a crowd with minimal effort, and reach people outside of existing networks. Consider events such as:

- School fairs, sporting events, and cultural nights, and
- Street fairs and farmers markets.

Different groups use a variety of methods to engage people, and it is important to find a method that is fun for both the people who will be working the table, and the people you are trying to reach. This could include:

- Photo booths,
- Walking tour maps, or
- Buttons, stickers, and magnets.

*Invest in Neighborhoods Leadership Manual: Tips for Door Knocking*

http://www.investinneighborhoods.com/doorknocking.html

Practical tips for door-knocking as a neighborhood association, including a sample rap sheet, materials to bring, and ideas for making the experience fun and safe for everyone.

*Community Organizing Toolkit Game:*

http://organizinggame.org/toolkitE/Framework.swf

While a bit dated and certainly campy, this online learning module has detailed tips on door knocking as a community organizing presented in a light-hearted comic manner.
**STATIONARY FEEDBACK METHODS**

Some community projects have also found success with placing a stationary board in a community space where passing community members can write or draw feedback. Notable examples of such efforts come from Candy Chang, famous for her, “I Wish This Were a _____” project, in which community members were invited to imagine and express how places could be transformed.

Gathering this kind of community knowledge is usually more effective when you go to where people already are, rather than asking them to come to you. Having such boards at events, on potential development sites, or in local businesses usually requires establishing a relationship with said event host, property owner, or business manager, but the time to establish these connections will pay large dividends.

Community engagement events can take many forms and can be used individually or in combination as part of a larger engagement program. Choices should be made depending on the type of information and involvement sought.

**ADDITIONAL RESOURCES**

Michigan State University Extension. *Building Great Neighborhoods: Chapter 6: Developing/Conducting a Neighborhood Survey*

OPEN HOUSE

This mechanism is best when trying to give information to the public around a particular issue and the goal is to attract as many people as possible. It can be used in conjunction with a survey and handout materials to allow people to stop by the event with a limited time commitment and attract people with no previous engagement or familiarity with the organization or subject matter.

CHARRETTE

A charrette is a structured work session that is usually design related and requires multiple work groups who report out their ideas to the entire session after deliberations. Charrettes are best utilized when there is sufficient time and interest in a particular project that requires thoughtful brainstorming and community involvement. These events require more supplies, such as markers and design supplies.

FOCUS GROUPS AND STAKEHOLDER INTERVIEWS

These events can be used to get more detailed information regarding community goals and to generate responses to a development or a particular political issue.
methods to ensure diverse community engagement

Getting a hundred people in the room is great, but what if the people in the room are all from a single subset of the neighborhood and do not represent the broader community? Diversity in community engagement is an important factor that both improves the quality and viability of the outcomes and increases the persuasiveness and authority of decisions within the community and with outside actors. As a representative body, CPNA represents the entire neighborhood, which carries an obligation to pro-actively reach out to all members. As mentioned above, it is also in CPNA's best interest to do so. If key stakeholder groups are missing from a decision-making process, the outcome may be problematic enough to generate backlash and require the process to start over, wasting time and further alienating people. Additionally, the more diverse a group of people, the more comprehensive an understanding of the neighborhood and its needs and resources the group has and the more innovative a set of solutions they can craft. The results of an inclusive public engagement process also contribute to a successful argument with the City and developers.

A key first step is recognizing that it is sometimes uncomfortable to discuss differences such as race, income, English proficiency, ability level, etc., but not allowing initial discomfort to prevent reaching out.

Neighborhood associations often use the following methods to open the door for a wider range of neighbors:

- Meeting at a location that is easily accessible on foot and by public transit,
- Having a volunteer childcare provider for neighborhood meetings,
- Using translation services (delivered simultaneously or by headphone sets),
- Considering school, work, and religious obligations when setting meeting times,
- Providing refreshments,
- Designating a point person to greet first-time attendees, and
- Creating pathways to participation outside of regular meetings.

Underlying these methods is a willingness to reflect on which voices are in the room and which are not. This might entail examining the demographics of the membership and of the board for comparison with neighborhood demographics and then conducting targeted outreach to even out imbalances. For example, if renters are underrepresented as compared to homeowners, perhaps flyers at local apartment complexes would be useful. (Part Two contains analysis tools for monitoring demographic changes in the community.) The next step is to be open to integrating new priorities that emerge and listening when people bring up barriers they face to participating.
It may feel overwhelming to consider all the many groups not yet fully participating. This work does not have to take place all at once. An attainable goal might be to reach out to one group each week or each month, depending on your time. Perhaps visit the nearest senior center one month, a Vietnamese Church the next month, and a Spanish-language day care after that. When you receive reciprocal invitations to events, try to go!

**OTHER NEIGHBORHOODS**


**TRANSLATION SERVICES**

- The Office of Neighborhood Involvement (ONI) contact person for requesting translation services is Ashley Horne (ashley.horne@portlandoregon.gov). The contact information is posted here: [http://www.portlandoregon.gov/oehr/67224](http://www.portlandoregon.gov/oehr/67224) for the appropriate person at each City of Portland bureau.

**YOUTH & ELDER RESOURCES**

- Multnomah Youth Commission, which is the official youth policy body for both Multnomah County and the City of Portland: [https://multco.us/](https://multco.us/)
- Elders in Action, which is a nonprofit that advocates for older adults and provides volunteer opportunities: [http://eldersinaction.org](http://eldersinaction.org)

**DIVERSITY AND CIVIC LEADERSHIP ORGANIZATIONS**

- Center for Intercultural Organizing (503) 287-4117; [www.interculturalorganizing.org](http://www.interculturalorganizing.org)
- Immigrant and Refugee Community Organization (503) 234-1541; [www.irco.org](http://www.irco.org)
- Latino Network: (503) 283-6881; [www.latnet.org](http://www.latnet.org)
- Native American Youth and Family Center: (503) 288-8177; [www.nayapdx.org](http://www.nayapdx.org)
- Oregon Action: (503) 282-6588; [www.oregonaction.org](http://www.oregonaction.org)
- Urban League: (503) 280-2600; [www.ulpdx.org](http://www.ulpdx.org)

**RACIAL EQUITY TRAINING AND TOOLS**

- ONI puts together an annual summit, free of cost, which is highly oriented toward neighborhood association leaders and often includes sessions on diverse engagement: [https://www.portlandoregon.gov/oni/28399](https://www.portlandoregon.gov/oni/28399)
- Multnomah County has created The Equity and Empowerment Lens, which is a tool that can be used to improve planning and decision-making: [https://multco.us/diversity-equity/equity-and-empowerment-lens](https://multco.us/diversity-equity/equity-and-empowerment-lens)
- There are other powerful analytical tools available for free online. These include the Regional Equity Atlas [https://clfuture.org/equity-atlas](https://clfuture.org/equity-atlas), and are discussed in Part Three.
Developing relationships with other organizations can greatly increase capacity to make progress towards achieving community goals. Positive ongoing relationships can lay the foundation for bringing groups together for a specific project or to advocate for a common interest. The Community Tool Box, which is a free online tool put together by the University of Kansas, provides several examples of effective partnerships as well as step-by-step guidance. [http://ctb.dept.ku.edu/en/creating-and-maintaining-partnerships](http://ctb.dept.ku.edu/en/creating-and-maintaining-partnerships)

Do not worry if the goals of your organizations do not align perfectly. Instead, look for common interests. Likewise, other organizations do not need to fit perfectly within the Neighborhood Association geography. Groups working in nearby neighborhoods, or even across the city or region might make great partners on a particular issue, such as transit, or air quality.

When engaging with institutions or organizations, it is important to remember that they are simply made up of human beings. Many people are open to informal meetings and will be happy you reached out. Come with a couple of specific questions or points to cover and think about how you can help them meet their organization’s goals as well. If one person is too busy, uninterested, or just unpleasant, do not let that stop you from seeking out someone else.

Tip: organizations tend to have patterns to their email addresses (firstname.lastname@company.com for example), if you are interested in getting in touch with someone whose contact information you do not know, put their name in the pattern.

### NEIGHBORHOOD ASSOCIATIONS

The Neighborhood Association structure is strong in Portland and there are multiple layers at which to make connections.

- **Office of Neighborhood Involvement** [https://www.portlandoregon.gov/oni](https://www.portlandoregon.gov/oni) provides free training and other resources
- **North Portland Neighborhood Services** is the umbrella organization for the North Portland Neighborhood Associations, which has resources such as small grants for projects. There are similar umbrella groups for the other quadrants as well. [http://www.npnscommunity.org](http://www.npnscommunity.org); (503) 823-4524; info@npnscommunity.org
- **University Park Neighborhood Association** meets quarterly on the fourth Monday of the month in January, April, July, and October. [https://www.facebook.com/UPNA.PDX](https://www.facebook.com/UPNA.PDX)
- **Portsmouth Neighborhood Association** meets the third Tuesday of the month. [http://portsmouthneighborhood.com](http://portsmouthneighborhood.com)
- **St. Johns Neighborhood Association** meets the second Monday of the month at 7pm at the St Johns Community Center. [http://www.stjohnspdx.org](http://www.stjohnspdx.org)
- **Linnton Neighborhood Association** meets on the third Wednesday of every odd month (February, April, June, August, October, December). [https://linnton.com](https://linnton.com); linntonlanduse@gmail.com; (503) 799-5368
**ISSUE-BASED ORGANIZATIONS**

- Golden Harvesters provides food to low income people. [http://goldenharvesters.org/?page_id=2](http://goldenharvesters.org/?page_id=2)
- npGreenway is a nonprofit focused on completing the Willamette Greenway Trail. [http://www.npgreenway.org](http://www.npgreenway.org)
- Bus Riders Unite is an advocacy organization focused on sustainable public transportation. [http://www.opalpdx.org/bus-riders-unite/](http://www.opalpdx.org/bus-riders-unite/)
- Bicycle Transportation Alliance is a nonprofit organization working to promote bicycling in Oregon. [https://btaoregon.org](https://btaoregon.org)
- Community Alliance of Tenants is an advocacy organization focused on housing justice. [http://oregoncat.org](http://oregoncat.org)

**LOCAL BUSINESSES**

- North Portland Business Alliance [http://www.npbiz.org](http://www.npbiz.org)
- St. Johns Main Street [http://www.stjohnsmainstreet.org](http://www.stjohnsmainstreet.org)

**FAITH COMMUNITY**

- Bahai Faith [http://portlandbahai.org](http://portlandbahai.org)
- Pioneer United Methodist Church [https://www.facebook.com/PioneerUnitedMethodistChurch](https://www.facebook.com/PioneerUnitedMethodistChurch)
- Portland Miracle Revival Church [http://portlandmiraclerevival.webs.com](http://portlandmiraclerevival.webs.com)
- First Samoan Church [https://www.facebook.com/pages/First-Samoan-Church-Assembly-of-God/142191772484377](https://www.facebook.com/pages/First-Samoan-Church-Assembly-of-God/142191772484377)
LOCAL SCHOOL RESOURCES

Schools are often hubs of community activity and both the Parent Teacher Association and the Schools Uniting Neighborhoods (SUN) Program are excellent entry points. The mission of the SUN School Program is, “to improve the lives of children, their families and the community through partnering with local school communities to extend the school day and develop schools as community centers in their neighborhoods”. While schools will have a catchment area that is much larger than the Cathedral Park neighborhood’s boundaries, most Cathedral Park neighborhood members with children will be active at these schools and targeting outreach there would be beneficial to the CPNA.

- Roosevelt High School has an active PTA, which meets on the third Wednesday of the month in the Heritage Room at 6pm as well as a SUN program led by Brandon Weaver (bweaver@pps.net; 503-916-5260 x71418).
- George Middle School can be contacted either at the main office (503-916-6262) or the SUN Community School (503-916-5718).
- James John Elementary School also has a PTA that meets the first Tuesday of the month in the school cafeteria at 6pm, as well as a SUN school program led by George Caceres (georigic@lifeworksnw.org; 503-283-9652).
Part 2. Accountable Development
accountable development overview

The concept of accountable development acknowledges that while there are usually strong benefits and financial gains associated with new construction the relationship between who benefits and who pays in terms of neighborhood impacts, environmental change, or use of public resources, is not always in balance. Advocates for accountable development are different from people who argue for limited or no growth--they do not necessarily want to stop all new things from coming in, but they do want to make sure that developers are responsible when considering questions like:

- Will the community improve for everyone, or just those with the most resources?
- Will current residents of the neighborhood be displaced?
- Will new jobs be created that actually help local people find employment?

The following section of the toolkit explains different pathways to advocating for accountable development and a few examples.
Figure 1: Categories of agreements and resources. Adapted from East Bay Alliance for a Sustainable Economy. (2008) “Building a Better Bay Area” pg. 22, with additional material.

Public comment
Land use review
Protest vs community support
Local knowledge

Community Resources
- Community Benefits Agreement
- Cooperative Agreement

Developer Resources
- Developer Agreement

Government Resources
- Subsidies
- Zoning decisions
- Zoning variances
- Eminent domain

A legally binding agreement between community organization and developer(s) to provide specific community benefits in exchange for support or non-opposition to a project.

An agreement to align government resources and community resources to leverage certain benefits from development projects.

An agreement to provide government resources, such as direct subsidies, for a particular development project to happen.
The East Bay Alliance for a Sustainable Economy (2008) outlines different categories of tools for securing responsible development practices: process and planning reform, policies that set new community standards, and project-based negotiated agreements.

- **Process reform**: These efforts focus on improving required community engagement efforts in the development process.

- **Policies that set community standards**: Other efforts for accountable development focus on broader policies, such as living wage standards, or inclusionary zoning efforts, which make it mandatory to include affordable homes in certain situations.

- **Project-based negotiated agreements**: The most commonly recognized form of project-based negotiated development agreements is the Community Benefit Agreement (CBA). A CBA is defined as a “legally enforceable contract between . . . community groups and a private developer, requiring . . . benefits from the developer in exchange for the community groups’ support of (or non-opposition to) the project” (Gross 2012, p. 229, quoted in Saito and Truong). While there are strong examples of project-specific negotiated agreements, the process for both making these agreements, and monitoring their implementation, is resource-intensive.

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**CASE STUDY: L.A. LIVE**

One example of a strong Community Benefits Agreement (CBA) is the 2001 agreement between developers of the L.A. Live entertainment district and a coalition of community organizations, including the Los Angeles Alliance for a New Economy (LAANE) and Strategic Actions for a Just Economy (SAJE). The CBA included provisions for affordable homes, local hiring, living wage jobs, and job training. A land trust agreement also emerged from the CBA after the initial negotiation. On the developer’s end, they were granted use of eminent domain, hotel tax rebates, and a faster approval process. Employers on the site also reaped the benefits of a more stable workforce through hiring agreements.

In Saito and Truong’s 2015 article on the agreement’s effectiveness, they noted several factors that made the agreement fairly successful. Critically, Saito and Truong noted how CBAs fit into the overall political climate, where city council representatives have become increasingly receptive to action from community organizations. They also noted that conditions—such as a strong real estate market—and the existence of substantial public resource—such as subsidies or eminent domain—set the environment for CBAs to take root.

Community organizations like LAANE contrast with groups that fight development outright. Rather, they work with growth interests to redirect more of the benefits of development to service workers who make the development run and people who live with the effects of development.

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1 Saito, Leland and Jonathan Truong. The L.A. Live Community Benefits Agreement: Evaluating the Agreement Results and Shifting Political Power in the City. Urban Affairs Review March 25, 20141078087414527064
The L.A. CBA process also included early involvement from Community Development Corporations (CDCs), who took on the work of actually assembling the various requirements of financing, constructing, and managing affordable housing. Whereas many project agreements that require the developer to pay for affordable housing do not end in results, in the L.A. Live agreement, affordable housing was built early, and the minimum percentage for full build-out was built before most of the market-rate housing. Since the L.A. Live project also displaced people from existing homes, this is not as radical of a win as it may seem—the need for those homes was urgent, and people were still displaced from the neighborhood.

Saito and Truong note that a broad coalition of organizations is necessary to stay vigilant on keeping the developer accountable to the agreement. Strategic partnerships also helped groups leverage the necessary legal and technical expertise that went into negotiating the CBA, and implementing funded benefits like housing and job training.

The CBA had some flexibility built into it. For example, the original agreement outlined a developer contribution to community services, after paying for a short study on what was needed. This allowed time to define community needs, and resulted in the developer including childcare space, and also contributing to a recreation center.
CASE STUDY: OVERLOOK APARTMENTS

One local case of neighborhood association intervention is the Overlook Park Apartments in the Overlook neighborhood. Original plans for the building had called for a five-story 68-unit building near a MAX station, without car parking. After extensive negotiations, the neighborhood association convinced the developer to switch architects and deliver a design with fewer, larger units, and more parking. While there were tangible benefits of the new design, it is also worth considering that the new apartments are more expensive than those in the original design at a time when housing costs are far outpacing incomes across the region. Even when neighbors take strong action, it remains difficult to balance a wide range of community concerns.

WHAT CAN GO WRONG?

- A negotiated agreement that mostly contains elements that are already required by law or government policy
- A document that is not legally binding
- A lack of enforcement mechanisms for the agreement
- It is not clear who is making the decision, or who is responsible for certain outcomes
- Lack of broad community representation or support
The developer has a proposal on the table—the plans look crisp, and the vision is really starting to take shape. This is an exciting time, but how do you know if the development is really going to support your community’s long-term goals for development? What are the positive and negative impacts associated with the proposal, and how might minor improvements to the proposal create a significantly better future for neighbors? This section is about evaluating a proposal for its impacts.

Evaluating and monitoring an agreement are almost as important as the agreement itself when it comes to fostering long-term outcomes that benefit the broader community. The Twin Cities Equitable Development Principles and Scorecard is a useful guide for evaluating proposed private development and publicly proposed projects, as well as the direction of your own agreements with developers. The guide includes the following categories, which are summarized here, and provides a checklist format for going more in-depth into each category.

**Equitable Community Engagement practices**
- Did engagement efforts include people who are most vulnerable to the impacts of the project?
- Were community members engaged early, and throughout the process?
- Did development plans ultimately reflect community identified goals and objectives?

**Equitable Land Use practices**
- Is there support for increased opportunity, living wage jobs, community ownership of land, or for new locally owned businesses?
- Are there infrastructure and environmental improvements to enhance livability and public health?

**Equitable Economic Development practices**
- Is public funding oriented toward helping those most in need to obtain better working standards and entrepreneurial support, instead of helping parties who already have strong economic resources?
- Are there mechanisms for preventing the displacement of people of color, low-income residents, and locally owned businesses?

**Equitable Housing practices**
- Does a development support a mixed-income neighborhood by including viable options for a wide range of family incomes?
- Are there intentional moves for being a community for large families, single-parent households, elderly households, people with disabilities, and other populations?
- Are various approaches to affordability taken, such as replacing a loss of lower-cost homes or consideration for combined household costs?
Equitable Transportation practices

- Is there a commitment to improving access to transit and active transportation options?
- Are there improvements for pedestrian safety and access for people with disabilities?
- Are there measures to reduce noise and air pollution?

GENERAL QUESTIONS TO ASK AT EVERY STAGE OF EVALUATION

Who benefits? Who has something to gain?
Who pays? Who loses something?

Often, there will be development trade-offs that include both wins and losses, but paying attention to who the people are in each scenario can help you negotiate a path where wins and losses are more evenly spread.

CPNA NEIGHBORS SCORECARD

How does the current proposal for the Steel Hammer Site stack up? This scorecard is adapted from the Twin Cities Equitable Development and Principles Scorecard model, using the goals and objectives established through previous meetings with Cathedral Park residents, recorded in the Cathedral Waterfront Plan. Use the scorecard to see how well the developer’s proposal meets your and your neighbors goals, and where it could use improvement.

A scorecard is not a replacement for ongoing conversation, but is instead a tool to focus and start constructive conversations between neighbors. You don’t have to know every piece of technical research about the site—it includes technical considerations and city code, alongside priorities we’ve heard in previous conversations. If you want to write in some of your own priorities or knowledge, go for it! Likewise, if some things seem more important to you than others, that’s an important thing to talk about with your fellow community members.

Does the development proposal meet our community’s goals? This part of the checklist reflects the twelve goals developed in the Plan Document, but can and should be added to by all neighbors who are impacted by development. The neighborhood may of course decide that they can support a project even if not every box is checked, but it is important to ask whose interests are not being served when a box is unchecked. Consider if those people are represented in the negotiating group, and consult with the wider neighborhood.

Does it meet the minimum development standards? Minimum development standards head off some of the sections. If the developer does not meet these points, the developer may be in violation of existing city codes. If you are not completely sure that you can say yes to one of these minimum standards, ask the developer to clarify their intentions, and consult with the staff planner at the Bureau of Development Services.
scorecard

SENSE OF PLACE & DESIGN SCORE

☐ Site design interacts with the river and greenway trail
☐ Site layout encourages connections to the surrounding neighborhood and Cathedral Park
☐ Features of the site celebrate the neighborhood's natural features and industrial history
☐ Developer has consulted the neighborhood on design decisions, and choices have been made to reflect local character
☐ Planned uses on the site include places where members of the public can visit, shop, or use services
☐ Welcoming public outdoor spaces (besides the trail itself) are included in the site plan, and the neighborhood has been consulted on their design
☐ Design incorporates space for future commercial capacity if not immediately created
☐ If retail or commercial tenants are known, the tenants reflect the unique identity of North Portland, and neighbors have been consulted on the selection
☐ Capacity for multi-family homes, townhouses, employment areas, and retail shops are all present in the site design
☐ Funding for public art is included in the overall site plan and includes local artists

TOTAL SCORE________

TRANSPORTATION & INFRASTRUCTURE SCORE

Minimum standards

☐ Developer will pay system development charges and specifically provide for street improvements connecting to site, including pedestrian safety
☐ Developer will pay system development charges for necessary improvements in water and sewage systems
☐ Developer has shared the results of a traffic impact analysis and illustrated how they will mitigate the impacts of new development on the neighborhood, including an estimate of how many trips will be generated by uses on the site and specific projects to off-set the new trips.
☐ Developer can illustrate improved access to the part of the site between the railroad and the river

Further evaluation

☐ Improved railroad crossings are part of the development plan
☐ Pedestrian connections are visible in the developer's site design. PBOT standards require pathways for pedestrians between buildings at least every 500 feet.
☐ Site plan has active ground floor uses where people will feel a connection to the building and windows
☐ Site design encourages pedestrian access through the site
☐ Plans are in place for improved current and future access to transit

TOTAL SCORE________
The developer’s estimates of housing rent (or sale prices) reflect a range of existing incomes represented in the neighborhood, using the standard that people should not be paying more than 30% of their income toward housing.

- At least 15% of houses/apartments/condos available to people at less than federal poverty level--$673 for a family of four
- At least 15% of houses/apartments/condos available to people between the federal poverty level and twice the federal poverty level--$1,350 for a family of four
- Market-rate apartments are included in the remainder of new development
- The developer has a plan for the management of multi-family dwellings to ensure ongoing maintenance and care, either planning to keep building in their possession, or choosing a reputable management company
- The developer’s estimates of commercial rents create affordable commercial space for small businesses and entrepreneurs. This may include live/work spaces
- The site plan includes amenities that appeal to families with youth, e.g., playgrounds, skateboarding facilities, art
- The site plan includes amenities that appeal to senior residents
- The site plan includes housing that accommodates families with youth, such as homes with at least three bedrooms

**Additional Equity Considerations**

- Support is given for current homeless populations in the neighborhood
- Energy efficient, safe and healthy housing reduces utility bills for the residents and is free from environmental hazards.
- Preservation and replacement of any naturally occurring affordable and/or below market rate housing.

**TOTAL SCORE__________**
HEALTHY ENVIRONMENT SCORE

Minimum standards

☐ Trail will be built to Parks and Recreation standards, with 12 feet asphalt paving with 2 feet of plantings on either side, if development is happening on one of the two riverfront taxlots.
☐ There are no buildings planned between the river, and 50 feet from the top of the river bank

Further evaluation

Trail:
☐ Design for the greenway trail includes measures for avoiding bicycle and pedestrian conflicts near developed area
☐ Design for the greenway trail includes amenities such as public restroom access, benches, historic markers, and/or play features
☐ Design for the greenway trail includes space for people to get close to the river
☐ Greenway trail will be improved early in the development process

Green features and air quality:
☐ Site design includes landscaping with native plants
☐ Street trees and generous natural landscaping are present in the site plan
☐ Green roofs or ecoroofs are used in the project
☐ Air quality and noise impacts of commercial uses near residential uses are mitigated by design elements

Soil contamination:
☐ Brownfield remediation will meet or exceed standards for residential land
☐ The neighborhood has been consulted on the soil remediation process, with plans to minimize disruption to immediate neighbors

Noise pollution:
☐ Building construction is planned with noise mitigation measures such as sound-resistant windows
☐ Site design shows parking, vegetation, or other uses where people are not constantly present, in areas most immediately adjacent to the railroad line
☐ A sound and vibration buffer, such as a decorative wall, is in place
☐ Measurable reduction of noise pollution and emissions pollution
☐ Residences are not constructed within 200 feet of the railroad line

TOTAL SCORE_________
SURROUNDING COMMUNITY SCORE

These are more difficult to quantify, but are important considerations for how previous criteria may impact different populations. Items with an asterisk* have further detail below.

☐ Actions and commitments have been taken to minimize the impact of rising rent values in the neighborhood*
☐ Actions and commitments have been taken to minimize pressure on redeveloping existing housing stock in the neighborhood*
☐ Neighbors uphill from the site retain views across river
☐ Actions and commitments have been made to improve for surrounding environmental health
☐ New development will positively contribute to the local tax base*

TOTAL SCORE_______

TOTALS

SENSE OF PLACE & DESIGN SCORE____
TRANSPORTATION & INFRASTRUCTURE SCORE____
THRIVING DIVERSE COMMUNITY____
HEALTHY ENVIRONMENT SCORE____
IMPACTS ON SURROUNDING COMMUNITY SCORE____

Where is the developer's proposal weak?

What are the easiest improvements to make?

Considering the shortcomings of the proposal, who is most impacted in your community?
IMPACTS OF DEVELOPMENT ON SURROUNDING COMMUNITY

Neighborhood property values are apt to rise with redevelopment. Brownfield remediation alone has a demonstrated impact on surrounding real estate sale prices, ranging from an increase of 12.4 to 32.2%. While the influence of further development is even more difficult to isolate, the general effect of living near a new development versus an industrial site will undoubtedly have a positive influence on neighboring values.

This increase in value can make vacant or “underdeveloped” lots more attractive to developers. Since there is now a larger gap between the current value, and how much the property could be worth if the developer built something there and sold it, owners are more likely to pursue redevelopment projects. Some people see this as a good thing. Adding properties can increase local tax revenue and accommodate a growing population of people relocating to Portland and of young people moving out on their own. However, concerns such as the destruction of local trees, possible demolition and redevelopment of older homes, and overall change in neighborhood character are also valid.

EVALUATING IMPACT ON TAXES AND TAX REVENUES

Will rising property values in the Cathedral Park neighborhood create new tax revenues for schools, and other amenities? Will it raise property tax bills for people who might not be able to afford it?

Most properties in Cathedral Park are now assessed significantly below their real market value (http://www.co.washington.or.us/BOC/upload/Metro_PropertyTaxPresentation_Sep2012-1.pdf, pg 38). Measure 50—a rule passed by voters—currently restricts how much a property’s assessed value can increase per year from its price in the mid-1990s. That value can only increase by 3% per year. Meanwhile, the rate of property tax per $1,000 of that assessed value is also restricted by Measure 5. This means that the relationship between increased property values and increased property tax revenues is highly constrained. Because many properties are assessed at 60% or less than their current real value, and that assessed value can only increase by 3% per year, the rise in property taxes is still taking years to catch up even to today’s real market values.

As an example, consider a home in the neighborhood with an estimated real market value of roughly $315,000 in 2014, versus $85,000 fifteen years ago. One might expect there to be a big increase in property tax income from such a change! However, the assessed value fifteen years ago ($54,000), has increased consistently at 3% per year, and is now only $84,000. It hasn’t even caught up to the 1999 market rate. While the property value rose to 3.7 times its former value, the assessed value only rose 150%. At the current rate, it would take 45 years for the assessed value to
catch up to today's market value alone. Their annual property tax bill rose from $1,000 to $2,000 in that time.

On one hand, this situation limits the impact of development on homeowners with a fixed income. Unless property owners undergo major renovations or request to have their zoning changed (which could trigger a reassessment), or additional levies are passed that influence the rate of taxation, property owners should not see bigger tax bills resulting from nearby development.

Vacant properties that are built upon, properties that are redeveloped, and properties that are substantially renovated so as to trigger a tax reassessment, would be an exception to this pattern. These categories of properties would be assessed at a rate that is closer to their real market value. Estimating the overall tax revenue from redeveloped properties is confounded by many variables related to both the development and to the infrastructure demands required by new development.
character-based narratives as discussion tools

Now that we’ve considered a long checklist of items to look for in a developer’s proposal, and considered some of the external impacts of new development, we can turn our attention to asking who carries the benefits and costs of the proposal. In order to consider the influence of development on a range of people, we will take three hypothetical households, each representing a small slice of the community.

Who benefits from redevelopment?

- 33.2% of people within the neighborhood make twice the poverty level or lower—in 2015, that means a gross monthly income of $4,042 for a family of four. The conventional consideration for housing “cost burden” is if it is greater than one-third of household income, meaning that a home for a family of four would need to be currently priced at $1,347 a month or less.

- 15.2% of people within the neighborhood make less than the federal poverty level—in 2015, that’s a gross monthly income of $2,021. An affordable monthly rent or mortgage cost for this family would be $673, which would generally need to be subsidized.

PAM PENNYPINCHER

Pam is a preschool teacher with two kids of her own, Heidi and Hector.

Her job pays $28,120 a year—the median wage for preschool teachers in Oregon. This puts her family over the federal poverty rate ($20,090 for a family of 3), but is not a lot. In relationship to the neighborhood, about 16% of her neighbors are in the same boat, or doing worse.

An affordable rent for Pam’s family would be about $781 a month. Heidi has asthma, and needs regular medication and doctor’s visits. Pam is concerned about local air quality.

Discussion questions for evaluation:
How does the new development influence Pam’s ability to keep her family stable?
How does the new development influence her family’s health?
MANUEL MEDIAN

Manuel and Chris have a condo in the neighborhood. Their two-person household is the median size for Cathedral Park. Their income of $48,060 is the exact median for families in the neighborhood. Manuel works in a physical therapy office, and Chris works in food service while crafting his dream of starting a small design business.

An affordable rate for Manuel and Chris to pay for housing would be about $1,335 per month. About 68% of their neighboring households manage to pay less than a third of their regular income in housing costs, but Chris and Manuel pay a little bit more than that.

Chris and Manuel are concerned about what it will take to start a small business in Portland, while also keeping up with their home and student loan payments. They also think they would like to adopt a child in the near future, which would mean getting a bigger place someday.

Discussion questions for evaluation:
How does development influence Chris’ ability to start a small business?
What are the prospects for Chris and Manuel to find a bigger place for raising their future child?
Do amenities associated with development influence the ability to raise a child?

ERNIE & MAHA MOORE

Ernie is an insurance appraiser, and his wife Maha is an event planner. Together, they make a little over $100,000 a year. They have an adult child, Otis, who is off in college. About 17.2% of Cathedral Park households make more than $100,000 a year, and 34.4% make at least $75,000.

Ernie and Maha still feel young and go for daily jogs around the neighborhood, but Ernie is approaching retirement age and Maha is trying to figure out if she could start to unload some of her consulting work once Ernie is at home more. They are considering whether it will be worthwhile to sell their home, or stay in place. Maha really cares about staying active for healthy aging, and is also worried that climbing the hill to the bus or shop in town will no longer be possible for her if she develops her family’s tendency toward arthritis.

Discussion questions for evaluation:
Will development influence Ernie and Maha’s costs before they sell?
Will development influence how much Ernie and Maha get for their house if they sell it to retire?
Will the neighborhood be a good place for Ernie and Maha to retire in? What if their ability to be mobile changes?
FURTHER READING

East Bay Alliance for a Sustainable Economy. (2008) “Building a Better Bay Area”
This report features a variety of case studies where community coalitions have partnered with developers and cities to win community benefits. It examines not only negotiations around individual projects, but broader reform attempts and community policy-setting.

Contains more detailed methods for how to calculate development impacts, including fiscal impacts, traffic, socio-economic impacts, and environmental impacts. Contains worksheets, spending estimates, and traffic impact figures.

Good Jobs First
http://www.goodjobsfirst.org/accountable-development details public development subsidies, researching subsidies, and development activism

PolicyLink Equitable Development Toolkit:
http://www.policylink.org/equity-tools/equitable-development-toolkit/about-toolkit

Twin Cities Equitable Development Principles and Scorecard:
regulatory leverage points

ZONING

Zoning decisions will determine several aspects of what a developer is allowed to build “by right” without any special permissions, or with additional oversight and review. The zoning choice may also influence the aspects of design review that may be necessary. Zoning will also influence whether certain performance bonuses, such as affordable homes, affordable commercial space, green roofs, or other aspects, yield a sufficient height bonus to the developer.

LAND USE REVIEW

According to the City of Portland’s ABC’s of Land Use presentation, the City expects 80% of new developments will comply with zoning regulations and not require land use review. However, there are certain situations that would require review, opening opportunities for comment and neighborhood association involvement in hearings and testimony, and working with a Bureau of Development Services staff planner.

The following list outlines various types of development review that may apply to new development, what triggers the review, and whether it is likely to be relevant to the Steel Hammer Site process. The final column references what “Type” of review is required, which is explained in further detail in the second table.
### Development Review Categories

<table>
<thead>
<tr>
<th>Development Review*</th>
<th>When Does It Come Up?</th>
<th>Relevant To N Crawford Site?</th>
<th>What Type Of Process?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment Review</td>
<td>“Adjustment reviews provide flexibility for unusual situations and to allow for alternative ways to meet the purpose of the regulation.”</td>
<td>Unlikely given generous site size</td>
<td>Type II</td>
</tr>
<tr>
<td>Conditional Use Review</td>
<td>If a proposed use on the site is listed as “CU” in the zoning table</td>
<td>Possible, depending on proposed use</td>
<td>Variable</td>
</tr>
<tr>
<td>Design Review</td>
<td>In April draft of MUZ concept, design review will be required for CM2 proposals over 48 ft., and CM3 zoned areas</td>
<td>Yes, due to overlay zone. Also, depending on zoning--monitor Mixed Use Zones process and zoning selection</td>
<td>Type II for St. Johns/Lombard Plan overlay</td>
</tr>
<tr>
<td>Environmental Review</td>
<td>Only if proposed development would not meet environmental standards listed in zoning code</td>
<td>Unlikely</td>
<td>Type IX or Type II</td>
</tr>
<tr>
<td>Greenway and Greenway Goal Exception Review</td>
<td>Greenway review is required for tax lots south of railroad track. A greenway goal exception would be triggered if the developer were trying to build a “non river-dependent use” within the greenway setback</td>
<td>Greenway Review: Yes in all cases Greenway Goal Exception: not likely, but would be highly relevant to goals and outcomes for the project</td>
<td>Greenway reviews are Type II. Greenway EXCEPTIONS** are Type III and since they correspond to a state goal, would actually go before city council. <a href="https://www.portlandoregon.gov/shared/cfm/image.cfm?id=143752">https://www.portlandoregon.gov/shared/cfm/image.cfm?id=143752</a></td>
</tr>
<tr>
<td>Historic Review</td>
<td>Historic designations, designation removal, incentives, demolition</td>
<td>No</td>
<td>Variable</td>
</tr>
<tr>
<td>Land Division and Final Plat Reviews</td>
<td>If the developer wants to divide the land into smaller parcels</td>
<td>Maybe</td>
<td>Variable <a href="https://www.portlandoregon.gov/bds/index.cfm?a=72498">https://www.portlandoregon.gov/bds/index.cfm?a=72498</a></td>
</tr>
<tr>
<td>Master Plans and Impact Mitigation Plans</td>
<td>If the developer wants to use a master plan for the large site</td>
<td>Maybe</td>
<td>Type III</td>
</tr>
<tr>
<td>Nonconforming Review</td>
<td>If there is a building use that will not conform with zoning</td>
<td>No</td>
<td>Type II</td>
</tr>
<tr>
<td>Planned Development Review</td>
<td>Only if developer is interested in a more creative site plan, that, for example, might distribute the allowed density unevenly</td>
<td>Unlikely</td>
<td>Type IIx or Type III</td>
</tr>
</tbody>
</table>
### Development Review*

<table>
<thead>
<tr>
<th>DEVELOPMENT REVIEW*</th>
<th>WHEN DOES IT COME UP?</th>
<th>RELEVANT TO N CRAWFORD SITE?</th>
<th>WHAT TYPE OF PROCESS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Review</td>
<td>Tree review may be triggered when relevant parts of the zoning code are violated, but outside of the Greenway Overlay</td>
<td>Very unlikely, only north of Crawford</td>
<td>Type II or Type III</td>
</tr>
<tr>
<td>Zoning Changes</td>
<td>If the developer request a change in zoning or Comprehensive Plan designation</td>
<td>Yes</td>
<td>Type III</td>
</tr>
</tbody>
</table>

*This list excludes reviews required as part of specific area plans or overlays that are not relevant to the Cathedral Park Neighborhood. For a full list, see [https://www.portlandoregon.gov/bds/36650](https://www.portlandoregon.gov/bds/36650)

**An example of a case where a Greenway Goal exception has been considered is the Centennial Mills site, which is uniquely different than the North Crawford site in that the existing structure is well within the overlay zone.

### Types of Review

<table>
<thead>
<tr>
<th>TYPE CATEGORY</th>
<th>NOTICE</th>
<th>DECISION MADE BY</th>
<th>DECISION TIMELINE FROM COMPLETE APPLICATION</th>
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</thead>
<tbody>
<tr>
<td>Type I</td>
<td>Property owners within 100 ft. of site</td>
<td>Staff</td>
<td>14-21 days</td>
</tr>
<tr>
<td>Type Ix</td>
<td>Property owners within 100 ft. of site</td>
<td>Staff</td>
<td>30-45 days</td>
</tr>
<tr>
<td>Type II</td>
<td>Property owners within 150 ft. of site and recognized organizations within 400 ft.</td>
<td>Staff</td>
<td>21-28 days</td>
</tr>
<tr>
<td>Type IIx</td>
<td>Property owners within 150 ft. of site and recognized organizations within 400 ft.</td>
<td>Staff</td>
<td>30-42 days</td>
</tr>
<tr>
<td>Type III</td>
<td>Property owners within 400 ft. of site and recognized organizations within 1000 ft.</td>
<td>Hearings Officer or appropriate commission</td>
<td>Public hearing within 51 days. Notice recipients must be given 20 days’ notice</td>
</tr>
<tr>
<td>Type IV</td>
<td>Same as Type III</td>
<td>Same as Type III</td>
<td>Same as Type III, except 2 hearings</td>
</tr>
</tbody>
</table>

For more detail, see: [https://www.portlandoregon.gov/bds/index.cfm?a=71804](https://www.portlandoregon.gov/bds/index.cfm?a=71804)
delivering strong testimony

Public testimony (including letters and email, as well as verbal testimony at hearings, and more informal conversations with staff planners) is a critical step in advocating for the wider community's interests. Good testimony convinces the listener that your position is right, but really good testimony prepares the listener to make the same argument to their bosses, staff lawyers, and others.

BE SPECIFIC

In cases where there are changes you want to see in a proposal, state specifically what would make the proposal better and why. Give a clear direction on what you want decision-makers to do. Include the end goal that you, and the people you represent, would like to achieve, not just the intermediate steps.

SHOW STRENGTH IN NUMBERS

Showing that a large number of people support your position is a source of strength. A hundred angry neighbors are harder to ignore than one angry neighbor. However, using repetitive testimony or form letters is not always as effective as letting individual stories shine. Also remember that the content of the argument still matters in a land use hearing—a majority of people asking for a change that unjustly burdens a small minority may not win the day. Show not only that a large number of people are involved, but that a large range of people are considered.

CONNECT THE DOTS

Decision-makers are accustomed to considering many trade-offs regarding a development, and they may draw different connections between aspects of a proposed development and wider city goals and policies than you do. It is important to show where existing City policies support what you are advocating for.

The table on page 41 illustrates some areas of alignment between goals outlined in the Plan Document, and existing city policies.

Where policies are part of the Comprehensive Plan, the current reference is to the Proposed Draft version (https://www.portlandoregon.gov/bps/article/497457). Note that the Recommended Draft is due to be released during this project period, and changes to goals, particularly in the housing section, are anticipated.

ADDITIONAL RESOURCES

Amanda Fritz’ Land Use Reviews: A Primer for Neighborhood Land Use Chairs: http://www.portlandonline.com/fritz/?a=240868&c=49247 particularly useful details on the appeals process, and attending conferences

### CATHEDRAL WATERFRONT PLAN GOAL

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<tbody>
<tr>
<td>Goal 1: Development fosters a sense of place and creates a neighborhood-level destination</td>
<td>St. Johns/Lombard Plan</td>
<td></td>
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<tr>
<td>Goal 2: Development includes a mix of uses that complement one another</td>
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<td>Goal 3: Residential development actively maintains socio-economic diversity in the Cathedral Park neighborhood</td>
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<td>Goal 4: Development provides spaces for jobs and entrepreneurial activity, in balance with residential development</td>
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<tr>
<td>Goal 5: Development and amenities support and foster diversity in age groups</td>
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<td>Goal 6: The greenway trail is a defining feature of new site development and is implemented early, and with high-quality amenities</td>
<td>Statewide Planning Goal 15: Willamette River Greenway <a href="http://www.oregon.gov/LCD/docs/goals/goal15.pdf">http://www.oregon.gov/LCD/docs/goals/goal15.pdf</a></td>
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<td>Goal 7: Site development is pedestrian oriented</td>
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<td>Goal 8: Development includes infrastructure improvements for the surrounding neighborhood</td>
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<td>Goal 9: Views of nature and local landmarks are protected for residential neighbors and in public viewsheds</td>
<td>City of Portland Scenic Resources Protection Plan, pg. 47 <a href="https://www.portlandoregon.gov/bps/article/89965">https://www.portlandoregon.gov/bps/article/89965</a></td>
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<td>Goal 10: Development mitigates railroad noise, prioritizing impacts on residential development</td>
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<td>Goal 11: Development improves local air, soil, and water quality</td>
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<td>Goal 12: Development will include trees, generous planting areas, and well-designed landscaping</td>
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funding leverage

The Neighborhood Association’s willingness to assist in seeking financial assistance for brownfield redevelopment, arts grants, or other aspects of development can represent important leverage. CPNA can exchange assistance in accessing public resources that the developer may not qualify for alone for desired community benefits. Below is a snapshot of current grants and funding source ideas that could be useful to the community and should serve as a starting point for future funding research.

ENVIRONMENTAL RESOURCES

Portland Bureau of Environmental Services
• Brownfield Program https://www.portlandoregon.gov/bes/35008
• Technical Assistance https://www.portlandoregon.gov/bes/article/316737
• Assessment https://www.portlandoregon.gov/bes/article/245455
• Clean Up https://www.portlandoregon.gov/bes/article/316737
• Percent for Green https://www.portlandoregon.gov/bes/article/341452
• Community Watershed Stewardship Program https://www.portlandoregon.gov/bes/43077

East Multnomah Soil and Water Conservation District
• PIC http://emswcd.org/grants-and-cost-share/apply/for-organizations-pic/
• SPACE http://emswcd.org/grants-and-cost-share/apply/space/

Metro
• Neighborhood Cleanup http://www.oregonmetro.gov/tools-partners/grants-and-resources/neighborhood-cleanup-matching-grants

Business Oregon
• http://www.orinfrastructure.org/Infrastructure-Programs/Brownfields/

Oregon Coalition Brownfields Cleanup Fund
• http://www.orinfrastructure.org/assets/docs/brownfieldsc.pdf

Oregon Department of Environmental Quality
• Voluntary Cleanup Pathway http://www.deq.state.or.us/lq/cu/cupathway/voluntary.htm
• Independent Cleanup Pathway http://www.deq.state.or.us/lq/cu/cupathway/independent.htm

Center for Creative Land Reuse (Regional Brownfield Technical funded by EPA)
• Technical Assistance for Brownfields http://www.cclr.org/land-recycling-101
• Funding Sources (14!) http://www.cclr.org/state-resources/oregon
• Additional Resources http://www.cclr.org/state-resources/oregon
ART

• Regional Arts & Culture Council [http://www.racc.org/grants/overview-deadlines]
• Percent for Art by Oregon Arts Commission [http://www.oregonartscommission.org/programs/public-art/percent-for-art]

COMMUNITY DEVELOPMENT

Metro
• Community Enhancement Grant [http://www.oregonmetro.gov/tools-partners/grants-and-resources/community-enhancement-grants]

HOUSING FINANCE

Portland Housing Bureau
• Homebuyer Opportunity Limited Tax Exemption (HOLTE) [https://www.portlandoregon.gov/phb/61184]
• Multiple-Unit Limited Tax Exemption (MULTE) [https://www.portlandoregon.gov/phb/61191]
• Non-Profit Low Income Housing Limited Tax Exemption (NPLTE) [https://www.portlandoregon.gov/phb/61192]
• SDC Exemption Program
• [https://www.portlandoregon.gov/phb/61105]
• Direct Assistance for Rental Housing Development
• Housing Development Subordinate Loan (HDSL) [https://www.portlandoregon.gov/phb/article/429918]
• Equity Gap Contributions (EGC) [https://www.portlandoregon.gov/phb/article/429901]
• Cash Flow Share Loan (CFS) [https://www.portlandoregon.gov/phb/article/524193]

Metro
• TOD Program Funding and TOD Green Building Grants, if property has functional pedestrian connection to transit corridor with frequent bus (less than ¼ mile) or within boundary of an urban center and TOD typology.
State of Oregon

- Oregon Vertical Housing Tax Zone program for mixed-use buildings
- Risk-sharing loan for construction financing
- Oregon Community Incentive Fund Grant
- Low Income Weatherization Program (LIWP)
- Low Income Housing Tax Credits (LIHTC; federal funds allocated by the State)

TRANSPORTATION

Metro

- Enhancement Grants: small infrastructure projects, such as bicycle parking or wayfinding signage/street markings. A total amount of $50,000 is available; the typical grant request is from $5,000 to $15,000.
- Planning Grants: planning projects, aimed at further defining a regional travel options program or series of strategies at the local level. Ideally, a plan would build upon planning guidance found in a transportation system plan. A total of $75,000 is available, which will likely pay for one planning project.

Trimet


Bureau of Transportation

your notes
Part 3. Analysis Tools
track upcoming development proactively

Getting ahead of development can be aided by monitoring both commercial and residential real estate listing sites to see what is for sale - properties may or may not have for-sale signs posted on site. This will be helpful in giving the neighborhood more time to involve themselves in the process instead of the limited time period that occurs after development notices are sent to the required parties.

LOOPENET

The best source for commercial properties is Loopnet.com, which is the largest online marketplace for properties that are for sale and/or lease. Loopnet requires an account to log in, and although it is easy to create a free account, some of the properties listed (and shown on the maps) are “locked” and require a paid membership to access. If this occurs, consider browsing the commercial real estate broker websites, which often provide profiles and summary brochures on their available properties, in order to find more detailed information.

Some of the larger local brokers in the Portland area include the following: Kidder Mathews; NAI Norris, Beggs & Simpson; Capacity Commercial Group; Melvin Mark; and Macadam Forbes.

ZILLOW & TRULIA

Available residential properties can be viewed on websites like Zillow and Trulia. It is important to also monitor residential sites because, although they might currently only have one single-family house on the lot, the current and future underlying zoning could mean additional development potential for these properties. Residential homes and lots that are either for sale or have been foreclosed could have development potential that ranges from a lot split (for homes on larger pieces of land) to a multi-family building, to even something with commercial uses. This isn’t to say that all homes for sale will mean that something new is put in its place, but it is important to be diligent and monitor the sites just in case.

PORTLANDMAPS

One way to easily access the zoning information is through portlandmaps.com. This site lists the zoning, comprehensive plan designation, and any additional overlay zones and plan districts. The zoning information can be found under the Maps tab, under summary information. Other important information, like size, ownership, and property value, is also available via this site. Portlandmaps on occasion has historic documents and permits also uploaded to each property’s profile, but if there is interest in knowing more about the history of a property (beyond what is available on Portlandmaps), the Multnomah County Records office and the City of Portland Archives are both open to the public.
pro forma and related tools

One of the key tools that developers use when planning real estate projects is called a pro forma. A pro forma is a financial statement that projects gross income, operating expenses, and net operating income for a future period based on a set of specific assumptions. In general, a pro forma will take into consideration factors like the square footages, rents, vacancy rates, operating expenses, loan amounts, and interest rates to determine what the rate of return will be on their investment over time. Pro formas are used when working with a lender to secure financing at different stages of the development. A construction loan is secured while the project is being built, and a permanent loan is secured after the project is fully leased. The permanent loan essentially pays off the construction loan and is often secured in advance of the construction loan in order for the construction lender to be confident they will get paid, whereas the construction loan acts more like a line of credit during the construction process. The different risk factors at these two stages of any development lead to different terms that are agreed upon in the loan.

Each developer has unique pro forma models they will use for their developments, which can range from an excel spreadsheet to a complex software tool. The CW Team created a pro forma for the purposes of this project and has attached it as an appendix. The main benefit of this tool is for the Cathedral Park neighborhood to be able to input different values and see how it will impact the rate of return for the developer and thus the overall project feasibility. In general, a positive return in the low double digits is ideal.

Another open source tool that is accessible for the CPNA to use is a set of spreadsheets available through “Envision Tomorrow”, a tool developed by Fregonese Associates. These spreadsheets take a complex pro forma and invert the calculations so that instead of starting with square feet and rents, the user can input other physical parameters, as well as percentages of uses (including parking), and get an output calculation of the estimated return. These models require more concrete information about the zoning and development standards, and the additional costs that can be incurred during construction (like brownfield remediation and impact fees) and were thus not used for this project. However, if given more information from a developer, “Envision Tomorrow” could serve as a useful tool for the CPNA. To access these spreadsheet models, visit the Fregonese Associates website (see links below).

Overview of the tool
http://www.envisiontomorrow.org/enhanced-roi/

Prototype Library
http://www.envisiontomorrow.org/prototype-library-downloads/
By conducting an Advanced Search on American Factfinder and selecting Census Tracts as the proper geography for your search, Board members can get up to date information on the demographics and housing profile for their community. Some important information includes:

- Total population (ACS Table B01003)
- Households
- Age (ACS Table B01001)
- Race & Ethnicity (ACS Table B03003)
- Median Income (ACS Table B19013)
- Median Home Value (ACS Table B25077)
- Poverty Status (ACS Table C17002)
- Tenure (Renters/Owners) (ACS Table B25032)
- Median Rents (ACS Table B25064)
- Housing Mix (units in structure) (Table B25024)

Find more information at:
Factfinder [http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml](http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml)
Social Explorer [www.socialexplorer.com](http://www.socialexplorer.com)
transportation impact tools

THE CITY OF PORTLAND TRANSPORTATION SYSTEM PLAN (TSP)

This is the long-range plan to guide transportation investments in Portland. The purpose of the TSP is to:

- guide the maintenance, development, and implementation of Portland’s transportation system, to accommodate 20 years of growth in population and employment, and
- implement the plans and regulations of the regional government and the State of Oregon, including Metro’s Regional Transportation Plan (RTP) and the Oregon Transportation Planning Rule (TPR).

Use the TSP to get an understanding of the “capacity” of a street and to analyze future plans and improvements that are planned for your neighborhood roads.

You can check the major transportation projects and improvements planned for the North Portland Neighborhoods here: https://www.portlandoregon.gov/transportation/article/517017

Another important resource found on the Portland Bureau of Transportation’s website is the Creating Public Streets and Pedestrian Connections through the Land Use and Building Permit Process document. You can use this document to understand and analyze the necessary improvements to the surrounding rights-of-way (streets and stormwater infrastructure) that the developer has to undertake when developing a property. Depending on the zoning of the property, the document spells out the improvements expected on the surrounding streets.

If you have the address of a property, you can use www.portlandmaps.com to get a summary of the existing transit connections nearby, traffic counts and traffic volume data and the TSP designations of nearby streets.

ADDITIONAL RESOURCES

Coalition for Livable Future. Regional Equity Atlas http://clfuture.org/equity-atlas Provides maps and data related to population, environmental justice, and access to resources. Includes user’s guide and a dozen how-to videos.

Brownfields 101 http://www.cclr.org/land-recycling-101
Advocating for a community requires negotiating not only with members, but on their behalf. When people think about strong negotiators, they sometimes think about people in suits pounding on tables, playing hardball, and hiding their true motives. However, getting at underlying interests and engaging in open communication can be an asset. Several negotiation concepts are helpful for identifying the interests of others and better representing your own.

**POSITIONS VS. INTERESTS**

When neighbors come to meetings to represent their interests, it can be hard to find common ground. While some beliefs about how people should live and behave in a community are indeed polar opposites, finding out why a person thinks the way they do, and identifying the concrete changes in their lives that they perceive coming from a particular position, can go a long way for finding common ground.

- **Position:** My neighbor built a new fence without asking me and she needs to take it down!
- **Interest:** My old neighbors and I used to share our backyards, and I felt like we were a tight-knit community. The fence makes me feel isolated, and like no one will take care of me in my old age.

**BATNA**

A BATNA is the “Best Alternative to Negotiated Agreement.” If you were negotiating on the price to buy a house, and found that the seller simply would not go lower than what you think is reasonable, your best alternative might be to wait until another house goes on the market in the area where you are searching. On the other hand, if you have already sold your home and are accruing costs each month that you don’t purchase a new home, there will be a threshold where the decision to pay a higher price might make sense. Knowing where that boundary lies is critical to taking care of your interests.

Being aware of your counterparts’ BATNA helps ensure that:

1. you believe that they are ready to drop out of negotiations when they still have more to gain from working with you
2. you are aware of when it does make sense for them to stop working with you
ADDITIONAL RESOURCES

Resolutions Northwest

• Neighborhood Mediation Program: provides assistance in resolving conflict between neighbors, landlord/tenant conflicts, small businesses, and neighborhood groups

• Facilitation program: Assistance leading major meetings, preparation before meetings, and processing after the fact. Financial assistance may be available through the Office of Neighborhood Involvement

• Training: RNW hosts training sessions on conflict resolution, equity and inclusion, communication, and restorative justice. Contact: 503-595-4890
your notes