

Contract Proposal

for the Sacred Heart Church

Supplemental Materials to the Archdiocese Housing Office Development Application



CGS Consulting

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FORWARD

The Master of Urban and Regional Planning Program (MURP) at Portland State University offers students the unique opportunity to build a strong connection between the community and future planning professionals. This connection is realized through the capstone of a two-term Planning Workshop course offered through the MURP program. Planning Workshop offers students the chance to become more intimately involved in a real-life planning situation by directly working with a client to identify specific projects and work products that enhance student's learning experience while providing tangible work products that benefit the client.

This contract demonstrates our understanding of the workshop project, an outlined scope of work, and intended final products to be produced by a five-member team of MURP students.

TABLE OF CONTENTS

INTRODUCTION	5
PROJECT BACKGROUND & CONTEXT.....	9
The Brooklyn Neighborhood	9
The Catholic Church	11
The Sacred Heart Parish.....	12
OPPORTUNITY RESPONSE	15
RELATIONSHIP WITH THE CLIENT	17
THE PRODUCT.....	19
Summation of Visioning Process	19
Market Study	20
Feasibility Study	22
Documentation of Final Products	24
TEAM QUALIFICATIONS.....	25

APPENDIX

A Timeline

B. Sample Charts for Market Study

C: Sample Pro Forma for Senior Housing

INTRODUCTION

Historically, the Sacred Heart Church has played a critical role in the Brooklyn Neighborhood as an architectural landmark and community and cultural center. For a variety of reasons explored below, the Sacred Heart Church has struggled to maintain parish membership levels over the past three decades. A declining congregation size and financial instability threaten the church's vitality and long-term viability.

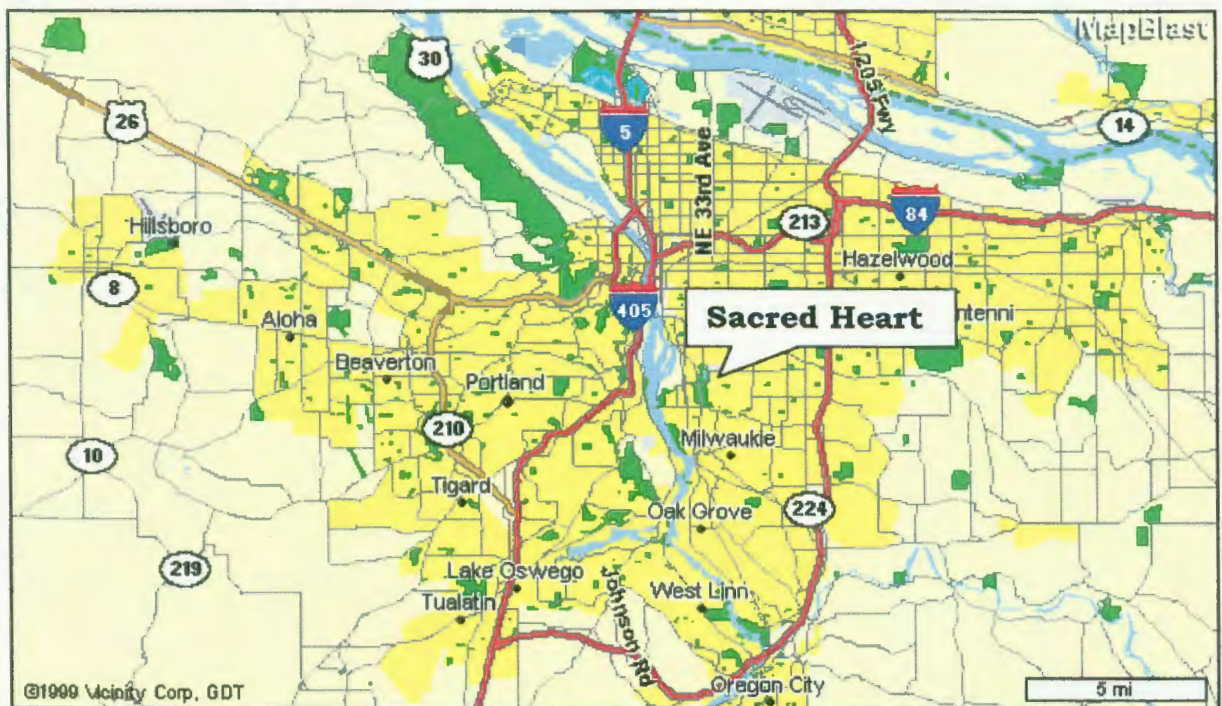


Fig. 1 – Location of Sacred Heart Church in Portland, OR

In 1998, with the arrival of Father Joseph Baccellieri and the creation of a Pastoral Council, the parish began exploring opportunities to revitalize the church and increase parishioner membership through redeveloping the Church's 1.81-acre property. During the last two years, Father Baccellieri and the Pastoral Council have undertaken outreach within the church and the Brooklyn community to identify goals for the property's redevelopment.

This contract describes the context and confluence of factors that have given rise to this redevelopment opportunity, and the work that will be provided to move the church's redevelopment efforts forward.

The Site

The Sacred Heart property, located at 3910 SE 11th Avenue in Portland, Oregon, comprises most of the block between Center Street to the south, Bush Street to the north, 11th Avenue to the west and Milwaukie Avenue to the east. It is adjacent to residential areas to the north, west and south and commercial uses on Milwaukie Avenue to the east.

The site contains four buildings, a parking lot with approximately 30 parking spaces, and a large playing field. Buildings include the church, a rectory, a condemned school building, and a parish hall.

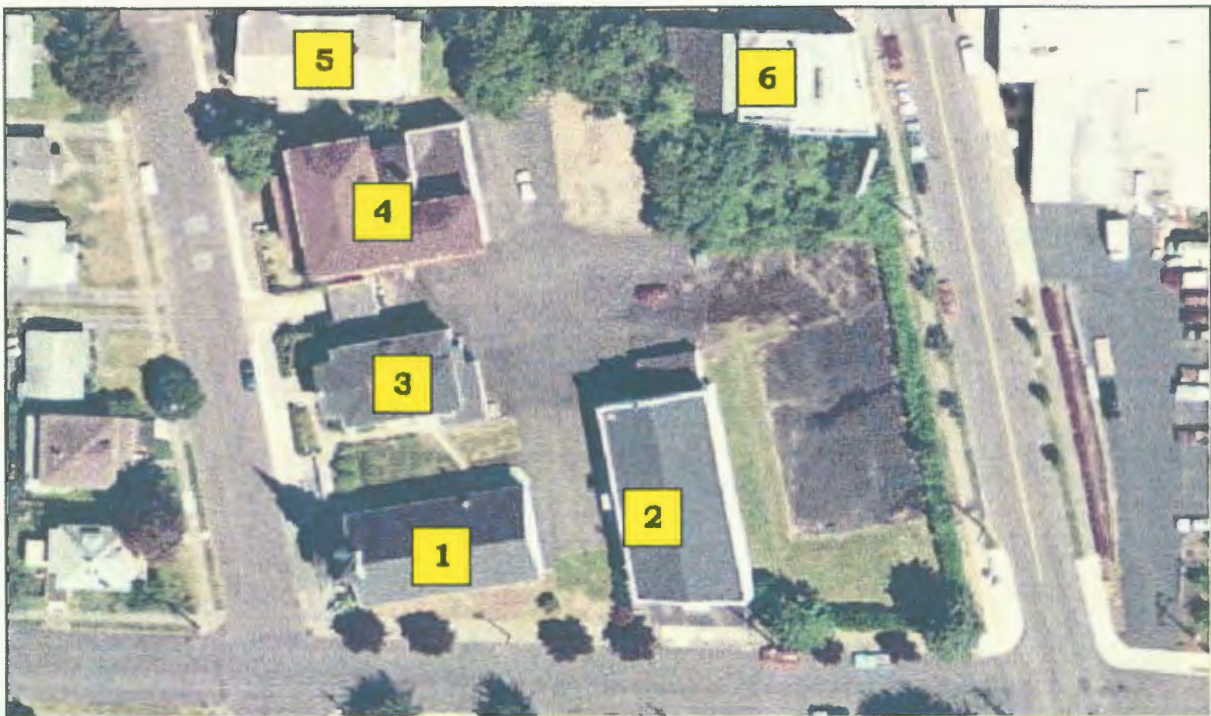


Fig. 2 – Buildings on the site

1. **Sacred Heart Church**- Moved to this location by horse and wagon in 1903 from its original location at SE Boise and SE Milwaukie. The building lacks a restroom and still needs some small upgrades to meet building code.
2. **Gregory Hall**- Built in 1913, this building served as the parish hall. It is currently leased to a Waldorf middle school and not available for church use. This building also fails to meet current building code and needs several ADA upgrades before it could be leased to another tenant. The Waldorf School plans to move to a larger space within a year.
3. **Church Rectory**- This building houses the administrative offices of the parish and was built in 1911. Several offices on the second level are

leased to local community organizations. This building requires the least amount of improvements to meet current code.

4. **Sacred Heart Elementary**- Built in 1911, this originally served as the parish's primary school for first through eighth graders. Later it was leased to Childsworld, an early childhood education organization. Childsworld was forced to leave when the building was condemned in 1995 for numerous building code violations. The building currently stands vacant.
5. **Benedictine Convent**- This building is owned by the Mt. Angel Benedictine Order. It currently houses four sisters, although designed to house 14. This building will also require substantial upgrades for further re-use. Mt. Angel will likely be willing to sell the site in exchange for housing units on site.
6. **Toy Manufacturer**- This lot is not owned by the Archdiocese. It contains a two-story brick building that faces SE Milwaukie Avenue. The owner has been approached several times about selling to the church but is unwilling to sell the land at this time.

to be a part of the community organization. This building is the first
of many to be built in the future.

1. Sacred Heart Elementary School is a 12,000 square foot building
located on the corner of 1st and 2nd streets. It is a two-story
building with a large auditorium and a gymnasium. The building is
owned by the Catholic Church and is used for religious and educational
purposes.

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PROJECT BACKGROUND & CONTEXT

The motivation to redevelop the Sacred Heart property emerged as a response to recent revitalization and planning efforts in the neighborhood, pressures from the Catholic Church, and trends in Sacred Heart membership.

The Brooklyn Neighborhood

The Sacred Heart property is located within the historic Brooklyn neighborhood in southeast Portland, close to downtown Portland and the east bank of the Willamette River. The area first emerged as a working class neighborhood due to early railroad and industrial growth. Its "solidity as a neighborhood was based on the immigrant population's common bonds of hard work, low pay, and family integrity."¹ Brooklyn began declining between 1930 and 1960, "due to the end of large-scale European immigration and the growing obsolescence of its industrial base."² It continued to suffer in the 60's and 70's as a result of suburban flight and general inner-city decline.

This trend of decline is beginning to reverse, as inner-city Portland neighborhoods become the focus for revitalization. The Brooklyn neighborhood is experiencing increasing pressure to redevelop, due to its accessible location, proximity to the river, and the increasing regional demand for housing and employment.

From 1998-2000, the Brooklyn neighborhood, in conjunction with REACH Community Development, created the Milwaukie Action Plan. The plan is the result of a community-based visioning process to revitalize the Brooklyn neighborhood. The goals identified through this process focused on reinforcing neighborhood identity, maintaining the area's character, strengthening the business district and encouraging a bicycle- and pedestrian-friendly transportation system.

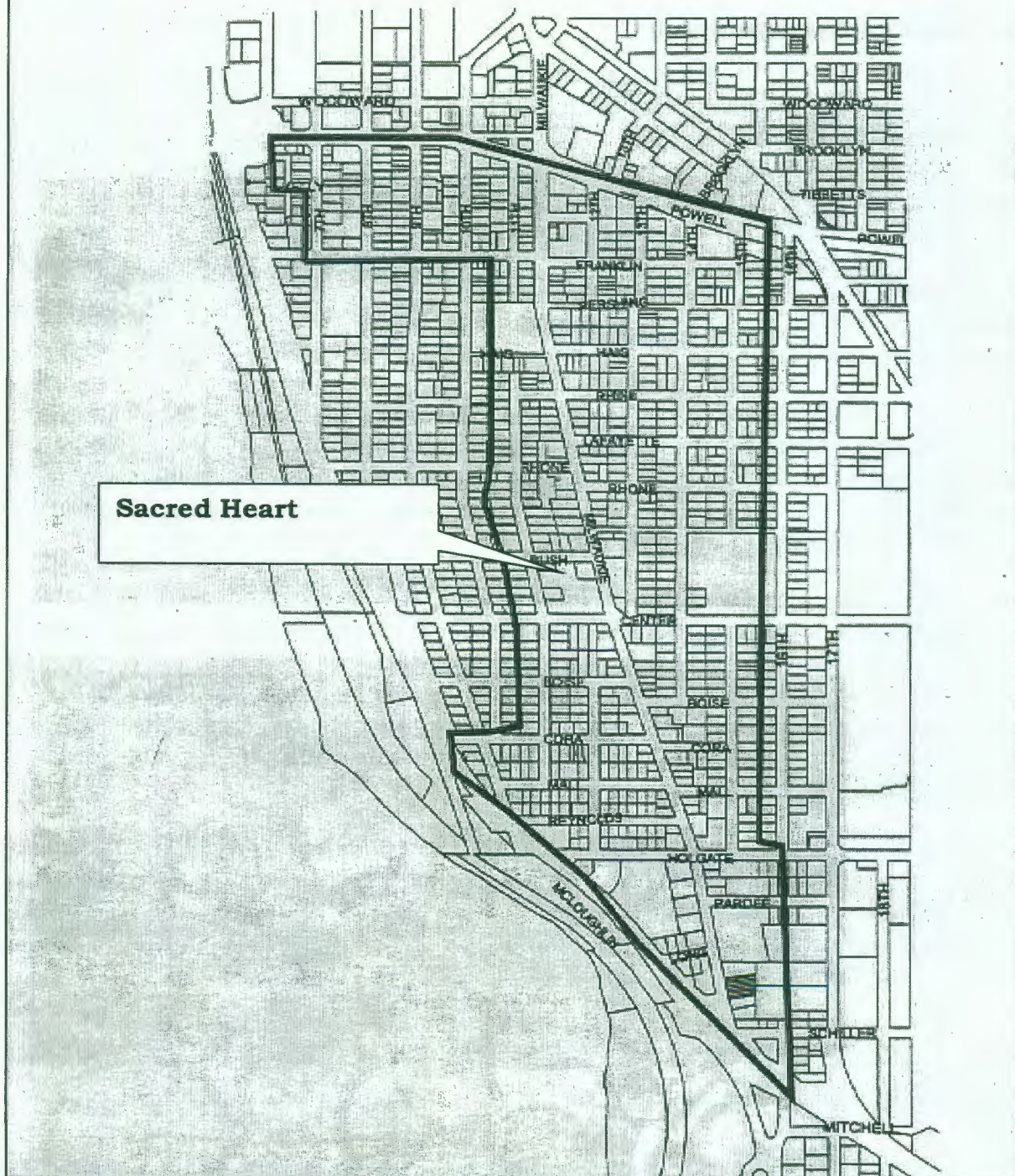
During the creation of the Milwaukie Action Plan, the Sacred Heart Church property was identified as a critical link in achieving the plan's goals, due to its size, location, current condition, and potential for expanding community connections within the neighborhood.

¹ Brooklyn Neighborhood Plan. Adopted by City Council March 20, 1991. Ordinance No. 163982

² Ibid

In May of 1999, REACH hosted design charrettes with neighborhood residents to consider the redevelopment of three sites along Milwaukee Ave. The Sacred Heart property was among the sites selected. The charrette presented an important opportunity for church members to interact with the community and to discuss the potential of redeveloping the site, while identifying design elements that were important to the community.

MILWAUKIE ACTION PLAN TARGET AREA



The Catholic Church

In addition to neighborhood dynamics, pressures to redevelop the Sacred Heart property have arisen due to dynamics within the Catholic Church. Across the U.S., Catholic Church attendance has been in decline since the 1960's. Mirroring the migration of city populations from the inner city to the suburbs, suburban church membership levels have increased, while the inner-city churches have continued to decline. In addition to population shifts, Father Baccellieri attributes the decline to changes that occurred within the Second Vatican Council that reorganized the leadership structure within the church. Many parishioners, he feels, were uncomfortable with the move towards a more democratic, pyramid-style leadership that the Vatican Council advocated.

Priest shortages within the Catholic Church have caused the church to find more efficient ways to serve their parishioners. The population flight from the inner city to the suburbs has forced the Catholic Church to relocate many of their priests to suburban parishes. This shift has left the inner city churches with a deficit of priests with which to staff existent parishes.

The pressure to consolidate has resulted in situations like those faced by North Portland parishes over the past several years, where four parishes were recently combined into one. In the early 90s, four rotating Priests served three congregations totaling 1000 members. The North Portland Vicariate declared expenses too high and combined the Parishes, an act difficult for many families to accept as their neighborhood church closed and small Parish communities merged with new families. Facing a similar outlook, the Southeast Portland Vicariate has engaged in long-term planning that calls for one less Priest in the district (SE 82nd to the Willamette, Milwaukee to Sandy Blvd.). This declaration has caused alarm among Sacred Heart parishioners.³

Throughout its history, the Catholic Church has been in the business of purchasing land for the future expansion of the Church.⁴ In 1999, in an effort to reengage the Catholic Church with its surrounding community, the National Council of Catholic Bishops issued a letter to all Catholic Churches stating that the reuse of church property would benefit the good of the order. Parishes were encouraged to consider how their lands could better meet the needs of the community.

That same year, Portland Priest Father Michael Maslowsky initiated a major redevelopment effort at St. Anthony's Church in outer Southeast Portland. St. Anthony's was a fledgling parish that conducted its masses in the

³ Ibid.

⁴ National Council of Catholic Bishops. June 1999.

basement of an unused school. Under Father Maslowsky's direction, St. Anthony underwent an expansive redevelopment project that encompassed five acres and included a new church, senior housing, senior assisted living, an Alzheimer's care unit, a daycare center, bakery and church offices in a village type setting.

The success of the development led to the incorporation of a Housing Office within the Archdiocese of Portland. The Housing Office acts as a clearinghouse for parishes interested in developing a housing or care project. The Housing Office approves and prioritizes parish applications, as well as oversees the financing, development and management of new construction.

The Sacred Heart Parish

Consistent with trends in the Catholic Church, Sacred Heart has experienced declining membership in the later half of the 20th century. By the mid-90's, the challenges of a declining membership were compounded



Church Buildings along SE 11th

by a lack of leadership within the church, financial instability and the poor condition of buildings on the church property.

Father Joe Baccellieri's appointment to Sacred Heart Church in 1998, while only as a part-time priest, represents a major turning point for the church. When he arrived the church had negative cash flow, its Pastoral Council had dissolved and

membership was low. Currently, the Parish has 264 individual members and an average of 100 people attending Sunday mass. However, Church employees estimate that 70 of these members are over 65 years of age.⁵

Father Baccellieri's first act as Priest was to re-establish the Pastoral Council, a leadership body consisting of nine long-time parishioners. Its primary charge is to focus on the challenges the church faces, including membership decline and property redevelopment.

⁵ Interview with Joanne Hoffart, February 15, 2001

The Pastoral Council, led by Father Baccellieri, began their task of creating a plan for redevelopment through a series of listening sessions with Parishioners. One hundred parishioners participated in these sessions in June of 1999. Parishioners expressed "a need for a Pastor who is a steady and dedicated presence," and they wanted to address "the financial burden of the church and the continued financial debt."⁶ The hopes expressed for the Parish's future reflected growing parishioner concern about the future viability of the Parish: "We want to be recognized by the Archdiocese as a viable parish being revitalized with a membership that will continue to grow."



Gregory Hall

The information gathered during the listening sessions, as well as the REACH- sponsored design charrette was provided to DiBenedetto/Thompson/Livingstone Architects to develop a master plan for the site. The resulting master plan reflects the input identified during the listening sessions, the results of the design charrette, and Pastoral Council input. The plan outlines the existing site conditions, provides cost estimates for identified reuse of individual buildings, and provides sample floor plans for senior housing units.

In December 2000, after completion of the Master Plan, the Council voted to move forward with a development application to the Archdiocese of Portland Housing Office.

⁶ "Results of Parish Listening Sessions," Sacred Heart Church

OPPORTUNITY RESPONSE

In the spring of 2001, the Pastoral Council members established tentative priorities for the property, pending the marketability and financial feasibility of their ideas. Lacking this information prevented Pastoral Council members from committing to a specific development program and refining the program's details. Additionally, much of the work that went into formulating their ideas remained undocumented. In processing the application for approval, the Archdiocese Housing Office will evaluate the Sacred Heart application for evidence of the visioning, outreach and consensus-building that has gone on within the Church and the neighborhood, which is necessary for a successful development project.

As a result, the work products outlined are intended to meet the needs identified above.

1. A summary and documentation of the work the church has undertaken to date;
2. A market study for the uses identified by the Pastoral Council (senior housing and education) as well as office, retail and community center use;
3. A sample pro forma for senior housing to illustrate basic development financing to the Council and other interested Parishioners.
4. Compilation of products into a final document which will be presented to both the Archdiocese Housing Office and the Pastoral Council.

OPPORTUNITY RESPONSE

In the spring of 2001, the Pastoral Council of St. Ignace established a committee to study the feasibility of a new parish. The committee was composed of members of the Pastoral Council, the parish council, and the parishioners. The committee's mandate was to study the feasibility of a new parish in the area of St. Ignace, and to report to the Pastoral Council and the parishioners. The committee's report was presented to the Pastoral Council and the parishioners in the fall of 2001. The committee's report was positive, and it recommended that a new parish be established in the area of St. Ignace.

As a result, the work of the committee was rewarded to create the new parish.

A summary and documentation of the work of the committee was submitted to the Pastoral Council.

A letter was sent to the Pastoral Council by the Pastoral Council, and a letter was sent to the parishioners by the parishioners, and a letter was sent to the parishioners by the parishioners.

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RELATIONSHIP WITH THE CLIENT

Sacred Heart Church, represented by Father Baccellieri and the Pastoral Council, is the client for the final products proposed within this document. The group will collaborate with the client to research and synthesize the significant effort they have put forth in arriving at their redevelopment priorities. CGS Consultants will compile the second and third products through independent research. The results of our research will be presented to the pastoral council for their use in continuing to refine the development vision and to collect additional input.

Beyond regular information-gathering contacts, the group will sit in on the Pastoral Council's monthly meetings in April and May to present updates and gather feedback. At April's meeting the group will present and elicit feedback on our summation of the visioning process. In May, the group will present the preliminary results of both the market and feasibility studies.

The group expects to rely upon a number of sources beyond the church both to gather information and for peer review of the products developed. Informational sources are listed in product methodology below. Peer reviewers, to be met with individually on an as-needed basis include:

- Doug Glancy, Director of Development, REACH CDC
- Will Macht, Macht Development Co.
- Will White, Director, Housing Development Center
- Ed Starkie, Edward Starkie Consulting

RELATIONSHIP WITH THE CLIENT

During the initial phase of the project, the client and the project manager will establish a relationship with the client. The client will provide the project manager with the necessary information to develop a project plan. The project manager will then develop a project plan and submit it to the client for approval. Once the project plan is approved, the project manager will begin the project and will report progress to the client on a regular basis.

The project manager will also be responsible for managing the project budget and for ensuring that the project is completed on time. The project manager will also be responsible for managing the project risks and for ensuring that the project is completed within the client's expectations.

The project manager will also be responsible for managing the project communication and for ensuring that the client is kept informed of the project progress. The project manager will also be responsible for managing the project resources and for ensuring that the project is completed within the client's budget.

• Project Manager: Responsible for overall project management and for ensuring that the project is completed on time and within budget.

• Client: Responsible for providing the project manager with the necessary information and for approving the project plan.

• Sponsor: Responsible for providing the project manager with the necessary resources and for ensuring that the project is completed within the client's budget.

• Stakeholders: Responsible for providing the project manager with the necessary information and for ensuring that the project is completed within the client's expectations.

THE PRODUCT

This section describes each of the four products that will be provided for the Sacred Heart Church, detailing the sources, methodology and necessary tasks for each work product.

Summation of Visioning Process

The summation of the Sacred Heart process will be a process timeline and a supporting narrative. The goal of this product is to concisely define what the Parish has accomplished during the last two years, and to communicate to the Archdiocese Housing Office the development options considered, the rationale for decisions made, and the depth of Parishioner consensus behind each decision. In the evaluation process, the Housing Office emphasizes Parishioner commitment to and involvement in the redevelopment of their property. Documenting the work undertaken by the Pastoral Council will strengthen the development application. This product will also allow the Pastoral Council to better reflect upon their process and to move forward with greater confidence in the efforts they have undertaken to date.

Methodology: Summation of Development Process

CGS Consultants will compile the history of Sacred Heart's internal discussions and interaction with various consultants, partnering organizations and the Brooklyn community. The following sources will be utilized:

Source A. Interviews:

- Catholic Archdiocese Housing Office
- Reach CDC/Milwaukee Action Plan Staff
- Dibendetto/Thompson/Livingstone Architects PC
- Developer Brian McCarl
- Father Joe Baccellieri
- Sacred Heart staff
- Pastoral Council Members

Source B. Documents:

- *Sacred Heart Master Plan*
- Brian McCarl's drawings & site designs
- *Regenerating Brooklyn Main Street: Milwaukee Action Plan Design Recommendations*
- Pastoral Council Meeting Minutes

- *Sacred Heart Parish History*
- *Milwaukie Action Plan*
- *Listen Session Notes*
- *Brooklyn Neighborhood Plan*

Tasks: Summation of Visioning Process

1. Conduct interviews and any necessary follow-up communication with the above sources. Ask sources to describe:
 - Their involvement in the process.
 - The strengths and weaknesses of the process from their perspective.
2. Summarize interviews (key points & insights) for final appendix.
3. Distribute introductory letter to members of the Parish explaining the purpose of the work products that will be provided to the church.
4. Collect, read and summarize the above documents.
5. Create draft outline of process.
6. Create decision chart, indicating options considered, rationale for rejection or pursuit of option, and how option relates to organizational mission statement.
7. Review draft outline and decision chart with Pastoral Council for input.
8. Finalize process outline and narrative.

Market Study

The market study will provide the Pastoral Council with an understanding of the existing and potential market demand, current supply (competition) and anticipated cash flow for various uses. The study will investigate the two uses prioritized by the Council (senior housing and education/early childhood development). Three additional uses: retail, office, and a City-sponsored community center will be analyzed for further consideration by the Council. These additional uses are included to help broaden the discussion, and to ensure that supporting data is available should the Council decide to pursue other land uses, e.g., first floor retail within a senior housing development. Increasing the Pastoral Council's awareness of market demand considerations will increase their confidence in their decisions and the final development proposal.

Methodology: Market Study

A market study is a document that follows a standard format to display data collected through a variety of sources. Market studies define and explain significant market elements including; regional economic trends, demographics of the market area, and supply and demand for particular uses. These elements are then used to identify what uses the market will bear.

Element A. Brief overview of larger regional economic trends and policies

Relevant trends will include projected regional population growth, an overview of the fastest growing industries, job growth, etc., and potential regional impacts of large-scale trends such as state Medicare cuts (likely to impact senior housing).

Sources: Portland Development Commission (PDC) and City of Portland Bureau of Planning market analyses, State of Oregon Economic Report, The Institute of Metropolitan Studies, METRO

Element B. Demographics

The market within three relevant geographies—the Brooklyn Neighborhood, SE Portland, and the Portland metro region—will be described through the indicators listed below. This information will be presented as trend data over the past 20 years and forecasted over the next 5 years, in a table format, to illustrate the recent and predicted growth and/or decline of these market indicators. Statistics to be considered include:

- Number of households
- Housing unit mix
- Household composition
- Population age structure
- Median income
- Education level

Sources: Census Data, 1980, 1990, 1996 (American Community Survey), METRO, Population Research Center

Element C. Market supply & demand for potential use categories

This element describes the existing supply and demand for five uses: housing, education, retail, office, and a City-sponsored community center. Tables will be used to present the data in a format that is easy to comprehend and compare (See Appendix B for sample tables). These tables will likely be reformatted for the final product according to the extent and relevancy of information.

Two geographies are considered for each use: the Brooklyn neighborhood and the Portland metro region. Each describes a market range that warrants consideration: while Brooklyn represents the immediate market, most uses (such as senior housing) will draw tenants from throughout the region. Column headings vary by use: for example, vacancy rates describe the demand for housing and retail space whereas enrollment figures and waiting list numbers describe the demand for private early childhood education. For office space, absorption rate approximates market demand by describing the typical length of time new construction sits on the market before it is leased.

Rent range describes the housing, office and retail rents that the market will bear. 'Market segment' describes the typical family that sends its child to a private educational institution (implications for this use, for example, will likely relate market segment results to the demographic characteristics of the Brooklyn neighborhood). Data will be compiled through the sources listed below; a list of implications will accompany each chart as described in the appendix.

Housing Sources: Census Data, REACH CDC, Community Development Network, Northwest Pilot Project, and Metro.

Educational Use Sources: Catholic Church, Office of the Clergy; Phone interviews; Daycare Association/licensing organization; ROSE CDC

Office Sources: Milwaukee Action Plan, Greater Brooklyn Business Association Market Study, Hovee/PDC reports, Grubb & Ellis Market Reports

Retail Sources: Milwaukee Action Plan, Greater Brooklyn Business Association Market Study, Hovee/PDC reports, Grubb & Ellis Market Reports

City Sponsored Community Center Sources: City of Portland, Bureau of Parks, Census/American Community Survey.

Tasks: Market Study

1. Review tables with two members of peer review panel for feedback.
2. Collect data per chart according to the sources listed.
3. Revisit methodology: do the above charts provide the best summary of market demand and supply? Did researchers find alternative information worthy of inclusion? Was all information available?
4. Complete draft charts.
5. Draft bulleted implications to accompany each chart.
6. Discuss and formulate additional implications as a group.
7. Review completed charts and implications with two members of peer review panel.
8. Present charts to Pastoral Council (May meeting) for additional input on how uses further their mission.
9. Finalize charts and implications.

Feasibility Study

The primary purpose of the feasibility study is to increase church members' understanding of and comfort level with the development process and development financing. A feasibility study will be prepared containing two main components: a regulatory analysis and a sample pro-forma. The

regulatory analysis will consider the opportunities and constraints contained in City Code as applicable to the church property.

A pro-forma demonstrates the costs, revenues and financial functioning of a real estate development (See Appendix C for sample pro-forma). It details one financial scenario for a specific use, integrating results from the market analysis with site specifics (such as lot size, zoning restrictions, etc.). A variety of senior housing options will be considered for this pro-forma. This proposed use has garnered the greatest support within the Pastoral Council and has proven to be successful with similar properties that have been developed by the Archdiocese.

The sample pro-forma will help Pastoral Council members understand how revenue from a development can repay the debt assumption that large-scale development requires. The initial framework of the feasibility study provided to the client can be expanded upon by the Archdiocese Housing Office in its pursuit of a formal financial application process with a lender.

Methodology: Feasibility study

Element A: Regulatory analysis

The regulatory analysis will explore the regulatory parameters of this site, including the City of Portland zoning code, comprehensive plan, design guidelines and other applicable City, Regional, State and Federal laws. The outcome of this analysis will help determine densities based upon intended land uses as well as provide a framework for the types of construction costs that may be incurred due to design guideline parameters found in the City's code.

Sources: City of Portland Zoning Code, City of Portland Comprehensive Plan, METRO Regional Transportation Plan, METRO's 2040 Vision, Milwaukie Action Plan Design Guidelines, Federal Religious Land Use and Institutionalized Persons Act of 2000

Element B: Pro-forma analysis for senior housing

Much like a market study, a pro-forma involves collecting and presenting numbers testing the viability of a development. The pro-forma will demonstrate possible financial scenarios for senior housing, deriving from calculations that are based upon projected revenues and costs associated with developing an allowed number of housing units for seniors identified in the regulatory analysis.

The sample pro-forma (Appendix B) demonstrates the structure that will be used to calculate the financial feasibility of this project. The sources listed below, along with information obtained from the market analysis, will provide costs and revenue data.

Sources: Interviews with U.S. Bank construction loan officers, DiBenidetto/Thompson/ Livingstone architects, City of Portland Office of Planning and Development Review, development manuals, construction cost manuals.

Tasks: Feasibility study

1. Complete zoning code review for each identified use.
2. Share information with Pastoral Council.
3. Determine types of senior housing to explore within pro forma.
4. Identify sources for determining debt coverage ratios and capitalization rates.
5. Summarize data from market analysis to determine projected rents.
6. Draft completed pro forma for discussion with two peer reviewers.
7. Review pro forma with Housing Office: can it be altered to better reflect considerations/costs/financing mechanisms specific to their office.
8. Present feasibility study to the Pastoral Council.
9. Provide memo to Pastoral Council outlining determining factors that will make this project financially feasible.

Documentation of Final Products

Sacred Heart will be provided a final document that is a compilation the summary of the church's visioning process to date, a market study including five possible land uses, a zoning code analysis, and pro-formas for senior housing. This document will contain the elements presented in the outlined work items above, in addition to recommendations on how to move forward with the redevelopment of the Sacred Heart property. This document will be presented to the Pastoral Council.

TEAM QUALIFICATIONS

Trina Buitron

Trina Buitron is currently a planner with WRG Design, Inc., a Portland-based planning, landscape architecture, surveying and engineering firm. She works as both a planner and Community Relations Coordinator for mixed-use development projects, including a currently proposed mixed-use Home Depot in Portland, OR. Trina graduated from University of Portland with a Bachelor of Science in Communications Management in 1994. She will complete a Masters in Urban and Regional Planning at Portland State University in June 2001. Trina has five years experience in planning and public involvement, specializing in mixed-use developments, residential subdivisions, and commercial centers.

David Gill

David Gill is currently employed in the Aviation Planning and Development Department of Portland International Airport (PDX), which is administered by the Port of Portland. David graduated from the University of Utah, Salt Lake City, with a Bachelor of Arts in Anthropology and English in 1998. He will complete a Masters in Urban and Regional Planning at Portland State University in June 2001. His current focus is the legal context of planning and its impact on the effectiveness of long-range planning. In September he will enroll at the Northwestern School of Law at Lewis and Clark College in Portland, Oregon to further explore this connection. David's planning experience includes working on the Terminal Expansion South (TES) Project at PDX as well as planning for expanded bus and pedestrian access at PDX.

Tess Jordan

Tess Jordan currently works for the City of Portland's Bureau of Planning in the long-range neighborhood planning division. She graduated from Reed College in 1996 with a Bachelor of Arts in Political Philosophy. She will complete a Masters in Urban and Regional Planning at Portland State University in December 2001, as well as a Graduate Certificate in Real Estate Development. Her past experience includes project management for the Community Development Network (CDN), an affordable housing advocacy group supporting local community development corporations. She has also worked as a drafter and carpenter for a residential design-build firm, and has researched and developed housing policy for the Portland Development Commission.

Eric King

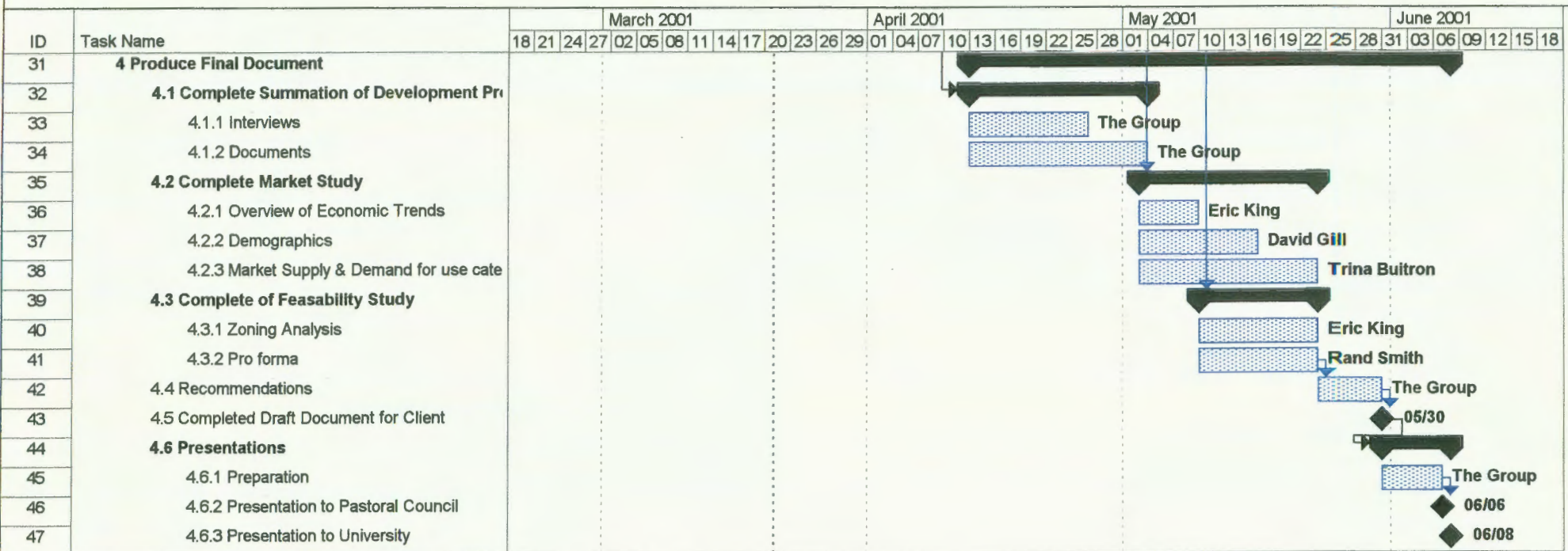
Eric currently works for the City of Portland, Office of Neighborhood Involvement as the Manager for the newly created Community Residential Siting Program. The program is designed to be a centralized point of information and referral to deal with questions/concerns around the siting of residential social services as well as provide mediation/facilitation services for groups in conflict. Eric graduated from the University of Wisconsin, Madison in 1997 with a Bachelor of Science in Economics and a Bachelor of Arts in Sociology with a certificate in Analytical Research. Currently, he is pursuing a Masters Degree in Urban and Regional Planning with a specialization in Land Use and a certificate in Real Estate Development. Eric is also actively involved in his neighborhood and has served as the chairman of the board for his homeowner's association.

Rand Smith

Rand is a land use planner with WRG Design, in Portland, Oregon. Rand holds a Bachelor of Science in Resort/Lodging Management from California State University, at Chico in 1993 and will complete a Masters in Urban and Regional Planning at Portland State University in June 2001, as well as a Graduate Certificate in Real Estate Development. Rand's relevant experience includes working with the State of Oregon's Transportation and Growth Management Program, which helps jurisdictions implement Smart growth principles into their Planning codes, as well as working with various developers through the entitlement phase of their projects.

APPENDIX A: TIMELINE

Project Timeline



Project: Sacred Heart Redevelopment
Date: Wed 03/21/01

Task



Milestone



External Tasks



Split



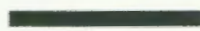
Summary



External Milestone



Progress



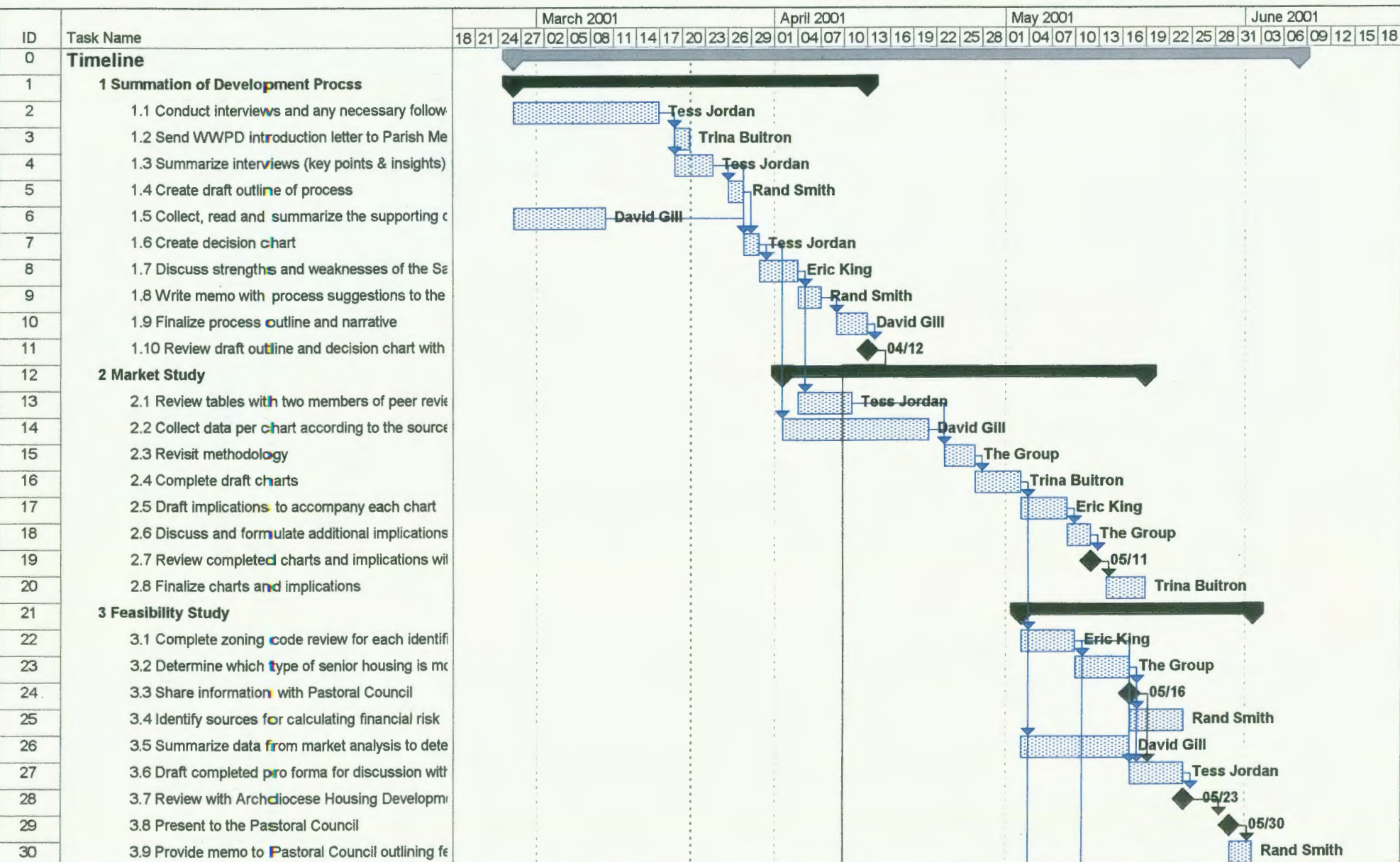
Project Summary



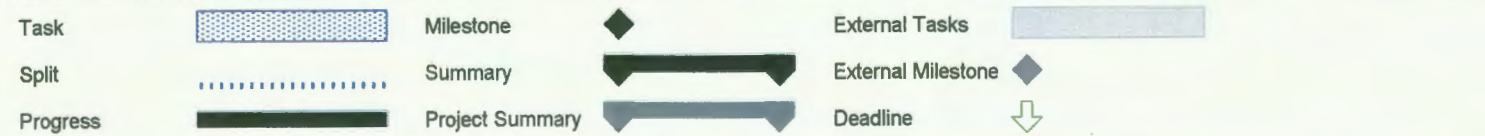
Deadline



Project Timeline



Project: Sacred Heart Redevelopment
Date: Wed 03/21/01



APPENDIX B: SAMPLE CHARTS FOR MARKET STUDY

1. Housing

	Brooklyn Neighborhood			Portland Region		
	Number units	Rent range	Vacancy rate	Number units	Rent range	Vacancy rate
Multi-Family						
Senior housing						
Live/Work Units for Individuals with Disabilities						
Adult Day Care						
Respite Care						
Affordable units						

Sources: Census Data, REACH CDC, Community Development Network, Northwest Pilot Project, and Metro.

2. Educational Uses

	Brooklyn Neighborhood			Portland Region		
	Number/ location of schools	Enrollment/ Capacity	Market segment	Number/ location of schools	Enrollment/ capacity	Market segment
Early Childhood						
Catholic (K-12)						
Daycare						

Sources: Catholic Church, Office of the Clergy; Phone interviews; Daycare Association/licensing organization; ROSE CDC

3. Office

	Brooklyn/SE Neighborhoods			Portland Region		
	Square footage on market	Rent range	Absorption rate 2000	Square footage on market	Rent range	Absorpti on rate 2000
Office Class A						
Office Class B						
Office Class C						

Sources: Milwaukee Action Plan, Greater Brooklyn Business Association Market Study, Hovee/PDC reports, Grubb & Ellis Market Reports

4. Retail

	Brooklyn/SE Neighborhoods			Portland Region		
	Square footage on market	Rent range	Vacancy rate	Square footage on market	Rent range	Vacancy rate
Retail: under 10,000 sq. ft.						
Retail: 10-30,000 sq. ft.						

Sources: Milwaukee Action Plan, Greater Brooklyn Business Association Market Study, Hovee/PDC reports, Grubb & Ellis Market Reports

5. City-sponsored Community Center

	Market as Defined by City of Portland, Bureau of Parks
Identified funding Sources	
Data demonstrating demand	
Overview of Siting Process	

Sources: City of Portland, Bureau of Parks, Census/American Community Survey.

APPENDIX C: SAMPLE PRO FORMA FOR SENIOR HOUSING

<i>Identified Use</i>		
	INCOME	Percent
Gross Leasible Area		
Rent/sf/yr		
Gross Rentable Income		
Common Area Maintenance/sf (CAM)		
CAM Total		
<i>Gross Income Subtotal</i>		
Vacancy Rate		
-Vac		
Effective Gross Income		
	EXPENSE	
Tax		
Insurance		
Utilities		
Common Area Maintenance		
Maintenance		
Management		
Operating Expenses		
NET OPERATING INCOME		
Debt Coverage Ratio		
Available Debt Service		
Debt Service Constant		
Mortgage Loan Amount		
Land Costs		
Land Costs (74,000 sf total) per sf		
Total Construction Costs per sf		
-Total Construction Costs		
Total Development Costs		
Total Development Costs per sf		
Equity Required		
Annual Debt Service		
Net Cash Flow		
Return on Cost		
Return on Equity		
Capitalization Rate		
Development Value		
Development Profit		