



POWELL-DIVISION TRANSIT AND DEVELOPMENT PROJECT

# **DRAFT** EQUITABLE DEVELOPMENT RESOURCE KIT

SEPTEMBER 3, 2014

## Equitable Development Resource Kit

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Spurred by early discussions as part of the Powell-Division Transit and Development Project, Metro initiated research into equitable development practices that would gather the great work already happening in communities and organizations throughout the metro region. Prompted also by community members, this research includes equitable development tools, case studies, lessons learned, and best practices from projects across the nation.

This document is a working draft, and Metro invites your contributions. The more information we share together and teach each other on this topic, the more robust our collective knowledge becomes. As a collaboratively developed and shared resource, it belongs to all of us. Please send ideas, comments, and other feedback related to this document to Heidi Beierle, [Heidi.beierle@oregonmetro.gov](mailto:Heidi.beierle@oregonmetro.gov), or Camille Freestone, [Camille.freestone@oregonmetro.gov](mailto:Camille.freestone@oregonmetro.gov), for inclusion in future drafts.

## OVERVIEW

The purpose of this document is to provide the people, organizations, and agencies working on equitable development with a common knowledgebase that we all can use to creatively approach community development opportunities, anticipate undesirable effects, and improve communities in the ways we all envision.

This document includes:

- **Resources** – an annotated list of plans, tools, and studies with key findings highlighted
- **Organizational websites and resources** – links to sites with information or resources beyond those included in the annotated list
- **News stories** – a collection of recent stories relating to equitable/ transit-oriented development
- **Case studies** – transit-oriented developments and planning processes outside the Portland metro area that exemplify one or many aspects of equitable transit-oriented development
- **Opportunities and challenges for equitable transit-oriented development** – a review of what works well and what hinders equitable transit-oriented development along with best-practices for overcoming challenges
- **Current equitable development conversations** – a list of Portland metro area agencies, organizations, and coalitions developing and applying equitable development strategies
- **Equitable development tools** – a review of tools used in the Portland metro area and other places

## RESOURCES

### ***A Guide to Community-Driven Transit Oriented Development Planning, T.R.U.S.T. South LA and Abode Communities***

Materials are available online at [www.TRUSTsouthla.org/TODguide](http://www.TRUSTsouthla.org/TODguide)

The Rolland Curtis Gardens redevelopment project serves as an extended case study and resource model for developments that include new affordable housing and community-serving commercial uses located near transit hubs. The guide reflects the planning procedure from outreach and organizing to developing a final site plan.

### ***Building the Line to Equity: Six Steps for Achieving Equitable Transit Oriented Development in Massachusetts, S Pollack, K Rose, D Marsh, Policy Link. August 2006.***

Available at [http://beta.policylink.org/sites/default/files/BuildingTheLineToEquity\\_final.pdf](http://beta.policylink.org/sites/default/files/BuildingTheLineToEquity_final.pdf)

### ***Creating Equitable, Healthy, and Sustainable Communities, EPA***

<http://www.epa.gov/environmentaljustice/sustainability/index.html> under “Research” plus many other good resources on this site

This document provides an overview of equitable community development. It uses case studies to demonstrate past successes that offer low-income, minority, tribal, and overburdened communities development approaches that respond to their needs and that reflect their values. Seven common elements serve as the EPA’s best practices for places that provide clean air, water, and land; affordable and healthy homes; safe, reliable, and economical transportation options; and convenient access to jobs, schools, parks, shopping, and other daily necessities.

#### Seven Common Elements

- Facilitate meaningful community engagement in planning and land use decisions
- Promote public health and a clean and safe environment
- Strengthen existing communities
- Provide housing choices
- Provide transportation options
- Improve access to opportunities and daily necessities
- Preserve and build on the features that make a community distinctive

### ***Equitable Development Toolkit: Transit Oriented Development, Policy Link, [www.policylink.org](http://www.policylink.org)***

Available at

[http://www.policylink.org/site/c.lkIXLbMNJrE/b.5137373/k.E65E/Transit\\_Oriented\\_Development.htm](http://www.policylink.org/site/c.lkIXLbMNJrE/b.5137373/k.E65E/Transit_Oriented_Development.htm) and the entire suite of tools in the Equitable Development Toolkit can be found on

Policy Link’s website:

[http://www.policylink.org/site/c.lkIXLbMNJrE/b.5136725/k.EE25/All\\_Tools.htm](http://www.policylink.org/site/c.lkIXLbMNJrE/b.5136725/k.EE25/All_Tools.htm)

The toolkit provides tools that advocates, community builders, and organizers can use to achieve diverse, mixed-income neighborhoods that provide access to opportunities for employment, education, affordable housing, and health and well-being. The tools provide strategies to reduce economic and social disparities among individuals, social groups, neighborhoods, and local jurisdictions across metropolitan regions. These strategies include policy changes that promote mixed-income communities, benefit all community residents, and strengthen metropolitan regions.

***Equitable Development Toolkit: Code Enforcement, Policy Link, [www.policylink.org](http://www.policylink.org)***

Available at <http://www.policylink.org/sites/default/files/code-enforcement.pdf>

This report describes the use of housing code enforcement as a tool to transfer ownership of multi-family dwellings to tenants or community organizations in cases where codes have been violated. It discusses implementation, key players, and related policy, and includes a case study for Washington DC's Columbia Heights neighborhood.

***Equitable Development Toolkit: Commercial Stabilization, Policy Link, [www.policylink.org](http://www.policylink.org)***

Available at <http://www.policylink.org/sites/default/files/commercial-stabalizing.pdf>

This report describes the range of available commercial stabilization tools, which can include capital investment, design guidelines, business attraction, façade improvement, and commercial development. It discusses key players, financing, implementation, and related policies and offers case studies of commercial stabilization efforts in Oakland and Berkeley.

***Equitable Development Toolkit: Cooperative ownership Models, Policy Link, [www.policylink.org](http://www.policylink.org)***

Available at <http://www.policylink.org/sites/default/files/Cooperative-Ownership-Models.pdf>

This report describes models of cooperative business ownership, including worker cooperatives, employee stock ownership plans, consumer cooperatives, and producer cooperatives. It covers financing, related policies, and implementation challenges and includes case studies for a worker cooperative temp agency in Baltimore and a producer cooperative in Puerto Rico.

***Equitable Development Toolkit: Rent Control, Policy Link, [www.policylink.org](http://www.policylink.org)***

Available at <http://www.policylink.org/sites/default/files/rent-control.pdf>

This report describes elements of strong rent control laws to protect tenants from rising housing costs and provides counterarguments to the most common arguments against rent control policies. The authors provide brief case studies for Hoboken, NJ, Santa Monica, San Francisco, and Baltimore as well as links to rent control legislation and ordinances.

***eTOD Score: A Proposed Rating System for Equitable Transit-Oriented Development, Northeastern University Dukakis Center for Urban and Regional Policy and Center for Transit-Oriented Development. December 2012.***

Available at [http://www.northeastern.edu/dukakiscenter/wp-content/uploads/eTOD\\_StationAreaRatingSystem\\_01092013.pdf](http://www.northeastern.edu/dukakiscenter/wp-content/uploads/eTOD_StationAreaRatingSystem_01092013.pdf)

The purpose of this document is to propose an objective way of assessing which station areas and what types of transit-oriented development can best serve both regional and local needs, using Boston as the test case city. This rating system is designed to identify neighborhoods and districts with built, social, and transit attributes that reduce driving, encourage higher transit ridership, and promote transit equity and accessibility. “Good” equitable transit-oriented projects provide what is “missing” in a station area, which improves a neighborhood’s or station area’s suitability for equitable transit-oriented development.

***Families and Transit-Oriented Development: Creating Complete Communities for All*, Federal Transit Administration and Center for Cities and Schools, University of California, Berkeley. June 2012.**

Available at <http://reconnectingamerica.org/resource-center/browse-research/2012-2/tod-205-families-and-transit-oriented-development-creating-complete-communities-for-all/>

This planning manual illustrates why planning for transit-oriented development that serves families is important for creating complete communities and how such integrated planning can be achieved. The first half of the book lays out the why – families are an important market segment that can receive many benefits from locating in transit-rich locations with a mix of housing, retail, and other uses. Next, the manual describes the ten core connections between TOD and families, and then delves into seven action-oriented steps to support family-friendly complete communities and high-quality education.

***Filling the Financing Gap for Equitable Transit-Oriented Development: Lessons from Atlanta, Denver, and the San Francisco Bay Area and the Twin Cities*, Enterprise Community Partners, Low Income Investment Fund, Living Cities**

Available at <http://www.liifund.org/wp-content/uploads/2013/04/TOD-Report-03-26-13-FINAL.pdf>

Equitable Transit-Oriented Development (TOD) requires cross-disciplinary integration among many actors, and regions across the county differ in at least four critical variables that affect equitable TOD: strong, moderate, or weak economies; political will; capacity among stakeholders; and nature of the transit system. The study:

- Defines the actors and behaviors that lead to successful equitable TOD outcomes
- Lays out a few key equitable TOD system-level findings
- Identifies key project level challenges and financing gaps and offers recommendations
- Offers three suggestions to advance equitable TOD
- Provides twelve case studies

***Fostering Equitable and Sustainable Transit-Oriented Development, Living Cities, [www.livingcities.org](http://www.livingcities.org)***

Available at <http://www.livingcities.org/knowledge/media/?action=view&id=5>. There are additional resources on the Living Cities site. They contributed to the “Filling the Financing Gap...” document above.

The five papers collected in this document focus on the critical roles different stakeholder groups can play individually and collectively to catalyze opportunities for TOD implementation across the country, and to explore new models and tools that will respond to the needs of the 21st century. The briefing papers address barriers to and promoting growth of sustainable TOD. The papers explore:

- What is the ideal for TOD we want to see on the ground versus the reality of current land-use and development patterns? What has actually been achieved?
- Public sector roles
- Investment community roles
- Private developer roles
- Philanthropic sector roles

Together, these papers describe a series of common and distinct barriers, and they point to the potential for more coordinated action among stakeholder groups.

***FTA Fact Sheet: Transit-Oriented Development Planning Pilot***

Available at [http://www.fta.dot.gov/documents/MAP-21\\_Fact\\_Sheet\\_-\\_Transit-Oriented\\_Development\\_Planning\\_Pilot.pdf](http://www.fta.dot.gov/documents/MAP-21_Fact_Sheet_-_Transit-Oriented_Development_Planning_Pilot.pdf)

This fact sheet provides an overview of funding opportunities within MAP-21 for transit-oriented development. This may be a possible funding source for the project, but it will be important to revisit in 2015 following reauthorization of MAP-21 or changes with a new transportation bill.

***Gentrification and Displacement Study Overview, Dr. Lisa Bates, City of Portland Bureau of Planning and Sustainability.***

Available at <https://www.portlandoregon.gov/bps/article/452087>

This overview introduces a longer work with full detail and succinctly introduces gentrification as the negative consequences of revitalizing neighborhoods and defines it. The study assesses the vulnerability of different neighborhoods to early-, mid-, and late-stage gentrification. The full study explores the risk for residential displacement, a review of national best practices, and policy tools and program that Portland could use to mitigate gentrification. The overview concludes with a list of Portland policies that support equitable housing development and a list of best practices categorized for which stage of gentrification they are most useful to mitigate the negative effects.

Full report available at <https://www.portlandoregon.gov/bps/article/454027>



***In the Face of Gentrification: Case Studies of local Efforts to Mitigate Displacement*, D K Levy, J Comey, S Padilla, Washington DC: The Urban Institute. 2006.**

Available at [http://www.urban.org/UploadedPDF/411294\\_gentrification.pdf](http://www.urban.org/UploadedPDF/411294_gentrification.pdf)

This report's case study of Seattle's Central Area describes how the local Chamber of Commerce created an Urban Enterprise Center focused on job training and business development for residents in that neighborhood.

***Infrastructure Financing Options for Transit-Oriented Development*, Environmental Protection Agency. January 2013**

Available at <https://www.planning.org/divisions/blackcommunity/pdf/garyindinana.pdf>

***Keeping the Neighborhood Affordable: A Handbook of Housing Strategies for Gentrifying Areas*, D K Levy, J Comey, S Padilla, Washington DC: The Urban Institute. 2006.**

Available at [http://www.urban.org/UploadedPDF/411295\\_gentrifying\\_areas.pdf](http://www.urban.org/UploadedPDF/411295_gentrifying_areas.pdf)

This handbook provides an overview of strategies for addressing affordable housing. The strategies are divided into three categories: housing production, housing retention, and asset building; possible outcomes and implementation challenges are considered. This document considers the interplay of strategy implementation and housing-market context.

**Housing production:** housing trust funds, inclusionary zoning ordinances, low-income housing tax credits, split-rate tax structure, tax increment financing

**Housing retention:** code enforcement, rent control, preservation of federally subsidized housing (Section 236 and Project-based Section 8), tax relief assistance

**Asset building:** individual development accounts (IDAs), homeownership and education counseling, limited equity housing co-ops (LEHCs), community land trusts (CLTs), location efficient mortgages (LEM), Section 8 homeownership program

***Making the Connection: Transit-Oriented Development and Jobs* S Grady and G LeRoy, Good Jobs First. March 2006.**

Available at

<http://www.goodjobsfirst.org/sites/default/files/docs/pdf/makingtheconnection.pdf>

This study examines the ways TOD can serve the needs of working families – particularly those with low and moderate income – by providing affordable housing and/or better access to jobs. Three types of projects have a higher likelihood of addressing the needs of working families: projects in which a community coalition negotiated for a Community Benefits Agreement that included elements such as local hiring, living wages, and affordable housing set-asides; projects in which a community development corporation initiated the project and made it integral to its neighborhood improvement mission; and cases in which an exceptional private developer intentionally designed a project for the benefit of low-income families and/or commuters. An



important finding is that in most cases economic development subsidies help make the project happen; however, only in Portland is there any tie between economic development and transit. Authors recommend reforming job subsidies to make them location efficient as a way to codify equitable TOD intent (related to jobs and working families). Portland, Oregon's Transit-Oriented Development Property Tax Exemption is the one example where jobs and transit are connected.

***Neighborhood Change, 1970 to 2010: Transition and Growth in Urban High Poverty Neighborhoods, Joseph Cortright, Impresa Inc., Dillon Mahmoudi, Portland State University. May 2014.***

Report available online at <http://www.impresaconsulting.com/page/neighborhood-change>

This paper analyzes changes in high poverty urban neighborhoods in the nation's large metropolitan areas between 1970 and 2010. The study uses census tract data to track neighborhood performance and defines high poverty as neighborhoods with a poverty rate of greater than 30 percent. Five key findings:

- High poverty neighborhoods experience a high persistence of poverty over time
- High poverty neighborhoods are not stable
- The incidence of neighborhood rebounding is surprisingly small
- The number of high poverty neighborhoods in the core of metropolitan areas has tripled and their population has doubled in the past four decades
- High poverty areas experience an "up or out" dynamic

Gentrification gets noticed because it happens fast although it occurs relatively infrequently. The slow decline of neighborhoods appears in far greater proportion than gentrification; however, it happens imperceptibly. Consequently, people do not tend to notice neighborhood decline. Racial and ethnic desegregation in neighborhoods has led to increased income segregation among neighborhoods, which damages neighborhood vitality more than racial and ethnic segregation.

Mixing incomes, education, and home ownership within neighborhoods can help stabilize them and work against and/or slow the forces of neighborhood decline.

***Not in Cully: Anti-Displacement Strategies for the Cully Neighborhood, Living Cully. June 2013.***

Available at

[http://www.pdx.edu/usp/sites/www.pdx.edu.usp/files/A\\_LivingCully\\_PrinterFriendly\\_0.pdf](http://www.pdx.edu/usp/sites/www.pdx.edu.usp/files/A_LivingCully_PrinterFriendly_0.pdf)

***Redefining Redevelopment: Participatory Research for Equity in the Los Angeles Figueroa Corrido, A Gibbons and G Haas, Figueroa Corridor Coalition for Economic Justice. 2002.***

Available at <http://www.saje.net/atf/cf/%7B493B2790-DD4E-4ED0-8F4E-C78E8F3A7561%7D/redefineredevelopment.pdf>

This report summarizes research undertaken by the coalition to identify best practices for designing a community jobs program. Now operational, the program trains low-income residents for jobs generated by investment in the corridor.

***Strategies to Prevent Displacement of Residents and Businesses in Pittsburgh’s Hill District, R Damewood and B Young-Laing. 2011.***

Available at [www.hdcg.org/Content/Documents/Document.aspx?DocId=120570](http://www.hdcg.org/Content/Documents/Document.aspx?DocId=120570)

This paper provides an overview of the Hill District’s history of disinvestment and recent development pressures. It reviews anti-displacement strategies that have been used throughout the country and discusses the efforts of a neighborhood advocacy group and community development law firm to have these strategies implemented in the Hill District. The paper includes Hamtramck, Michigan’s “right to return” policy, the result of African American former residents’ class action lawsuit against the city for discriminatory urban renewal efforts, that requires the city to develop affordable replacement housing and give children and grandchildren of displaced residents first priority for returning. The authors recommend adopting a right to return policy for the Hill District under which all new housing development plans must give admissions preference for displaced persons, including residents who were displaced by urban renewal and their descendants.

***The Tracking Toolbox: A Resource for Understanding Your City’s Development Process and Making It Work Better for Workers, Neighborhoods and Communities.* Jennifer Steffel Johnson, The Partnership for Working Families.**

Available at

[http://www.forworkingfamilies.org/sites/pwf/files/publications/2010.05\\_tracking\\_toolbox.pdf](http://www.forworkingfamilies.org/sites/pwf/files/publications/2010.05_tracking_toolbox.pdf)

***TOD 205 Families and Transit-Oriented Development: Creating Complete Communities for All,* Center for Transit-Oriented Development in partnership with the Center for Cities and Schools**

Available at <http://www.ctod.org/pdfs/tod205.pdf>

Center for Transit-Oriented Development [www.ctod.org](http://www.ctod.org)

***Vision for Broadway – Planning and the Black Community Division Technical Assistance Workshop: Applying Equitable Development and Smart Growth Strategies for Corridor Enhancement.* Planning and the Black Community Division, American Planning Association. June 2009.**

Available at <https://www.planning.org/divisions/blackcommunity/pdf/garyindiana.pdf>

***Equitable Development Toolkit: Community Reinvestment Act,* Policy Link, [www.policylink.org](http://www.policylink.org)**

Available at <http://www.policylink.org/sites/default/files/community-reinvestment-act.pdf>

***Equitable Development Toolkit: Corner Stores,* Policy Link, [www.policylink.org](http://www.policylink.org)**

Available at <http://www.policylink.org/sites/default/files/corner-stores.pdf>

***Equitable Development Toolkit: Developer Exactions,* Policy Link, [www.policylink.org](http://www.policylink.org)**

Available at <http://www.policylink.org/sites/default/files/developer-exactions.pdf>

***Equitable Development Toolkit: Farmers market***, Policy Link, [www.policylink.org](http://www.policylink.org)

Available at <http://www.policylink.org/sites/default/files/developer-exactions.pdf>

***Equitable Development Toolkit: Grocery Stores***, Policy Link, [www.policylink.org](http://www.policylink.org)

Available at <http://www.policylink.org/sites/default/files/grocery-stores.pdf>

***Equitable Development Toolkit: Living Wage Provisions***, Policy Link, [www.policylink.org](http://www.policylink.org)

Available at <http://www.policylink.org/sites/default/files/living-wage-provisions.pdf>

***Equitable Development Toolkit: Local Hiring***, Policy Link, [www.policylink.org](http://www.policylink.org)

Available at <http://www.policylink.org/sites/default/files/local-hiring.pdf>

***Equitable Development Toolkit: Minority Contracting***, Policy Link, [www.policylink.org](http://www.policylink.org)

Available at <http://www.policylink.org/sites/default/files/minority-contracting.pdf>

## ORGANIZATIONAL WEBSITES AND RESOURCES

Coalition for a Livable Future [www.clfuture.org](http://www.clfuture.org)

Resource portal: <https://clfuture.org/resources/other-resources>

Includes: demographics, economic opportunity, education, equity, food, health, healthy environment, housing, opportunity mapping, transportation

Center for Transit-Oriented Development [www.ctod.org](http://www.ctod.org)

The Labor/Community Strategy Center <http://www.thestrategycenter.org/>

[Bus Riders Union](#)

[Transit Riders for Public Participation](#)

Transportation for America <http://t4america.org/>

[Access to Jobs](#)

Transportation Equity <http://www.transportationequity.org/>

[PolicyLink Transportation Prescription](#): Bold New Ideas for a Healthy, Equitable Transportation System 2009

## NEWS ARTICLES

Study shows gap between public health and transportation policy, June 12, 2014

<http://www.ucdenver.edu/about/newsroom/newsreleases/Pages/Study-shows-gap-between-public-health-and-transportation-policy.aspx>

Does new mass transit always have to mean rapidly rising rents?, May 13, 2014

<http://www.citylab.com/housing/2014/05/does-new-mass-transit-always-have-mean-rapidly-rising-rents/9077/>

Learning in: A coalition organizes for equitable redevelopment, June 23, 2014

[http://www.rooflines.org/3752/learning\\_in\\_a\\_coalition\\_organizes\\_for\\_equitable\\_redevelopmen\\_t](http://www.rooflines.org/3752/learning_in_a_coalition_organizes_for_equitable_redevelopmen_t)

Light rail significantly reduces traffic study shows. Does it apply to Portland-Tigard Southwest Corridor?, July 3, 2014

[http://www.oregonlive.com/commuting/index.ssf/2014/07/study\\_shows\\_how\\_light\\_rail\\_red.ht\\_m\\_l](http://www.oregonlive.com/commuting/index.ssf/2014/07/study_shows_how_light_rail_red.ht_m_l)

About select bus service in NYC. Choosing the routes.

<http://www.nyc.gov/html/bmt/html/about/choosing-routes.shtml>

Making the Fairmount line gentrification-proof, July 15, 2014

<http://www.bostonglobe.com/opinion/2014/07/15/making-fairmount-line-gentrification-proof/KB568Ymham1MCS6iY7bPgM/story.html>

The value of fast transit, July 21, 2014

<http://www.thetransportpolitic.com/2014/07/21/the-value-of-fast-transit/>

Metro renews focus on creating affordable housing, August 13, 2014

<http://news.streetroots.org/2014/08/13/metro-renews-focus-creating-affordable-housing>

## CASE STUDIES

### Minneapolis-St. Paul, Midtown Global Exchange (open since May 2006)

New transit facility and 2 transfer stations

1929 Midtown Exchange building vacant for many years

350 housing units (88 historic lofts, 219 market rate and affordable rental units, 52 town homes); 411,000 sq ft of office space to health HQs; 10,000 sq ft to County offices; 71,000 sq ft to Global Market; 1900-space parking garage

Created or retained more than 2000 jobs, including 200 local entrepreneurs at Global Market Houses 65 local businesses, provides stable neighborhood anchor, successfully mixes uses

### Minneapolis-St. Paul, Frogtown Square (completed Feb 2011)

50 units affordable senior housing, ground floor retail, underground parking

Help revitalize area and reduce crime

Fully leased retail space builds on success of the Neighborhood Development Center (also tenant) and entrepreneurship program – did take some time; well-designed functional retail bays;

+ local- and minority-owned small businesses, neighbors: new library, affordable housing for 98 families; builds an economy from within a neighborhood, serves as an example to aspiring small businesses along central corridor

Aims to attain 18% minority and 6% female workforce participation in the Central Corridor light rail transit project

### Berkley, Ed Roberts Campus (opened November 2011)

Partnership among seven nonprofits with a history in Independent Living Movement of People with Disabilities

Universal design with residential and non-residential community uses

TOD with community facility as centerpiece, silo busting, extra financing sources by including diverse uses

Location along transit lines provided access to transportation funding

Lower income neighborhood has experienced most crime of all BART stations. Now safety improvements of various types reduce crime.

Uses draw attention to issues faced by people with disabilities, and it's a very successful project in this regard by providing accessible services for transit-dependent people.

### East Oakland, Fruitvale Public Market (first phase opened in 2003)

Neighborhood about half Hispanic with sizeable African American and Asian populations; median household income (\$36,849) well below city-wide average

40,000 sq ft retail space, 115,000 sq ft commercial space; 47 one- and two-bedroom residential units, 10 units designated affordable; offices provided for health provider, senior center, library, charter school, and child care center

Two-block pedestrian walkway and plaza connect to commercial and BART station

Second phase includes 257 mixed-income residential units and additional parking

Business improvement district taxed themselves to pay for regular sidewalk sweeping and street patrol within the village

Seattle, Othello Neighborhood Inclusive Planning (opened in July 2009)

Culturally diverse community engaged in planning around a new light rail station

Historically underrepresented communities

Today, vibrant and diverse neighborhood with shopping, a library, community college, and affordable homes

Nearly 50% of residents are foreign born, variety of income levels with affluent neighborhoods and two large public housing projects

City used online surveys and traditional neighborhood meetings

+ special outreach liaisons to work with members of historically underrepresented communities (ethnic, youth, people with disabilities), liaisons translated materials and held smaller meetings with constituents before City meetings, attendance at City meetings grew over time (participation increased from 10 to between 300 and 400 residents per meeting)

New Holly neighborhood includes 1450 homes for people with a range of incomes, new walking and biking path

3 additional housing complexes planned primarily for low-income buyers

Gary, IN, Vision for Broadway (document completed June 2009)

<http://www.planning.org/divisions/blackcommunity/pdf/garyindiana.pdf>

Preliminary planning project for a highway corridor between Downtown and Midtown, the historic heart of Gary's African American community (not specifically TOD, but improvements for bicycles and pedestrians are a priority, and possibility to add a trolley bus)

Gary was a steel boom town and has experienced population decline for 40 years, signs of revitalization are becoming increasingly apparent, but one of the primary challenges is dealing with smaller population, vacant, poorly maintained, and derelict buildings and vacant lots

Partnership with APA's Planning and the Black Community Division

Vision document establishes 6-month, 12-month, and 5-year actions to improve the Broadway corridor while other planning and development activities occur

Main planning tools used for this project include: historic preservation, equitable development, context sensitive design, vacant properties strategies, green collar jobs, trails and greenways, and youth programs

Chicago, Chicago-Bethel Center [www.bethelnewlife.org](http://www.bethelnewlife.org) (opened in May 2005)

Community organized around potential loss of its transit center, which catalyzed redevelopment 23,000 sq ft transit center, provides employment services, child care, and banking in a "green" building (LEED Gold) on a former brownfield site

Direct connection to Green Line Lake-Pulaski "L" stop

Community was struggling economically before the redevelopment

Plan addressed residents' needs for a walkable neighborhood and better community services

Provides employment counseling, job training, and placement services, commercial services, technology center, child care, and retail space

Catalyzed development of 50 affordable homes within walking distance of the Center and train station; retail tenants at the Center hire from the employment training program; increased access to community services and reduced environmental impacts



Montgomery County, Maryland – inclusionary zoning adopted in 1974

<http://montgomerycountymd.gov/DHCA/resources/files/rr-ahtf.pdf>

Urban centers, suburban neighborhoods, and productive agriculture

One million individuals, 18% of Maryland’s entire population with the largest concentration of residents holding a Bachelors degree of any community with a population over 50,000; nearly 500 square miles of land

Excellent school system, public services, job availability, well-maintained neighborhoods, and commercial centers

Progressive and effective affordable housing programs, such as the award winning Moderately Priced Dwelling Unit (MPDU) program, and the Montgomery Housing Initiative Fund (HIF), a model trust fund

Current efforts do not sufficiently address the affordable housing crisis, encompassing homeless and special needs populations, and into the range of the middle income workforce.

<http://nlihc.org/article/40-years-ago-montgomery-county-maryland-pioneers-inclusionary-zoning>

In 1974, Montgomery County, Maryland pioneered inclusionary zoning practices

Currently requires that between 12.5% and 15% of homes in new developments of 20 units or more be Moderately Priced Dwelling Units (MPDUs)

The program requires that 40% of newly developed MPDUs first be offered for sale to the Housing Opportunities Commission, Montgomery County’s public housing agency, and to non-profit housing providers

Produced approximately 12,500 units of housing affordable to moderate and low income families since its inception

View additional MPDU program information from the Montgomery County Department of Housing and Community Affairs at: <http://bit.ly/1F9tr0>

## OPPORTUNITIES AND CHALLENGES FOR EQUITABLE TOD

### Challenges to Equitable TOD

- Lack of policy and resources (incentives and requirements) to preserve affordable, non-rent restricted housing in high-opportunity areas (can lead to loss of affordable housing stock)
- Low-income communities are 1) often overlooked for development; 2) deeply impacted by withdrawal of jobs near transit; 3) not adequately engaged in developing plans for their future
- Particularly surrounding weaker market stations:
  - Difficulty overcoming issues of scale, complexity, and land assembly that are typical of large TOD projects
  - Competition for limited sources of permanent financing
  - Shortage of competitive (9%) Low Income Housing Tax Credits and other subsidy sources
  - Few TOD incentives are available within highly competitive pools of funding
- Extensive new infrastructure is often required that affordable housing developers cannot pay for alone
- Local land use regulations and controls are usually cumbersome and unsupportive of mixed-income TOD
- Subsidies for affordable housing at the federal and for most states have decreased in recent years
- Land prices around transit stations increase once a new transit line is announced, and affordable housing developers lack the funds to acquire and assemble this land
- Transit agencies must be involved but TOD is new function for them
- Rising land prices
- “Highest and best transit use” required by FTA (may be better following 2013 Appropriations Act for MAP-21 which includes \$10 million in 2013 and 2014 for TOD)
- Developer and lender assumptions
- Commuters
- Market forces
- Existing zoning
- Design and form

### Opportunities for Equitable TOD

- Transit agency is active and engaged partner
- Creative use of MPO or transit agency resources
- Refined uses of TIF to support equitable development (Portland dedicates 30% of TIF funds collected in URAs to housing that is affordable to households with incomes below 80% of the area median)
- 4% Low Income Housing Tax Credit (non-competitive) successful in submarkets of all strengths
- Strong opportunities to model use of 4% Low Income Housing Tax Credit near transit, potentially with mezzanine debt

- Experienced affordable housing developer engaged partner
- Prepare a strong business plan
- Be or find the right developer
- Secure tenants early (before construction)
- Build in phases
- Give TOD a good name
- Highlight double bottom line benefits of TOD – social and community outcomes of TOD still contribute to economic success

### Keys to Success

- Create the right mix of uses and build ridership demand
- Organize residents for meaningful community involvement
- Develop clear ambitions – but set realistic goals
- Be there at every stage
- Introduce anti-displacement early
  - An essential element is timing. Displacement prevention has failed pretty much consistently in Portland. EPAP contends that a significant element is not addressing this in the early disinvestment stage of gentrification and even in the reinvestment planning stage. Portland has consistently waited until displacement is entrenched.
- Focus on people and function, not formulas
  - Location efficiency
  - Value recapture
  - Livability
  - Financial return
  - Expanded choice
  - Efficient regional land use patterns
- Get the density right

### Common Elements for Equitable Development

- Facilitate meaningful community engagement in planning and land use decisions
- Promote public health and a clean and safe environment
- Strengthen existing communities
- Provide housing choices
- Provide transportation options
- Improve access to opportunities and daily necessities
- Preserve and build on the features that make a community distinctive

### Principles of Equitable Development (from APA Planning and the Black Community Division)

- Housing choice.
- Transportation choice.

- Personal responsibility.
- Capacity building.
- Healthy communities.
- Heritage preservation.
- Stewardship (environmental).
- Entrepreneurship.
- Sustainable wealth creation.
- Civic engagement.
- From good to great through planning/ design, standard of excellence.

**Other financing tools**

- New Market Tax Credit
- Historic Tax Credit
- Enterprise Zone Tax Credit
- National Historic Preservation Main Street program
- [Transportation Growth Management](#) (TGM) Grants

## CURRENT EQUITABLE DEVELOPMENT CONVERSATIONS

Contact Name	Contact email	Host/Organization	Meetings and Events	Location	Time
Lori Boisen	<a href="mailto:divisionmidwayalliance@gmail.com">divisionmidwayalliance@gmail.com</a>	EPAP (East Portland Action Plan) Economic Development Subcommittee	4 <sup>th</sup> Mon of the month	David Douglas School Board Room	6:30-8:30 pm
Donita Sue Fry	<a href="mailto:donitasf@nayapdx.org">donitasf@nayapdx.org</a>	EPAP Civic Engagement Subcommittee	3 <sup>rd</sup> Tuesday of the month		6:30-8:30 pm
Lore Wintergreen, East Portland Action Plan	<a href="mailto:lore.wintergreen@portlandoregon.gov">lore.wintergreen@portlandoregon.gov</a>	City of Portland, Health Equity Tools and EPAP Civic Engagement Subcom			
Ben Duncan	<a href="mailto:Benjamin.e.duncan@multco.us">Benjamin.e.duncan@multco.us</a>	Multnomah County – Office of Diversity and Equity			
Kathryn Sofich, Policy and Communications	<a href="mailto:kathryn.sofich@multco.us">kathryn.sofich@multco.us</a>	Multnomah County – Department of Community Justice			
Betsy Clapp	<a href="mailto:Elizabeth.clapp@multco.us">Elizabeth.clapp@multco.us</a> Olivia Quiroz: <a href="mailto:cwpp@multco.us">cwpp@multco.us</a> <a href="mailto:olivia.quiroz@co.multnomah.or.us">olivia.quiroz@co.multnomah.or.us</a>	Multnomah County – Health Department			
Jake Warr	<a href="mailto:warrj@trimet.org">warrj@trimet.org</a>	TriMet – Equity & Access Advisory Committee	3 <sup>rd</sup> Thursday of the month	TriMet	
Pietro Ferrari	<a href="mailto:Pietro.ferrari@oregonmetro.gov">Pietro.ferrari@oregonmetro.gov</a>	Metro – Equity Strategy Advisory Committee	Monthly June 23		3-5 pm
Jon Williams	<a href="mailto:Jonathan.williams@oregonmetro.gov">Jonathan.williams@oregonmetro.gov</a>	Metro – Equity Development Program			
Judith Mowry Dante James	<a href="mailto:Judith.mowry@portlandoregon.gov">Judith.mowry@portlandoregon.gov</a> <a href="mailto:Dante.james@portlandoregon.gov">Dante.james@portlandoregon.gov</a>	City of Portland – Office of Equity and	1 <sup>st</sup> and 3 <sup>rd</sup> Thus of the month (not open to	Office of Equity and Human Rights,	9-11 am

Paulo Catalani	<a href="mailto:Ronault.Catalani@portlandoregon.gov">Ronault.Catalani@portlandoregon.gov</a> <a href="mailto:jeri.williams@portlandoregon.gov">jeri.williams@portlandoregon.gov</a>	Human Rights, Citywide Equity Committee	the public-internal City staff)	421 SW 6 <sup>th</sup> Ave, Ste 500	
		CoP, OEHR, Commission on Disability	Fri, June 13	OEHR, Steel/Bridge Rooms, 421 SW 6 <sup>th</sup> Ave 5 <sup>th</sup> Flr	10 am - 1 pm
Danielle Brooks, Civil Rights Title IV & ADA Title II	<a href="mailto:danielle.brooks@portlandoregon.gov">danielle.brooks@portlandoregon.gov</a>	CoP, OEHR			
		CoP, Human Rights Commission	Wed, June 4	421 SW 6 <sup>th</sup> Ave, Ste 500	4-6:30 pm
Kim McCarty	<a href="mailto:Kim.mccarty@portlandoregon.gov">Kim.mccarty@portlandoregon.gov</a>	CoP, CoG, Multco: Fair Housing Advocacy Committee	June 2	421 SW 6th Avenue, Ste 500	3-5 pm
		CoP, OEHR, HRC, Housing Rights Task Force			
Laurie Wells	<a href="mailto:Laurie.wells@greshamoregon.gov">Laurie.wells@greshamoregon.gov</a>	City of Gresham – CDBG			
Demi Espinoza	<a href="mailto:demi@coalitioncommunitiescolor.org">demi@coalitioncommunitiescolor.org</a>	Coalition for Communities of Color; Community and Economic Development -- others		501 SE Hawthorne, Multnomah County Building	10-11 am
Scotty Ellis, Equity Program	<a href="mailto:scotty@clfuture.org">scotty@clfuture.org</a>	Coalition for a Livable Future		1410 SW Morrison St	5:30 pm
Jonathan Ostar	<a href="mailto:Jon@opalpdx.org">Jon@opalpdx.org</a>	Transportation and Health Equity Network OPAL/CLF			
Vivian Satterfield	<a href="mailto:Vivian@opalpdx.org">Vivian@opalpdx.org</a>	OPAL – Bus Riders Unite	3 <sup>rd</sup> Tue of the Month	2407 SE 49th Ave	6pm
Diem Huynh, Membership Coordinator	<a href="mailto:diem@apano.org">diem@apano.org</a>	Asian Pacific American Network of Oregon	2 <sup>nd</sup> Thursday of the month	Harrison Park School (2225 SE 87 <sup>th</sup> Ave)	5:30- 8:30 pm

Duncan Hwang, Director of Development & Communications	<a href="mailto:duncan@apano.org">duncan@apano.org</a>	APANO Economic Justice, Health Equity, Education Equity			
Yelena Hansen, Program Manager		Ecumenical Ministries of Oregon, Russian Oregon Social Services			
Tina Do	<a href="mailto:TinaD@irco.org">TinaD@irco.org</a> ; Sophorn Cheang, <a href="mailto:sophornc@irco.org">sophornc@irco.org</a> , Oleg Kubrakov, <a href="mailto:olegk@irco.org">olegk@irco.org</a> , Abdiasis Mohamed, <a href="mailto:abdiasism@irco.org">abdiasism@irco.org</a> , Patricia Lim- Pardo, <a href="mailto:patricial@irco.org">patricial@irco.org</a>	IRCO – Economic Development Program; Diversity and Civic Leadership Program			
Midge Purcell, Director of Advocacy and Public Policy	<a href="mailto:mpurcell@ulpdx.org">mpurcell@ulpdx.org</a>	Urban League; Partnership for Racial Equity			
Carmen Rubio, Executive Director	<a href="mailto:carmen@latnet.org">carmen@latnet.org</a>	Latino Network			
Reyna Lopez, Civic Engagement Director	<a href="mailto:reyna@causaoregon.org">reyna@causaoregon.org</a>	Causa Oregon			
Zoe Piliafas, Director of Programming Lale Santelices, Program Coordinator	<a href="mailto:Zoe@CommunityCyclingCenter.org">Zoe@CommunityCyclingCenter.org</a> <a href="mailto:Lale@CommunityCyclingCenter.org">Lale@CommunityCyclingCenter.org</a>	Community Cycling Center/Andando en Bicicletas en Cully			
Oscar Guerra- Vera, Equity and Inclusion Program	<a href="mailto:Oscar@interculturalorganizing.org">Oscar@interculturalorganizing.org</a>	Center for Intercultural Organizing -- Civic Engagement and			



Coordinator		Policy Advocacy			
Tony DeFalco, Living Cully Coordinator Pedro Moreno, Outreach Worker	<a href="mailto:tonydefalco@verdenw.org">tonydefalco@verdenw.org</a> <a href="mailto:pedromoreno@verdenw.org">pedromoreno@verdenw.org</a>	Verde			
Donita Sue Fry, Civic Engagement Ryan Parker, Community Economic Dev.	<a href="mailto:donitasf@nayapdx.org">donitasf@nayapdx.org</a> <a href="mailto:ryanp@nayapdx.org">ryanp@nayapdx.org</a>	NAYA Family Center, Youth and Elders Council	2 <sup>nd</sup> Tuesday	5135 NE Columbia BLVD	6-8 pm
Trell Anderson, Director of Housing and Community Development	<a href="mailto:tanderson@catholiccharitiesoregon.org">tanderson@catholiccharitiesoregon.org</a> Patricia Rojas, Division Manager <a href="mailto:projas@catholiccharitiesoregon.org">projas@catholiccharitiesoregon.org</a> Toc Soneoulay-Gillespie <a href="mailto:tsoneoulay@catholiccharitiesoregon.org">tsoneoulay@catholiccharitiesoregon.org</a>	Catholic Charities – El Programa Hispano, Caritas Housing, Refugee Resettlement			
Claudia Arana Colen, Health Equity Coordinator	<a href="mailto:claudia@upstreampublichealth.org">claudia@upstreampublichealth.org</a> Heidi Guenin, Policy Manager, Land Use and Transportation <a href="mailto:heidi@upstreampublichealth.org">heidi@upstreampublichealth.org</a>	Upstream Public Health			
Queta Gonzales, National Director of Programs	<a href="mailto:qgonzalez@cdeinspires.org">qgonzalez@cdeinspires.org</a>	Center for Diversity and the Environment			
Mark Noonan, Community Engagement Manager	<a href="mailto:Mark@eldersinaction.org">Mark@eldersinaction.org</a> JoAnn Herrigel, Civic Involvement Coordinator <a href="mailto:Joann@eldersinaction.org">Joann@eldersinaction.org</a>	Elders in Action			
Patty Katz, Portland Organizer	<a href="mailto:patty.katz@oregonaction.org">patty.katz@oregonaction.org</a>	Oregon Action	3 <sup>rd</sup> Thursday	126 NE Alberta Street, Suite 202	6:30 pm

John Miller, Executive Director	<a href="mailto:john@oregonon.org">john@oregonon.org</a>	Oregon Opportunity Network			
John Jackly, Director of Business and Social Equity	<a href="mailto:jackleyj@pdc.us">jackleyj@pdc.us</a>	Portland Development Commission	2 <sup>nd</sup> Wednesday	222 NW 5 <sup>th</sup> Ave	3-5:30 pm
Reyna Lopez	<a href="mailto:reyna@causaoregon.org">reyna@causaoregon.org</a>	Oregon Health Equity Alliance	Wed, June 4 (Oregon Equity Project)	DoubleTree Hotel	
Rev. Joseph Santos-Lyons	<a href="mailto:jsantoslyons@apano.org">jsantoslyons@apano.org</a>	Healthy Oregon Partnerships for Equity	Quarterly		
Alberto Moreno, Executive Director	<a href="mailto:alberto@orlhc.org">alberto@orlhc.org</a>	Oregon Latino Health Coalition			
Tricia Tillman, Director	<a href="mailto:tricia.tillman@state.or.us">tricia.tillman@state.or.us</a>	Oregon Health Authority			
Kristin Lensen		Kristin Lensen Consulting			
Jonathan Ostar, OPAL Environmental Justice	<a href="mailto:Jon@opalpdx.org">Jon@opalpdx.org</a>	Regional Transportation Justice Coalition	1 <sup>st</sup> and 3 <sup>rd</sup> Wed		
Cassie Cohen, Executive Director	<a href="mailto:cassie@groundworkportland.org">cassie@groundworkportland.org</a>	Groundwork Portland			
Orion Lumiere, Executive Director	<a href="mailto:orion@oregoncat.org">orion@oregoncat.org</a> Justin Buri: <a href="mailto:justin@oregoncat.org">justin@oregoncat.org</a> Jensi Albright: <a href="mailto:jensi@oregoncat.org">jensi@oregoncat.org</a>	Community Alliance of Tenants			
Nick Sauvie, Executive Director	<a href="mailto:Nick@rosecdc.org">Nick@rosecdc.org</a>	ROSE Community Development Corporation			
Jean DeMaster, Executive	<a href="mailto:jdemaster@humansolutions.org">jdemaster@humansolutions.org</a>	Human Solutions, Inc.			

Director					
Connie Ashbrook, Executive Director	<a href="mailto:connie@tradeswomen.net">connie@tradeswomen.net</a>	Oregon Tradeswomen, Inc.	Sept 26-27, <a href="#">2014 Tradeswomen Leadership Institute</a>	PCC Cascade	5 pm
Chris Rall, OR and WA field outreach	<a href="mailto:Chris.rall@t4america.org">Chris.rall@t4america.org</a>	Transportation for America			
Keely Glassley, Executive Assistant	<a href="mailto:keelyd@seiu49.org">keelyd@seiu49.org</a>	SEIU Local 49			
Betty Dominguez, Director of Policy and Equity	<a href="mailto:betty.dominguez@homeforward.org">betty.dominguez@homeforward.org</a> Mike Andrews, Director of Development and Community Revitalization: <a href="mailto:mike.andrews@homeforward.org">mike.andrews@homeforward.org</a>	Home Forward			
Kimberlee Sheng, Executive Director	<a href="mailto:ksheng@bufor.org">ksheng@bufor.org</a>	Black United Fund of Oregon			
Nichole June Maher, President and CEO	<a href="mailto:nichole@northwesthealth.org">nichole@northwesthealth.org</a>	Northwest Health Foundation			
Tom Clancey Burns, Executive Director	<a href="#">Email Tom</a>	Community Action Partnership of Oregon		Salem	
Joan Smith, Executive Director	<a href="mailto:joan.smith@mealsonwheelspeople.org">joan.smith@mealsonwheelspeople.org</a>	Meals on Wheels			
Chana Andler, Liaison to Villages NW	<a href="mailto:chana@VillagesNW.org">chana@VillagesNW.org</a>	East Village PDX			

**City of Portland Fair Housing Advocacy Committee****Neisha Saxena** – recommendation by Multnomah County

Neisha is an attorney with Disability Rights Oregon, an Oregon non-profit that promotes Opportunity, Access and Choice for individuals with disabilities by assisting them with legal problems directly related to their disabilities, including fair housing issues. Neisha was on the Analysis of Impediments Committee.

**Jason Trombley** – recommendation by Coalition of Communities of Color

Jason is a public relations professional who represents Coalition of Communities of Color on FHAC. In his capacity with the CCC, he helped develop the strategic plans for two of the organization's committees - the Community & Economic Development committee and the Education Justice Committee. Further, he serves as one of the primary representatives for the CCC to support Portland Public Schools as the district implements their Racial Educational Equity Policy. Currently he represents the CCC on two PPS committees with a focus on equity: The Achievement Compact Advisory Committee and is current co-chair of the Superintendent's Advisory Committee on Enrollment and Transfer (SACET).

**Members****Abby Ahern** (At Large) – recommendation by ad hoc FHAC nominations committee

While working toward her MSW, Abby had the opportunity to work on a new tenant education curriculum called Rent Well, and run the pilot class to ensure its success. Abby sits on the Diversity Advisory Council with Clackamas County and sees her work with the FHAC as an exciting opportunity to make Multnomah County a more equitable and welcoming place to live.

**Liora Berry** – recommendation by Multnomah County

Liora is the Clinical Director of the Homeless Services Division at Cascadia Behavioral Healthcare. She oversees Cascadia's Homeless Services Division: Street outreach, Transitional housing, Drop-in center, and over 200 units Permanent Supportive Housing. She brings valuable insight into community advocacy; direct services; education and outreach to housing and service providers.

**Marc-Daniel Domond** – recommendation by Gresham

Marc is an Executive Project Manager with COLAS Construction, a minority-owned construction company. Marc is a resident of Gresham, and on his neighborhood's Home Owners Association.

**Jerad Goughnour** – recommendation by Portland.

Jerad is a small rental landlord and partner in a property management company Gateway Property Management. He represents the Rental Housing Association of Greater Portland. He brings a smaller landlord perspective, and professional management of smaller properties.

**Elisa Harrigan** – recommendation by Portland

Elisa is the Affordable Housing Initiative Program Office for Meyer Memorial Trust, recently served as Executive Director of the Community Alliance of Tenants, and was a member of the Analysis of Impediments Committee. She brings the tenant perspective to fair housing.

**Deborah Imse** – recommendation by Portland

Deborah is the Executive Director of the Metro Multifamily Housing Association. She is a member of the Portland Housing Advisory Commission, and was a member of the Analysis of Impediments Committee.

**Kayse Jama** – recommendation by the Center for Intercultural Organizing (CIO)

Kayse is the Executive Director of the Center for Intercultural Organizing. He is leading CIO to develop an inclusive, diverse, grassroots organization working to build a multi-racial, multicultural movement for immigrant and refugee rights.

**John Miller** – recommendation by Portland

John Miller is the Executive Director of Oregon ON. He has an extensive housing background, and brings the perspective of Oregon ON's many partners to the table.

**Rachel Payton** – recommendation by Multnomah County

Rachel is an Advocacy Coordinator for Volunteers of America's Home Free program which rather than provide a facility or temporary apartments for individuals and families fleeing domestic violence, Home Free helps survivors to access their own housing and then assists them in staying there – safely and independently.

**Joe VanderVeer** – recommendation by Portland Disability Commission

Joe is a member of the Portland Commission on Disability and is the chair of the Accessibility in the Built Environment subcommittee for the commission. Part of the work plan for the ABE subcommittee seeks to address the critical shortage of accessible, affordable housing for people with disabilities in Portland and Multnomah County. Joe also serves on the board of directors for Disability Rights Oregon and chairs the Multnomah County Disability Services Advisory Council. In his professional life, Joe works with nonprofits that serve people experiencing poverty, homelessness, and disability.

**Lynne Walker** – recommendation by Gresham

Lynne Walker is a resident of the City of Gresham and serves on the Community Development & Housing Subcommittee, which helps develop Gresham's goals, policies, and programs for housing & community development.

**Raina Smith-Roller** – recommendation by Gresham

As Rent Assistance Coordinator at Human Solutions, Raina oversees many Eviction Prevention programs. She brings knowledge of landlord issues and the impact of housing stability on household success.

**Betty Dominguez** – recommendation by Home Forward

Betty is the Director of Policy and Equity at Home Forward. Home Forward has the unique perspective of being both landlord and fair housing services funder.

**Michael Alexander** - recommendation by the Coalition of Communities of Color

Mr. Alexander assumed the role of President & CEO of the Urban League of Portland in August 2013 where he acts as the organization's lead executive. Prior to joining the Urban League of Portland's leadership team, Mr. Alexander served as Vice President for Account Management at Regence Blue Cross Blue Shield where he was responsible for the design and management of Regence-wide account management, retention and purchaser satisfaction strategies.

**Metro's Equity Advisory Committee**

**Carl Talton**, chair

Executive chair of the Portland Family of Funds, United Fund Advisers and Northwest Community Capital Fund

Talton is a former vice president of government affairs, community and economic development at Portland General Electric, and has served as a board member for the Northwest Health Foundation, Concordia University Foundation, Albina Head Start, N/NE Economic Development Alliance, the Institute for Portland Metropolitan Studies at Portland State University, the Oregon Association of Minority Entrepreneurs and the Neighborhood Partnership Fund, and served on the Oregon Economic and Community Development Department Commission. Talton is a past member of the Portland Development Commission. He was born and raised in the Portland area and resides with his family in Northeast Portland where he has lived since early childhood.

**Rey España**, vice chair

Community Development department director, Native American Youth & Family Center

España has over 38 years of experience in community development projects including affordable housing, neighborhood initiatives, acquisitions, direct service development, home repair and weatherization of low income housing, and education. At NAYA Family Center, España began work on an educational program to address the rate of dropouts within the greater Portland metropolitan area. España is a primary driver in growing the capacity of the organization and developing long-term assets, programming, and opportunities for the community.

**Joseph Berezhinskiy**

Program director, Slavic Community Center

Joseph Berezhinskiy strives to make a difference in the Slavic community and his goal is to make Portland a better place for people from all ethnic backgrounds. Berezhinskiy moved to Portland as a teenager and considers Portland home.

**Betty Dominguez**

East County program director, Home Forward

Dominguez moved to Oregon in 1996 from San Diego where she had been a bank vice president in real estate and construction lending, and joined the Oregon Department of Housing and Community Services in 1997 where she worked for 10 years. In her capacity as regional adviser to the director of the department, Dominguez worked with a number of jurisdictions within the Metro region on issues of housing and community development, and served on the Regional Community Solutions Team and Economic Revitalization Team under Governors Kitzhaber and Kulongoski respectively. She also served on Metro's Transit Oriented Development steering committee. She joined Home Forward, the housing authority for Multnomah County, in 2006 where she works in project development, and leads the organization's Moving To Work program under HUD.

**Ben Duncan**

Chief Diversity and Equity Officer, Multnomah County Office of Diversity and Equity

Duncan is board chair of OPAL Environmental Justice Oregon. Duncan focuses on the relationships between health and social, economic, and environmental conditions through both public policy and community-based empowerment work. Duncan also works with the Diversity and Quality Team, is an appointee to the Region X Health Equity Council through U.S. Department of Health and Human Services Office of Minority Health, and serves as chair of the Oregon Governor's Environmental Justice Task Force.

**Kirsten Kilchenstein**

Donor relations officer, Oregon Community Foundation

Kilchenstein joined the staff at the Oregon Community Foundation in 2011 where she supports individuals, families and businesses with their charitable giving. From 2001–11, she served as education director for Caldera. Kilchenstein holds a master's degree in conflict resolution with a focus in arts-based conflict resolution from Portland State University. She has extensive experience using the arts for violence prevention, is a certified mediator and has a B.A. in psychology. She currently serves on the board of the Portland Children's Museum and on the advisory board of the Nest Foundation, which is working to end the commercial sexual exploitation of children in North America.

**Judi Martin**

Hispanic services coordinator, Clackamas County Health, Housing and Human Services

Martin began as a family advocate for Latino families in an Oregon Head Start program and later served as a family services manager of an Early Head Start program in Portland. She serves as the staff liaison to the County's Diversity Leadership Council, an advisory committee appointed by the Board of County Commissioners. She is on the steering committee for the Hispanic Interagency Networking Team, a collaboration of agencies that serve in the Latino community.

**Julia Meier**

Director, Coalition of Communities of Color



Meier has been director of the CCC since 2009, coming from practicing law at Alaska Legal Services, providing free legal representation to low-income Alaskans. Prior, Meier worked at the Alaska Native Justice Center overseeing and facilitating projects engaged in the establishment and implementation of restorative justice models. She provided training and technical assistance to tribal courts and traditional justice personnel in rural Alaska. She also worked closely with the Alaska Rural Justice and Law Enforcement Commission. Meier graduated Summa Cum Laude from the University of Oregon and earned a Juris Doctorate from Harvard Law Schools in 2005.

**Virginia Nguyen**

Director of Diversity and Inclusion, Nike

**Pam Treece**

Executive director, Westside Economic Alliance

Before beginning at the Westside Economic Alliance, Treece served as a consultant to Greater Portland Inc., director of the Association of Regional Partners, and vice president of Oregon External Affairs for PacifiCorp. Treece is a native Oregonian. She received her undergraduate degree from Portland State University and her master's degree from Lewis & Clark College.

**Daniel Vazquez**

Ethnic minority outreach coordinator, mayor's office, City of Beaverton

Vázquez serves on the TriMet Transit Equity Advisory Committee and the Washington County Fairgrounds Advisory Committee. Previously, Vázquez was a teacher and tutor in Hood River County; an advocate for unfranchised communities in Multnomah County; a community inclusion and outreach organizer in Washington County; a program coordinator for the City of Beaverton; and a community advocate for the New Portlander Program, part of the Office of Equity and Human Rights in the City of Portland. Vázquez is a native of the state of Jalisco in Mexico. He earned a B.A. in political science and business administration from University of Oregon, and speaks Spanish, English, Thai, Mandarin Chinese, Japanese and Korean. In his spare time, Vázquez enjoys promoting voter registration and civic participation.

**Sydney Webb**

Former City Councilor, City of Tigard

Webb is recently retired after serving eight years on the Tigard City Council and 11 years on the Washington County Housing Advisory Board. Webb's career included owning her own business, Graphic Expressions, for 13 years and working in public relations for a financial planning firm before becoming the executive director of the Good Neighbor Center for 11 years.

**Phillip Wu**

Community Health Initiative, Kaiser Permanente

Wu is a pediatrician in Community Benefit with Kaiser Permanente, promoting healthy, equitable communities through policy advocacy and changes to the built environment. Wu serves on the boards of the Northwest Health Foundation, the Intertwine Alliance and the

Westside Transportation Alliance and is a member of the transportation committee of the Westside Economic Alliance. Wu previously served on Metro's Blue Ribbon Committee for Trails and Flexible Funds Committee. Wu believes in the "social determinants of health" and that policy initiatives that seek to affect the "social determinants" must be evaluated through an equity lens.

#### **TriMet's Transit Equity Advisory Committee**

**Andre Baugh**, Portland Planning Commission

**Jan Campbell**, TriMet Committee on Accessible Transportation

**Catherine Ciarlo** (Chair), CH2MHill

**Terrence Coleman**, OPAL/Bus Riders Unite

**Bridget Dazey**, Workforce Investment Council of Clackamas County

**Heidi Guenin**, Upstream Public Health

**Roberta Hunte**, OPAL Board

**Judi Martin**, Clackamas County Hispanic Services

**Shannon Mayorga**, Kaiser Permanente

**Shellie Romero**, ODOT

**Consuelo Saragoza**, TriMet Board of Directors

**Daniel Vazquez**, City of Beaverton (formerly)

**Cameron Whitten**, Portland African American Leadership Forum

EQUITABLE DEVELOPMENT TOOLS		what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?	Creates Aff Hous.	Preserves AH	Invests in Hous- ing	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development	
<b>Affordable housing preservation ordinance</b>	ordinance requires owners of local preservation projects to give the City and tenants 90 days notice of any plans to sell the project or make it no longer affordable. Within the 90-day period, the City can offer to buy the property, thereby preventing its conversion to market-rate housing. owners of federally-assisted affordable housing projects must give the City and tenants one year's notice of expiring federal subsidies and 150 to 210 days notice of intent to "opt out" of a long-term assistance contracts or extensions	Portland, OR; Chicago, IL; Sacramento, CA; Denver, CO;						x						x		
<b>Anti-speculation or real estate transfer tax/fee</b>	Establish to deter speculation in gentrifying areas; use funds to finance affordable housing development and preservation	FL, NJ			Cities, counties or districts in Oregon are prohibited by state law from adopting new real estate transfer taxes; creates a barrier to creating a housing trust fund					x	x			x		
<b>Code enforcement</b>	Use penalties attached to housing code enforcement to negotiate benefits for tenants of multi-family dwellings with negligent owners (e.g., reduce tenants' rent until compliance is achieved or transfer ownership to tenants or community organizations).	Washington DC Columbia heights neighborhood;							x					x		
<b>Commercial stabilization</b>	Provide technical assistance, financial advising, micro lending, design assistance, and storefront improvement funds to small businesses; undertake basic streetscape improvement projects.	Oakland, CA; Berkeley, CA; Austin, TX; Seattle, WA (Rainier Valley)							x						x	x
<b>Community benefits agreement / Developer Agreements</b>	Agreements negotiated between community-based organizations and commercial developers to include living wage jobs, local hiring, and/or affordable housing; create incentives for large businesses to create employee-assisted housing programs. Community benefits can also be incorporated into City policies (e.g., first-source hiring for contracting jobs). A Developer Agreement is similar but typically an agreement between landowner (often city or quasi-judicial organization) and developer outlining requirements for the development that include public benefits such as affordable housing, infrastructure investments, etc.	Oakland, CA (east bay alliance); Washington DC; Bronx, NY; Los Angeles (Figueroa Corridor); Alameda Corridor; Hartford Areas Rally Together; Staples Center Project; Minneapolis, MN (Longfellow Station Community); Portland, OR			Portland		x	x						x		x
<b>Community building initiatives</b>	Support local community organizations that engage and empower residents in local development initiatives	Atlanta, GA (Reynoldstown)?; ODOT Adopt-A-Landscape Program;								x				x	x	x
<b>CDBG &amp; HOME (federal funds)</b>	Loans and grants from federal funding programs are typically made available to developers through a Request for Proposals process or Notice of Funding Availability (PHB 2010). These include deferred-interest loans to renovate small affordable housing projects and predevelopment loans for nonprofits to create affordable, mixed-income or mixed-use projects. All properties that receive a subsidy from the City to create low-income rental housing must remain affordable for at least 60 years	widely used					x	x				x	x	x	x	x
<b>Community mapping / impact reports</b>	Use during early stages of development to assess fiscal, employment, housing, neighborhood services, and smart growth impacts of projects. Include health and environmental impact assessments looking at socioeconomic impacts to minimize adverse effects of development.	Washington, DC; Richmond, VA; Minneapolis, MN;								x				x		
<b>Community land trusts</b>	Nonprofit organization creates affordable homeownership opportunities by leasing land for a nominal fee to individuals who own the buildings on the land. By retaining ownership of the land, clts are able to greatly reduce the cost of purchasing a home. buyers agree to limit the amount of profit they make on the sale of the home, ensuring permanent affordability.	Albuquerque, NM; Portland, OR; Burlington, VT; Davis, CA;			Yes; City of Portland 1990's		x	x						x	x	x

EQUITABLE DEVELOPMENT TOOLS						Creates Aff. Hous.	Preserves Aff. Hous.	Increases Aff. Hous. in Rents	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?										
<b>Condominium conversion ordinance</b>	State law requires landlords to give their tenants at least 120 days notice of a condominium conversion and the right of first refusal to buy their unit; also prohibits landlords from evicting tenants without cause or imposing excessive rent increases during the notice period; local jurisdictions can add requirements such as relocation assistance	State of Oregon; Eugene, OR; Santa Barbara and San Diego, CA; Washington DC	cities and counties, state, zoning ordinance or state statute	state law governs conversions				x				x		
<b>Developer exactions</b>	Use impact fees to finance affordable housing development and preservation. Development impact fees and exactions are charges assessed on new development to defray the cost to the jurisdiction of expanding and extending public services to the development.	Lancaster and Sacramento, CA; Boston, MA;		Portland, OR offers exemptions to SDCs for affordable housing projects					x			x	x	
<b>Development code incentives</b>	Reduce minimum lot size, setbacks, and parking requirements or create floor area bonuses for affordable housing construction. According to a 2007 study, however, the bonuses have never been used. The study found that the bonuses did not provide enough financial incentive for developers or they competed with other, more generous incentives.	Santa Barbara, CA;			x					x	x			
<b>Document recording fee</b>	Establish fee for filing of deeds, mortgages, real property contracts, etc. to finance affordable housing development and preservation.	OR; WA		already implemented in Oregon	x	x			x		x			
<b>Eviction protection laws</b>	Enact strong eviction protection laws to prevent eviction without just cause in neighborhoods experiencing speculation. Such controls typically apply to owners of buildings with more than a certain number of units, protect vulnerable tenants (e.g., low-income, elderly, people of color), and protect tenants in danger of eviction due to a bank foreclosure on the property., including protection of tenants who have month-to-month leases, prevention of the steep rental increases that often accompany rapid resident turnover, and stabilization of communities. Has helped prevent eviction of tenants just to raise rent but has also made it harder to get rid of problem tenants.	Oakland, CA; Glendale; San Diego, CA; Seattle, WA; Washington DC						x			x			
<b>Home ownership programs</b>	Provide down payment and closing-cost assistance to first-time homebuyers; support Section 8 Homeownership program; establish homeownership and foreclosure education and counseling programs; provide funds for home repair and rehab; provide assistance to owners to create accessory dwelling units to reduce financial burden of homeownership.	Portland, OR (administered by nonprofit organizations); Sacramento, CA; Seattle, WA; Boston, MA; Davis, CA; Oakland, CA; Washington DC;						x			x	x	x	
<b>Lease-purchase home ownership</b>	allows low- and moderate-income families to lease a home for two years after which time they can purchase it.	Portland, OR (Sabin CDC); Cleveland, OH; Springfield, IL; Kalamazoo, MI		Other nonprofit organizations have considered offering a similar program, though some like Proud Ground have decided not to pursue the option after determining it has had limited success in other areas				x			x	x	x	
<b>Location-efficient mortgages**</b>	A location efficient mortgage (LEM) enables homebuyers interested in living in urban areas to increase the amount they borrow while making a smaller downpayment. The reduction in automobile-related expenses increases income that can then be directed toward mortgage payments. 15 or 30 year fixed rate mortgage with a max LTV ratio of 97%. Must participate in homeownership counseling. In addition to increasing the purchase power of relatively lower-income households, the mortgages provide an incentive to higher-income households to move into urban communities, which might intensify gentrification issues.	Chicago, IL; San Francisco, CA; Seattle, WA;						x			x	x	x	
<b>Housing levy</b>	Establish a property tax levy to raise funds for affordable housing development and preservation.	Seattle, WA;	City / voter-approved	has been considered in Portland in the past	x	x			x		x			

**EQUITABLE DEVELOPMENT TOOLS**

what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?	Creates Aff Hous.	Preserves AH	Increases Aff Hous. in Hous. Markets	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
<b>Housing rehabilitation program</b>	housing repair programs for homeowners who need help staying in their homes through no-interest home repair loans or free repair services for qualifying individuals	Portland, OR; Atlanta, GA; Seattle, WA; St. Petersburg; Santa Barbara, CA; Oakland, CA; Washington DC; Philadelphia, PA					x				x	x	x
<b>Housing trust funds</b>	A dedicated funding source for affordable housing development and preservation. Housing trust funds are a public-sector tool used to funnel financial resources to housing developers, nonprofit organizations, or local government departments to develop or rehabilitate affordable housing for low- and moderate-income individuals. A public agency is normally responsible for the collection and distribution of the fund's resources. Typical sources are real estate transfer taxes, accumulated interest from real estate transactions, and penalties for late or delinquent payments of real estate excise taxes (Linker et al. 2001). A stable funding source for a variety of uses, including acquisition, new construction, rehabilitation, emergency repairs, and housing-related programs such as rental assistance and homeownership education.	Boulder, CA; King County, WA; FL	Local, regional, state	For those areas not experiencing a strong housing market, little revenue will be generated through the trust fund; consequently, little affordable housing or services will be provided. Statewide housing trust funds can avoid this problem. City-based funds can find other creative funding sources, such as foundation or corporation contributions. Can connect well with funding sources like the recording fee or housing levy.	x	x			x	x	x	x	
<b>Inclusionary zoning</b>	Require or incentivize inclusion of affordable housing units for new residential developments; They encourage mixed-income communities and provide lower-income residents an opportunity to remain in their neighborhoods despite gentrification pressures; Despite the ban, cities like Portland can and do require a certain percentage of affordable housing in projects that receive public subsidies.	Montgomery County, MD; New York City; San Francisco, CA; Denver, CO; Fairfax County, VA; Boston, MA; Santa Barbara, CA; Davis, CA; Washington DC	cities and counties		x						x		
<b>Individual development accounts</b>	Establish savings program that provides matching funds for contributions from residents; allowable uses include homeownership costs, education, entrepreneurship, etc.	Portland, OR; Atlanta, GA; CA; TX; IN					x				x	x	x
<b>Land Banking</b>	Inventory vacant, buildable lots; take properties out of the speculative market (particularly during dips in the market); create affordable housing	Habitat for Humanity East Metro (Portland); Philadelphia, PA; Las Cruces, NM;	non-profits, local and regional governments		x			x			x	x	x
<b>Linkage fees</b>	Require commercial developers to construct affordable housing units or pay in-lieu fee.	Chicago, IL; Boston, MA; Sacramento and San Diego, CA;	Local and regional; zoning codes						x		x	x	
<b>Limited-equity housing cooperatives</b>	Conversion or Construction of low-income apartments to a limited-equity cooperative providing existing renters / community residents the opportunity to purchase the building (provide funding to assist initial acquisition). Co-op members work together to reach mutual goals based on democratic control and decision-making. offer ownership opportunities to lower income households while limiting the return from resale that they can receive from the housing (often a fixed % increase in value / year). Create financing program to enable tenants to purchase expiring-subsidy properties and maintain them as affordable housing.	MA; NY, NY (Brooklyn & Harlem); Davis, CA; Washington DC		Portland		x	x				x	x	x
<b>Local hiring programs</b>	Require a portion of work hours on a project be performed by local residents as well as a percentage of new hires. Provide training specifically geared towards special skill sets and neighborhood residents. Provide assistance in qualifying for, applying for, and maintaining jobs. Job training centers work directly with industries in the area and new businesses locating in the area. Increases financial opportunities for residents allowing them to remain in their community and recirculate earnings in the neighborhood.	Oakland, CA (50% hours and new hires); Portland, OR; Hartford, CT; Berkeley, CA; Brooklyn, NY					x				x	x	x

EQUITABLE DEVELOPMENT TOOLS						Creates Aff. Hous.	Preserves Aff. Hous.	Increases Aff. Hous. in Rents	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?										
<b>Location-Efficient Subsidies**</b>	Economic development monies that are dispersed to projects based upon the development's ability to: maximize use of existing investments in infrastructure; avoid or minimize additional government expenditures on new, publicly financed transportation or other infrastructure; and have nearby housing affordable to the workforce of the applicant, accessible and convenient transportation, or some combination of both.	King County, WA; Illinois; Minneapolis, MN;		when connected with specific local hiring and local entrepreneur investments = more equitable							x	x	x	x
<b>LIHTC &amp; Oregon Affordable Housing Tax Credit Program</b>	provide funding for affordable housing projects by encouraging private-sector investment in such developments. Oregon Housing and Community Services administers the competitive tax credit programs. LIHTC offers private investors federal tax credits (providing equity) in exchange for the development of affordable rental housing units.		LIHTC is designed to be flexible. State or local administrators are responsible for setting the program's goals		x						x			
<b>Minority contracting</b>	Increasing the capacity of these local businesses creates wealth in the community by generating job opportunities for residents. Research shows that minority businesses hire greater percentages of minority employees than majority-owned firms do. As businesses of color are given greater opportunity to grow, they will train and employ more minority residents, who can then reinvest in their communities. Minority contracting programs are part of a larger community benefits movement, where communities are organizing around publicly subsidized development projects to leverage community benefits like agreements to pay workers a living wage, hire local residents, provide sufficient affordable housing, or provide for displaced homes and businesses.	Los Angeles, CA (Alameda Corridor Business Outreach Program); Portland, OR (Interstate Avenue Light Rail); ODOT; Metro					x					x	x	
<b>Neighborhood planning process</b>	Allow local residents to create neighborhood plan that guides development; proposals at odds with plan trigger review by neighborhood planning team.	Austin, TX; Brooklyn, NY (Fifth Avenue Committee); Seattle, WA		ODOT's TGM grants could fund such a process for a station area				x				x		
<b>No net loss policy / replacement ordinance</b>	requires that the area "retain at least the current number, type and affordability levels of housing units home to people" earning up to 60 percent of area median income through preservation or replacement (market-rate and regulated)	Portland, OR; San Francisco, CA; Los Angeles, CA				x						x		
<b>Non-profit acquisition support</b>	City of Portland provides financing to CDCs, which purchase existing rental buildings, rehabilitate them and restrict them as affordable for at least 60 years (most in URAs).	Portland, OR; Boston, MA; Washington DC			x	x					x	x	x	
<b>Owner-occupancy ordinance</b>	to ensure that affordable residential units would be maintained as ownership opportunities. ordinance requires any purchaser and subsequent owner of an affordable housing unit to occupy the unit for the entire duration of their ownership, unless otherwise approved by the City as well as sell at a lower, more affordable rate, applied to regulated and lower-priced market units	Davis, CA;		works well for units built as part of inclusionary zoning ordinance, affordable housing creation, or subsidy programs				x				x		
<b>Preserve cultural facilities</b>	Preserve culturally important institutions, sites, landmarks and art.	Indiana; Los Angeles, CA;						x				x	x	x
<b>Rent controls</b>	Enact rent control policies to maintain affordability. Apply rent cost restrictions to projects receiving public assistance. Rent control laws specify the types of buildings covered and exempted, the amount of rent increase allowed annually (based on a set percentage increase or in relation to the Consumer Price Index), and a maximum rent cap. Laws can also stipulate that the landlord must be in compliance with building codes and cannot reduce existing services to increase profit	Hoboken, NJ; Santa Monica, CA; NY, NY; San Francisco, CA; Baltimore, MD; Oakland, CA; Washington DC;		Rent control, an anti-displacement tool used in many California cities, is banned in Oregon; The law does not preclude cities, however, from limiting rents on affordable properties that have received public benefits such as density bonuses.	x		x				x	x	x	

**EQUITABLE**

**DEVELOPMENT TOOLS**

	what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?	Creates Aff Hours	Preserves AH	Invests in Rts- Kents	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
<b>Rental/financial assistance programs</b>	short-term rent assistance program which provides funds to nonprofit organizations that offer rental assistance to clients. Most of the programs target households whose incomes are at or below 50 percent of median income. Funding for the programs come from a variety of federal, state and local sources, but it is limited	Portland, OR; Berkeley, CA; Miami, FL; Seattle, WA						x				x	x	x
<b>Right of return policy</b>	Enact "right to return" policy under which new affordable housing must give an admissions preference to persons displaced by revitalization.	Pittsburgh, PA Hill District; Hamtramck, MI; San Francisco (Hunter's Point), CA		paired with replacement / no net loss policy					x			x		
<b>Resident shareholders</b>	Offer residents stock ownership in CDC commercial real estate projects; support cooperative business enterprises in at-risk neighborhoods.	Good Hope Marketplace Washington,DC; Puerto Rico; Baltimore, MD						x				x	x	x
<b>Retain expiring-subsidy units</b>	Offer tax incentives to renew contracts for expiring affordable multi-family housing; encourage owners to seek federal incentives to renew contracts and/or restructure mortgages; grant local government, nonprofits, or tenants right of first refusal for purchase of property; require owners to pay a conversion fee to cover tenant relocation costs.	Anika, MN; San Francisco, CA;					x		x				x	x
<b>Split-Rate Taxes**</b>	Split-rate taxes, also know as two-tiered property tax reform, differentiate property taxes into a lower tax rate for buildings and a higher tax rate for vacant, unimproved land. Creates incentives to improve properties and reduce vacant lots. Flat-rate property taxes ultimately penalize building improvements when assessments raise the assessed value of the overall property. This strategy does not directly subsidize new affordable housing for purchase or rent, but it does provide an incentive for speculators to release vacant property that could be used to build affordable housing.	<b>PA</b>	state legislation	low administrative costs, market driven						x	x			
<b>Targeted economic development</b>	Create organization or program dedicated to business development for residents in at-risk areas.	Seattle, WA (central area); Los Angeles, CA (Figueroa corridor)						x				x	x	x
<b>Tax abatements:</b>	Limited tax abatement for qualifying properties, projects or applicatns.	Portland, OR; Washington, DC; Philadelphia, PA; Atlanta, GA; Boston, MA;									x	x		
<b>Rental Rehabilitation</b>	Tax abatement on any increase in assessment value resulting from the rehabilitation of rental units. To qualify, a certain percentage of the units must be designated as affordable.	Portland, OR					x				x	x		
<b>Single Family New Construction</b>	Tax abatement for income-eligible homebuyers who buy and occupy homes in specific neighborhoods. The goal is to encourage developers to build and sell new affordable housing in those areas.	Portland, OR (N and NE);					x				x	x	x	
<b>Transit-Oriented Tax Exemption</b>	Tax abatement applies to mixed-use or high density residential projects in designated areas near transit. Projects must meet certain affordability requirements.	Portland, OR (only known use)	any city or county in Oregon				x				x	x	x	x
<b>New Multiple-Unit Housing**</b>	Tax abatement applies to new multifamily or mixeduse projects in Urban Renewal Areas or Central City, which is the area near the downtown core along the Willamette River.	Seattle, WA; Portland, OR;									x	x	x	
<b>Non-profit Owner-Manager of Low-Income Housing</b>	Tax abatement for nonprofit organizations that provide housing to low-income residents.						x				x	x	x	x

**EQUITABLE**

**DEVELOPMENT TOOLS**

	what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?	Creates Aff Hours	Preserves Aff Housing	Invests in Residents	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
<b>Tax deferrals</b>	Defer property taxes for lower-income homeowners facing rising property values. When the home is sold, the deferred tax payments can be paid for using profits from the sale. The authors note that elderly homeowners in particular may benefit from property tax deferral and financial assistance. Deferred taxes generally incur interest (for success should be set low)	Portland does not offer these (except to eligible homebuyers in limited areas), but the state of Oregon offers tax abatements and deferrals to limited classes of people. Philadelphia, PA; Washington, DC; Boston, MA (for seniors)		Tax relief may be coupled with low-interest loans or grants to lower-income residents to assist with home maintenance costs. Pair with housing rehabilitation program (listed above)				x			x	x	x	x
<b>Lower-Income, Long-Term Homeowners Tax Credit (or Assessment Cap Credit)</b>	Provides low-income residents with a refund on their income taxes that is equal to the difference between their current real estate property tax bill and 105 percent of their bill from the prior year. Essentially, the program limits the increase in property taxes to 5 percent a year. Protects low-income homeowners from "rapid increases in realproperty taxes that could force them to sell their homes and possibly leave the District. By being able to stay in their homes, homeowners could access the improvements to their neighborhood. Assessment Cap Credit limits the increase in any property's tax value to 10 percent a year and is automatically applied to property tax bills.	Washington DC (50% AMI, yearly paperwork); Boston, MA;		Oregon already has a property tax growth cap at 3% due to measure 47 (except for new construction). Would need an even lower rate for this subset poulation or use an abatement instead				x			x	x		
<b>Tax reactivation program</b>	gives tax-foreclosed properties at no cost to nonprofit organizations, which develop or rehabilitate them into affordable housing; requires rental projects to remain affordable for at least 60 years and homeownership projects to remain affordable for at least 30 years.	Multnomah County, OR; Chicago, IL (IL State statute authorized Cook County);				x					x	x		
<b>Tenant displacement assistance</b>	When property owners apply for a land use change or property improvement that will displace tenants due to one of the following reasons: demolition of a rental unit, alternation of a building that reduces the number of rental units, conversion of a single rental unit to a condominium unit, or change of use from residential to nonresidential use. Gives tenants 60 days notice of the application. They must also pay tenant households \$5,000 or the equivalent of four times the median advertised rental rate, whichever is greater (more for special needs tenants). Tenants are eligible for this assistance if they either live in a unit or lived in a unit in the preceding six months. This latter provision is intended to prevent landlords from evicting tenants and thenapplying for a land use change or project approval	Santa Barbara and Los Angeles, CA; Seattle, WA;		Pair with right of return policy: if a property is redeveloped with homeownership units, give tenants a right of first refusal to buy a unit within 90 days.			x	x			x			
<b>Tenant opportunity to purchase act</b>	Under TOPA, owners of rental housingunits must give their tenants the right of first refusal to purchase their property before selling it to anyone else (District of Columbia 1980). Tenants – or a tenant organization that can be formed in housing with five or more units – have the right to match an offer for sale. single-family rental units as well as apartment buildings. tenants have 15 to 45 days from receiving notice of an offer of sale to provide theowner and the District with a written statement of interest. They then have at least 60 to 120 days to negotiate a deal, plus additional time to secure financing and financial assistance.	Washington DC							x		x	x	x	



EQUITABLE DEVELOPMENT TOOLS						Creates Aff. Hous.	Preserves Aff. Hous.	Increases Aff. Hous. in Rets. Markets	Stabilizes Dev't Impacts	Generates \$	Reduces Costs	Near-term: Planning	Mid-term: Construction	Long-term: Development
what is it?	who has used it?	who has authority to use it?	in what context does it work best?	is it being contemplated locally?										
<b>TIF</b>	dedication from URA funds to housing that is affordable to households with incomes below 80% area median income; Dedicate a portion of tax increment funds to financing affordable housing development and preservation. Existing property owners are protected from tax increases during the TIF lifetime and any additional revenue comes from new developments. has meant that public investments made to revitalize urban renewal areas must be matched by investments in affordable housing. Not only must money be used to create or preserve affordable housing, it must be directed to the same neighborhood that is being revitalized by the City	Portland, OR (PDC) - 30% set aside; Chicago, IL; Houston, TX;				x	x			x			x	
<b>Vacant lot program**</b>	Utilize vacant property receivership; undertake housing rehab for vacant/boarded single-family homes; pursue infill development for community assets	Baltimore, MD; Seattle, WA; Washington DC		Portland does support infill development and land banking				x				x		
<b>Value capture**</b>	A type of public financing that recovers some or all of the value that public infrastructure, such as building transportation or sewer facilities, generates for private landowners. Can entail the creation of a new assessment, tax, or fee (e.g., a special tax or development impact fee); the diversion of new revenue generated by an existing tax (e.g., tax-increment financing); or a revenue-sharing agreement that allows a government agency to share some of the revenue generated (e.g., joint development). State law usually defines how and where these mechanisms can be used. They are typically not confined to revenue-generating infrastructure and can be used to fund all types of TOD infrastructure, including utilities, roads, pedestrian and bicycle improvements, and parking facilities.		Typically established by a local government in accordance with state law. They sometimes require a vote by the affected property owners.						x		x			
<b>Workforce development agreements (similar to local hiring programs)</b>	It outlines employment goals and requirements for city-funded projects or programs, and is signed by numerous organizations in the community, to help local residents secure employment and build their assets (directly tied to those investments). E.g. at least 80 percent of the employees in the program to be local hires	Portland, OR; San Francisco, CA; Seattle, WA					x				x			
<b>Workforce development programs</b>	help residents build their assets through workforce development programs. These programs, which include interview preparation and job coaching, help residents train for and find employment. This, in turn, helps them build assets, allowing them to afford increases in their housing costs and avoid displacement	nonprofits throughout Portland, OR; Seattle, WA;					x				x	x	x	

\*\* = not inherently equitable but could be structured accordingly

**LOOK UP**

Housing Assistance Payment Program	DC
Homestead Deduction	DC
District Opportunity to Purchase Act	DC

**PRIMARY RESOURCES**

KEEPING THE NEIGHBORHOOD AFFORDABLE: A Handbook of Housing Strategies for Gentrifying Areas Diane K. Levy Jennifer Comey Sandra Padilla

Mitigating Displacement Due to gentrification: Tools for Portland, Oregon Eunice Kim Tufts University April 2011

Gentrification and Displacement Study: implementing an equitable inclusive development strategy in the context of gentrification Commissioned by City of Portland Bureau of Planning and Sustainability Authored by Lisa K. Bates, PhD Updated: 05/18/13

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