

Community Investment Strategy

Appendix D. Workshops

1. Transportation Workshop Agenda and Invite List
2. Transportation Workshop Powerpoint
3. Transportation Workshop Notes
4. Human Services, Housing, Community Health Workshop Agenda and Invite List
5. Human Services, Housing, Community Health Workshop Powerpoint
6. Human Services, Housing, Community Health Workshop Notes
7. Community Facilities Workshop Agenda and Invite List
8. Community Facilities Workshop Powerpoint
9. Community Facilities Workshop Notes
10. Utilities Workshop Agenda and Invite List
11. Utilities Workshop Powerpoint
12. Utilities Workshop Notes



**Task 9 – Community Investment Strategy
Subject Expert Workshop #1: TRANSPORTATION
October 7, 2013 – 1:00 – 4:00 pm**

**Willamette Room, 4th Floor - Lane Council of Governments
859 Willamette Street, Eugene**

AGENDA

- | | |
|---|--------------------|
| 1. Introduction | 10 minutes |
| 2. Overview of Community Investment Strategy Framework Process | 10 minutes |
| 3. Desired Workshop Outcomes | 5 minutes |
| <ul style="list-style-type: none">• Establish a common understanding of planned investment needs and priorities of different community agencies;• Explore opportunities to integrate planned investments in a way that strengthens the region's ability to make the most of existing and future public resources while achieving the best economic, environmental and social return for the region; and• Provide information for future conversations and choices | |
| 4. Maps and Data | 20 minutes |
| 5. Facilitated Dialogue with Subject Experts | 120 minutes |
| <ul style="list-style-type: none">• Do these tools provide information that could help you? How could these tools help leverage ways to improve collaboration?• What would be helpful to have that you don't already get from existing processes?• What questions do you have of each other in order to work together more efficiently?• What other topic areas/sectors do you need information from in order to do your job?• How is transportation funding changing and how will that impact your agency? Do assurances exist that your funding sources will exist in the future? | |
| 6. Summary and Next Steps | 15 minutes |

Transportation

Tom Boyatt	Springfield		744-3373	x	x	x
Jeff Paschall	Springfield	jpaschall@springfield.il.gov	726-1674	x		
Len Goodwin	Springfield			x	x	
David Reesor	Springfield			x	x	
Rob Inerfeld	Eugene		x5343	x		x
Mark Schoening	Eugene	Mark.A.Schoening@ci.eugene.or.us	541-682-4930	x	x	x
Matt Rodrigues	Eugene	Matt.J.Rodrigues@ci.eugene.or.us	541-682-6036	x	x	T
Savannah Crawford	ODOT	CRAWFORD S	747-1354	x	x	
David Helton	ODOT	David.I.Helton@odot.state.or.us		x	x	D
Tom Schwetz, Planning	LTD	SCHWETZ Tom	x6203	x		
John Evans	LTD		x6146	x	x	
Theresa Brand	LTD	Theresa.Brand@ltd.org		x		D
Sasha Luftig	LTD	Sasha.Luftig@ltd.org		x		
Todd Lipkin, Finance M	LTD	todd.lipkin@ltd.org	P: 541-682-6153	x		x
Lydia McKinney	Lane County	Lydia.MCKINNEY@ci.lane.or.us	x6930	x	x	D
Sarah Wilkinson	Lane County	sarah.wilkinson@ci.lane.or.us	541-682-6932	x	x	x
Dan Ingram	Lane County			x		x
Paul Thompson	LCOG		x4405	x		D
Petra	Coburg	petra.schuetz@ci.coburg.or.us		x	x	x
Stephanie Jennings	Eugene			x		T
				20	11	



Task 9 – Community Investment Strategy

Subject Expert Workshop

UTILITIES

October 10, 2013



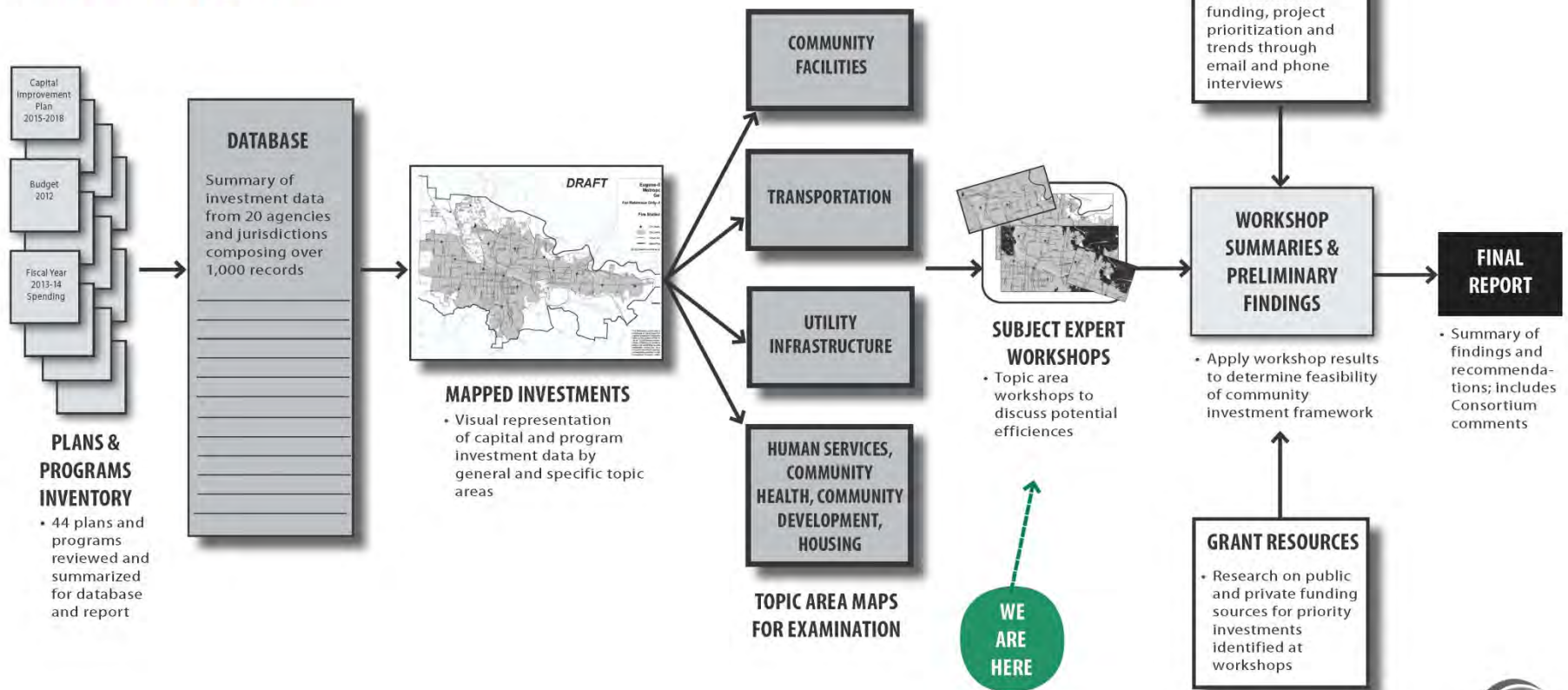
- 1. Introductions; Introduction to Lane Livability Cons.**
- 2. Community Investment Strategy Framework**
- 3. Desired Workshop Outcomes**
- 4. Maps and Data**
- 5. Facilitated Dialogue with Subject Experts**
- 6. Summary and Next Steps**



Introduction – Lane Livability Consortium



Task 9. Community Investment Strategy Framework Process Diagram



LIVABILITYLANE

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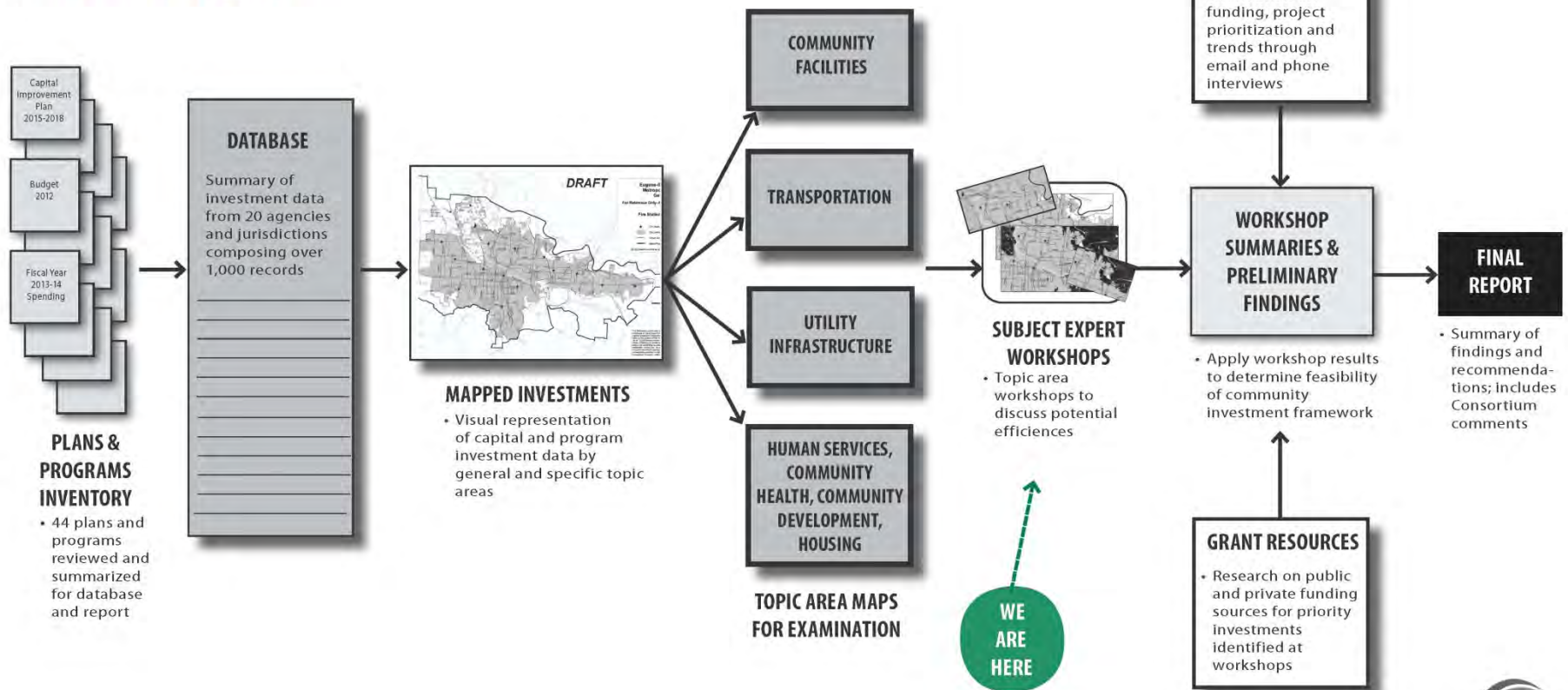
Impact Area	Mapped	Not Mapped
Community Health	5	13
Economic Development	1	6
Electricity	62	28
Higher Education	55	0
Housing	25	17
Human Services	31	58
Parks and Open Space	49	57
Public Buildings and Administration	50	37
Public Safety	14	8
Schools K-12	31	13
Stormwater	29	27
Transportation	128	137
Wastewater	30	8
Water Supply	106	22



CPW Overarching Themes - Transportation

- Transportation linked to CPW's four core areas (housing, economic development and public health)
- Housing, housing development costs and housing density are linked to transportation system and transportation infrastructure costs
- Transportation decisions impact public health and economic development
- Access to services directly connects to transportation system
- Region has an ideal proximity to key freight infrastructure

Task 9. Community Investment Strategy Framework Process Diagram





Subject Expert Workshops

- **Transportation** (impact area includes transportation)
- **Utility Infrastructure** (impact areas include electricity, stormwater, water supply, and wastewater)
- **Community Facilities** (impact areas include parks and open space, higher education, schools K-12, and public buildings/administration)
- **Housing, Community Development, Human Services, and Community Health** (impact areas include community health, economic development, housing, and human services)



Desired Workshop Outcomes

- Common understanding of planned investments;
- Planned investment integration; and
- information for future conversations and choices

Maps and Data – Limitations

- Data and maps are snapshot in time created with best available information
- Range of detail in documents – location, dollars and years
- Not all projects can be mapped
- Uneven spatial distribution
- Some subjectivity required when compiling database

Community Investment Database

Over 1000 records, gleaned from 34 documents

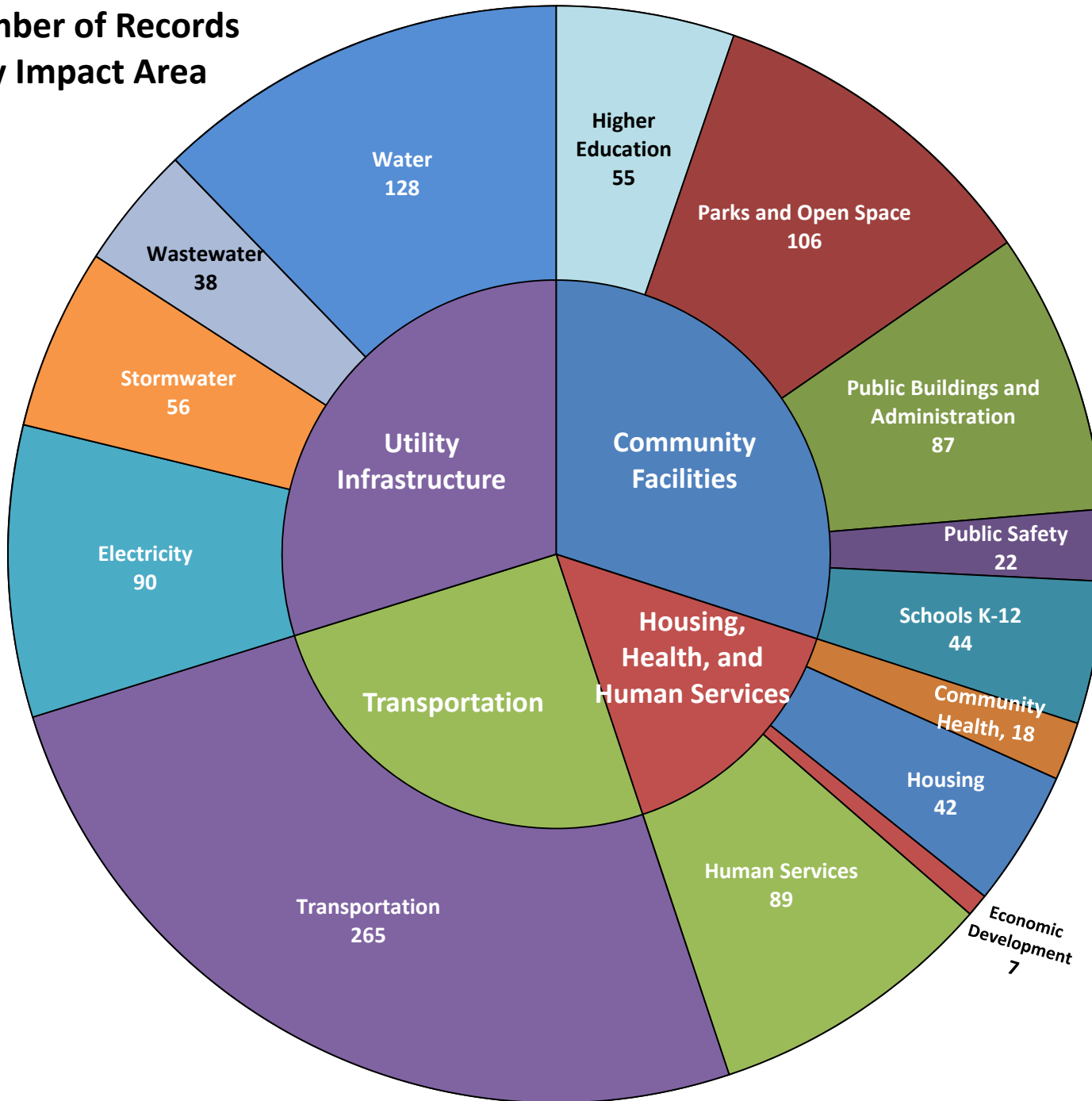
Project-level and program-level information includes:

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

Projects and Programs were each categorized into one of 14 **Impact Areas**

Impact Areas	Record Count	Major Topic Areas	Total Investments (Funding Sources)	Total Investments (All FYs)	Past and Current Investments (FY11-12 to FY13-14)	Future Investments (FY14-15 to FY19-20)
Higher Education	55	Community Facilities (314)	\$741,780,697	\$691,780,697	\$691,780,697	\$0
Parks and Open Space	106		\$143,326,308	\$65,682,308	\$20,727,808	\$44,954,500
Public Buildings and Administration	87		\$803,324,221	\$530,428,006	\$382,844,006	\$147,584,000
Public Safety	22		\$309,600,097	\$291,056,428	\$236,867,428	\$54,189,000
Schools K-12	44		\$479,915,660	\$512,344,740	\$417,346,740	\$94,998,000
Community Health	18	Housing, Health, and Human Services (156)	\$92,609,340	\$92,957,820	\$92,856,826	\$100,994
Housing	42		\$30,455,696	\$27,175,189	\$26,425,189	\$750,000
Economic Development	7		\$3,025,322	\$2,864,817	\$2,864,817	\$0
Human Services	89		\$102,966,812	\$108,435,190	\$108,062,978	\$372,212
Transportation	265	Transportation (265)	\$937,220,879	\$923,524,906	\$433,623,305	\$489,901,601
Electricity	90	Utility Infrastructure (312)	\$221,059,989	\$221,059,989	\$66,566,986	\$154,493,003
Stormwater	56		\$74,097,129	\$66,894,930	\$26,920,130	\$39,974,800
Wastewater	38		\$203,016,009	\$197,236,043	\$117,058,703	\$80,177,340
Water	128		\$139,074,445	\$135,063,446	\$42,573,077	\$92,490,369
Database Totals	1047		\$4,281,472,604	\$3,866,504,509	\$2,666,518,690	\$1,199,985,819

Number of Records by Impact Area

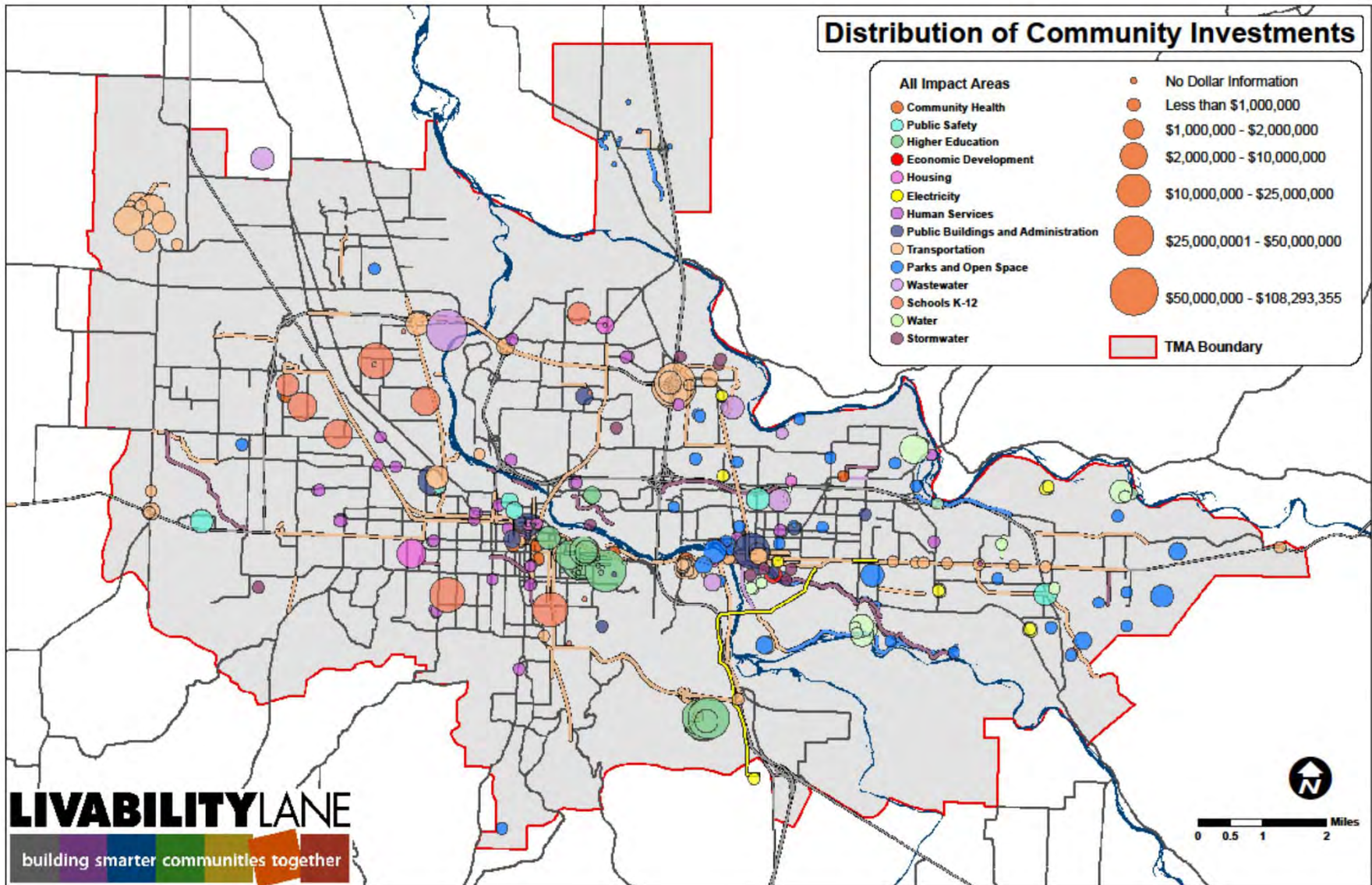


Distribution of Community Investments

All Impact Areas

- Community Health
- Public Safety
- Higher Education
- Economic Development
- Housing
- Electricity
- Human Services
- Public Buildings and Administration
- Transportation
- Parks and Open Space
- Wastewater
- Schools K-12
- Water
- Stormwater

- No Dollar Information
- Less than \$1,000,000
- \$1,000,000 - \$2,000,000
- \$2,000,000 - \$10,000,000
- \$10,000,000 - \$25,000,000
- \$25,000,000 - \$50,000,000
- \$50,000,000 - \$108,293,355
- TMA Boundary



Distribution of Community Investments

Impact Area: Transportation

No Dollar Information

Less than \$1,000,000

\$1,000,000 - \$2,000,000

\$2,000,000 - \$10,000,000

\$10,000,000 - \$25,000,000

\$25,000,000 - \$50,000,000

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TMA Boundary

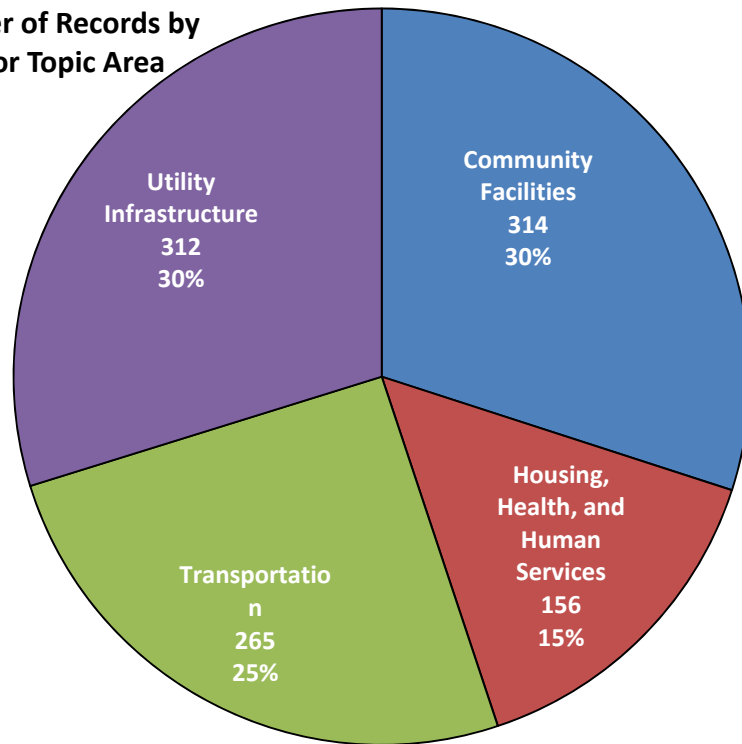
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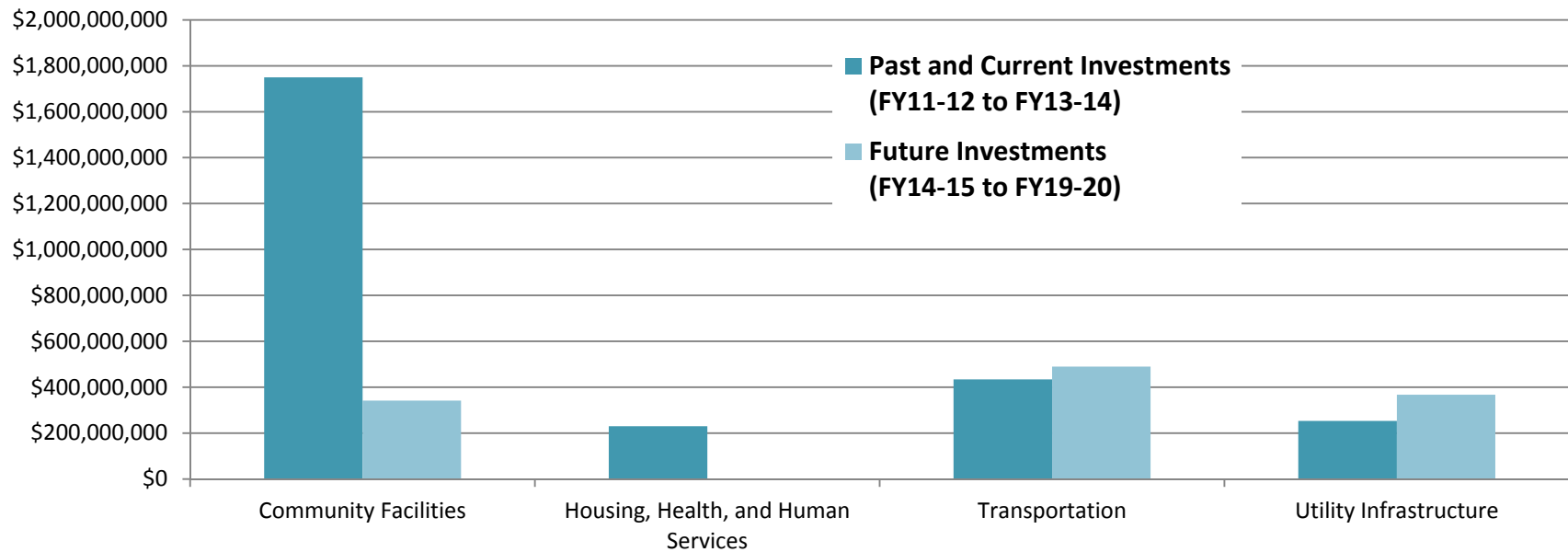
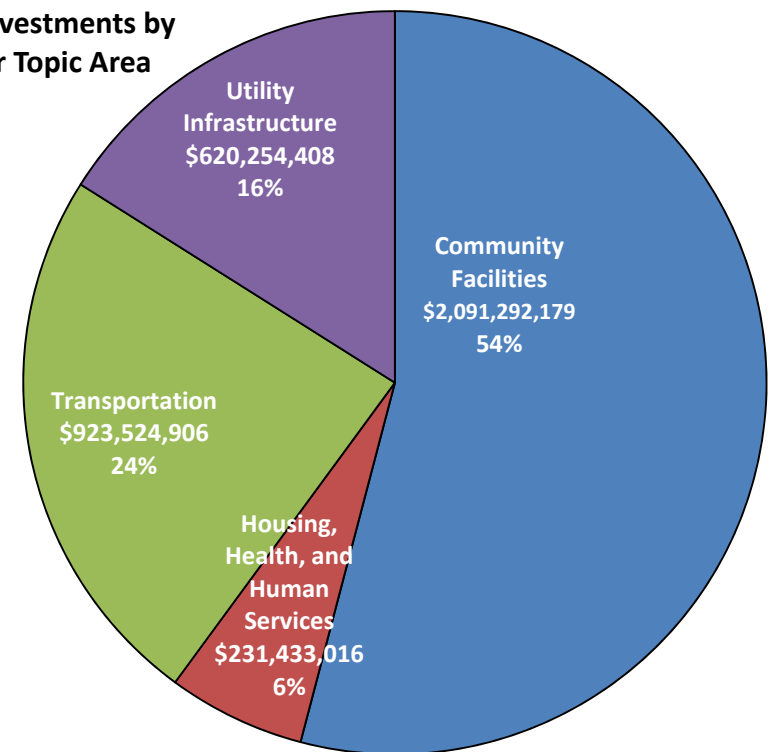


0 0.5 1 2 Miles

Number of Records by Major Topic Area



Total Investments by Major Topic Area





Questions

- Do these tools provide information that could help you?
- How could these tools help leverage ways to improve collaboration?
- What would be helpful to have that you don't already get from existing processes?



Questions

- What questions do you have of each other in order to work together more efficiently?
- What other topic areas do you need information from in order to do your job?

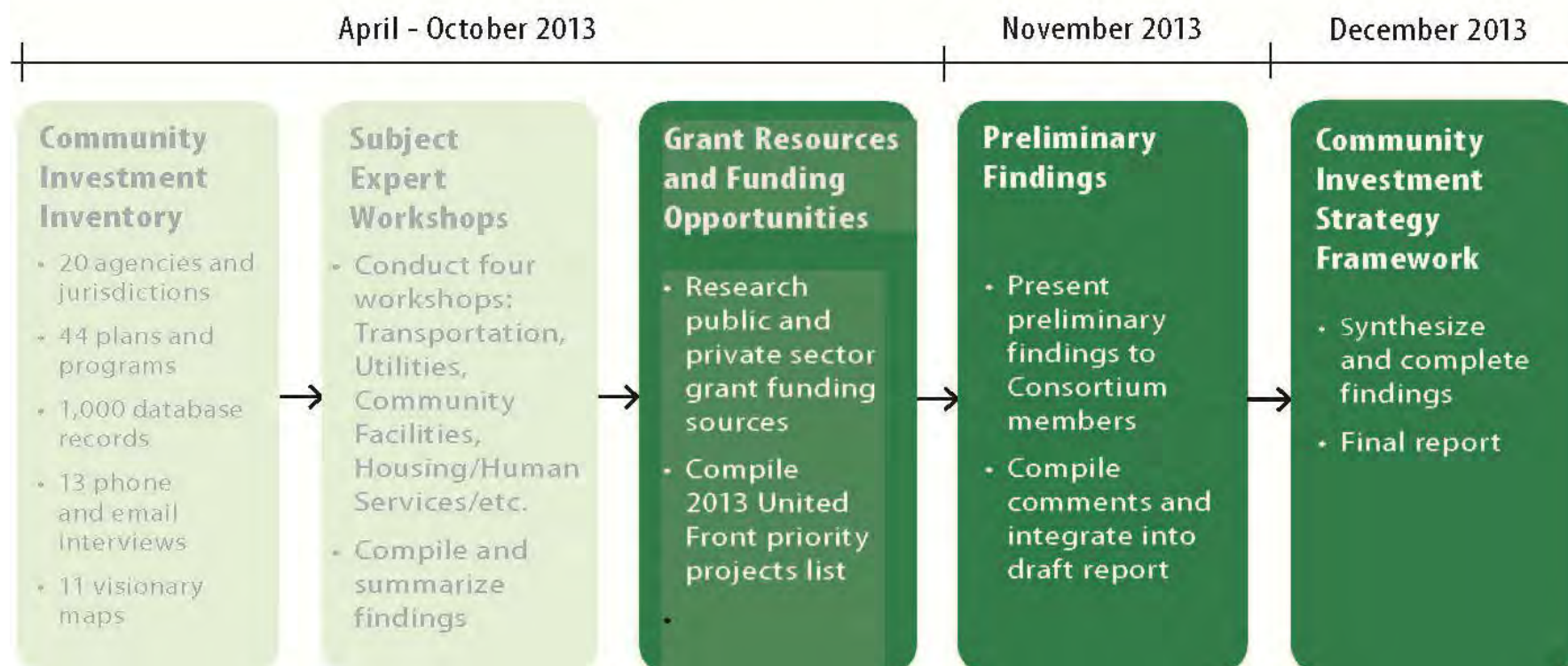


Questions

- How is transportation funding changing and how will that impact your agency?
- Do assurances exist that your funding sources will exist in the future?

Next Steps

Community Investment Strategy Framework



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CPW Gaps - Transportation

- Relationship to airport and freight
- Connection between affordable housing and transportation costs should be better recognized
- Inadequate consideration of health impacts of transportation investments and strategies



CPW Opportunities - Transportation

- Eugene-Springfield's central location.
- Linking CPW's four core areas
- Eugene-Springfield area potential focal point for trade and distribution to coast and between San Francisco and Seattle
- Practice of car sharing can reduce need for large parking requirements in housing developments
- Recognize link between active transportation and impacts on individual health and quality of life.
- Better link between transportation and housing



Task 9 – Community Investment Strategy
Subject Expert Workshop #1: TRANSPORTATION
October 7, 2013 – 1:00 – 4:00 pm
NOTES

Attendees:

Jenifer Willer, City of Eugene, jenifer.m.willer@ci.eugene.or.us
Tom Boyatt, City of Springfield, tboyatt@springfield-or.gov
Mark Schoening, City of Eugene, mark.a.schoening@ci.eugene.or.us
Sarah Wilkinson, Lane County, sarah.wilkinson@co.lane.or.us
Dan Ingram, Lane County, Daniel.ingram@co.lane.or.us
Dave Reesor, City of Springfield, dreesor@springfield-or.gov
Sasha Luftig, LTD, sasha.luftig@ltd.org
Todd Lipkin, LTD, todd.lipkin@ltd.org
Rob Inerfeld, City of Eugene, Rob.Inerfeld@ci.eugene.or.us
Tom Schwetz, LTD, tomschwetz@ltd.org

Facilitated Dialogue with Subject Experts

LCOG staff facilitated a discussion with attendees around the information presented.
Comments from attendees have been categorized as follows:

1. How the investment tools could help the participating agencies
2. Critique of data and investment tools
3. How tools help leverage ways to improve collaboration
4. What information could be shared with other areas and what information would be helpful to transportation

How the investment tools could help the participating agencies

- Investment tools can assist with decision making and policy development at a high level or in the broader regional context
- Is a tremendous tool for grant writing (combining topic areas)
- Helpful in shared knowledge of planned community investments, particularly around mobility and connections
- Helpful in identifying corridors of investment (showing project locations and dollar information)
- Phasing of projects can be informed by tools
- Value in the diversity of organizations and sharing information across areas (transportation, schools, utilities etc.)
- Tools facilitate connections and communication between transportation agencies and between transportation and other community organizations – value in creating connections
- Can coordinate project planning (locations-goals-timing)

- This information could be used to check investments across areas
- Map is easiest tool to read and conveys community investment priorities
- Value in bringing all the info together in one place
- Could use a tool like this for engaging community investors in projects we are doing
- Specific information that could be helpful includes:
 - Graphs & charts
 - All-inclusive map
 - Future vs. current investments
 - Comparison table of dollars to other categories
 - Historic data also helpful in decision making
 - Dollars are useful in summaries

Critique of data and investment tools

- Need to refine the information - Standardize the records in the database and methods of data entry - Prepare list of items that we could enter similarly to improve tools – determine appropriate level of detail
- The tools would be most helpful on-line - map on the internet to explore investment info in a specific area, in support of transportation funding
- Need to define the terms and categories (impact areas, funded/unfunded, project/program, etc.)
- Confusion about integrating projects - Confirm inclusion of projects in the database
- Difficulty assigning categories – sometimes depends on what plan the information came from
- On the map show Fiscal Year dollars (not funding sources) – 6-yr transportation funding cycle
- Most Lane County transportation dollars are spent on maintenance – probably don't show on map – loss of O&C money
- This database may create less clarity than already existed – For example, where does the LTD Building end up?
- Show all categories on map – is more useful than just transportation
- Transportation alone map is not surprising but maybe is for other impact areas
- What is the story behind the maps and dots on the map – provide material in crafting a story for legislation and grants
- Budget docs are less important – property info may be more useful
- Get locations as 1st priority – map visions
- Different fiscal years – planning horizons between plans and organizations is an issue
- Link to census data is possible
- Zooming capability also possible
- Assumptions affect answers - What is behind the numbers? How did we get the numbers?
- City Eugene bond info not included (no dollars in bond info – provides list of streets)
- Transportation already has this kind of information
- Send list of projects to organizations for review - Double checking data sources – Would agencies spend time checking data?

Critique of data and investment tools cont.

- Investment information is outcomes of planning processes. Are investments linked to priorities? So far we haven't reflected priorities. Are we going to do that?
- Information needs to be maintained to stay relevant
- Costly to maintain - assumptions about funding the tools? - It's not free - How fund tools?
- Maybe we don't try to include dollar amounts, funding source all the specifics. We focus on getting the projects on a map so people can see them & follow up to get the details.
- Maybe the story isn't about the dollars, maybe it's about the site or the corridor – site context
- Maybe the dollars are useful in graphs, but not on the maps. The dollars make our mapping more difficult, more complicated, more constrained. They are what they are. Get away from dollars?
- Dollars are important – but need to compare apples to apples. Capital only. No maintenance- No programs
- Dollars are meaningful to others, especially when they can be associated with a specific facility (e.g. airport)
- Is it possible to standardize? Heard yes from a couple people
- Can individual agencies map 5-year plans? How translate? Can plans read the same to be consistent? Translate the information into a form...enter info into the tools? Who's responsible to enter data? Is it feasible to maintain this record entry over time? May already have the information - Jurisdictions already maintaining individually
- Also want to see budgets
- Reliability of data? 1st year most assurance, farther out less assurance
- Amendments may be a challenge in standardized data entry
- Funding cycles vary – Life cycle of major projects – 3 separate maps – planned – development – delivery (annual vs. projected) would also help eliminate FY issues
- Building from what already doing if create database; refresh cycle would need to be addressed (Ex. Franklin Blvd) Discuss refresh cycle - step away from strict year-by-year structure? Does that make it easier or more difficult?
- Information lost in translation – when discrepancies exist in information given to Lane Livability Consortium vs. what is entered in the individual plans
- Leave out programs for now
- Plan for improving database: spool out each agency's records to them so they can review and make suggestions for improvement and possibly establish a scope of required effort to make those improvements.
- Keep it manageable in scope. Take out current and past spending. Things that aren't going to happen just add more noise to the map

How tools help leverage ways to improve collaboration

- Some organizations do plan and share investments and some don't plan or share investments
- Interest in aligning improvements with other agencies
- Transportation people already meet and collaborate but could use information from others
- Could identify downtowns as priority investment areas

How tools help leverage ways to improve collaboration cont.

- Partnerships exist (NW natural, ped/bike) 5-year plan to EWEB/NWN – spread out if needed
- Opportunities exist to collaborate with other impact areas – reviewing other common investments would be helpful (Ex. Schools, university, private development)
- Roads & utilities are well coordinated - information sharing ranges in notice time
- Need more info from schools, other entities, not the city. UO sometimes surprises Eugene with projects (similar with SUB)
- Opportunities for collaboration between agencies (particular to site-specific investments)
- Collaborate w/ providers in advance – prior to project implementation - May be able to incorporate other projects in scope if we know early on/other projects in pipeline. Project specific coordination w/ major capital projects.
- Regional coordination exists
- Don't have as many projects in the 1-yr before construction- LTD does same thing with EmX projects, within a year or so of construction
- Perhaps more coordination on programmatic side, bike / ped stuff, communication among program managers
- Project specific coordination between LTD, Eugene, Springfield and Lane County (9 mo. – 3 year notice)
- Broader coordination at a regional level (capital and programmatic) is already happening
- These tools stimulate communication - Communication to outside audiences other than transp.
- How advance models of interagency coordination – who are point people? – are you willing to participate?
- Priorities competing – reach a level of coordination/collaboration
- Engaging other groups in each other's processes? Engage folks at start - How can the information be in a format that allows the engagement/conversations?
- Bring local knowledge to project planning - Public process provides a way to come forward with contact information?
- Advance inter-agency consultation - No response is an issue in current consultation
- Identify contacts that are responsible for investment information - Accountability required
- Opposition to coordination preserves flexibility in individual process
- Interests are not necessarily mutually supportive (Self-interest vs. common rights)
- Unintentional perhaps short-term tends to be self-interested (changes at last minute)
- Systematic way to work together? To make accountable? Reduce self-interesthow? How can we help each other?
- Limitations to community investment strategy
- Process of interagency consultation – make self-interest exception (not norm) – “consultation “ is still only feedback
- Consultation – communication – coordination – collaboration (Begin w/ communication – 1st step towards coordination/collaboration)
- Foundation of regional coordination already needs to be in place for grants
- Conversations with other topic areas - benefit of improving coordination

How tools help leverage ways to improve collaboration cont.

- Leverage resources together - Grant applications ask for coordination – looking for cross-coordination - Without shared knowledge in place it will hinder the grant apps
- Transportation conversations around funding have gone on for years
- Outside UGBs have different challenges - Choices become more complicated going forward as fewer sites remain. Movement toward no UGB expansions may force coordination
- Some organizations don't choose to not plan, funding doesn't allow it (location detail, etc.)
- Coordination should lead to efficiencies
- Federal funding causes barriers
- Annual meeting? Large endeavor – by subject area may be more efficient, but value in cross-sector sharing - Central data source may be more convenient than a meeting

What information could be shared with other areas and what information would be helpful to transportation

- City Eugene annually updating info. - City has rolling 6-yr CIP maps & dot information
- LTD would like to be able to consider other investments along one of their own possible future corridors (e.g. river road) overall community-wide investment strategy
- What about looking programmatically?
- Include private sector?
- People that usually come to transportation seeking information include: Utilities and developers
- Could collaborate between service providers on site specific development (schools, higher education) – go beyond property lines
- 5-year map with investments may be useful – encompassing all areas – be accurate - shorter time horizon – a lot changes and some organizations may not have information that far out but collect from the ones who can
- More categories? Add additional detail, more colors for transportation (ped, bike, pavement, signals, etc.)
- How is M&O helpful? – new facilities could be added to those projects – can be helpful
- Pull maintenance out? Just focus on future projects? Counter arguments about need to communicate on maintenance not just added lanes or new streets.
- Map categories: project preservation, maintenance, new construction
- Programs exist in transportation – not just projects
- Address waste in resources – extreme ex. Wastewater project is completed and a transportation project in the same location begins
- Realtors may like this information – link in RLID?
- No systematic way of engaging community investors. How set-up process to find out what they're doing? Engage them in a manner that helps them become aware – for example 4j
- How can we understand their specific expertise and information to identify joint solutions
- Include property ownership for agencies (ex. Where is school owned property?)
- Agree the challenges exist in comparing different information
- Categories of funding: Partially funded/funded/unfunded



Task 9 – Community Investment Strategy
Subject Expert Workshop #4:
HUMAN SERVICES, HOUSING, COMMUNITY HEALTH
October 30, 2013 – 9:00 A.M. – 12:00 P.M.

Willamette Room, 4th Floor - Lane Council of Governments
859 Willamette Street, Eugene

AGENDA

- | | |
|---|--------------------|
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| 4. Maps and Data | 20 minutes |
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| 6. Summary and Next Steps | 10 minutes |

Housing, Comm Dev, Human Services, Community Health						
Name, title	Agency	Email	Phone	Invited	RSVP	Can Attend
Kevin Koh	Springfield		726-3458			
Stephanie Jennings	Eugene	Stephanie.A.Jennings@	541-682-5529			
Larry Abel	HACSA (3755)		x2503			
Betsy Hunter	HACSA (3755)		x2530			
Mira Gattis	HACSA (3755)	mgattis@hacsa.us				
Nora Cronin, Housing De	St. Vincent de Paul	ncronin@svdp.us	743-7139			
Sophia Bennett	St. Vincent de Paul	sbennett@svdp.us				
Anne Williams	St. Vincent de Paul					
Colleen Stewart	St. Vincent de Paul					
Elena Fracchia	United Way	efracchia@unitedwaylane.org	541-741-6000 x101	x		
Kellie DeVore	United Way	kdevore@unitedwaylane.org		x		
Hank Hoell	United Way					
Cindy Baskerville	LC Human Svc Comm	Cindy.Baskerville@co.la	x3031			
Kendra Ballenger, Progra	LC Health & Human Services	Kendra.BALLENGER@	x3777			
Steve Manela, Program M	LC Health & Human Services	Steve.Manela@CO.Lar	x3797			
Mike Sullivan, CD	Eugene		x5448			
Bill Ellis	Eugene		x8367			
Denny Braud, CD	Eugene					
Michael Wisth, Housing	Eugene					
John Tamulonis	Springfield		726-3656			
Claire Seguin	NEDCO					
Abigail Ofori-Amoah	NEDCO					
Robin Scott	Lane Workforce Partnership	Robins@laneworkforce.org				
Chuck Forster	Lane Workforce Partnership	ChuckF@laneworkforce.org				
Karen Gillette	Lane County Public Health		x3950			
Lindsey Adkisson	Lane County Public Health		x8772			
Jennifer Jordan	Lane County Public Health		x3781			
Patrick Luedtke	Lane County Public Health		x8762			
Pam Stuver	Lane County Public Health		x4670			
Marieke Young	Lane County Public Health		x3817			
Matt Laird	Lane County Housing					
Keir Miller	Lane County Housing					
Mark Rust	Lane County Housing					
Brian Johnson	Lane County Housing					
Angela Phinney	LCOG S&DS,		x4137			

Laura McClain	Ln Coalition for Healthy Active	laura@lchay.org				
Jamie Damon	Regional Solutions Center		346-8626			
Mark Rust	LC Eco Devo		x4541			
Glenda Poling	LC Eco Devo		x3725			
Steve Dignam	LCOG		x7450			
Dan Reece	PeaceHealth	dreece@peacehealth.org				
Phil Farrington	PeaceHealth	pfarrington@peacehealth.org				
Petra Schuetz	Coburg	petra.schuetz@ci.coburg.or.us				



Task 9 – Community Investment Strategy

Subject Expert Workshop

Housing, Community Health, Human Services

October 30, 2013



- 1. Introduction to Lane Livability Consortium**
- 2. Community Investment Strategy Framework**
- 3. Desired Workshop Outcomes**
- 4. Maps and Data**
- 5. Facilitated Dialogue with Subject Experts**
- 6. Summary and Next Steps**

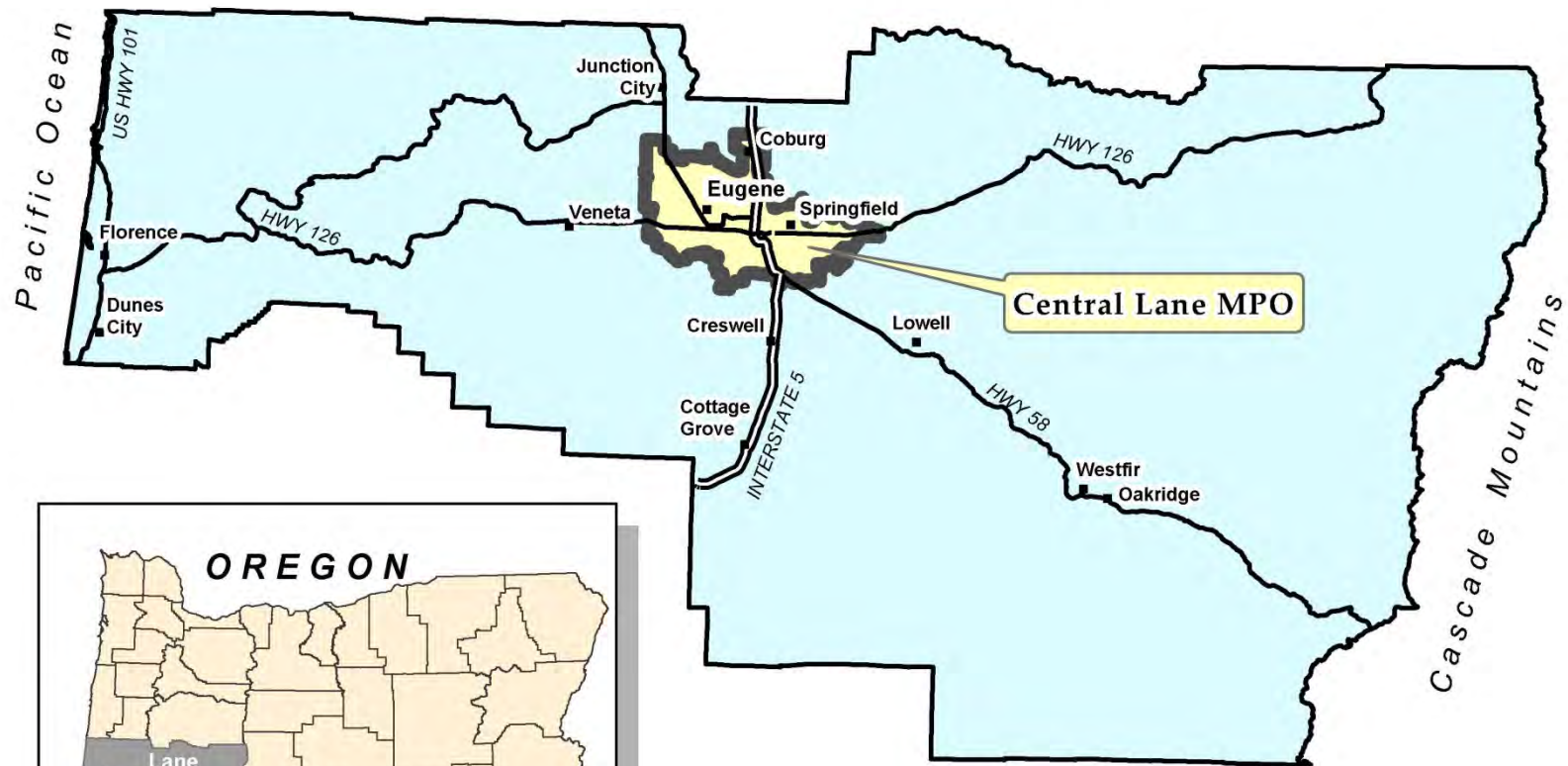


Introduction – Lane Livability Consortium



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Lane County, Oregon



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Miles



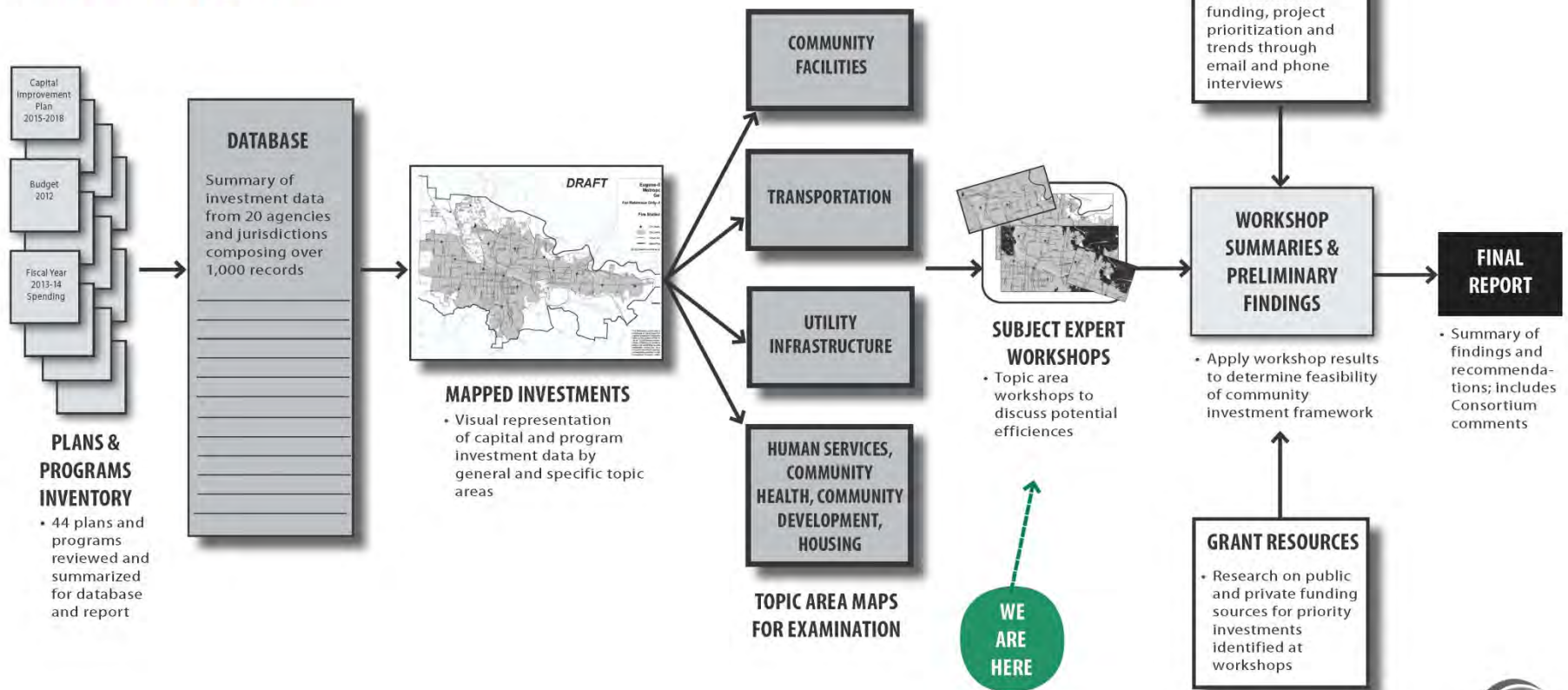
Lane Council of Governments
859 Willamette, Suite 500
Eugene, Oregon 97401



Activities – Lane Livability Consortium

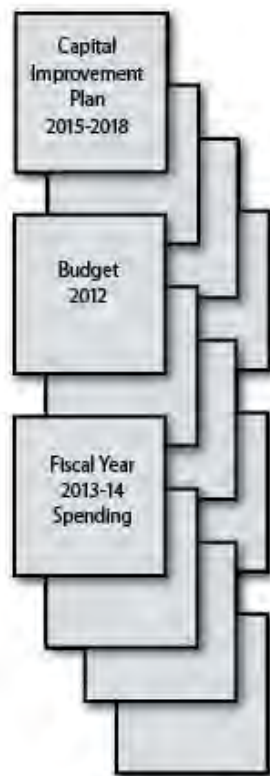
- Sustainability Baseline Assessment
- Scenario Planning
- Smart Communities: Closing the Gaps
- Moving Plans to Actions

Task 9. Community Investment Strategy Framework Process Diagram



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PLANS & PROGRAMS INVENTORY

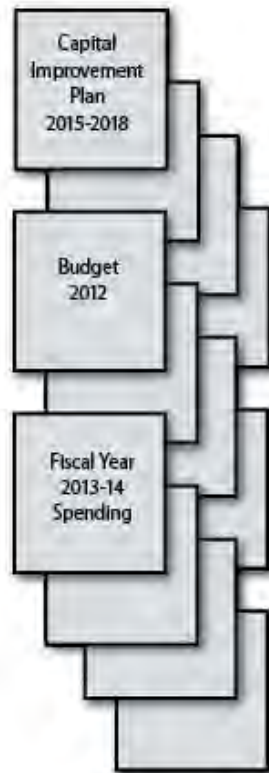
INVESTMENT PLANS

INVESTMENT PLANS DESCRIBE THE FUNDING FOR THE PRIORITIZED PROJECTS & PROGRAMS

1. Metro Public Facilities and Services Plan
2. Eugene-Springfield One Year Action Plan 2013-2014
3. Human Services Fund Priorities for Fiscal Years 2012 and 2013
4. Draft Metropolitan Transportation Improvement Program
5. *City of Eugene Capital Improvement Program (2014-2019)*
6. *City of Eugene Comprehensive Annual Financial Report*
7. City of Eugene 2013 Budget
8. City of Eugene 2012-2017 Multi Year Financial Plan
9. *City of Springfield Capital Improvement Program (2014-2018)*
10. *City of Springfield Comprehensive Annual Financial Report*
11. City of Springfield, FY 2013 Budget
12. Lane County Public Works Capital Impr. Program 2014-2018
13. Lane County FY2012 Comprehensive Annual Financial Report
14. Lane County 2013/2014 Budget
15. Human Services Plan for Lane County (December 16, 2009)
16. Willamalane Park and Recreation Comprehensive Plan and CIP
17. Lane Transit District Capital Improvements Program (2013-2023)
18. LTD 2011-2012 Comprehensive Annual Financial Report
19. ODOT Final Statewide Transportation Improvement Program
20. *EWEB 5-Year Water and 5-Year Electric Capital Improvement Plan*
21. *SUB Electric Division & Water Division Capital Improvement Budget 2012*
22. *SUB Electric and Water Utility Major Capital Improvements*
23. *MWMC 5-year Capital Improvement Program 2012-2017*
24. Regional Wastewater Program Budget & Capital Improvement Program
25. Metropolitan Wastewater Mgmt Commission 2005 Financial Plan
26. School District 4j Comprehensive Annual Financial Report
27. School District 4j Measure 20-210 Bond Information
28. Springfield Schools Comprehensive Annual Financial Report
29. Bethel School District Comprehensive Annual Financial Report
30. Bethel School District Bond Improvements
31. Lane Community College Budget Document
32. Conceptual Vision (Draft), August 2010
33. Oregon University System 2011-2013 Capital Construction Program
34. UO Campus Plan Second Edition 2011
35. UO Major Capital Projects, January 2013
36. UO Vision Plan: Campus Planning & Real Estate September 2012
37. HACSA project list
38. St. Vincent De Paul Development List as of April 2013
39. St. Vincent De Paul Newsletter with Financial Statement
40. United Way Program List 2013-2015
41. City of Coburg Transportation System Plan and Wastewater Plan
42. Coburg Parks and Open Space Master Plan
43. Coburg Water Management and Conservation Plan
44. *Coburg Water System Master Plan Update*

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PLANS & PROGRAMS INVENTORY

COMMUNITY NEEDS PLANS, VISIONARY PLANS

COMMUNITY NEEDS ARE MORE REFINED STRATEGIC PLANS DOCUMENTING SPECIFIC PROGRAMS & PLANS, & DETAIL ANTICIPATED COSTS; VISIONARY DOCUMENTS ARE GENERALLY LONG TERM PLANS THAT DETAIL BROAD COMMUNITY VALUES & GOALS

Community Needs

1. Eugene-Springfield TransPlan
2. Central Lane MPO Regional Transportation Plan
3. Lane County Community Health Improvement Program
4. Oregon State's Integrated Water Resources Strategy
5. Lane County Natural Hazard Mitigation Plan
6. Metro Waterways
7. Eugene PROS Project & Priority Plan
8. Eugene Bicycle and Pedestrian Master Plan
9. Eugene TSP
10. Lane County Transportation System Plan
11. Lane County Natural Hazards Mitigation Plan
12. Lane Workforce Partnership Local Strategic Workforce Plan
13. OR 126W: Fern Ridge Corridor Plan
14. OR 126 Expressway Management Plan
15. OR 569 (Beltline): River Road to Coburg Road Facility Plan
16. EWEB Strategic Plan
17. EWEB Drinking Water Source Protection Plan
18. 4J Long Range Facilities Plan

Visionary

1. Regional Prosperity Economic Development Plan Cascades West Comprehensive Economic Development Strategy
2. Eugene-Springfield Consolidated Housing 5 year Strategic Plan
3. Rivers to Ridges Reg'l Parks and Open Space Vision
4. Willamette River Open Space Vision & Action Plan
5. West Eugene Wetlands Plan
6. Ridgeline Area Open Space Vision & Action Plan
7. Parks, Recreation and Open Space Comp. Plan
8. Envision Eugene
9. Envision Eugene Implementation Update
10. Envision Eugene Draft Proposal
11. Envision Eugene Spotlight on Implementation
12. Climate Energy Action Plan
13. Springfield 2030
14. Lane County Rural Comprehensive Plan
15. Lane County Public Health Auth. Comp. Plan
16. Lane Coord. Public Transit Human Svcs Plan
17. LTD Long Range Transit Plan
18. EWEB Integrated Electric Resource Plan
19. Lane Strategic Plan
20. Coburg Crossroads Urbanization Study

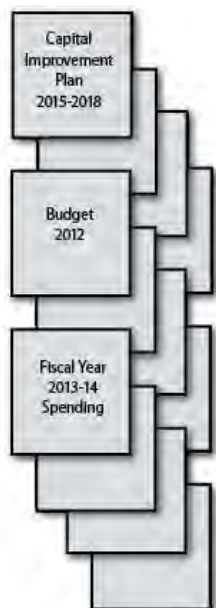


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Housing, Community Health, Human Services Plans & Programs

Housing, Health, and Human Services Investment Plan Years										
Plan Name	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Eugene-Springfield One Year Action										
City of Eugene CIP										
City of Eugene CAFR*										
City of Eugene Budget*										
City of Eugene Multi Year Financial										
City of Springfield CIP*										
City of Springfield CAFR										
City of Springfield Budget*										
Housing And Community Service Agency (HACSA) of Lane County Development List										
HACSA Strategic Plan*										
Lane County CIP*										
Lane County CAFR										
Lane County Budget										
Lane County Human Services Excel										
St. Vincent De Paul (SVDP) Development List										
SVDP Newsletter with Financial Statement										
United Way Program List										

(CAFR) Comprehensive Annual Financial Report
(CIP) Capital Improvement Program
*Plan reviewed and information is recorded in the Plan Summary but not in the database



PLANS & PROGRAMS INVENTORY

INTERVIEWS

- Qualitative information on funding, project prioritization and trends gathered through email and phone interviews

Interviews, Plan and Program Summaries

- What are the purpose, goals and/or objectives of the document?
- What types of funding are included?
- How are projects and/or programs prioritized?
- What are the funding trends?



Interviews, Plan/Program Summaries

Document Type	Agency, Jurisdiction	Purpose, Goals and Objectives
Capital Improvement Program, Major Capital Projects	Multiple	Multi-year program documenting funding and construction of agency facilities based on available revenue; typically based on long range plans, goals and policies
Budget	Multiple	Financial plan for an agency; may include goals and objectives of the broader organization; may include investments
Comprehensive Annual Financial Report	Multiple	Meeting the state and federal requirements for reporting previous year financial condition
Multi-year Financial Plan (Eugene)	Eugene	List of significant unfunded challenges; used as a strategic planning tool that is not adopted
Conceptual Vision, Master Plan	Multiple	Master planning for expansion, future improvements; typically no funding information/source



Interviews, Plan/Program Summaries

- Agency vision, goals, mission statement drive funding choices and priorities
- Negative effects of recent economic downturn
- Desire yet inability to address all needs
- Uncertainty and reliance on the unknown
- Long-term sustainability

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DATABASE

Impact Area	Mapped	Not Mapped
Community Health	5	13
Economic Development	1	6
Electricity	62	28
Higher Education	55	0
Housing	25	17
Human Services	31	58
Parks and Open Space	49	57
Public Buildings and Administration	50	37
Public Safety	14	8
Schools K-12	31	13
Stormwater	29	27
Transportation	128	137
Wastewater	30	8
Water Supply	106	22



Housing, Community Health, Human Services impact Areas

Community Health – Governmental and/or non-profit entities; medical or dental treatment (White Bird health services, etc.)

Housing – Governmental and/or non-profit entities that develop or improve affordable housing

Human Services – Governmental and/or non-profit entities dedicated to social services; Human Services Commission funded services to meet basic needs such as:

- Nutritious food, clothing, emergency shelter, utilities, and specialized case management services
- Improved access to housing, jobs, and positive community connections
- Prevention and reduction in violence, crime, and neglect
- Improved access, coordination and effectiveness of health, human services, and housing programs

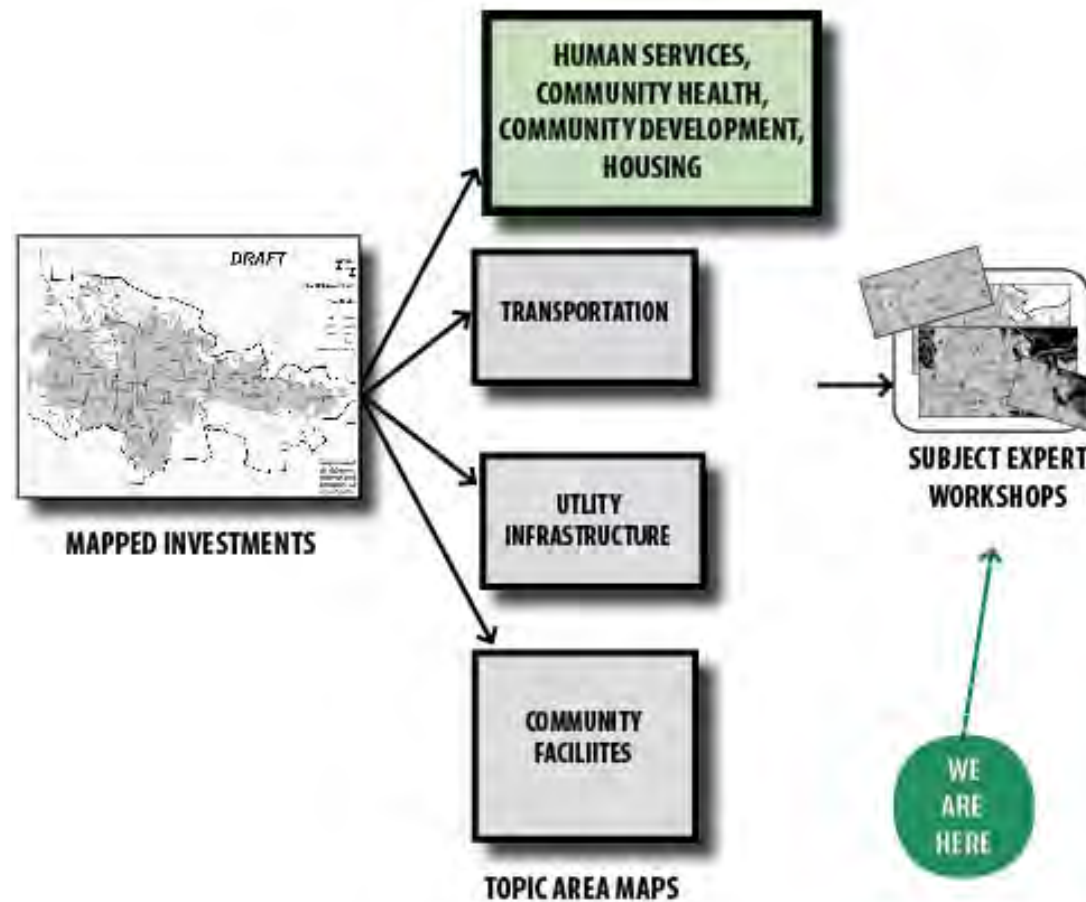


Database

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

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Desired Workshop Outcomes

- Common understanding of planned investments;
- Planned investment integration; and
- Information for future conversations and choices

Maps and Data – Limitations

- Data and maps are snapshot in time created with best available information
- Range of detail in documents – location, dollars and years
- Not all projects can be mapped
- Uneven spatial distribution
- Some subjectivity required when compiling database



Key Observations to Date

- Agencies and jurisdictions spend considerable time and resources preparing capital improvement plans and programming investments
- Implementation of improvements and programs can be unpredictable
- Successful regional cooperation already exists in some areas.
- Some entities keep capital investment planning private due to competition

Community Investment Database

Over 1000 records, gleaned from 34 documents

Project-level and program-level information includes:

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

Projects and Programs were each categorized into one of 14 **Impact Areas**



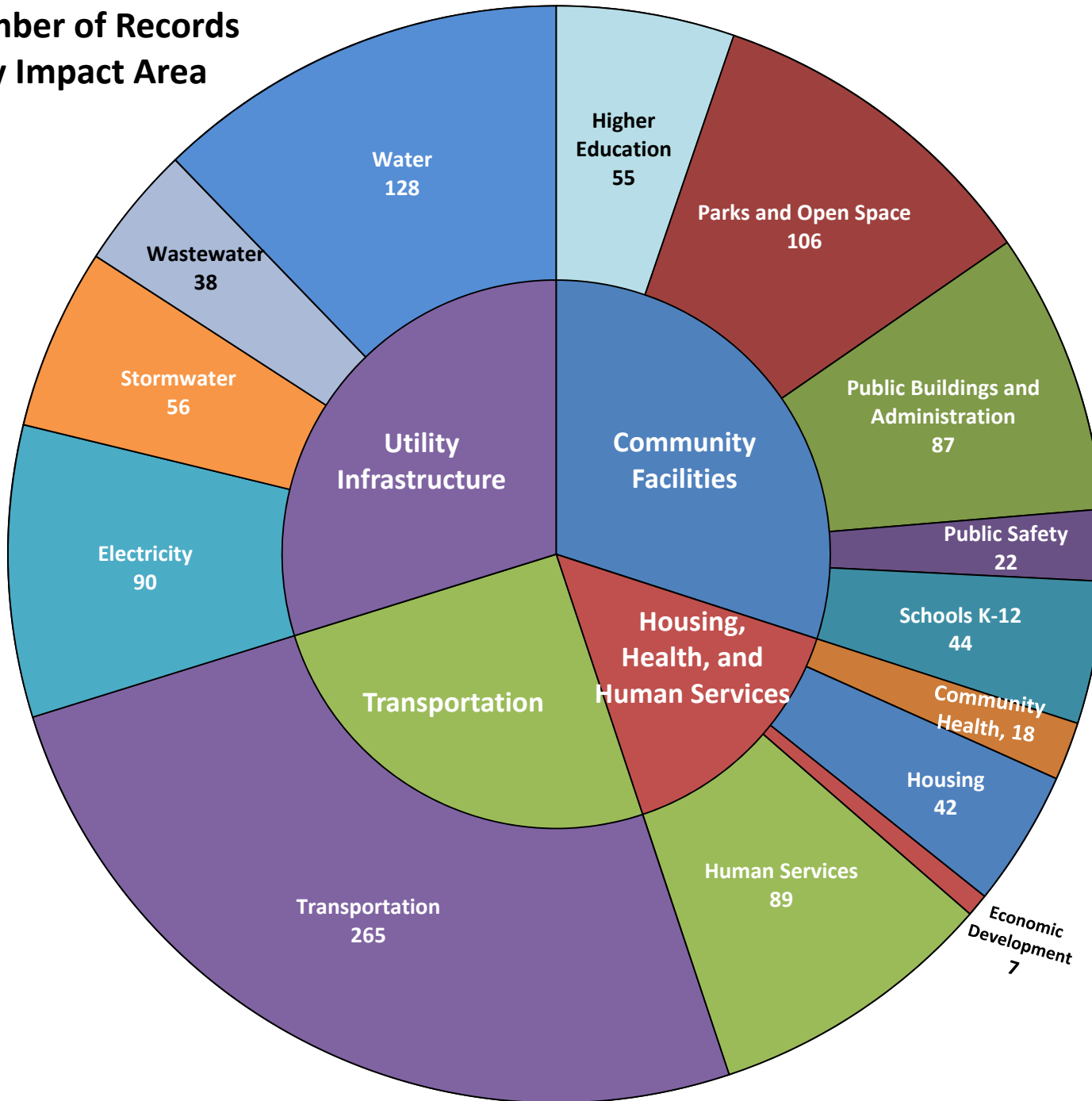
Impact Areas	Record Count	Major Topic Areas	Total Investments (Funding Sources)	Total Investments (All FYs)	Past and Current Investments (FY11-12 to FY13-14)	Future Investments (FY14-15 to FY19-20)
Higher Education	55	Community Facilities (314)	\$741,780,697	\$691,780,697	\$691,780,697	\$0
Parks and Open Space	106		\$143,326,308	\$65,682,308	\$20,727,808	\$44,954,500
Public Buildings and Administration	87		\$803,324,221	\$530,428,006	\$382,844,006	\$147,584,000
Public Safety	22		\$309,600,097	\$291,056,428	\$236,867,428	\$54,189,000
Schools K-12	44		\$479,915,660	\$512,344,740	\$417,346,740	\$94,998,000
Community Health	18	Housing, Health, and Human Services (156)	\$92,609,340	\$92,957,820	\$92,856,826	\$100,994
Housing	42		\$30,455,696	\$27,175,189	\$26,425,189	\$750,000
Economic Development	7		\$3,025,322	\$2,864,817	\$2,864,817	\$0
Human Services	89		\$102,966,812	\$108,435,190	\$108,062,978	\$372,212
Transportation	265	Transportation (265)	\$937,220,879	\$923,524,906	\$433,623,305	\$489,901,601
Electricity	90	Utility Infrastructure (312)	\$221,059,989	\$221,059,989	\$66,566,986	\$154,493,003
Stormwater	56		\$74,097,129	\$66,894,930	\$26,920,130	\$39,974,800
Wastewater	38		\$203,016,009	\$197,236,043	\$117,058,703	\$80,177,340
Water	128		\$139,074,445	\$135,063,446	\$42,573,077	\$92,490,369
Database Totals	1047		\$4,281,472,604	\$3,866,504,509	\$2,666,518,690	\$1,199,985,819



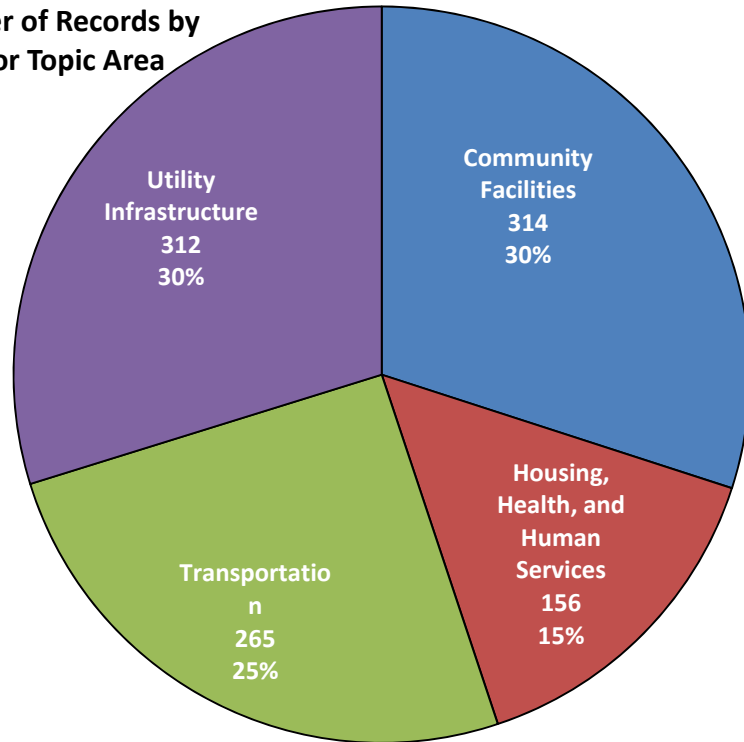
Utility-related Plans – Records, Dollars and FYs

Agency and Plan Name	Count of Records	Total Investments (Funding Sources)	Total Investments (Sum of FYs)
EWEB 5-Year ELECTRIC Capital Improvement Plan	16	\$206,484,051	\$206,484,051
SUB Electric Division Capital Improvements Budget 2012 (10-year summary)	74	\$14,575,938	\$14,575,938
City of Eugene CIP	20	\$30,640,000	\$29,240,000
City of Eugene Comprehensive Annual Financial Report	1	\$13,301,129	\$13,301,129
City of Springfield CIP	35	\$30,156,000	\$24,353,801
City of Eugene CIP	4	\$18,460,000	\$13,880,000
City of Eugene Comprehensive Annual Financial Report	1	\$22,359,079	\$22,359,079
City of Springfield CIP	25	\$35,052,000	\$33,852,034
City of Springfield Comprehensive Annual Financial Report	3	\$32,669,338	\$32,669,338
Metropolitan Wastewater Management Commission (MWMC) CIP	5	\$94,475,592	\$94,475,592
Coburg Water System Master Plan Update (May 2006)	8	\$4,011,000	\$0
EWEB 5-Year WATER Capital Improvement Plan	17	\$80,152,695	\$80,152,696
SUB Water Division Capital Improvements Budget 2012 (10-year summary)	103	\$54,910,750	\$54,910,750

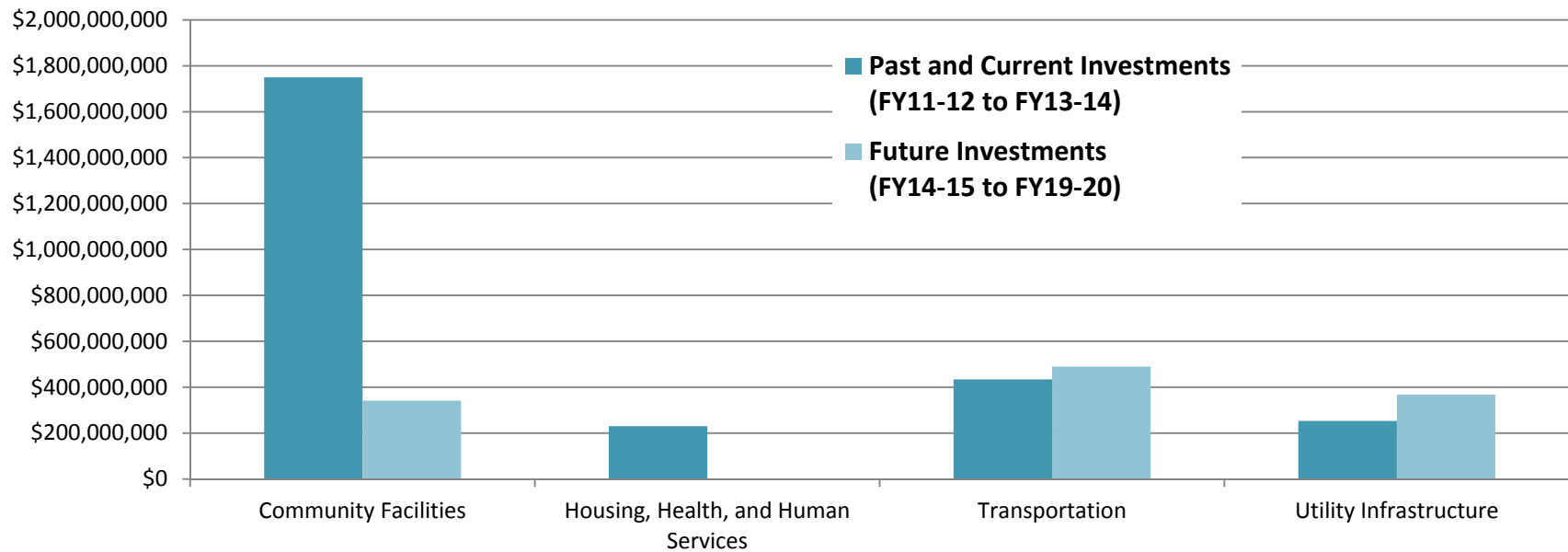
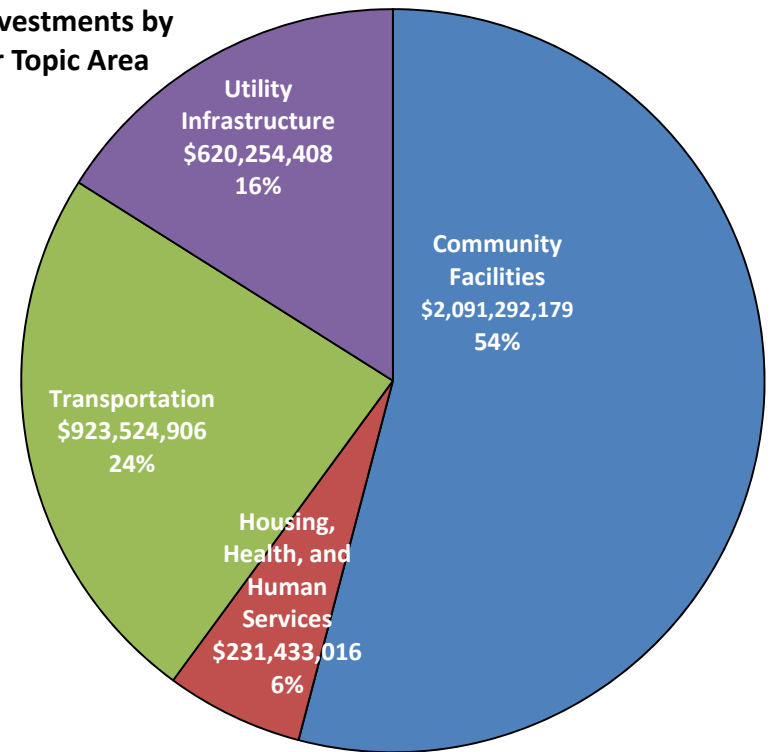
Number of Records by Impact Area



Number of Records by Major Topic Area



Total Investments by Major Topic Area



Community Investment Database

Over 1000 records, gleaned from 34 documents

Project-level and program-level information includes:

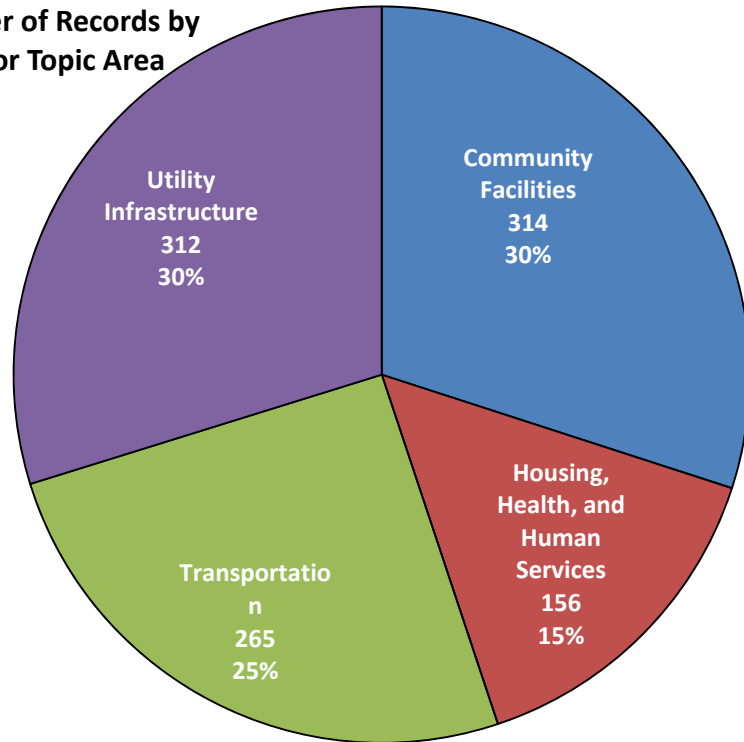
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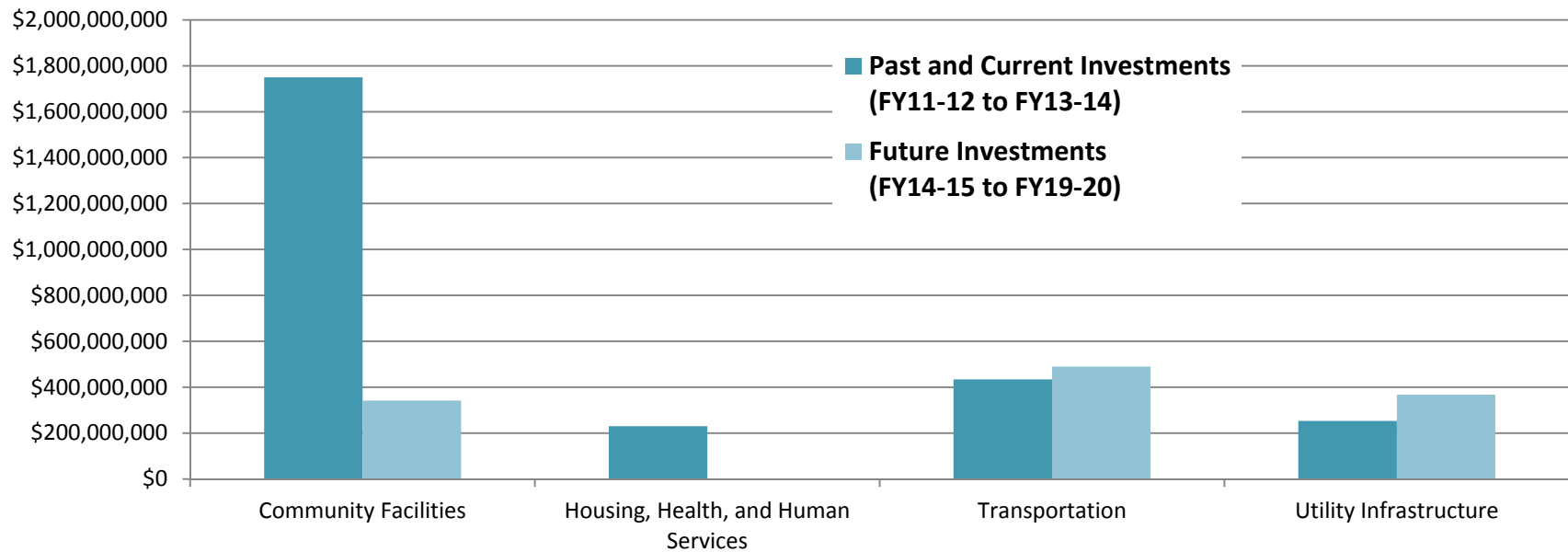
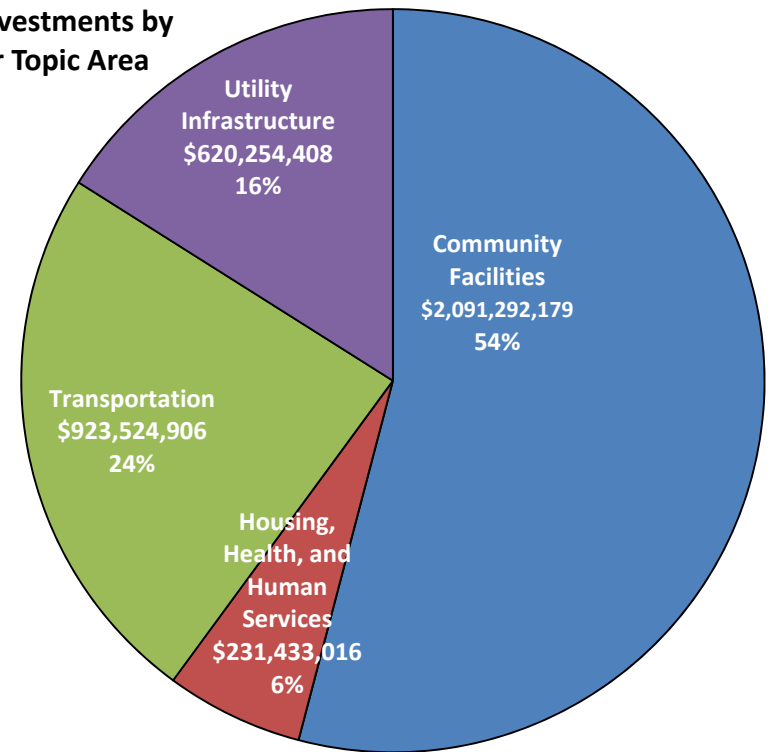


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Database Totals	1047		\$4,281,472,604	\$3,866,504,509	\$2,666,518,690	\$1,199,985,819

Number of Records by Major Topic Area



Total Investments by Major Topic Area

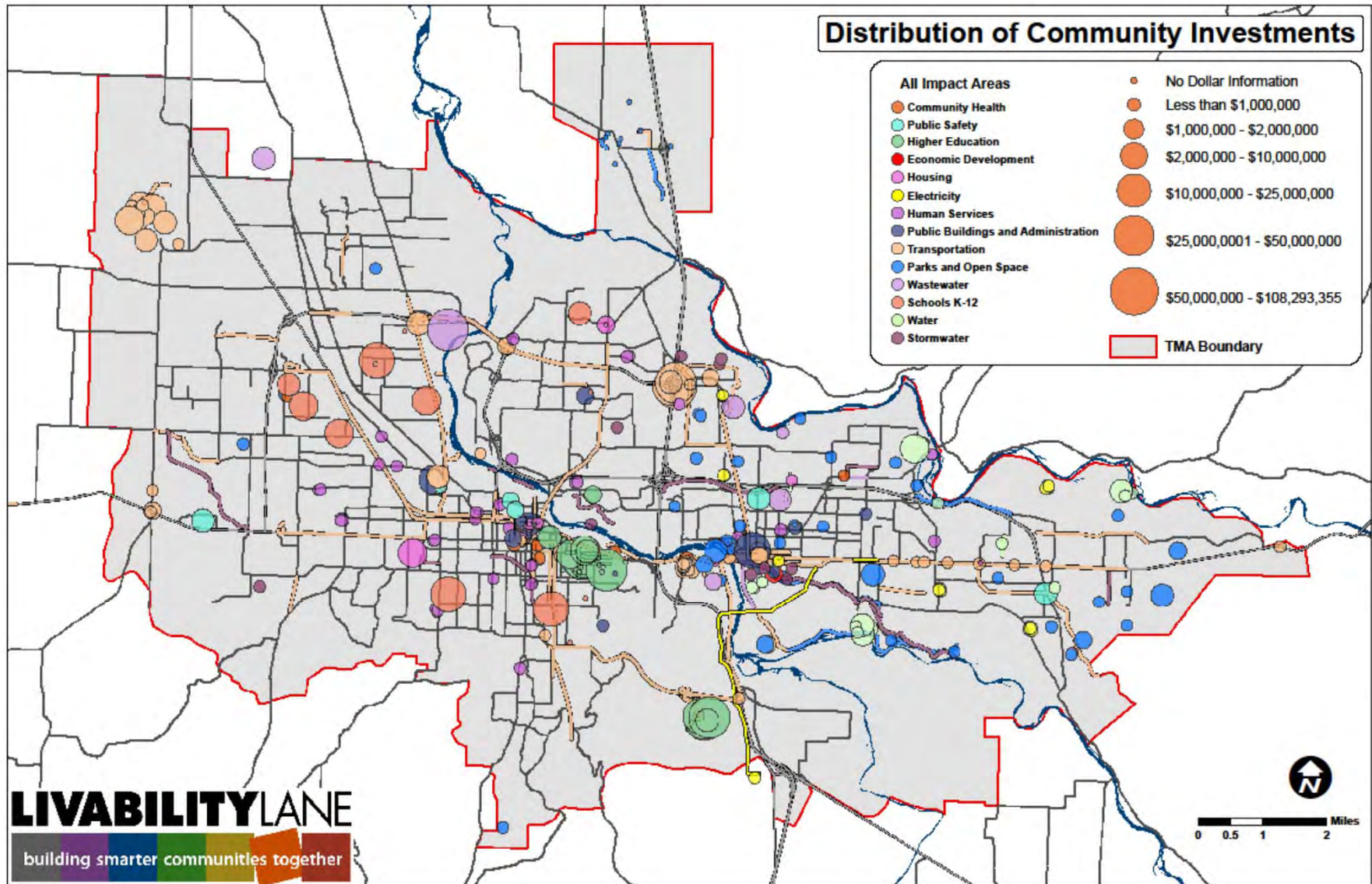


Distribution of Community Investments

All Impact Areas

- Community Health
- Public Safety
- Higher Education
- Economic Development
- Housing
- Electricity
- Human Services
- Public Buildings and Administration
- Transportation
- Parks and Open Space
- Wastewater
- Schools K-12
- Water
- Stormwater

- No Dollar Information
- Less than \$1,000,000
- \$1,000,000 - \$2,000,000
- \$2,000,000 - \$10,000,000
- \$10,000,000 - \$25,000,000
- \$25,000,000 - \$50,000,000
- \$50,000,000 - \$108,293,355
- TMA Boundary



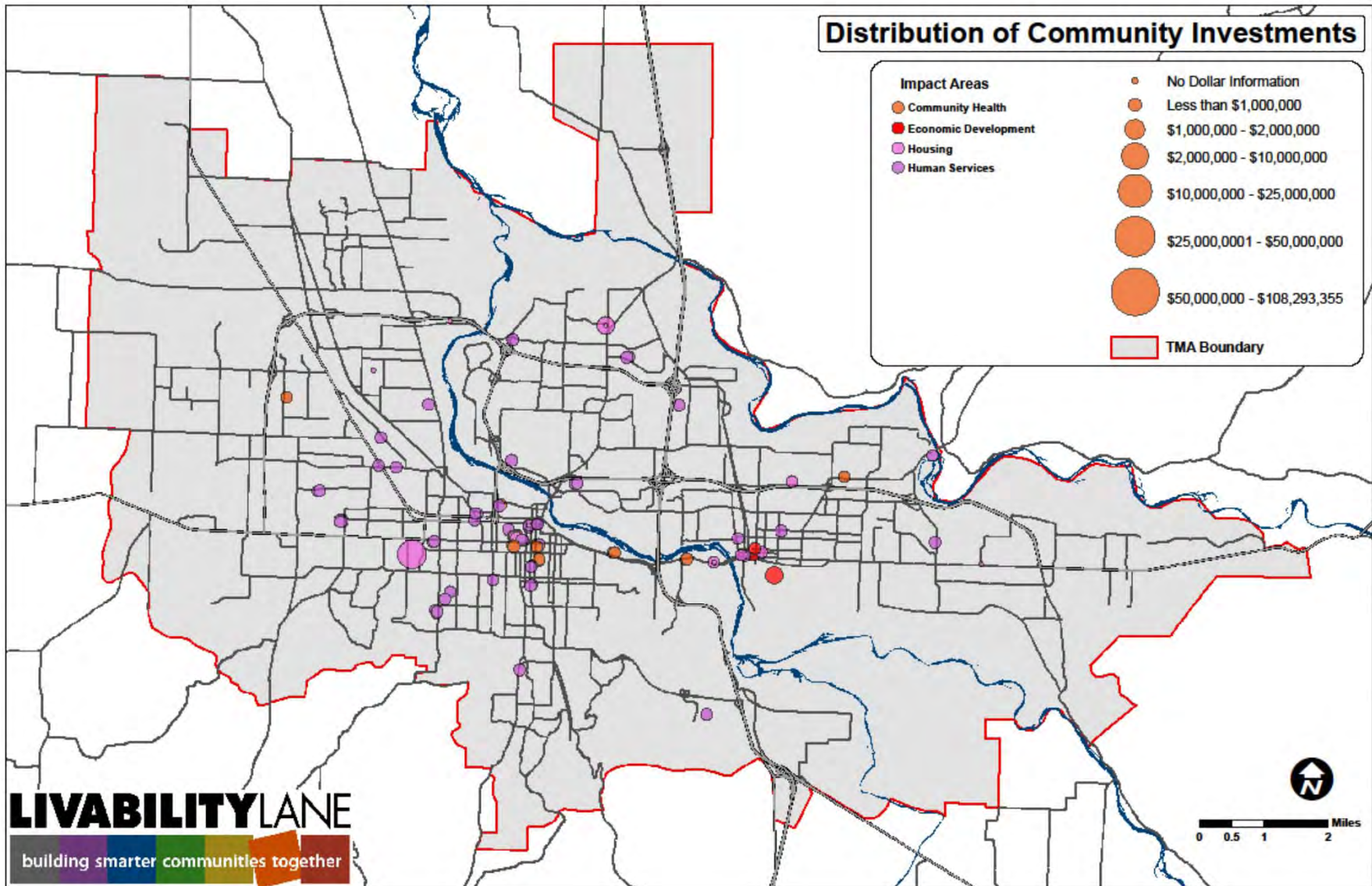
Distribution of Community Investments

Impact Areas

- Community Health
- Economic Development
- Housing
- Human Services

- No Dollar Information
- Less than \$1,000,000
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- \$25,000,000 - \$50,000,000
- \$50,000,000 - \$108,293,355

TMA Boundary



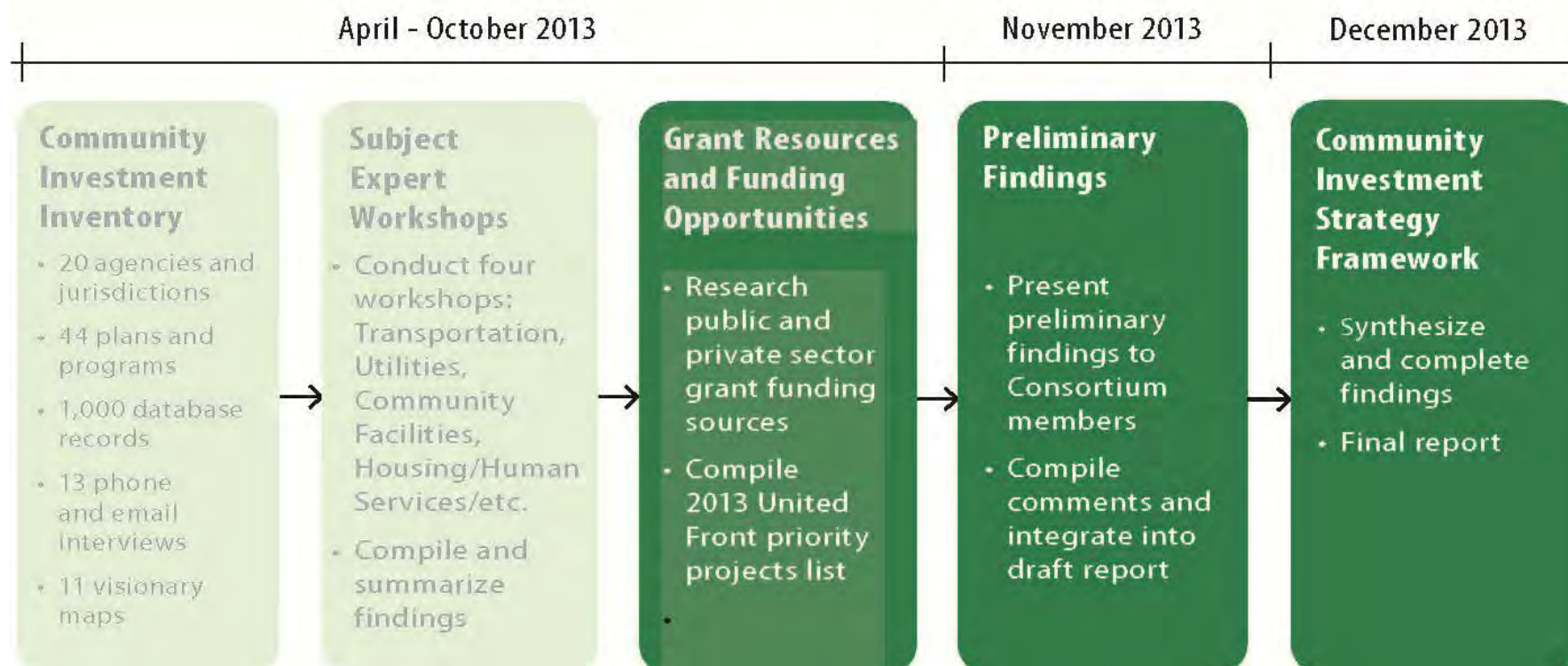


Questions

- Do these tools provide information that could help you?
- Do you have questions of each other that would facilitate working together more efficiently?
- What would be helpful to have that you don't already get from existing processes?
- What other topic areas do you need information from in order to do your job?

Next Steps

Community Investment Strategy Framework





<http://www.livabilitylane.org/>

Housing, Health, and Human Services Investment Plan Years										
Plan Name	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Eugene-Springfield One Year Action										
City of Eugene CIP										
City of Eugene CAFR*										
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United Way Program List										
(CAFR) Comprehensive Annual Financial Report (CIP) Capital Improvement Program *Plan reviewed and information is recorded in the Plan Summary but not in the database										



Task 9 – Community Investment Strategy
Subject Expert Workshop #4:
HUMAN SERVICES, HOUSING, COMMUNITY HEALTH
October 30, 2013 – 9:00 A.M. – 12:00 P.M.
NOTES

Attendees:

Angela Phinney, LCOG – Senior and Disabled Services, aphinney@lcog.org
Brian Johnson, Lane County Public Health, brian.k.johnson@co.lane.or.us
Stephanie Jennings, Eugene Housing, Stephanie.A.Jennings@ci.eugene.or.us

Facilitated Dialogue with Subject Experts

LCOG staff facilitated a discussion with attendees around the information presented.
Comments from attendees have been categorized as follows:

1. How the investment tools could help the participating agencies
2. Critique of data and investment tools (Questions and suggested improvements)
3. How tools help leverage ways to improve collaboration
4. Funding trends in Human Services, Housing, Community Health
5. What are the differences between Human Services, Housing, Community Health and other areas (e.g. Transportation, Utilities, Housing)

How the investment tools could help the participating agencies

- Is helpful to say: this is how we're investing locally. At a conceptual level seeing where investments are happening. This informs our process, dollars wise, spatially may not be as important.
- There is value in comparing different community areas to one another. We can look at what others are doing (schools etc.). The capital information is helpful even without the programs because we can see what others are doing.
- Helps to have a place to share the information. We currently don't know where the synergies are and this helps identify opportunities.
- This information can help tell a story – where we invest, how we invest, how we could invest. This information affects people's lives and telling the story of how we invest is what we want to tell. Can look at the investments on a neighborhood level as well. If we're investing a lot in a particular neighborhood what are we trying to accomplish there?
- Is helpful in identifying gaps in facility services and where future planned investments exist.
- Information is helpful even as a snapshot – where we're putting investments. We can focus on gaps but also identify opportunities to collaborate.

- How to track where are we gaining and losing in our community would be helpful – even small losses add up and the impact becomes great.

Critique of data and investment tools (Questions and suggested improvements)

- Map of investments - Can see this with capital projects but with Health and Human Services the programs cannot be mapped. How do you show Human Services – it's just regions such as Eugene/Springfield and Lane County. Acknowledged that programs are not mapable but that capital investments and programs complement each other and could tell programs in another way. Responses: Some Human Services programs will show up when we make capital investments in Human Services. On the programmatic side, office locations would be helpful. One struggle of the study was that it is difficult to quantitatively show Human Services.
- Entering the dollars depends largely on the individual agency's fiscal Department's ability to break-down or report the data in the way that we are collectively entering it in the database.
- The usefulness feels skewed. The map colors need to be more variable on the Human Services map – are difficult to read.
- Map should be accompanied by brief narratives.
- Would like to see previous housing development mapped as compared to planned development.
- Want more quantitative data to explain the dots on the map – How priorities and terms are defined.
- Would like to see Equity and Opportunity maps overlaid with this information. It seems that the Livability Communities are looking for pockets to invest in and it's hard to see those pockets without the demographics. Social determinants of health.
- It would be helpful to 'zoom-in' on neighborhoods and show more detail on the map. Bill had made a previous map for SDS that was helpful showing where sidewalks exist etc. Data oriented to providing services and need for services. That level of detail would be helpful for partnering with other agencies. We need the data on a small geo-scale versus the metro to determine patterns. Because County is so vast, it's difficult to see where local details exist. Even provide this information for outlying areas, Oakridge or Florence, where a pocket of need is not being addressed with services.

How tools help leverage ways to improve collaboration

- It would be helpful to have more meetings with other groups and discussing this information. Building cross-connections, building synergy. Sometimes it's difficult to know who to talk to in other agencies and meeting would help.
- We could develop simple tools to improve communication such as a list of plans, list of contacts, etc.
- The map stimulates collaboration if we know more about it. There could be more collaboration going on if we know more details about what others are doing.
- Reference to MOUs (Memo of Understandings). We refer to others through MOUs but conversations aren't happening with that method. The current processes seem to be operating at a distance – at an executive level.

- Participants asked who they would like more contact with? Answers: Transportation, Housing and Public Works – how can we have more of these conversations. Reference to HIAs (Health Impact Assessments).
- Participants asked if they have been in touch with schools about new construction. Answer: No but want to have more of those conversations around dollars and around sharing information and gaining better understanding of each other. Schools are sometimes not the prime focus but have significant implications for health.
- Would be helpful to improve inter-agency consultation and collaboration by talking about impacts on places. Discussing the complements and conflicts of the investment plans of different agencies and asking ourselves what adjustments can we make with our limited resources to seize opportunities together.
- We could focus our investments better if we collaborate more.
- Participants asked about their specific interagency connections. Conversation about upcoming events and the Consortium member agencies: Shared that HACSA is conducting a survey through LLC – will share the results. Shared that there is an upcoming Housing conference in Springfield (Holiday Inn) on November 12th.
- Lane County Community Health Improvement Plan is a 5-year initiative and vision plan. United Way is leading the social services realm. Major hospitals are required to be at the table. Participating agencies include: LCPH, UW, Peace Health and Trillium. This should be a driver of better health for the region and aligns with some LLC initiatives. There is opportunity to add agencies but haven't gained participation due to differing missions and values or perceived differences. Have a broad initiative right now but some specific locations with Trillium and BMI.
- Example of links to Community Facilities agencies and Transportation agencies: Playground with housing developments, proximity to mass-transportation and services. Ex in Aurora. Housing - Arterial effects of noise are an issue – provide accessibility but shield from noise.
- Participants asked to share what other impact areas are a priority to share information. Comment that some Parks and Open Space fall under Public Buildings and Administration. Answers: SDS: Parks & Open Space, Economic development, Transportation, Community Health. Lane County HS: Community Health, Economic development, Parks & Open space, Transportation, Schools. Eugene Housing: Schools, Transportation, Parks & Open Space, Human Services, Community Health.
- Non-traditional linkages may be outcomes of these meetings. Limited resources may keep folks from being at the table but still need to be engaged in the planning process.
- Example of the lack of a framework or communication strategy to measure the effects of community funding losses (e.g. school-age kids bus passes – the funding lost for program).

Funding trends in Human Services, Housing, Community Health

- Funding is based on Congress with no security in the Congressional processes.
- The recent government shut down makes things even more uncertain right now and will negatively affect how funding will happen.
- In Oregon, Federal dollars are not driven by local & state levels instead the policies are driven on what is happening on a Federal level. Is reactive instead of proactive.

- Changes in Federal resources are frequent and dramatic and how to track where are we gaining and losing in our community would be helpful – even small losses add up and the impact becomes great.
- Ballot Measure 5? Passed and hampered local governments for years which caused a long-term downhill trend that has a compounding effect.

What are the differences between Human Services, Housing, Community Health and other areas (e.g. Transportation, Utilities, Housing)

- Oregon Human Services does not operate like ODOT for example OHCS does not have the infrastructure like ODOT to target funding and conduct long-term planning.
- For SDS it is difficult to develop plans – try to develop a 4-year plan.
- Lane County is very different from the Eugene-Springfield metro as far as geography and control over fund allocation.
- For Eugene Housing the 5-year, 1-year and CAFR are required and have to map for HUD.



Task 9 – Community Investment Strategy
Subject Expert Workshop #3: COMMUNITY FACILITIES
October 21, 2013 – 9:00 A.M. – 12:00 P.M.

Willamette Room, 4th Floor - Lane Council of Governments
859 Willamette Street, Eugene

AGENDA

- | | |
|---|--------------------|
| 1. Introductions; Introduction to Lane Livability Consortium | 10 minutes |
| 2. Overview of Community Investment Strategy Framework Process | 15 minutes |
| 3. Desired Workshop Outcomes | 5 minutes |
| <ul style="list-style-type: none">• Establish a common understanding of planned investment needs and priorities of different community agencies;• Explore opportunities to integrate planned investments in a way that strengthens the region's ability to make the most of existing and future public resources while achieving the best economic, environmental and social return for the region; and• Provide information for future conversations and choices | |
| 4. Maps and Data | 20 minutes |
| 5. Facilitated Dialogue with Subject Experts | 120 minutes |
| <ul style="list-style-type: none">• Do these tools provide information that could help you?• Do you have questions of each other that would facilitate working together more efficiently?• What would be helpful to have that you don't already get from existing processes?• What other topic areas do you need information from in order to do your job? | |
| 6. Summary and Next Steps | 10 minutes |

Community Facilities (Parks, Schools)						
Name, title	Agency	Email	Phone	Invited	RSVP	Can Attend
Barb Bellamy, Chief of St	SD 4j	bellamy@4j.lane.edu	541-790-7735	x		
Devon Ashbridge	Springfield Publ	devon.ashbridge@springfield.k	726-3213	x		
Pat McGillivray	Bethel SD	pat.mcgillivray@bethel.k12.or.us		x		
Neil Bjorklund	Eugene Pks & OS		x4909	x		
Renee Grube	Eugene LCRS	Library, Cultural Recreation Serv	x5067			
Greg Hyde	Willamalane	gregh@willamalane.org	736-4050	x		
Rebecca Gershow	Willamalane	rebeccag@willamalane.org				
Chris Ramey	UO		346-5562	x		
Jen Steele, Director of Bu	LCC - wait to se	steelej@lanecc.edu	(541) 463-5604	x		
David Willis, Facilities Pla	LCC	WillisD@lanecc.edu		x		
Brett Rowlett	LCC	rowlett@lanecc.edu		x		
Brian Kelly, Vice Presiden	LCC	kellyb@lanecc.edu		x		
Rose Ellis, Budget Directo	LCC	ellisr@lanecc.edu				
Craig Smith	Eugene Recreation			x		
Jeff Perry	Eugene Facilities			x		
Mike Penwell	Eugene Facilities			x		
Petra Schuetz	Coburg	petra.schuetz@ci.coburg.or.us		x		
Jeff Narin	E-S Fire			x		
Mike Harman	Spr Police		left message	x		
DeAnne	Eug Police?		left message			

Task 9 – Community Investment Strategy

Subject Expert Workshop

COMMUNITY FACILITIES

October 21, 2013



- 1. Introductions; Introduction to Lane Livability Cons.**
- 2. Community Investment Strategy Framework**
- 3. Desired Workshop Outcomes**
- 4. Maps and Data**
- 5. Facilitated Dialogue with Subject Experts**
- 6. Summary and Next Steps**

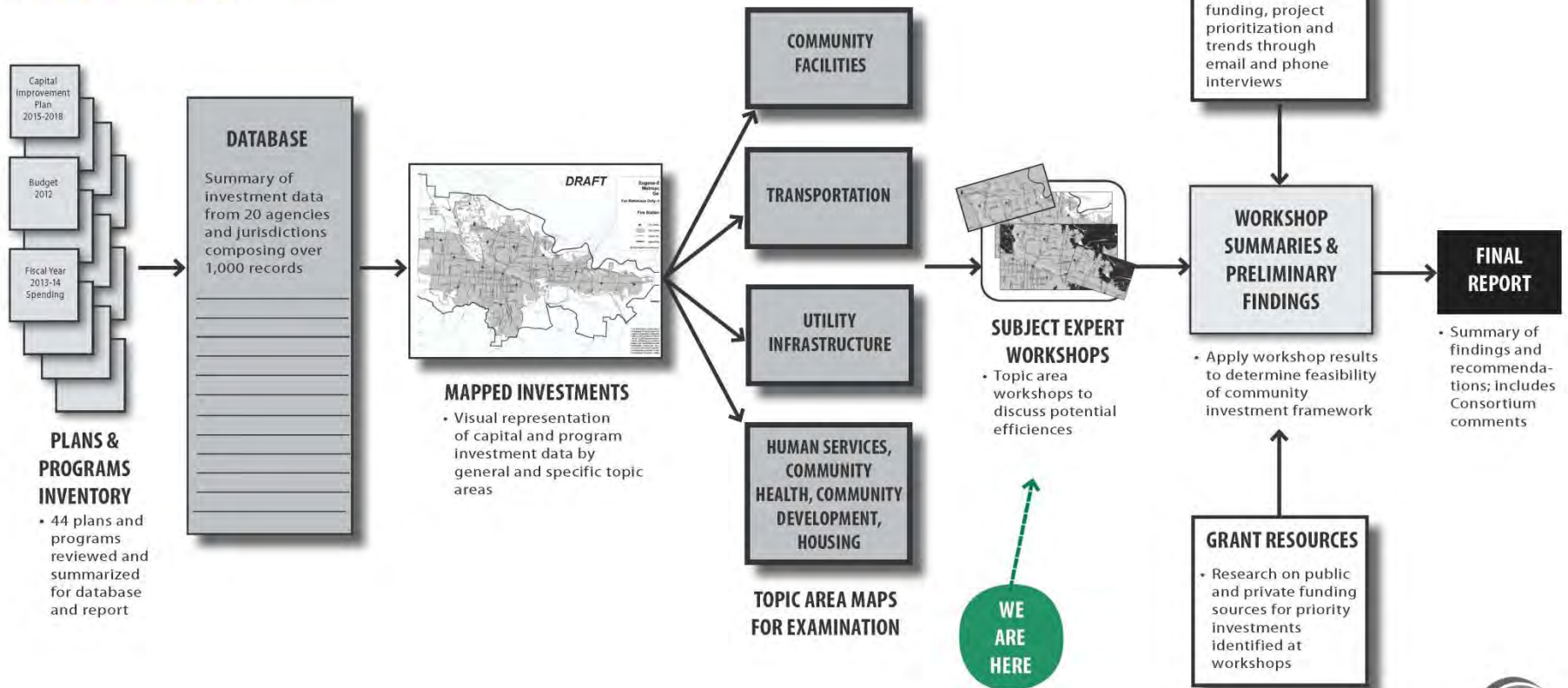
Introduction – Lane Livability Consortium

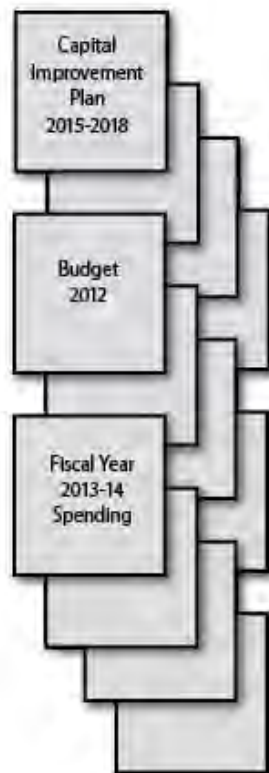


Activities – Lane Livability Consortium

- Sustainability Baseline Assessment
- Scenario Planning
- Smart Communities: Closing the Gaps
- Moving Plans to Actions

Task 9. Community Investment Strategy Framework Process Diagram





PLANS & PROGRAMS INVENTORY

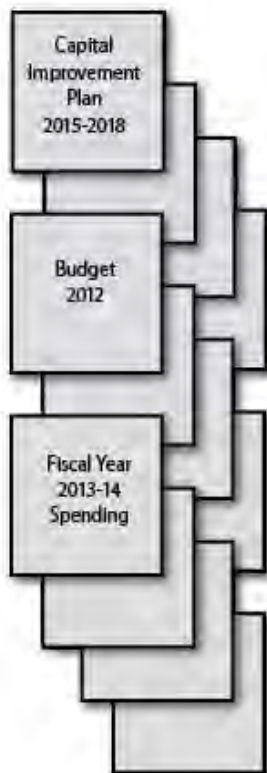
INVESTMENT PLANS

INVESTMENT PLANS DESCRIBE THE FUNDING FOR THE PRIORITIZED PROJECTS & PROGRAMS

1. Metro Public Facilities and Services Plan
2. Eugene-Springfield One Year Action Plan 2013-2014
3. Human Services Fund Priorities for Fiscal Years 2012 and 2013
4. Draft Metropolitan Transportation Improvement Program
5. **City of Eugene Capital Improvement Program (2014-2019)**
6. **City of Eugene Comprehensive Annual Financial Report**
7. City of Eugene 2013 Budget
8. City of Eugene 2012-2017 Multi Year Financial Plan
9. **City of Springfield Capital Improvement Program (2014-2018)**
10. **City of Springfield Comprehensive Annual Financial Report**
11. City of Springfield, FY 2013 Budget
12. Lane County Public Works Capital Impr. Program 2014-2018
13. Lane County FY2012 Comprehensive Annual Financial Report
14. Lane County 2013/2014 Budget
15. Human Services Plan for Lane County (December 16, 2009)
16. Willamalane Park and Recreation Comprehensive Plan and CIP
17. Lane Transit District Capital Improvements Program (2013-2023)
18. LTD 2011-2012 Comprehensive Annual Financial Report
19. ODOT Final Statewide Transportation Improvement Program
20. **EWEB 5-Year Water and 5-Year Electric Capital Improvement Plan**
21. **SUB Electric Division & Water Division Capital Improvement Budget 2012**
22. **SUB Electric and Water Utility Major Capital Improvements**
23. **MWMC 5-year Capital Improvement Program 2012-2017**
24. Regional Wastewater Program Budget & Capital Improvement Program
25. Metropolitan Wastewater Mgmt Commission 2005 Financial Plan
26. School District 4j Comprehensive Annual Financial Report
27. School District 4j Measure 20-210 Bond Information
28. Springfield Schools Comprehensive Annual Financial Report
29. Bethel School District Comprehensive Annual Financial Report
30. Bethel School District Bond Improvements
31. Lane Community College Budget Document
32. Conceptual Vision (Draft), August 2010
33. Oregon University System 2011-2013 Capital Construction Program
34. UO Campus Plan Second Edition 2011
35. UO Major Capital Projects, January 2013
36. UO Vision Plan: Campus Planning & Real Estate September 2012
37. HACSA project list
38. St. Vincent De Paul Development List as of April 2013
39. St. Vincent De Paul Newsletter with Financial Statement
40. United Way Program List 2013-2015
41. City of Coburg Transportation System Plan and Wastewater Plan
42. Coburg Parks and Open Space Master Plan
43. Coburg Water Management and Conservation Plan
44. **Coburg Water System Master Plan Update**

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PLANS & PROGRAMS INVENTORY

COMMUNITY NEEDS PLANS, VISIONARY PLANS

COMMUNITY NEEDS ARE MORE REFINED STRATEGIC PLANS DOCUMENTING SPECIFIC PROGRAMS & PLANS, & DETAIL ANTICIPATED COSTS; VISIONARY DOCUMENTS ARE GENERALLY LONG TERM PLANS THAT DETAIL BROAD COMMUNITY VALUES & GOALS

Community Needs

1. Eugene-Springfield TransPlan
2. Central Lane MPO Regional Transportation Plan
3. Lane County Community Health Improvement Program
4. Oregon State's Integrated Water Resources Strategy
5. Lane County Natural Hazard Mitigation Plan
6. Metro Waterways
7. Eugene PROS Project & Priority Plan
8. Eugene Bicycle and Pedestrian Master Plan
9. Eugene TSP
10. Lane County Transportation System Plan
11. Lane County Natural Hazards Mitigation Plan
12. Lane Workforce Partnership Local Strategic Workforce Plan
13. OR 126W: Fern Ridge Corridor Plan
14. OR 126 Expressway Management Plan
15. OR 569 (Beltline): River Road to Coburg Road Facility Plan
16. EWEB Strategic Plan
17. EWEB Drinking Water Source Protection Plan
18. 4J Long Range Facilities Plan

Visionary

1. Regional Prosperity Economic Development Plan Cascades West Comprehensive Economic Development Strategy
2. Eugene-Springfield Consolidated Housing 5 year Strategic Plan
3. Rivers to Ridges Reg'l Parks and Open Space Vision
4. Willamette River Open Space Vision & Action Plan
5. West Eugene Wetlands Plan
6. Ridgeline Area Open Space Vision & Action Plan
7. Parks, Recreation and Open Space Comp. Plan
8. Envision Eugene
9. Envision Eugene Implementation Update
10. Envision Eugene Draft Proposal
11. Envision Eugene Spotlight on Implementation
12. Climate Energy Action Plan
13. Springfield 2030
14. Lane County Rural Comprehensive Plan
15. Lane County Public Health Auth. Comp. Plan
16. Lane Coord. Public Transit Human Svcs Plan
17. LTD Long Range Transit Plan
18. EWEB Integrated Electric Resource Plan
19. Lane Strategic Plan
20. Coburg Crossroads Urbanization Study



Community Facilities Plans and Programs

4J School District

- Bond Funded Project List
- District Comprehensive Annual Financial Report

Bethel School District

- Bond Improvements
- Comprehensive Annual Financial Report

City Of Eugene

- 2012-2017 Multi Year Financial Plan
- CIP
- Comprehensive Annual Financial Report
- Budget

City of Springfield

- CIP
- Comprehensive Annual Financial Report
- FY13 Budget

Coburg Parks And Open Space Master Plan



Community Facilities Plans and Programs (cont.)

Eugene Springfield One-Year Action Plan 2013-14

Lane Community College

- Budget Document
- Draft Conceptual Vision

Lane County

- Budget FY 13-14
- Comprehensive Annual Financial Report
- CIP

Springfield Public Schools

- Comprehensive Annual Financial Report
- Facilities Update 2012

University of Oregon

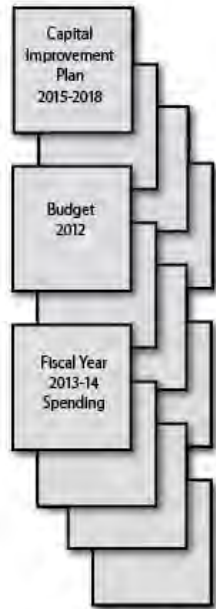
- OUS 2011-2013 Capital Construction Program
- Major Capital Projects, January 2013
- Vision Plan: Campus Planning and Real Estate
- Campus Plan Second Edition 2011

Willamalane Park and Recreation CIP

Interview Questions



- What types of investment funding appear in what types of documents?
- What are the steps to get funding and prioritize that funding? For example, are there long range plans or short-term strategic plans? And, how does a project shift from long range to short-term?
- What trends in funding and funding sources are you seeing?



PLANS & PROGRAMS INVENTORY

INTERVIEWS

- Qualitative Information on funding, project prioritization and trends gathered through email and phone interviews

Interviews, Plan and Program Summaries

- What are the purpose, goals and/or objectives of the document?
- What types of funding are included?
- How are projects and/or programs prioritized?
- What are the funding trends?



Community Facilities Impact Areas

Higher Education - Examples of Higher Education programs or projects include: University of Oregon Allen Hall Expansion and Remodel, seismic upgrades, etc.

Parks and Open Space - Examples of Parks and Open Space programs or projects include: Upgrade Neighborhood Parks, Pierce Park expansion, etc.

Public Safety - Examples of fire and police Public Safety programs or projects include: Constructing, equipping and operating the Command Training Center, Renovate existing Lincoln Yard facility, etc.

Public Buildings and Administration - Examples of governmental and/or non-profit Public Building and Administration programs or projects include: Preserve and maintain building service systems, broad general categories found in budget documents including 'Public Works' or 'Human Resources,' recreational buildings, community centers, etc.

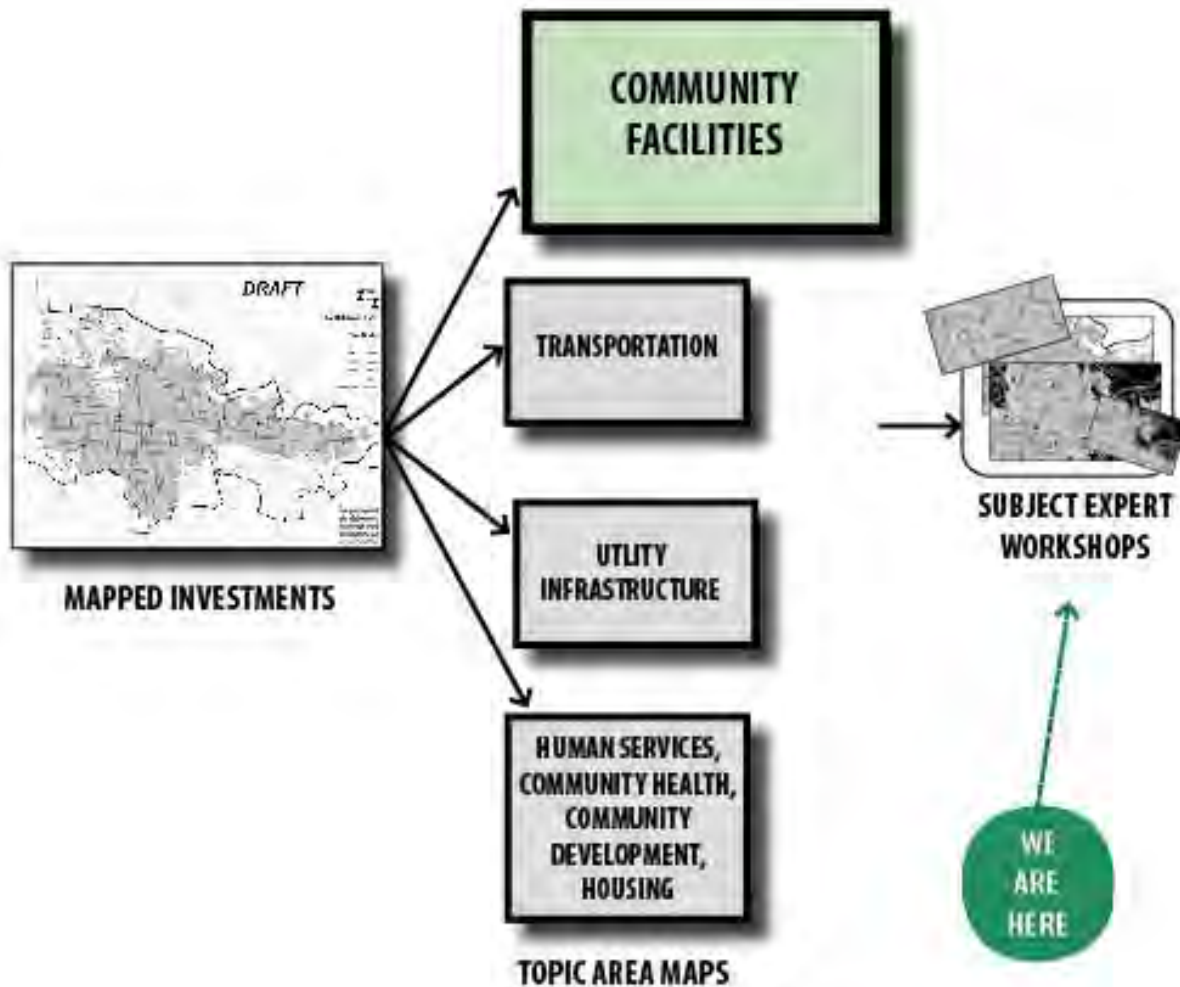
Schools K-12 - Examples of Schools K-12 programs or projects include: Instructional Services, Roosevelt Middle School replacement, etc.

Database

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

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Desired Workshop Outcomes

- Common understanding of planned investments;
- Planned investment integration; and
- Information for future conversations and choices

Maps and Data – Limitations

- Data and maps are snapshot in time created with best available information
- Range of detail in documents – location, dollars and years
- Not all projects can be mapped
- Uneven spatial distribution
- Some subjectivity required when compiling database

Key Observations to Date

- Agencies and jurisdictions spend considerable time and resources preparing capital improvement plans and programming investments
- Implementation of improvements and programs can be unpredictable
- Successful regional cooperation already exists in some areas.
- Some entities keep capital investment planning private due to competition

Community Investment Database



Over 1000 records, gleaned from 34 documents

Project-level and program-level information includes:

Project/program name, description, location

Agency and source document

Funding sources and funded/unfunded amounts (when provided)

Spending by Fiscal Year (when provided)

Additional information

Projects and Programs were each categorized into one of 14 **Impact Areas**

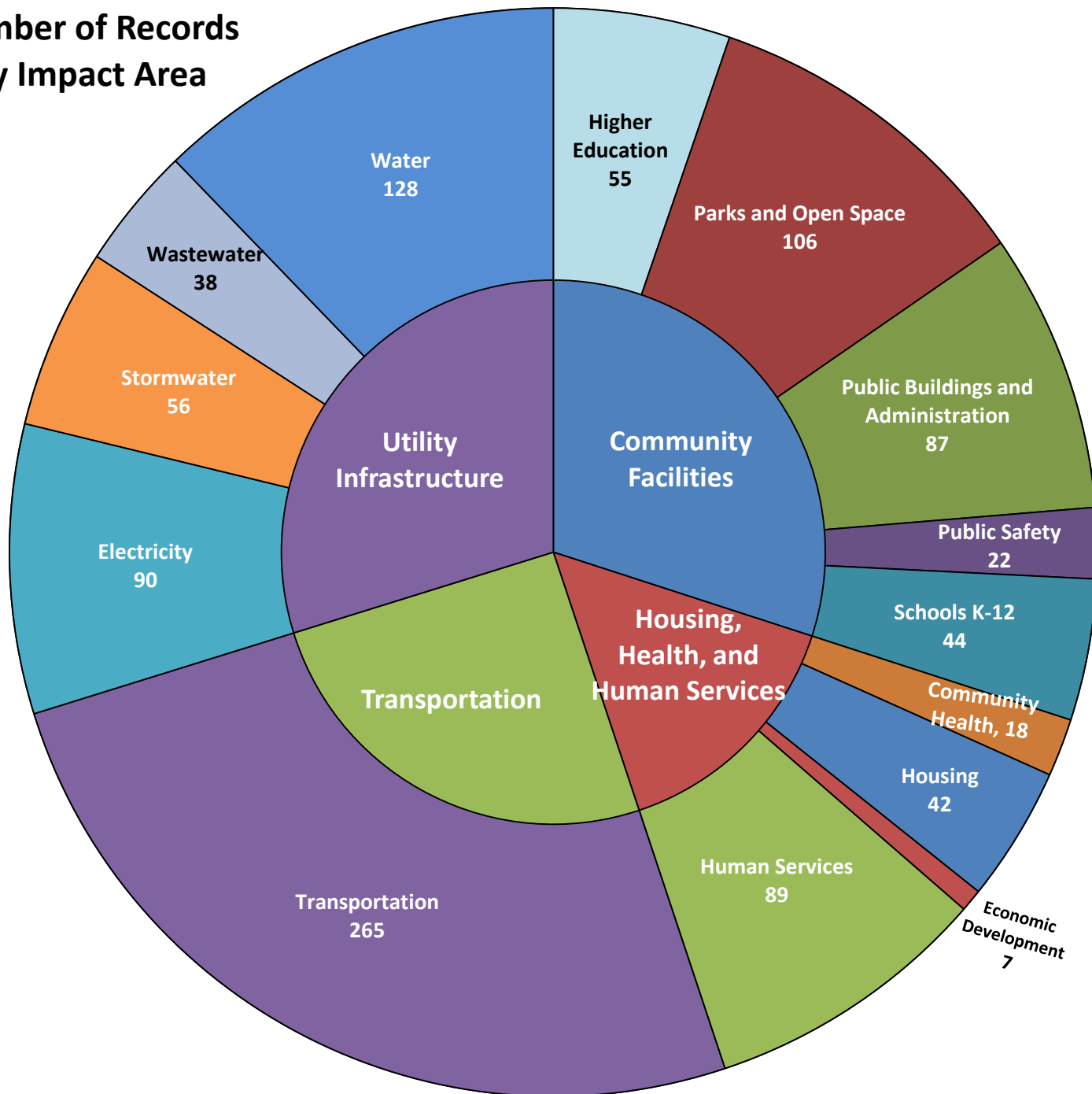
Impact Areas	Record Count	Major Topic Areas	Total Investments (Funding Sources)	Total Investments (All FYs)	Past and Current Investments (FY11-12 to FY13-14)	Future Investments (FY14-15 to FY19-20)
Higher Education	55	Community Facilities (314)	\$741,780,697	\$691,780,697	\$691,780,697	\$0
Parks and Open Space	106		\$143,326,308	\$65,682,308	\$20,727,808	\$44,954,500
Public Buildings and Administration	87		\$803,324,221	\$530,428,006	\$382,844,006	\$147,584,000
Public Safety	22		\$309,600,097	\$291,056,428	\$236,867,428	\$54,189,000
Schools K-12	44		\$479,915,660	\$512,344,740	\$417,346,740	\$94,998,000
Community Health	18	Housing, Health, and Human Services (156)	\$92,609,340	\$92,957,820	\$92,856,826	\$100,994
Housing	42		\$30,455,696	\$27,175,189	\$26,425,189	\$750,000
Economic Development	7		\$3,025,322	\$2,864,817	\$2,864,817	\$0
Human Services	89		\$102,966,812	\$108,435,190	\$108,062,978	\$372,212
Transportation	265	Transportation (265)	\$937,220,879	\$923,524,906	\$433,623,305	\$489,901,601
Electricity	90	Utility Infrastructure (312)	\$221,059,989	\$221,059,989	\$66,566,986	\$154,493,003
Stormwater	56		\$74,097,129	\$66,894,930	\$26,920,130	\$39,974,800
Wastewater	38		\$203,016,009	\$197,236,043	\$117,058,703	\$80,177,340
Water	128		\$139,074,445	\$135,063,446	\$42,573,077	\$92,490,369
Database Totals	1047		\$4,281,472,604	\$3,866,504,509	\$2,666,518,690	\$1,199,985,819



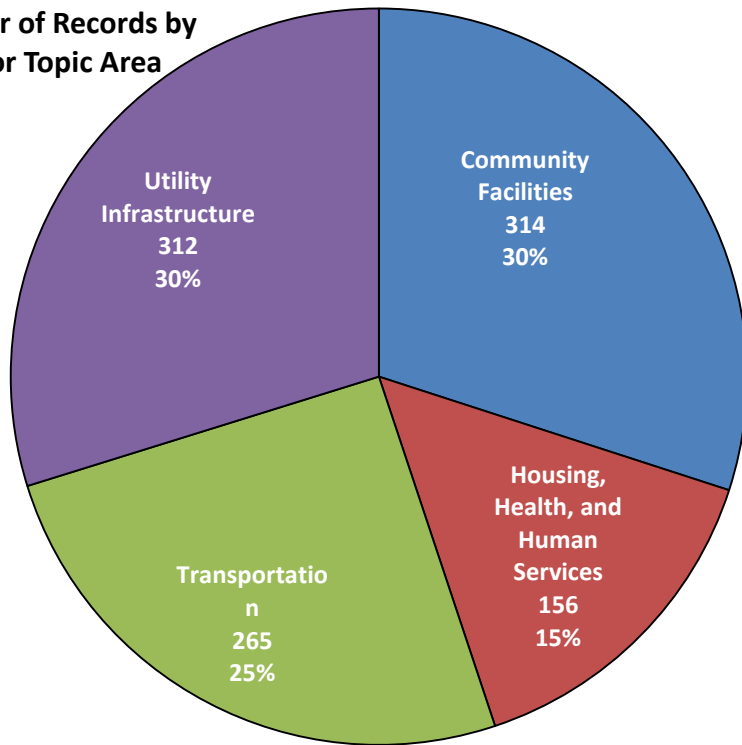
Plans, Records, Funding Source, FYs

Agency and Plan Name	Count of Records	Total Investments (Funding Sources)	Total Investments (Sum of FYs)
Lane Community College Budget Document	11	\$328,661,697	\$328,661,697
University of Oregon - OUS 2011-2013 Capital Construction Program	6	\$21,750,000	\$21,750,000
University of Oregon - UO Major Capital Projects, January 2013	11	\$96,119,000	\$341,369,000
University of Oregon - Vision Plan: Campus Planning and Real Estate	27	\$0	\$0
City Of Eugene 2012-2017 Multi Year Financial Plan	10	\$0	\$22,634,000
City of Eugene CIP	9	\$11,050,000	\$9,955,000
Coburg Parks And Open Space Master Plan (January 4, 2005)	40	\$0	\$0
Lane County Comprehensive Annual Financial Report	1	\$2,519,308	\$2,519,308
Willamalane Park and Recreation CIP	46	\$59,429,300	\$30,574,000
City Of Eugene 2012-2017 Multi Year Financial Plan	15	\$0	\$84,938,000
City of Eugene CIP	13	\$30,325,000	\$67,909,000
City of Eugene Comprehensive Annual Financial Report	5	\$95,214,138	\$95,214,138
City of Springfield CIP	14	\$2,328,000	\$36,230,000
City of Springfield Comprehensive Annual Financial Report	6	\$15,374,564	\$15,374,564
City of Springfield FY13 Budget	8	\$46,118,572	\$46,118,572
Eugene Springfield One-Year Action Plan 2013-14	7	\$594,685	\$594,685
Lane County Budget FY 13-14	7	\$308,466,229	\$52,483,037
Lane County Comprehensive Annual Financial Report	8	\$141,854,586	\$130,754,010
Willamalane Park and Recreation CIP	4	\$812,000	\$812,000
City Of Eugene 2012-2017 Multi Year Financial Plan	9	\$0	\$60,557,000
City of Eugene CIP	3	\$0	\$7,750,000
City of Eugene Comprehensive Annual Financial Report	1	\$28,641,938	\$28,641,938
City of Springfield CIP	2	\$0	\$11,620,000
City of Springfield Comprehensive Annual Financial Report	3	\$36,726,016	\$36,726,016
City of Springfield FY13 Budget	2	\$36,771,471	\$36,771,471
Lane County Budget FY 13-14	1	\$50,744,649	\$32,200,980
Lane County Comprehensive Annual Financial Report	1	\$76,789,023	\$76,789,023
4J Bond Funded Project List	12	\$168,000,000	\$168,000,000
4J School District Comprehensive Annual Financial Report	7	\$139,826,000	\$139,826,000
Bethel School District Bond Improvements	7	\$37,560,000	\$37,560,000
Bethel School District Comprehensive Annual Financial Report	8	\$31,159,833	\$63,588,913
Building 4J's future Overview, Phase 2	4	\$0	\$0
City Of Eugene 2012-2017 Multi Year Financial Plan	1	\$0	\$1,623,000
Springfield Schools Comprehensive Annual Financial Report	5	\$101,746,827	\$101,746,827

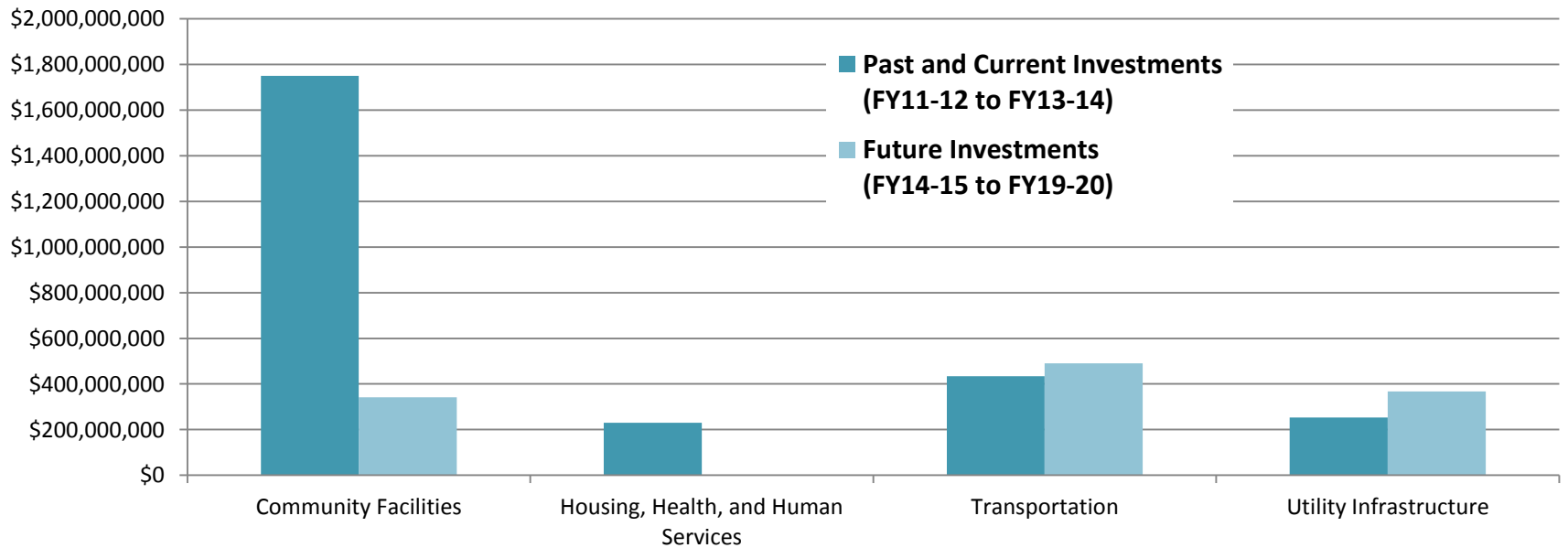
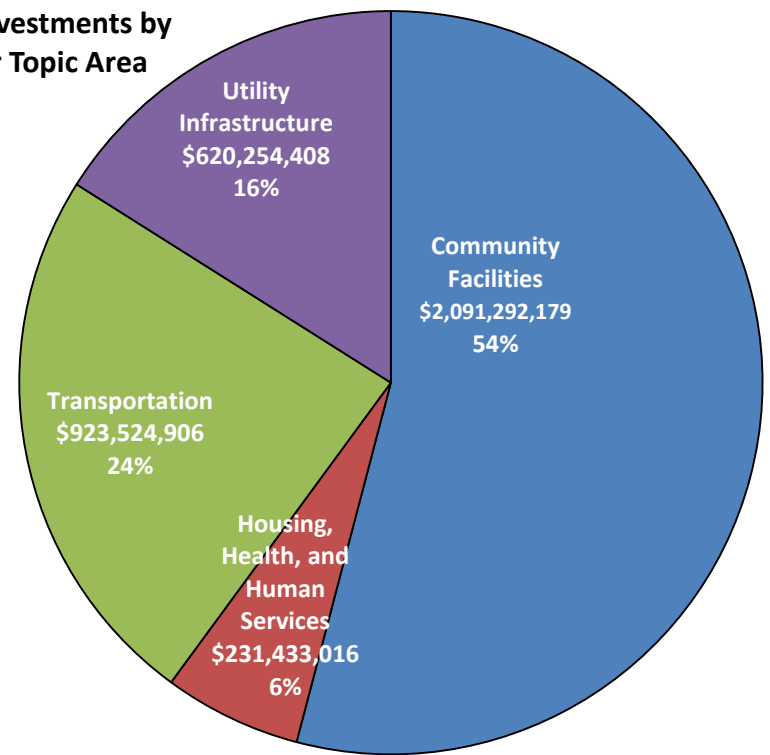
Number of Records by Impact Area



Number of Records by Major Topic Area



Total Investments by Major Topic Area



Community Investment Database



Over 1000 records, gleaned from 34 documents

Project-level and program-level information includes:

Project/program name, description, location

Agency and source document

Funding sources and funded/unfunded amounts (when provided)

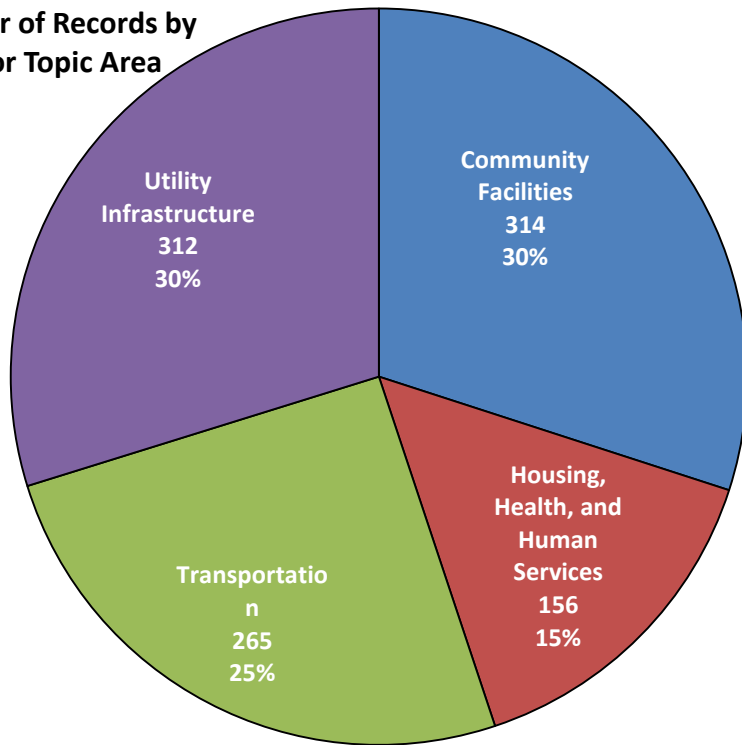
Spending by Fiscal Year (when provided)

Additional information

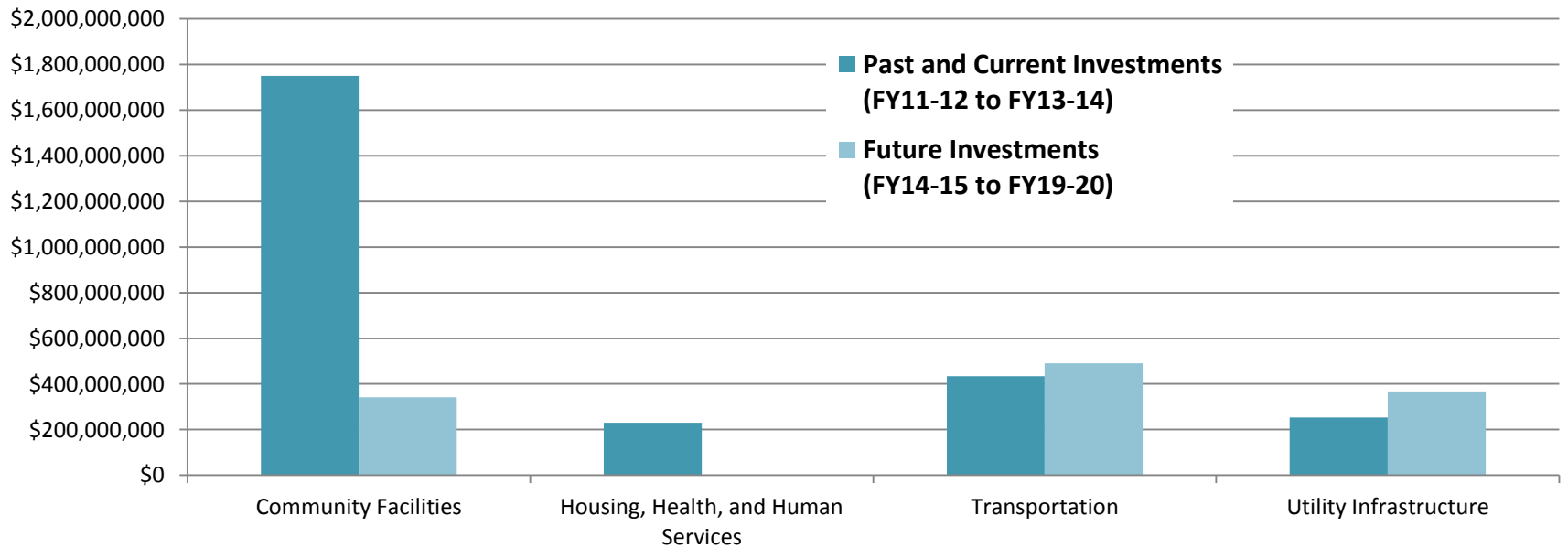
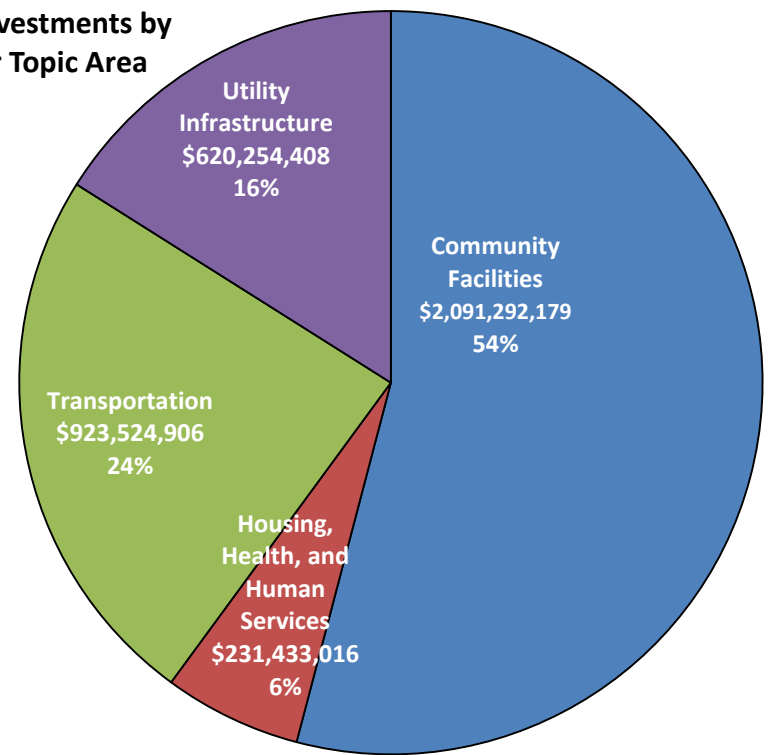
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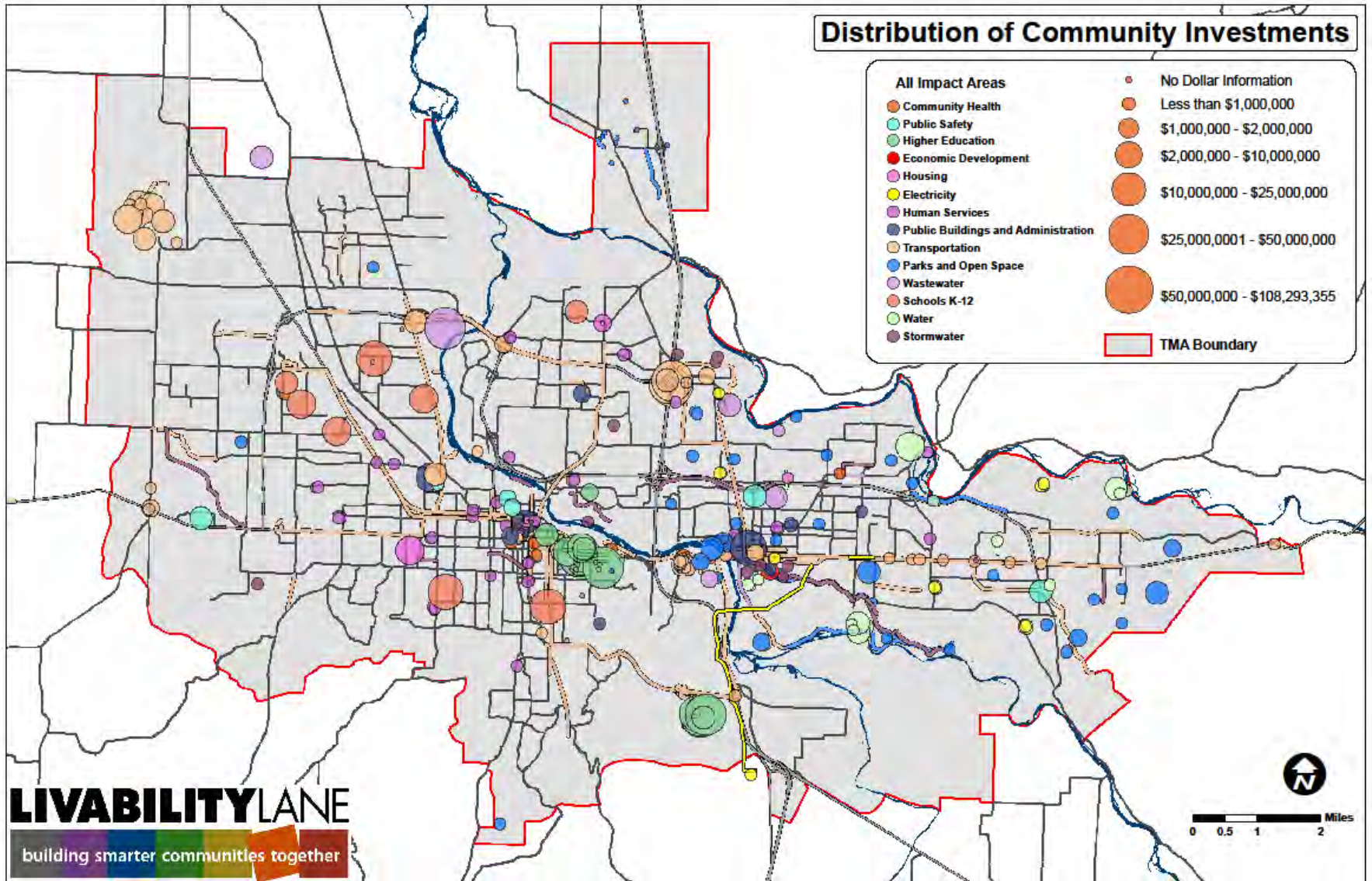
Number of Records by Major Topic Area



Total Investments by Major Topic Area



Distribution of Community Investments



Distribution of Community Investments

Impact Areas

- Public Safety
- Higher Education
- Schools K-12
- Public Buildings and Administration
- Parks and Open Space

- No Dollar Information
- Less than \$1,000,000
- \$1,000,000 - \$2,000,000
- \$2,000,000 - \$10,000,000
- \$10,000,000 - \$25,000,000
- \$25,000,000 - \$50,000,000
- \$50,000,000 - \$108,293,355

TMA Boundary

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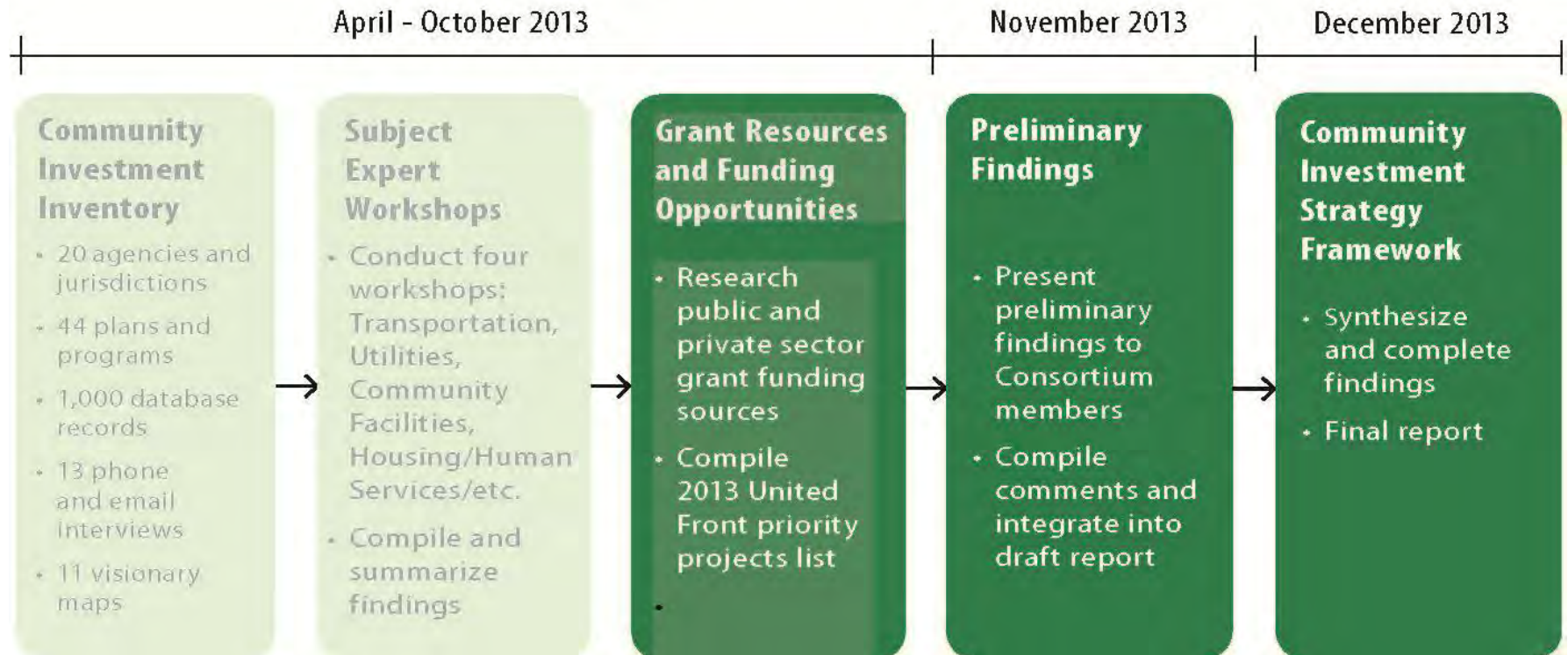
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Questions

- Do these tools provide information that could help you?
- Do you have questions of each other that would facilitate working together more efficiently?
- What would be helpful to have that you don't already get from existing processes?
- What other topic areas do you need information from in order to do your job?

Next Steps

Community Investment Strategy Framework



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Task 9 – Community Investment Strategy
Subject Expert Workshop #3: Community Facilities
October 21, 2013 – 9:00 am – 12:00 pm
NOTES

Attendees:

Craig Smith, City of Eugene - Recreation, craig.h.smith@ci.eugene.or.us
Michael Harman, City of Springfield – Public Safety, mharman@springfield-or.gov
Chris Ramey, UO Campus Planning Real Estate, cramey@uoregon.edu
Mike Penwell, City of Eugene - Facilities, Michael.J.Penwell@ci.eugene.or.us
Barb Bellamy, Eugene School District, bellamy@4j.lane.edu

Facilitated Dialogue with Subject Experts

LCOG staff facilitated a discussion with attendees around the information presented. Comments from attendees have been categorized as follows:

1. How the investment tools could help the participating agencies
2. Critique of data and investment tools (Questions and suggested improvements)
3. How tools help leverage ways to improve collaboration
4. What are the differences between Community Facilities and other areas (e.g. Transportation, Utilities, Housing)

How the investment tools could help the participating agencies

- Appreciate the magnitude of this task – undertook a major effort.
- Comparing future projections to past funded projects would be useful.
- Translating this information into creative leaps and problem solving among agencies. How can we take that leap towards integration?
- Merging information could lead to identifying efficiencies and overlaps between agencies.
- Data is very interesting – seeing links between schools and Parks & Rec.
- Identify trends, see demographics and compare to investments in housing and schools. Look at historic data to find trends.
- Just gathering the base list of plans was helpful in information sharing. There is opportunity to implement a consistent mechanism. Could lead to identifying liaisons or contacts.
- The community facilities map is very useful.
- Would be helpful to show elected officials for policy making.
- Franklin Corridor is a major area of investment right now, and this tool may be helpful in identifying future corridors.
- This tool is going in the right direction – a systems approach.

Critique of data and investment tools (Questions and suggested improvements)

- Did this study look at previous years of investments? The future docs are opportunistic, whereas with a study of the past we could look at the odds of securing funding in the future. Look at our

track record of success – may be more helpful than looking at unsecured funding/projects in the future. Could identify trends.

- Maps and data reflect how the agency plans are put together. The information may be deceiving because of differences in plan compilation and years. Response: One finding is that we are not comparing apples to apples and if we wanted to continue this we need to refine the data. The way projects are funded is also a major issue because they vary from speculation to secured funding.
- LLC began with basic information vs. very fine grain data in this task – we might need something in between.
- It is difficult to integrate different plans and community areas.
- Need to be cognizant of the limitations of the data – data becomes plans and policy and the data needs to be reliable. This information may lead to different distribution of funding. Response: This is a prototype to show what is possible.
- Need 3D vision to look at this – it's difficult to understand what we're looking at.
- Include information on how project investments come to fruition. How are we providing our services? What drives it, what impact does it have across areas? Where an agency places major facilities, what they use them for, that has impacts on other agencies. Ex. More parks, more bicycle patrol – more event resources...
- Could we map local history of 'growth steps': Annexation, schools, other facilities – sequence of development.
- Include information on land ownership locations (e.g. Police/Fire) and current approved bonds.
- Danger in data translation – how do we interpret the data?
- Triple bottom line is important. Trying to take objective data with subjective influences. Try to keep data and plans objective but reality is that differences in opinion matter and subjective layer overlaps the process. Different policies lead to different outcomes.
- Need to look at demographics – help paint a picture of the future. Combine LLC Equity and Opportunity Assessment information with this information. Look at poverty and public assistance.
- Maybe focus on certain projects with highest potential for interplay and impact and examine those for value to other agency planning efforts.
- If we create a synchronized system what does it look like? How much overlap/integration or synergy actually exists? Want to create a usable tool – How many of these overlapping projects are there? What is the value of institutionalized communication? Where do synergies impact choices?
- Group concern about need to maintain a database and that has to compete with other needs.
- Focus on more immediate projects, specific geographic area (e.g. Franklin, Glenwood), and specific agency. Provide the where and what, not all types of facilities lend themselves to multiple purposes.
- Looking at how this data would affect policy is an issue.
- Could also map assets with investments.
- Definition of 'corridors' often is because a problem has been identified. When you've identified commonalities, what do you do with that? Need to focus on critical community-wide issues that impact all of us.
- How to bring a need to the forefront, where it will become a priority with identified resources. How do we lift issues that are systemic? Need resources to bring those issues forward. How provide information to the top? Who to talk to? (Example: Travel Lane County Sports Commission has wide participation). Who's at the table and what's the value?

How tools help leverage ways to improve collaboration

- Merging information could lead to identifying efficiencies and overlaps between agencies (Example of missed opportunity is where a school facility is built right next to a parks facility and no improvement was made to the city facility)
- Each agency has their own plan – opportunity to integrate? This tool may show us those areas for integration and we can consider others in planning processes.
- Some collaboration exists between schools and Parks and Rec. – we want to get the most use out of the facilities (day/evening). These conversations could improve.
- Would benefit from knowing about projects sooner than later and collaborate in pre-planning.
- Barriers to collaboration: funding cycles, politics, changing demographics, separate planning processes, timing, changing visions, locations, and fund raising. Budgets don't operate in a vacuum.
- Chronological coordination – what triggers what? Does population growth trigger new school, or is it the other way around? New Fire station? The way things actually develop is not under full control of 'best planning outcomes.' Response: Could run cartographic model through time including census data – several variables is an issue.
- Getting plans in the hands of the public and formalize the process to strategize future development.
- Coordinate plans chronologically and make plans sharable with the public and each other.
- This tool may help identify the links where interagency consultation and collaboration are happening and where it could be improved. May lead to consistency in interagency consultation.
- Much value in planning together. Need to sit down with other departments and agencies and look at long-range plans. Look at funding, locations, and anticipate where we're going. How does city relate to school, and schools relate to location of hospitals/clinics, etc.?
- Tools may stimulate cross-communication with non-traditional partners.
- Design changes may be an outcome of integration.
- Understanding what we can and can't control. Various goals – How can we align?
- Include information on what brought groups together and positive examples of community collaboration.
- Contacts or liaisons would be helpful. People that have knowledge of own organization and who know who to talk to for certain issues.
- Board and Councils are a big influence on fund raising and policy decisions. Would be helpful to consider elected officials. May be the boards need to agree. Maybe hold a session that shows them the maps, demographics, this kind of information so they can see the broader landscape than just their own agency.
- Steps in decision making process: Ask if we should check-in with agency partners? Report back with information and then what? Identify next steps.
- UO example with Franklin corridor process – are there future opportunities for synergy? Response: We became better informed through the process, could leverage funds better. We broke out of UO bubble and could see effects on others.
- These tools could identify the micro-systems that exist – like Franklin.
- Information may affect how we do things/invest in the future if it coalesces with missions. Could help other agencies and vice versa.
- Tool is helpful to see where integration could happen – where the outliers are – acting on their own (Ex. Different objectives of Fire/Police).
- Level of collaboration potential is an issue.

- Contacts are evident because of longevity – there is a quarterly meeting in place. (Team Springfield). Contacts needed outside existing meetings.
- Eugene - Intra-City coordination comes at Executive level, used to be more decentralized. Still empowered but because of reduction in funding we need to run funding decisions through executive level.
- Tools could improve internal and external communication – timing issue of when, where, and what funding.
- Eugene Facilities – Take lead from Eugene Parks – do know some contacts – taken 15 years to meet UO.
- If we had an interactive map of the City investments or assets it could spur conversations and would be helpful.
- How can we help people navigate the complexities of different agencies – problem solve and work together? - LLC survey
- Could help in developing regional attractions – who are the players? Do we have infrastructure to support it? What's the value to each organization?
- Map could help in identifying who to talk to.
- LCOG – data we have: Schools, fire, police – don't have pre-schools. Eugene also has common infrastructure.

What are the differences between Community Facilities and other areas (e.g. Transportation, Utilities, Housing)

- Housing doesn't have Capital Improvement Program – controlled by public entities and funders. Housing planning is very different from transportation where projects stay on CIPs.
- Differences in funding exist between utilities and community facilities. Utilities have the benefit of service fees – can extrapolate into the future which is not the case with community facilities.
- Fire and police driven projects are very different than housing projects.
- Timing is a huge factor particularly with funding. Ex. Where school has bond funding but parks does not. Conversation has gone on for years – that funding cycles hinder collaboration.
- Timing and process of interagency consultation is widely variable across plans and agencies.
- Springfield Public Safety – whenever we change plans we communicate to closest partners. When we develop a 20-year plan we will read other plans but with 5-year plans we just check-in.
- Frustrations around integration exist because of different agency priorities (Ex. Property ownership, funding, etc.)
- UO recently created a dedicated liaison office.

LCOG: \\clsrv111.lcog1.net\lgs\Sustainable Communities\Task 9_Community Investment Strategy\Subject Expert Meetings\Community Facilities\CommunityFacilities_notes.doc Last Saved: February 21, 2014



**Task 9 – Community Investment Strategy
Subject Expert Workshop #2: UTILITIES
October 10, 2013 – 1:00 – 4:00 pm**

**Buford Room, 5th Floor - Lane Council of Governments
859 Willamette Street, Eugene**

AGENDA

- | | |
|---|--------------------|
| 1. Introductions; Introduction to Lane Livability Consortium | 10 minutes |
| 2. Overview of Community Investment Strategy Framework Process | 15 minutes |
| 3. Desired Workshop Outcomes | 5 minutes |
| <ul style="list-style-type: none">• Establish a common understanding of planned investment needs and priorities of different community agencies;• Explore opportunities to integrate planned investments in a way that strengthens the region's ability to make the most of existing and future public resources while achieving the best economic, environmental and social return for the region; and• Provide information for future conversations and choices | |
| 4. Maps and Data | 20 minutes |
| 5. Facilitated Dialogue with Subject Experts | 120 minutes |
| <ul style="list-style-type: none">• Do these tools provide information that could help you?• Do you have questions of each other that would facilitate working together more efficiently?• What would be helpful to have that you don't already get from existing processes?• What other topic areas do you need information from in order to do your job? | |
| 6. Summary and Next Steps | 10 minutes |

Utilities						
Name, title	Agency	Email	Phone	Other Contact	Invited?	RSVP?
Len Goodwin	Springfield	lgoodwin@springfield-or.gov	726-3685	(Ken Vogeny?)	x	x
Therese Walch	Eugene; Storm	Therese.Walch@ci.eugene.or.us	x5549	541-682-5549	x	
Felicity Fahy	EWEB	Felicity.Fahy@EWEB.ORG	685-7531		x	x
Jeannine Parisi	EWEB	Jeannine.Parisi@EWEB.ORG	(541) 685-7451		x	x
Jill Hoyenga	EWEB	Jill.Hoyenga@EWEB.ORG	(541) 685-7157		x	x
Jeff Nelson	SUB	jeffn@subutil.com	744-3779	New Phone #: 7	x	x
Sanjeev King	SUB	sanjeevk@subutil.com			x via JN	x
Amy Chinitz	SUB	amyc@subutil.com			x via JN	x
Bart McKee	SUB	BartM@subutil.com			x via JN	x
Doug Barab, System Engineer	EPUD	doug@epud.org			x	
Tom Jeffreys	EPUD	tomj@epud.org	Office: 541-744-7463, Cell: 541-228-6359			
Michelle Cahill, Director of Waste	MWMC	Michelle.R.Cahill@ci.eugene.or.us	x8606, 541-682-8600	410 River Ave,	x	x
Teri Higgins	Eugene; Waste	Teri.L.Higgins@ci.eugene.or.us	541-682-8462		x	x
Mark Schoening	Eugene; PW En	Mark.A.Schoening@ci.eugene.o	541-682-4930		x	x
Matt Rodrigues	Eugene; PW En	Matt.J.Rodrigues@ci.eugene.or.	541-682-6036		x	x
Jim Steers	Lane County				x	x
Jim Franklin	Lane County				x	x



Task 9 – Community Investment Strategy

Subject Expert Workshop

UTILITY INFRASTRUCTURE

October 10, 2013



- 1. Introductions; Introduction to Lane Livability Cons.**
- 2. Community Investment Strategy Framework**
- 3. Desired Workshop Outcomes**
- 4. Maps and Data**
- 5. Facilitated Dialogue with Subject Experts**
- 6. Summary and Next Steps**

Introduction – Lane Livability Consortium

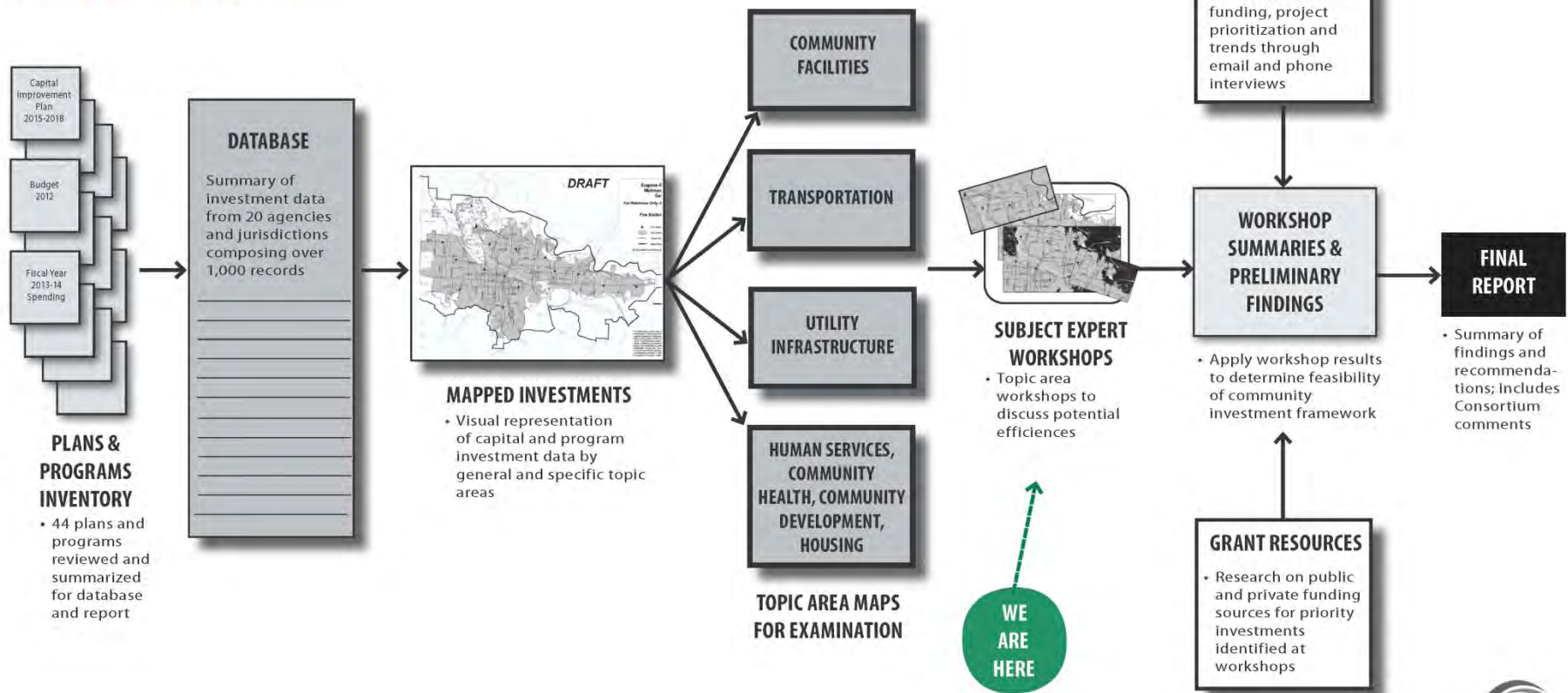


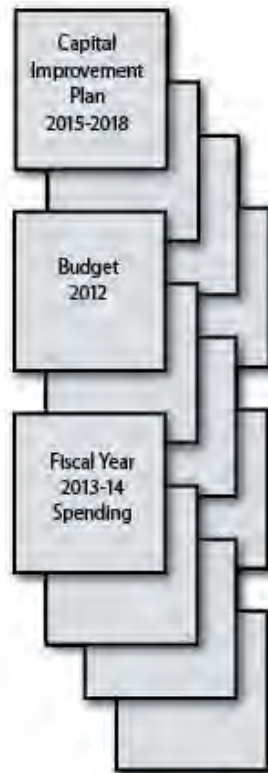


Activities – Lane Livability Consortium

- Sustainability Baseline Assessment
- Scenario Planning
- Smart Communities: Closing the Gaps
- Moving Plans to Actions

Task 9. Community Investment Strategy Framework Process Diagram





PLANS & PROGRAMS INVENTORY

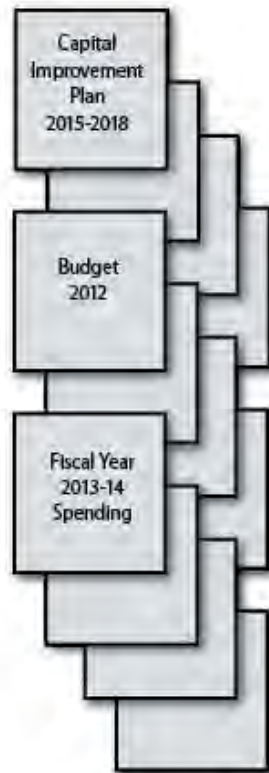
INVESTMENT PLANS

INVESTMENT PLANS DESCRIBE THE FUNDING FOR THE PRIORITIZED PROJECTS & PROGRAMS

1. Metro Public Facilities and Services Plan
2. Eugene-Springfield One Year Action Plan 2013-2014
3. Human Services Fund Priorities for Fiscal Years 2012 and 2013
4. Draft Metropolitan Transportation Improvement Program
5. *City of Eugene Capital Improvement Program (2014-2019)*
6. *City of Eugene Comprehensive Annual Financial Report*
7. City of Eugene 2013 Budget
8. City of Eugene 2012-2017 Multi Year Financial Plan
9. *City of Springfield Capital Improvement Program (2014-2018)*
10. *City of Springfield Comprehensive Annual Financial Report*
11. City of Springfield, FY 2013 Budget
12. Lane County Public Works Capital Impr. Program 2014-2018
13. Lane County FY2012 Comprehensive Annual Financial Report
14. Lane County 2013/2014 Budget
15. Human Services Plan for Lane County (December 16, 2009)
16. Willamalane Park and Recreation Comprehensive Plan and CIP
17. Lane Transit District Capital Improvements Program (2013-2023)
18. LTD 2011-2012 Comprehensive Annual Financial Report
19. ODOT Final Statewide Transportation Improvement Program
20. *EWEB 5-Year Water and 5-Year Electric Capital Improvement Plan*
21. *SUB Electric Division & Water Division Capital Improvement Budget 2012*
22. *SUB Electric and Water Utility Major Capital Improvements*
23. *MWMC 5-year Capital Improvement Program 2012-2017*
24. Regional Wastewater Program Budget & Capital Improvement Program
25. Metropolitan Wastewater Mgmt Commission 2005 Financial Plan
26. School District 4j Comprehensive Annual Financial Report
27. School District 4j Measure 20-210 Bond Information
28. Springfield Schools Comprehensive Annual Financial Report
29. Bethel School District Comprehensive Annual Financial Report
30. Bethel School District Bond Improvements
31. Lane Community College Budget Document
32. Conceptual Vision (Draft), August 2010
33. Oregon University System 2011-2013 Capital Construction Program
34. UO Campus Plan Second Edition 2011
35. UO Major Capital Projects, January 2013
36. UO Vision Plan: Campus Planning & Real Estate September 2012
37. HACSA project list
38. St. Vincent De Paul Development List as of April 2013
39. St. Vincent De Paul Newsletter with Financial Statement
40. United Way Program List 2013-2015
41. City of Coburg Transportation System Plan and Wastewater Plan
42. Coburg Parks and Open Space Master Plan
43. Coburg Water Management and Conservation Plan
44. *Coburg Water System Master Plan Update*

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PLANS & PROGRAMS INVENTORY

COMMUNITY NEEDS PLANS, VISIONARY PLANS

COMMUNITY NEEDS ARE MORE REFINED STRATEGIC PLANS DOCUMENTING SPECIFIC PROGRAMS & PLANS, & DETAIL ANTICIPATED COSTS; VISIONARY DOCUMENTS ARE GENERALLY LONG TERM PLANS THAT DETAIL BROAD COMMUNITY VALUES & GOALS

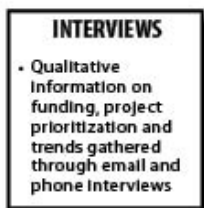
Community Needs

1. Eugene-Springfield TransPlan
2. Central Lane MPO Regional Transportation Plan
3. Lane County Community Health Improvement Program
4. Oregon State's Integrated Water Resources Strategy
5. Lane County Natural Hazard Mitigation Plan
6. Metro Waterways
7. Eugene PROS Project & Priority Plan
8. Eugene Bicycle and Pedestrian Master Plan
9. Eugene TSP
10. Lane County Transportation System Plan
11. Lane County Natural Hazards Mitigation Plan
12. Lane Workforce Partnership Local Strategic Workforce Plan
13. OR 126W: Fern Ridge Corridor Plan
14. OR 126 Expressway Management Plan
15. OR 569 (Beltline): River Road to Coburg Road Facility Plan
16. EWEB Strategic Plan
17. EWEB Drinking Water Source Protection Plan
18. 4J Long Range Facilities Plan

Visionary

1. Regional Prosperity Economic Development Plan Cascades West Comprehensive Economic Development Strategy
2. Eugene-Springfield Consolidated Housing 5 year Strategic Plan
3. Rivers to Ridges Reg'l Parks and Open Space Vision
4. Willamette River Open Space Vision & Action Plan
5. West Eugene Wetlands Plan
6. Ridgeline Area Open Space Vision & Action Plan
7. Parks, Recreation and Open Space Comp. Plan
8. Envision Eugene
9. Envision Eugene Implementation Update
10. Envision Eugene Draft Proposal
11. Envision Eugene Spotlight on Implementation
12. Climate Energy Action Plan
13. Springfield 2030
14. Lane County Rural Comprehensive Plan
15. Lane County Public Health Auth. Comp. Plan
16. Lane Coord. Public Transit Human Svcs Plan
17. LTD Long Range Transit Plan
18. EWEB Integrated Electric Resource Plan
19. Lane Strategic Plan
20. Coburg Crossroads Urbanization Study

Interview Questions



- What types of investment funding appear in what types of documents?
- What are the steps to get funding and prioritize that funding? For example, are there long range plans or short-term strategic plans? And, how does a project shift from long range to short-term?
- What trends in funding and funding sources are you seeing?

Interviews, Plan and Program Summaries

- What types of investment funding appear in what types of documents?
- What are the steps to get funding and prioritize that funding? For example, are there long range plans or short-term strategic plans? And, how does a project shift from long range to short-term?
- What trends in funding and funding sources are you seeing?

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DATABASE

Impact Area	Mapped	Not Mapped
Community Health	5	13
Economic Development	1	6
Electricity	62	28
Higher Education	55	0
Housing	25	17
Human Services	31	58
Parks and Open Space	49	57
Public Buildings and Administration	50	37
Public Safety	14	8
Schools K-12	31	13
Stormwater	29	27
Transportation	128	137
Wastewater	30	8
Water Supply	106	22

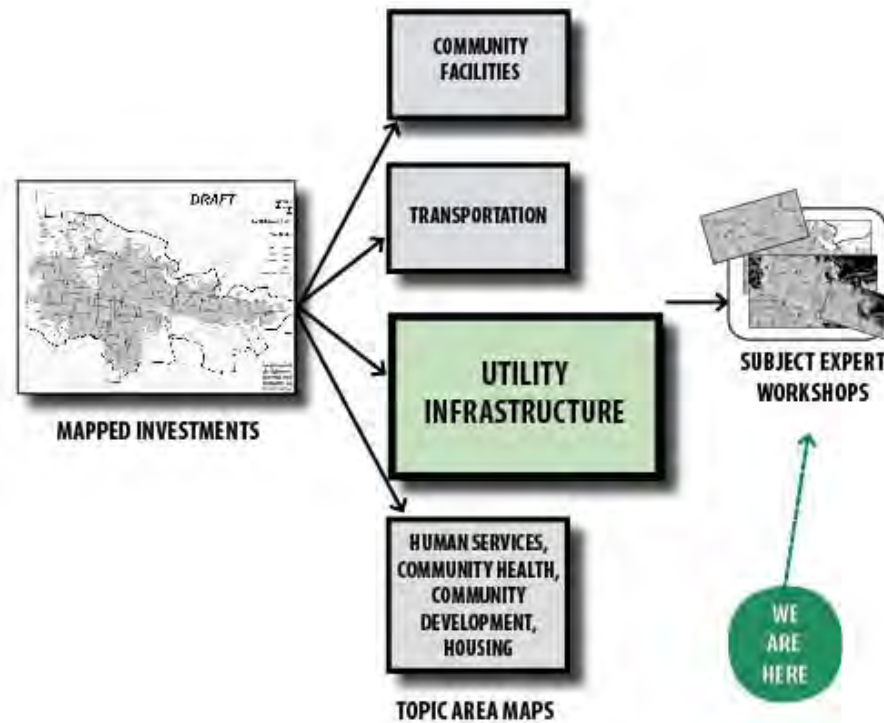


Database

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

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Desired Workshop Outcomes

- Common understanding of planned investments;
- Planned investment integration; and
- Information for future conversations and choices

Maps and Data – Limitations

- Data and maps are snapshot in time created with best available information
- Range of detail in documents – location, dollars and years
- Not all projects can be mapped
- Uneven spatial distribution
- Some subjectivity required when compiling database

Key Observations to Date

- Agencies and jurisdictions spend considerable time and resources preparing capital improvement plans and programming investments
- Implementation of improvements and programs can be unpredictable
- Successful regional cooperation already exists in some areas.
- Some entities keep capital investment planning private due to competition

Community Investment Database



Over 1000 records, gleaned from 34 documents

Project-level and program-level information includes:

- Project/program name, description, location
- Agency and source document
- Funding sources and funded/unfunded amounts (when provided)
- Spending by Fiscal Year (when provided)
- Additional information

Projects and Programs were each categorized into one of 14 **Impact Areas**

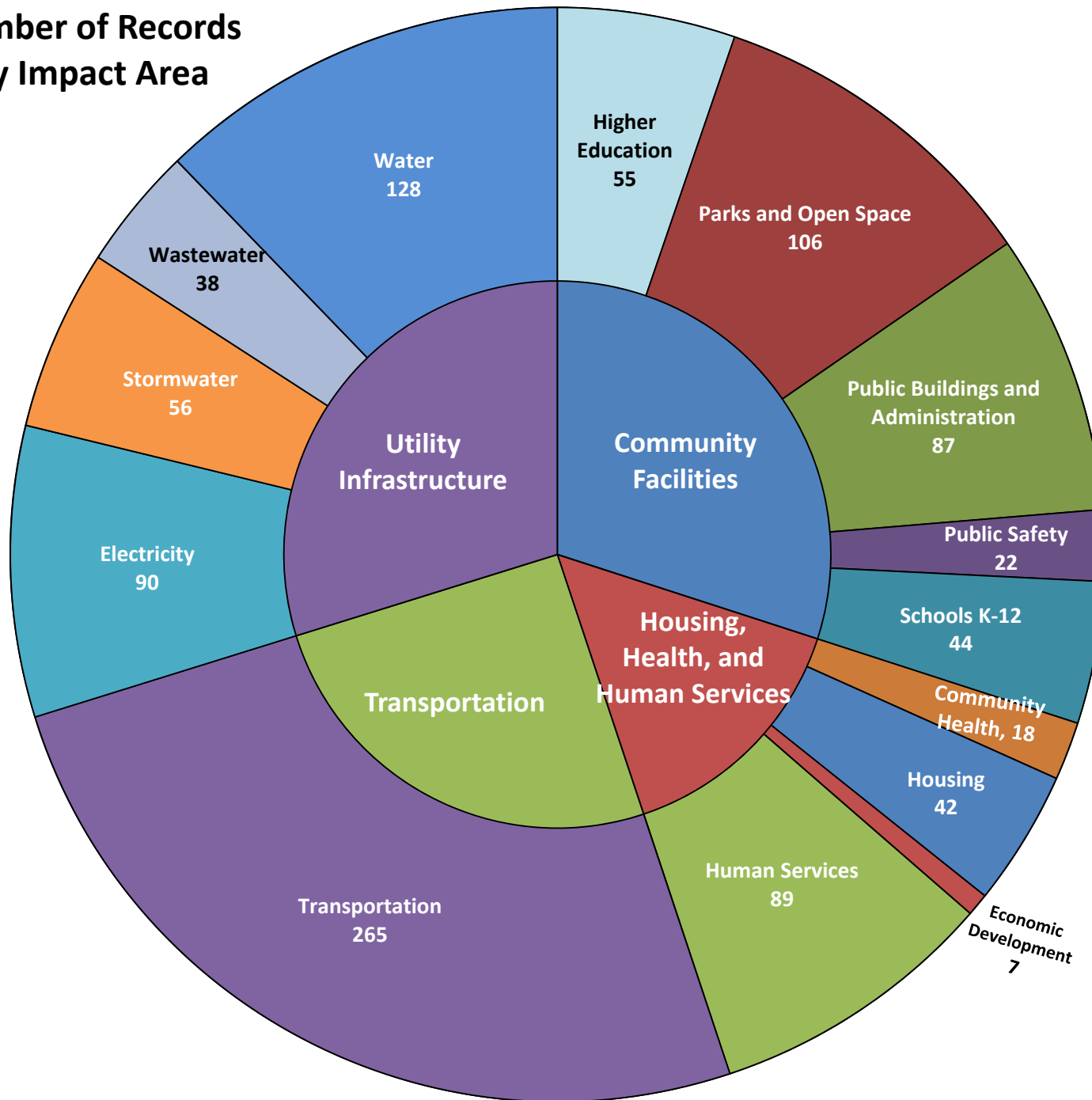
Impact Areas	Record Count	Major Topic Areas	Total Investments (Funding Sources)	Total Investments (All FYs)	Past and Current Investments (FY11-12 to FY13-14)	Future Investments (FY14-15 to FY19-20)
Higher Education	55	Community Facilities (314)	\$741,780,697	\$691,780,697	\$691,780,697	\$0
Parks and Open Space	106		\$143,326,308	\$65,682,308	\$20,727,808	\$44,954,500
Public Buildings and Administration	87		\$803,324,221	\$530,428,006	\$382,844,006	\$147,584,000
Public Safety	22		\$309,600,097	\$291,056,428	\$236,867,428	\$54,189,000
Schools K-12	44		\$479,915,660	\$512,344,740	\$417,346,740	\$94,998,000
Community Health	18	Housing, Health, and Human Services (156)	\$92,609,340	\$92,957,820	\$92,856,826	\$100,994
Housing	42		\$30,455,696	\$27,175,189	\$26,425,189	\$750,000
Economic Development	7		\$3,025,322	\$2,864,817	\$2,864,817	\$0
Human Services	89		\$102,966,812	\$108,435,190	\$108,062,978	\$372,212
Transportation	265	Transportation (265)	\$937,220,879	\$923,524,906	\$433,623,305	\$489,901,601
Electricity	90	Utility Infrastructure (312)	\$221,059,989	\$221,059,989	\$66,566,986	\$154,493,003
Stormwater	56		\$74,097,129	\$66,894,930	\$26,920,130	\$39,974,800
Wastewater	38		\$203,016,009	\$197,236,043	\$117,058,703	\$80,177,340
Water	128		\$139,074,445	\$135,063,446	\$42,573,077	\$92,490,369
Database Totals	1047		\$4,281,472,604	\$3,866,504,509	\$2,666,518,690	\$1,199,985,819



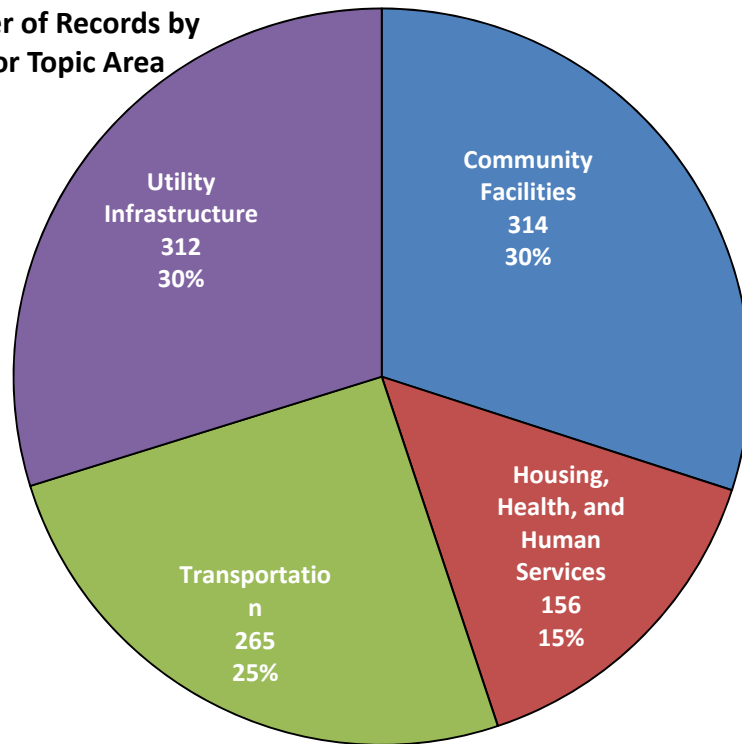
Utility-related Plans – Records, Dollars and FYs

Agency and Plan Name	Count of Records	Total Investments (Funding Sources)	Total Investments (Sum of FYs)
EWEB 5-Year ELECTRIC Capital Improvement Plan	16	\$206,484,051	\$206,484,051
SUB Electric Division Capital Improvements Budget 2012 (10-year summary)	74	\$14,575,938	\$14,575,938
City of Eugene CIP	20	\$30,640,000	\$29,240,000
City of Eugene Comprehensive Annual Financial Report	1	\$13,301,129	\$13,301,129
City of Springfield CIP	35	\$30,156,000	\$24,353,801
City of Eugene CIP	4	\$18,460,000	\$13,880,000
City of Eugene Comprehensive Annual Financial Report	1	\$22,359,079	\$22,359,079
City of Springfield CIP	25	\$35,052,000	\$33,852,034
City of Springfield Comprehensive Annual Financial Report	3	\$32,669,338	\$32,669,338
Metropolitan Wastewater Management Commission (MWMC) CIP	5	\$94,475,592	\$94,475,592
Coburg Water System Master Plan Update (May 2006)	8	\$4,011,000	\$0
EWEB 5-Year WATER Capital Improvement Plan	17	\$80,152,695	\$80,152,696
SUB Water Division Capital Improvements Budget 2012 (10-year summary)	103	\$54,910,750	\$54,910,750

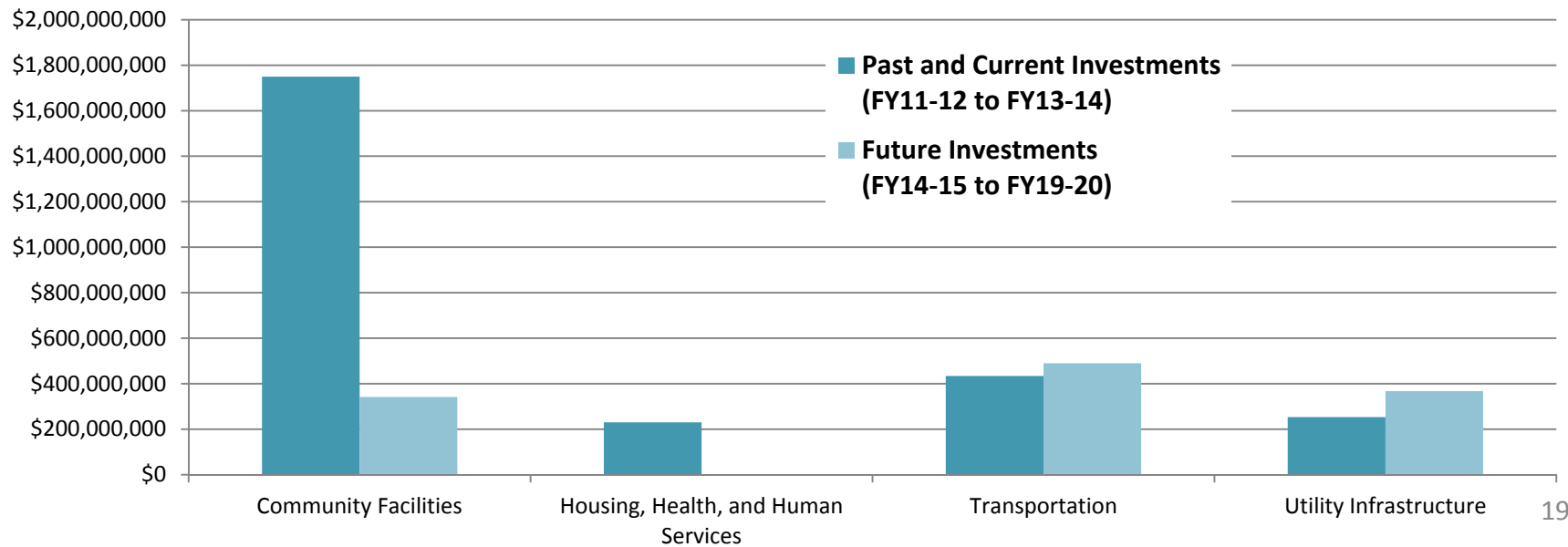
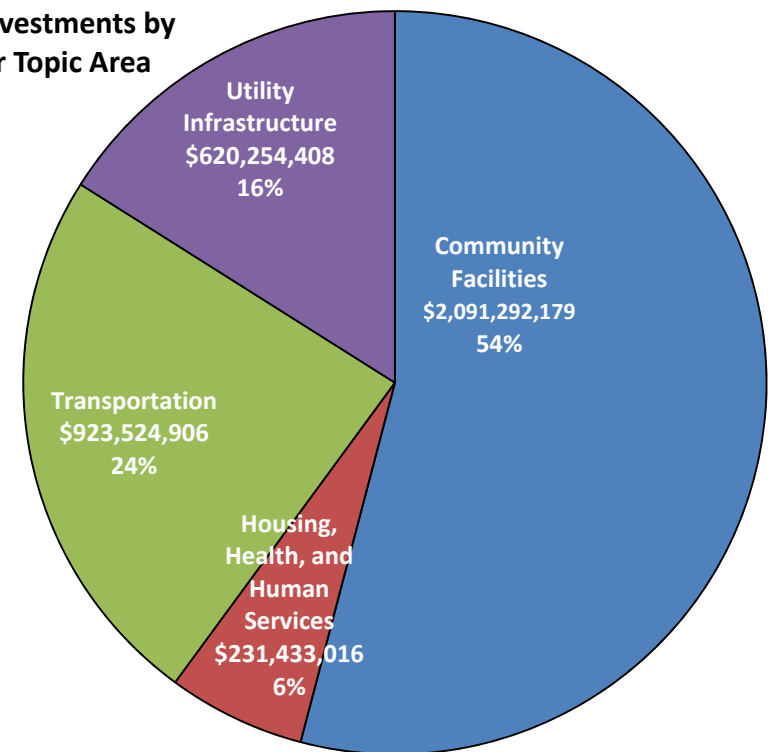
Number of Records by Impact Area



Number of Records by Major Topic Area



Total Investments by Major Topic Area



Community Investment Database



Over 1000 records, gleaned from 34 documents

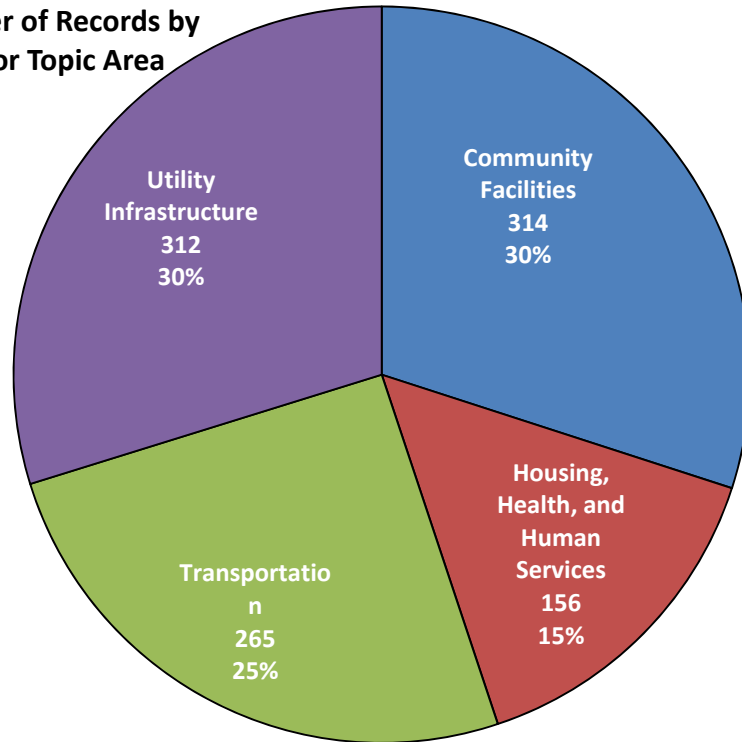
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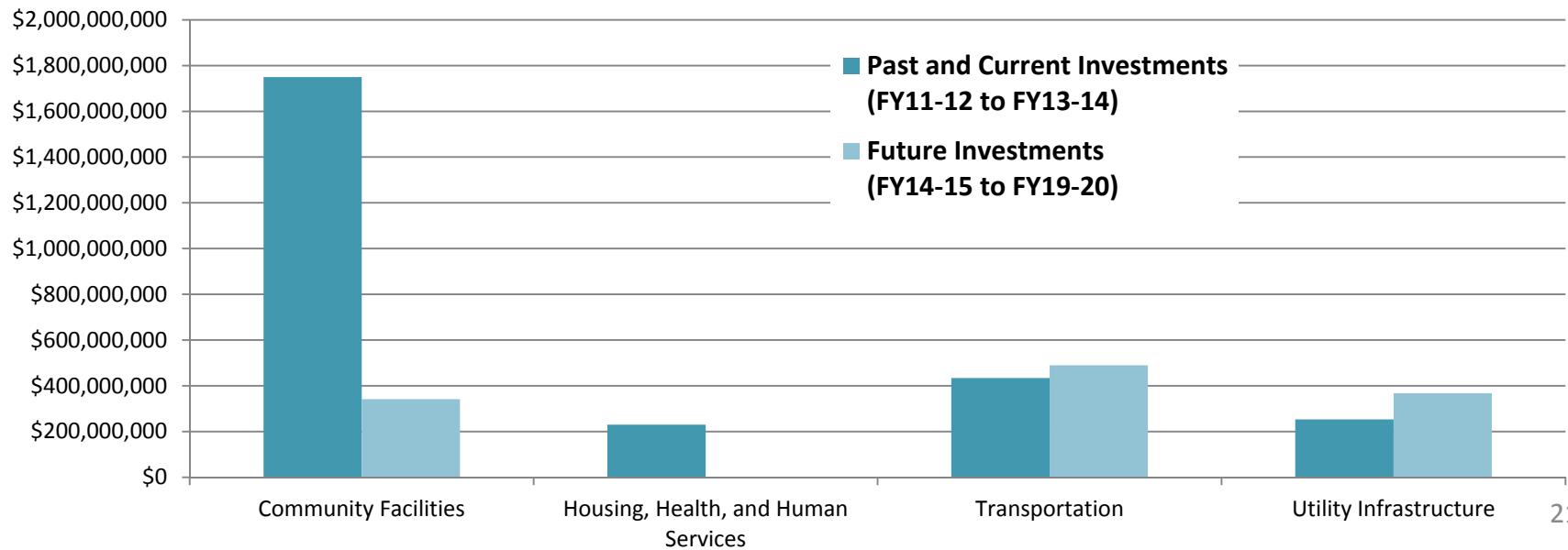
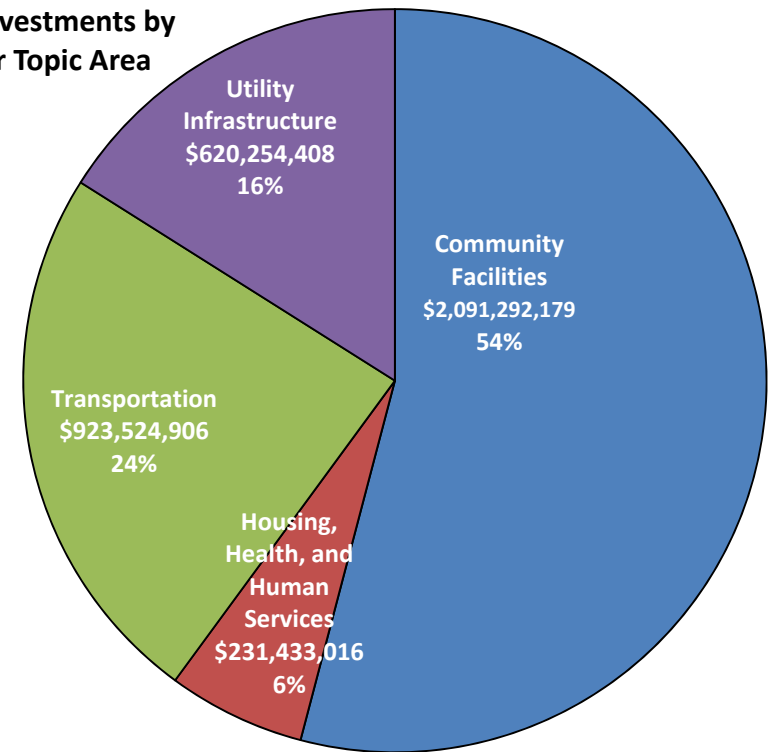
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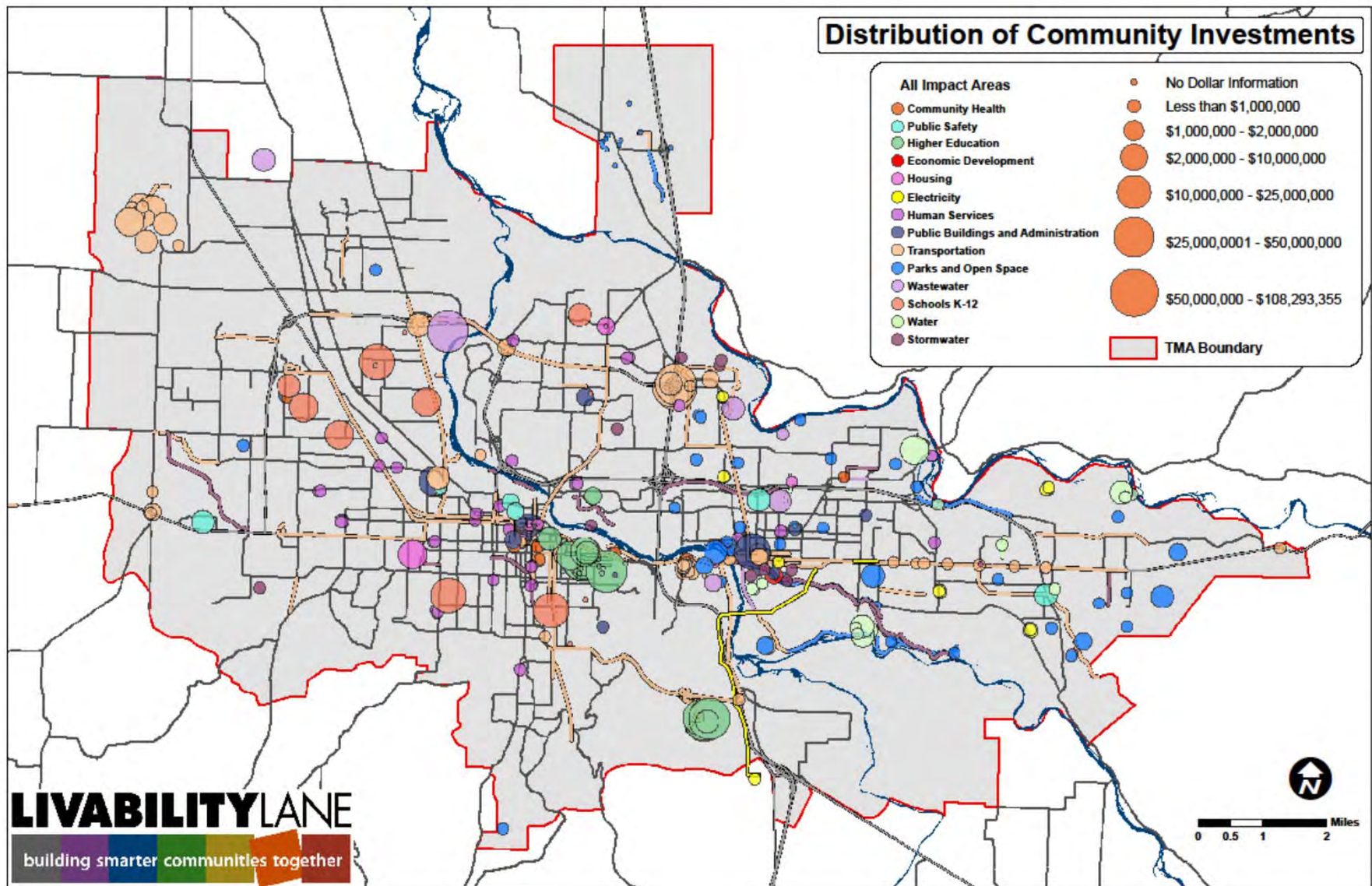
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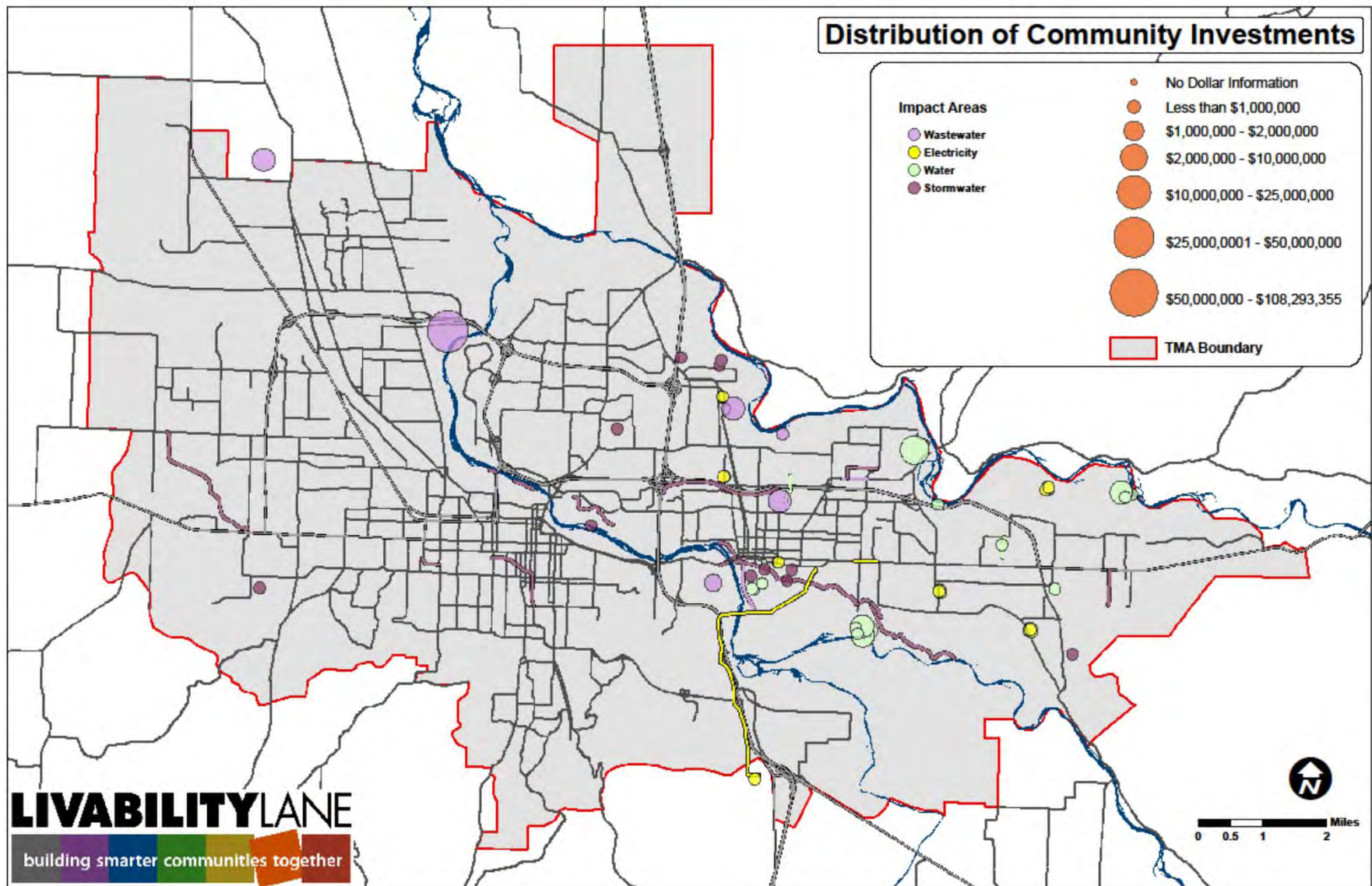
Number of Records by Major Topic Area



Total Investments by Major Topic Area





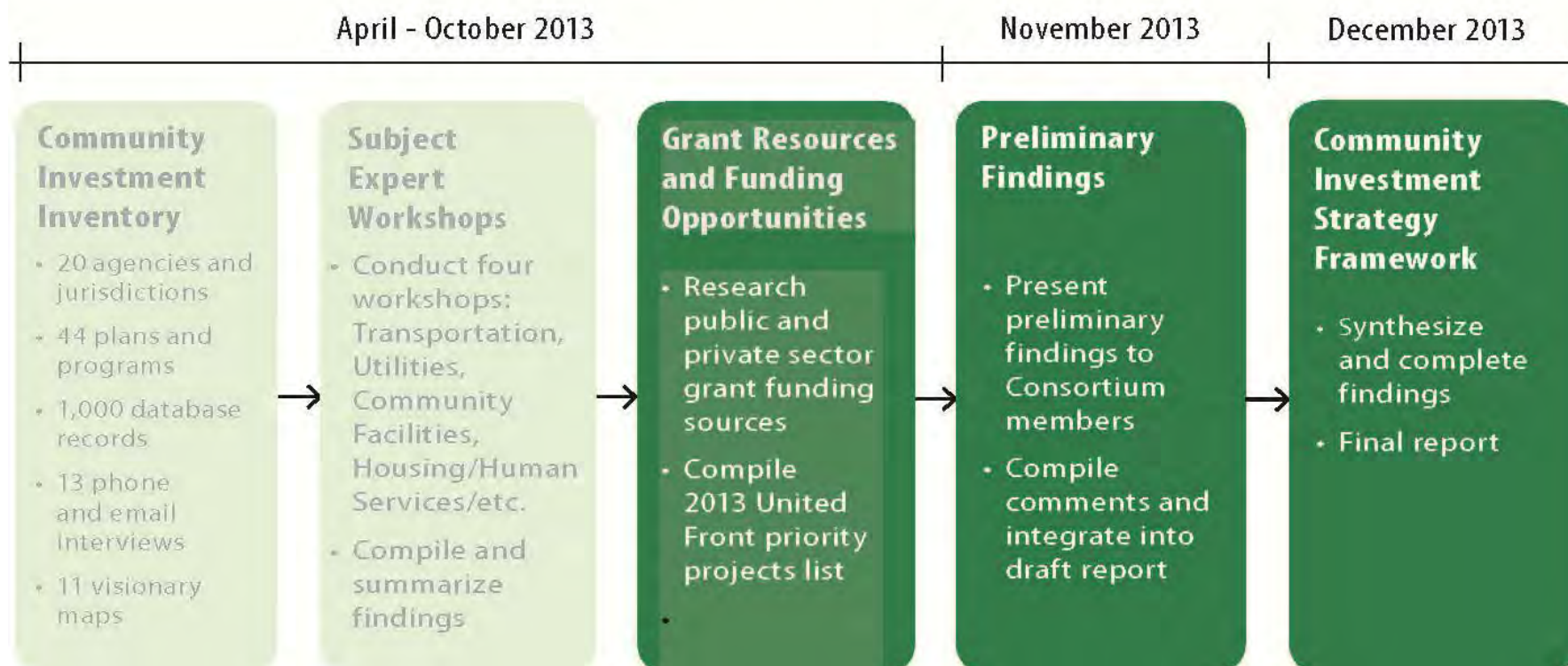


Questions

- Do these tools provide information that could help you?
- Do you have questions of each other that would facilitate working together more efficiently?
- What would be helpful to have that you don't already get from existing processes?
- What other topic areas do you need information from in order to do your job?

Next Steps

Community Investment Strategy Framework



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Task 9 – Community Investment Strategy
Subject Expert Workshop #2: UTILITIES
October 10, 2013 – 1:00 – 4:00 pm
NOTES

Attendees:

Jim Franklin, Lane County, James.Franklin@co.lane.or.us
Matt Rodrigues, City of Eugene, matt.j.rodrigues@ci.eugene.or.us
Doug Singer, City of Eugene, doug.k.singer@ci.eugene.or.us
Jim Steers, Lane County, jim.steers@co.lane.or.us
John Huberd, City of Eugene, John.c.Huberd@ci.eugene.or.us
Amy Chinitz, SUB, amyc@subutil.com
Felicity Fay, EWEB, felicity.fay@EWEB.org
Jeff Nelson, SUB, jeffn@subutil.com
Jeannine Parisi, EWEB, Jeannine.parisi@eweb.org

Facilitated Dialogue with Subject Experts

- **Do these tools provide information that could help you?**
- **Do you have questions of each other that would facilitate working together more efficiently?**
- **What would be helpful to have that you don't already get from existing processes?**
- **What other topic areas do you need information from in order to do your job?**

- Question about whether we included unfunded/funded dollars in the database? Answer: Yes, but not all agencies provided that level of detail and data is not standardized.
- Usefulness in map of all categories
- Different specificity of agency processes and documents – Do we know which plans need more specificity? Do we know which plans don't provide Funding Source info? So that we can assess level of effort to achieve standard information. Detail on what plans have what (Ex. Eugene – funding secured – unfunded):
 - We can present an assessment of:
 - The number of records that each agency has in the database
 - Of the records, which have information on funded/unfunded
 - More qualitative - We could include interview info
- Need for consistent terminology across agencies
- Place this in a framework – if all orgs provided info in the same way, what are the advantages to doing that? Are we agreed we want to go there?
- Any efficiency's we can build on?
- Utility grants are few/far between – tools less likely to benefit Utilities in that way – Efficiencies aspect may relate to some smaller more widely spread prospects, not necessarily the larger more centralized projects. – new technology maybe

- Some orgs deliberately keep info less specific so they can have more flexibility, heading down a direction, may change, can be reactive.
- Agree with what was said about large capital projects – things don't always pan out as planned. Projects can be sped up when other things happen. (E.g. transportation, - currently, communicate w/ some other orgs better than w/ others. Assumption by grantors that Utilities are individually funded
- Difficult to partner on bonds
- Where's the opportunity to partner?
- Standardize information – needs to be normalized
- What level of detail is needed-appropriate?
- Utilities coordinate now – when opportunities arise.
- Utilities expected to be funded individually (bonds, fees)
- We can provide the level of specificity you need on the map/in the data
- Map would help us
- Currently projects are mapped in combination with transportation
- Gaps in agency information would be useful – identify the weak links in communication streams.
- Large infrastructure system on maps (EWEB system) - gain that perspective in comparison to new projects – to facilitate understanding between agencies. Already funded. Some sensitivity around sharing that info (public safety)
- Different plans – different project timing – map shows all projects – maybe separate into current-visionary. Pull the unfunded pie-in-sky stuff off the map. Separate out levels of possible improvements.
- Planning (long-term) coordination versus immediate (short-term) notification
- Role of Metro plan (PFSP) as repository – place for coordination – bringing all info. In one place – PFSP – was mandated
- Was the Metro Plan helpful? Agencies support rehabilitation and small expansions
- Would be difficult to know how we would fund other projects – some collaboration exists today. Existing coordination may be sufficient.
- Where do projects show up –
 - SUB –has alternative plans, Utilities don't drive capacity. SUB water: Future possibility: projects that don't appear in any plan, such as Cedar Creek, Metro Waterways, Thurston well field, city storm water
 - EWEB – has similar process – alternatives presented when partners involved – limbo – unknowns – don't always drive capital improvements – reactive. EWEB: Capital projects are often opportunistic playing catch-up with others' projects
 - MWMC: Inflow & Infiltration (\$118M) impacts could be mitigated by others rather than having to increase treat capacity - As opportunities arise (e.g. replacement) I&I replacement – DEQ requirements, MWMC has permit
- Useful to have reliable data – need better data to support that argument, early on better
- Requests for avg consumption information, usage patterns – impact (water/wastewater), effects on rate models (e.g. MWMC charges by the gallon. Utilities are pushing low-flow toilets & concentration – less about capital spending/more about use-fees – this drives/impacts investments
- Eugene Storm – some useful info – how relate directly?
- Tools helpful? – Is interesting information
- Where projects overlap is helpful to know (ex. Wastewater, transportation)
- Example of current projects on opposite sides of river
- Some projects are not listed specifically in CIP – more categories.

- We currently coordinate with usual suspects (LTD, EWEB) – quarterly meetings – cover near term projects
- Eugene considering “Vista” across departments – that would be useful – would these tools provide that level of detail? What normalization is required? How often is it updated?
- Is helpful to see school data
- Quarterly meeting – EWEB / Eugene (Similar meeting in Springfield (Spring, SUB, Rainbow) - 1-yr horizon – near term plans – school info may be new and valuable info. Update cycle. Annual communication with others for the next year.
- Change & evolution of designs & plans can sometimes be very dramatic, have to react – risk in trying to prepare ahead of time for something that may not happen.
- Efficiency of projects could come from this – opportunity for cost savings – improve communication/coordination – talking to each other, instead of tripping on one another
- Data on map is ambiguous – can’t tell what is long-term/short-term – want detail of who is affected (Nicole added – want jurisdiction lines?)
- Private utilities – tend to want short-term info. – reactionary, hold back until we’re sure, utilities want info when it’s more concrete
- Want to plan w/ solid info – not pie-in-sky (ex. Glenwood Blvd – proj. redesigned several times because of funding)
- Difficult to do long-range plans (funding)
- Utilities currently meet- discuss inter-ties, tests of functionality, discuss planned projects
- Would it be helpful to see info of other areas? - Sub-Internatl. Paper Co., Rainbow Water Dist. – EWEB Hayden-bridge facility
- Joint-trench agreements exist – at permit time? When funding received (greenfield projects).
- Seems pretty individual until collaboration needs to happen
- Opportunities for collaboration? With location maybe, overlapping boundaries also play a role in utility of collaboration – The current processes respond to this – Ex. Both Eug/Spring. Coordinate with Lane County
- General public doesn’t understand the overlapping boundaries (Nicole added: Question to group – Who is the audience of this data? General public/participating agencies?)
- We coordinate today through individual contact/maps (ex. Slurry seal projects)
- Would be helpful to have info from LC
- LC - Glenwood Blvd. is a good example of collaboration – many agencies
- Already work together - Communication is good today.
- Because projects shift frequently – A standard, timely process would need to be in place (data updated often). Without an automated system, couldn’t be better than what already exists.
- Not usual suspects conversations or talking to groups that we don’t traditionally talk to may be helpful. Bringing together unusual groups – not traditional folks
- Would/how often would we use the map (see overlapping projects with other areas) – “Sometimes” – ex. SUB with school – work well with NWNat.
- Visionary plan side – we are seeing overlap – how can we collaborate – where are common goals?
- Advantage to working regionally with funds (long-range)
- Not always individual projects
- Source protection plans are not on the list
- Source protection is good place for grants – ties into other areas (apply jointly). There is good collaboration between SUB & EWEB on grants for source protection.
- Visionary plans that stay visionary and don’t turn into actual plans. Visioning a good time to overlap agencies/departments/jurisdictions – shared objectives. Goals don’t always align.

- Infrastructure in replacement plans may be opportunity for collaboration
- Maybe opportunities for synergy, but we don't do a lot of that
- Yes, goals overlap and gaps also exist – ex. Source protection – thermal level (SUB & City, Willamalane work together in planning – BPA dollars)
- Ex. Willamalane – easements that block utilities – SUB will map-out plans in response to projects like that.
- More standardized, detailed data would be helpful?
- Is it going to be updated? Who is responsible?
- Communication is already working well, but across areas – broad sense could be useful (Ex. Econ. Dev., greenfield) – Useful to the community as a whole – Maybe spur dialog – Develop goals for future development
- RLID could include utility information – dangerous (ex. Glenwood- transitioning services – changes)
- Why are we missing info? (public/private)
- Telecommunications? Fiber network maybe included in future.
- Opportunity in long-term/visionary planned projects – small enough that happening - When mistakes happen, is difficult to undo – near term/immediate maybe broader coordination
- Dry-well elimination – example of area to improve.
- Current 2-4 yr. communication
- Lane Utility Coordination Council exists – mo. Meeting – need speakers state-one-call system is involved
- Customer education & outreach is always welcome
- What is mapped/not-mapped? Programs difficult to map vs. projects
- Water temp/utility issues with customer expectations – receive calls
- Other areas that could be included? Parks, targeted areas for development (Envision Eugene has future development in it)
- Areas of infill identified by cities, schools, others. Underdeveloped areas, redevelopment potential are areas of particular focus
- Near-term is more useful
- Want to know what other groups have said – will say to these same questions.
- Lane Utility Coordination Council. Monthly, locates, awareness about program spending, not mapped
- Back-up data center –
- Are all of the plans available in one place? Jake's Data Plan; lane livability website
- Utilities communicate because they recognize the disadvantage of non-communication (upset customers, etc.)
- Public safety could be included
- Examples of cross-communication opportunities (ex. Tap water campaign overlaps w/ nutrition)
- Ex. Governor goals – shared planning disaster resilience, off-site data storage capacity
- Ex. Climate change collaboration – looking across utilities
- Tools could be used to answer some questions around the examples above (dispatch, capacity, etc.)
- Appreciate opportunity to comment

Next Steps

November 17, 2013 - Presentation to Lane Livability Consortium

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