

# Community Investment Strategy

December 2013



Prepared by:



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- City of Eugene
- City of Springfield
- Eugene Water & Electric Board
- Housing and Community Services Agency of Lane County
- Lane County
- Lane Council of Governments
- Lane Transit District
- Oregon Department of Transportation
- United Way of Lane County
- Saint Vincent de Paul Society of Lane County
- Springfield Utility Board
- University of Oregon

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## Executive Summary

The Eugene-Springfield metropolitan region is facing resource challenges that threaten our ability to maintain our infrastructure, retain our service capacity, and fund new development necessary to support our growing population. Overcoming these challenges requires an understanding of our needs and proposed investments, as well as innovative tools that promote a synergistic approach through which different agencies and departments can focus and leverage investments.

The Community Investment Strategy project (Task 9) of the Lane Livability Consortium sought to identify the region's collective infrastructure investments, program and service delivery, and maintenance and operations in order to prioritize opportunities for partnered local community investment. The process was designed to engage and assist the needs of multiple and diverse agencies, and to:

- 1) Establish a common understanding of the investment needs and priorities of different community agencies;
- 2) Explore opportunities to integrate 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;
- 3) Provide information for future conversations and choices; and
- 4) Allow partners to consider refinements and new approaches to enhance funding efficiencies based on common understanding.

The project consisted of the following four key steps:

- 1) Compilation and inventory of Community Investment Plans, culminating in the development of Plan and Program Summaries providing key baseline information on the goals, funding sources, related plans, and funding trends and prioritization for the different plans. The plan summaries are contained in **Appendix A**.
- 2) Creation of a database to capture and allow comparison of planned community investments across the region. The compiled data is included as part of **Appendix B**.
- 3) Mapping of the investment data. Maps showing the location of investments are included in **Appendix C**.
- 4) Conducting workshops with stakeholders to evaluate the materials and discuss potential next steps in developing a community investment strategy. The results of these conversations are included as **Appendix D**.

### Summary of Key Findings

This effort started a regional dialogue on how to develop information sharing processes and tools to help advance increased agency coordination and collaboration. The resources developed under this grant have several potential applications, including the following:

- **Agency consultation and collaboration.** This tool may help identify the links where interagency consultation and collaboration are happening and where it could be improved, which may in turn lead to consistency in interagency consultation. For instance, the maps show a multitude of investments along the Franklin Boulevard Corridor, an area which involves many different jurisdictions, and agencies, as well as the University of Oregon. The maps could be used to see

where different agency investments are occurring or planned to occur; look for efficiencies in project design, engineering, acquisition and construction; consider how and where programs and services are needed to support desired community outcomes; and ensure that the investments work together to meet the overall community vision and reinforce the desired community identity for the corridor.

- **Identification of met/unmet needs and funding prioritization.** The information could be compared to other inventories that identify key barriers to opportunity or facility and service gaps, in order to evaluate how we are addressing these community issues.
- **Communication.** 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. The information could be presented at different geographical scales, such as for a particular neighborhood, to tell the story of what we are trying to accomplish and how we are investing to make this a reality.
- **Trend analysis.** If longer-term trend data were available, this resource could be used to identify how we are gaining or losing in terms of investments, both in different geographic areas, but also by funding focus areas.

In creating these resources, partners also learned that collecting information on and mapping specific investments for the community as a whole is challenging, time consuming, and difficult to analyze and use. Despite these challenges, participants reaffirmed the value of continued coordination and developed specific recommendations for how to further the efforts initiated through this work, as follows:

- a. Establish better information sharing mechanisms and networking opportunities to build cross connections, synergies, and non-traditional linkages. Include public, non-governmental and non-profit entities.
- b. Create and maintain contact or liaison lists. Consider involving public information officers and intergovernmental relations staff. Formalize these partnerships.
- c. Move forward with the strategy and implementation steps outlined in the River Corridor Study and use this as a case example for future regional collaboration.
- d. Identify other potential regionally-significant locations where there is a similar confluence of different agencies, plans and investments to begin the process of establishing a regional collaborative framework.
- e. Advocate for continuing evolution of federal and state funding mechanisms to allow for more flexible, cross-cutting, outcome-based investments to be made in the region. Maintain and improve regional partnerships in anticipation of potential grant opportunities.
- f. Consider developing or amending current tools to provide staff and decision makers responsible for funding decisions with information on 1) potential contributing efforts or leveraging opportunities from other departments, agencies, private entities, and non-profit agencies; and 2) potential coordination opportunities with other governmental, private, and non-profit agencies. This could include databases or maps containing relevant information, decision support frameworks, or other tools that meet these information needs.

The report is organized into six main parts, including an Introduction (Section 1.0), a description of Community Investment Revenue Sources (Section 2.0), a description of Community Investment Expenditures (Section 3.0), a summary of a series of Community Investment Workshops (Section 4.0), Findings and Recommendations (Section 5.0), and Conclusions (Section 6.0).

## 1.0 Introduction

The Community Investment Strategy was initiated by a coalition of local public, nonprofit, and educational agencies and organizations called the Lane Livability Consortium. These entities are working together through the Lane Livability Consortium to find new ways to advance community growth and prosperity in the Eugene-Springfield metropolitan area. The Lane Livability Consortium was established in 2010 in order to apply for and receive a Sustainable Communities Regional Planning Grant from the U.S. Department of Housing and Urban Development. The Consortium's efforts are funded through the Regional Planning Grant and with leveraged resources contributed by local partner agencies. Work through the Consortium commenced in 2011 and will conclude in 2014.

Partner agencies include City of Eugene, City of Springfield, Lane County, Eugene Water & Electric Board, Housing and Community Services Agency of Lane County, Lane Council of Governments, Central Lane Metropolitan Planning Organization, Lane Transit District, Oregon Department of Transportation, St. Vincent de Paul Society of Lane County, University of Oregon Sustainable Cities Initiative, and the University of Oregon Community Planning Workshop.

The primary focus of the Consortium is to identify opportunities for greater impacts and linkages among our region's core plans and investments related to land use, transportation, housing, and economic development. Other Consortium initiatives include work on public engagement, assessment of existing plans, scenario planning, use of data for decision-making, organizational capacity building, and catalytic projects.

### 1.1 Purpose

The Eugene-Springfield metropolitan region is facing resource challenges that threaten our ability to maintain our infrastructure, retain our service capacity, and fund new development necessary to support our growing population. Overcoming these challenges requires an understanding of our needs and proposed investments, as well as innovative tools that promote a synergistic approach through which different agencies and departments can focus and leverage investments.

The Community Investment Strategy project (Task 9) of the Lane Livability Consortium sought to identify the region's collective infrastructure investments, program and service delivery, and maintenance and operations in order to prioritize opportunities for partnered local community investment. The process was designed to engage and assist the needs of multiple and diverse agencies, and to:

- 1) Establish a common understanding of the investment needs and priorities of different community agencies;
- 2) Explore opportunities to integrate 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;
- 3) Provide information for future conversations and choices; and
- 4) Allow partners to consider refinements and new approaches to enhance funding efficiencies based on common understanding.



The geographic focus area for this analysis is the boundary of the Central Lane Metropolitan Plan Organization (MPO), which includes the Cities of Eugene, Springfield, and Coburg as well as unincorporated land surrounding these jurisdictions.

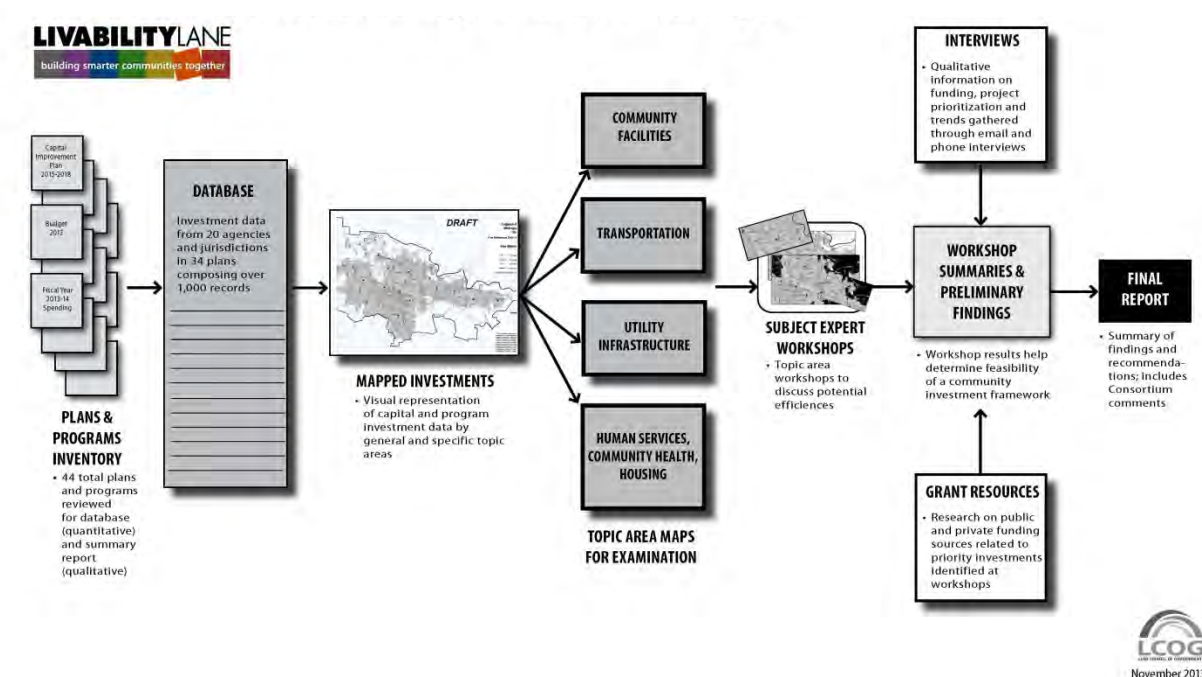
By building upon and complementing existing efforts and plans, this project sought to provide data and analysis that can be used by multiple agencies to consider refinements and new approaches to enhance funding efficiencies.

## 1.2 Methods and Products

A high level summary of the general process is described in Figure 1.1 below. A more detailed diagram is located on the following page.



Figure 1.2 Community Investment Strategy Framework Process Diagram



### Community Investment Inventory

An initial review of 84 plans and programs from 20 agencies and jurisdictions was completed to determine their applicability to the task. A brief summary of these plans were created. The following information was included in the summaries, where available in the plans and programs:

- Purpose or Goals of Plan
- Partnerships
- Description and Need or problem addressed
- Agency Department and Contact(s)
- Related Plans and Policies
- Types of funding
- Project Prioritization
- Funding Trends
- Access Database Total Records (Project IDs)

A list of the plans reviewed and the Plan Summaries are contained in **Appendix A**.

As a corollary to the Plan summaries, a number of conceptual or visionary maps prepared by various jurisdictions and agencies were compiled. These materials showed potential, long-term investments and significant locations for the future even though specific funding has not been identified. Copies of these compiled conceptual and visionary maps are also included in **Appendix A**.

As each plan was reviewed, it was placed into one of three categories:

1. Investment Plans: These documents describe short-term planned or programmed funding for the prioritized projects and programs

2. Community Needs: These documents generally include more refined strategic plans that document specific programs and plans, and detail anticipated costs
3. Visionary: These documents generally include the long-term plans that detail broad community values and goals

Specific programmed expenditures from the investment plans identified through this approach were then entered into a community investment database.

### Phone and Email Interviews

Staff conducted interviews via email and phone to capture qualitative information that was not easily discernible from reviewing the plans. This information provided more understanding of how different agencies and jurisdictions fund their investments. Generally, three questions were asked, as applicable to the agency or jurisdiction:

- What types of funding appear in what types of documents?
- What steps are taken to get funding and then 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?

### AGENCIES AND JURISDICTIONS

- City of Eugene
- City of Springfield
- Lane County
- Eugene Water & Electric Board
- Springfield Utility Board
- Emerald People Utility District
- Metropolitan Wastewater Management Commission
- Housing & Community Services Agency of Lane County
- Central Lane Metropolitan Planning Organization
- Lane Transit District
- Oregon Department of Transportation
- St. Vincent de Paul Society of Lane County
- United Way
- University of Oregon
- Lane Community College
- Eugene School District 4j
- Springfield Public Schools
- Bethel School District
- Willamalane Park District
- PeaceHealth

Responses to these interviews were included as part of the plan summaries contained in **Appendix A**.

### Community Investment Database

A database was created to record capital improvement projects and service program investment data from 19 of the 20 community partners. These community partners include ten consortium members as well as public entities within the MPO boundary with significant investments and infrastructure ranging from utilities, education, and special districts. This database was used to catalogue financial and location information (e.g. dollar amounts, fiscal years, locations, etc.). Over 1,000 records were created and investments from a total of 34 plans were included in the database.

A copy of the records added in the database are included as part of **Appendix B**.

To aid in the analysis of the region's investments, the investments were categorized into broad "Impact Areas" as follows:

- Transportation
- Community health
- Housing
- Economic development
- Human Services
- Higher Education
- Schools K-12

- Parks and Open Spaces
- Public Buildings and Administration
- Public Safety
- Stormwater
- Wastewater
- Water
- Electricity

In addition, a summary analyzing how each of the 34 plans related to these impact areas was created. This summary is contained as part of **Appendix A**.

### Investment Mapping

Using the database, LCOG identified and mapped (where possible) over 1,000 of the community's infrastructure investments, as well as locations where program and service delivery, and maintenance and operations are planned to occur.

Table 1.1 shows the impact area and number of projects or programs that could be mapped. Not all projects or programs are associated with a specific address or location and could not be mapped. In summary, 616 records were mapped and 431 were not.

**Table 1.1. Number of Mapped and Not Mapped Records by Impact Areas**

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

The regional investment maps are contained in **Appendix C**. See Section 3.0 for summary information containing the findings from the data compilation and mapping efforts.

### Subject Expert Workshops

Workshops were held with agency staff in four topics areas:

1. Transportation
2. Utility Infrastructure (including electricity, stormwater, water supply, and wastewater)

3. Community Facilities (including parks and open space, higher education, schools K-12, public safety and public buildings/administration)
4. Housing, Community Development, Human Services, and Community Health (including community health, economic development, housing, and human services)

At four subject expert workshops, LCOG presented the results of the inventory and assessment of capital and programmatic improvements for review and comment, acknowledging the limitations encountered while undertaking the work. Subject experts were asked about the following :

- If there was other information that staff could use that they do not already get from existing processes
- Whether there were questions of each other that would facilitate working together more efficiently
- What information from other topic areas would be helpful
- How funding is changing and the impact this will have
- Whether there are assurances that funding source(s) will exist in the future

The responses to these questions helped ascertain whether they believe creation of a community investment strategy framework was feasible. See Chapter 4.0 for more information on the Subject Expert Workshop outcomes and themes.

Summary of the information prepared for and presented at these workshops, together with notes from the workshops, are included as part of **Appendix D**.

### **Grant Resources and Funding Opportunities**

Following the workshop, a compilation of potential public and private funding sources within the context of current regional priorities was created. **Appendix B** contains the compilation of funding sources. However, with diverse priorities and areas of interest, there was not a singular focus or guidance on how to move forward in identifying and packaging potential funding opportunities; as a result, the compilation of potential funding resources is more general. See Chapter 2.0 for more information.

## 2.0 Community Investment Revenue Sources

### 2.1 Overview of Potential Revenue Resources

Revenue is the income governments, agencies, and non-profits need to pay for the services these entities provide. The major sources of revenue for governments, public education providers, and non-profit agencies are described in **Appendix B**.

In addition, the plan summary materials found in **Appendix B** describe the specific revenue sources that are used to support the region's investments in the different plans evaluated.

**Appendix B** also provides information on potential grant resources, as well as some general guidelines for agencies to use in preparing and submitting grant applications for a competitive grant award.

### 2.2 Summary of Findings

For local governments, there are a multitude of different revenue resources, spread among numerous federal and state agencies (each with differing mandates and priorities), and through different funding pathways (e.g. some direct to local governments, some direct to service providers, and others through state agencies). This makes for a complicated and challenging funding environment. This patchwork of different revenue resources can make it difficult to pool and leverage resources. It also reinforces specializations, and resulting silos. As a result, opportunities for integration of projects, programs and services are lost.

Revenue resources supporting local governments in the Eugene-Springfield region are also challenged by a number of interrelated issues, a sample of which includes the following:

- The economic downturn has affected personal incomes, with resulting loss of personal income taxes at a time when the needs of our citizens are growing;
- The economic downturn has also affected many of the payment for services, development and franchise fees that local governments rely upon;
- Instability in the housing market and resulting property tax variability has been difficult to predict;
- The region's infrastructure (e.g. roads, water and sewer lines, stormwater facilities, etc.) are aging and in need of ongoing maintenance and preservation. At the same time, state and federal funding support is strained;
- Funding for some areas is more strongly tied to federal sources, which can fluctuate and change quickly, and may not be tied to the needs of the community;
- Past commitments to public employee retirement accounts and underperforming investments are straining local and state budgets; and
- Health care costs are becoming a greater share of federal and state spending, which may limit funding for other activities and transfers from these levels of government.

Funding for non-profits has also been challenging, given the reduction in donations, increasing needs and competition for limited funding resources. Funding sources are similarly varied, and this patchwork of funding streams promotes silos and can add burdensome reporting and accountability requirements. Funding can also be inflexible, and sustainability can be challenging, as providers move from one grant

cycle to the next, creating and dismantling programs based on funding rather than need. Funding is typically designed for services, and rarely includes capital or infrastructure investments. Finally, meeting match obligations required by some grants can be challenging, as well as finding funding and staff resources to support on-going funding solicitation.

Funding for public education is also challenging due to a number of factors, including:

- The property tax limitations enacted under Measure 5 and the later Measures 47 and 50 shifted the primary burden of paying for K–12 education from local property tax payers to the state General Fund.
- Funding for education is competing for funding with other growing needs that may be mandated by other legislation, such as funding for safety and human services, mainly Medicaid.
- Bonds, levies and similar forms of funding are not sustainable sources of funding.

These funding challenges highlight several potential barriers to improved coordination in making regional investment decisions.

## 3.0 Community Investment Expenditures

### 3.1 Community Investment Database and Mapping Results

Based on the plans inventoried, the construction of, maintenance and operation of, and administrative work that occur at community facilities was the leading area for investment in the region, followed by Transportation; Utility Infrastructure; and Housing, Health and Human Services.

**Table 3.1. Summary of Community Investments from Plans Inventoried**

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

Within the different “Impact Areas”, funding for higher education and schools was a significant source of funding. This is consistent with similar analysis at the state level, which shows that funding to support Education is the largest expenditure in the State General Fund. These community facilities are key anchors in the community, and successful coordination around their siting, design, and program offerings provides the region with unique opportunities to consider how to achieve multiple community objectives.



**Figure 3.1. Community Investments by Focus Area**

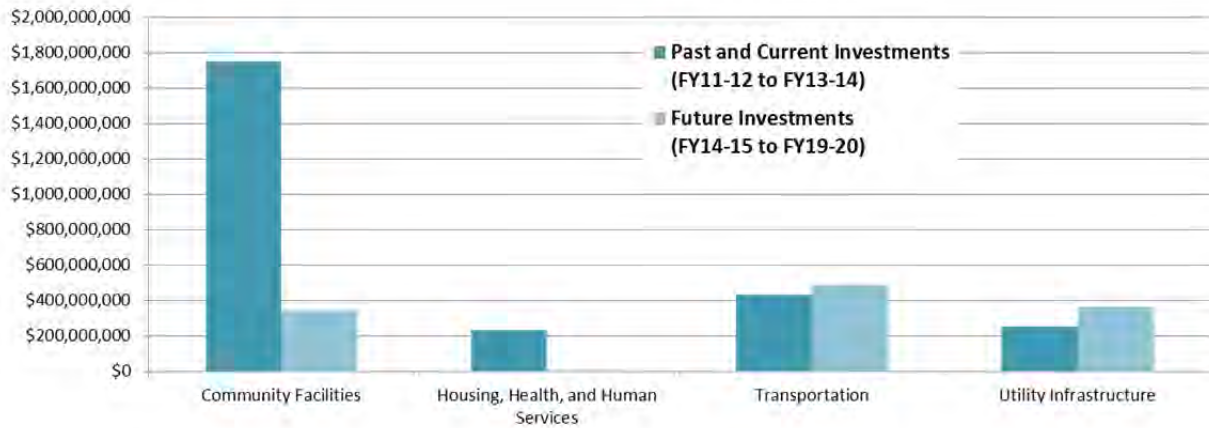


Figure 3.1 highlights the different ways in which future investment planning is accomplished by topic area. The housing, health, and human service future investments are difficult to plan because of variable funding resources. In contrast, projects funded through capital improvement plans have a developed funding structure and cycle, allowing for a longer term view of capital investments. This difference has the potential to create barriers to coordination.

**Figure 3.2. Map showing Distribution of Community Investments**

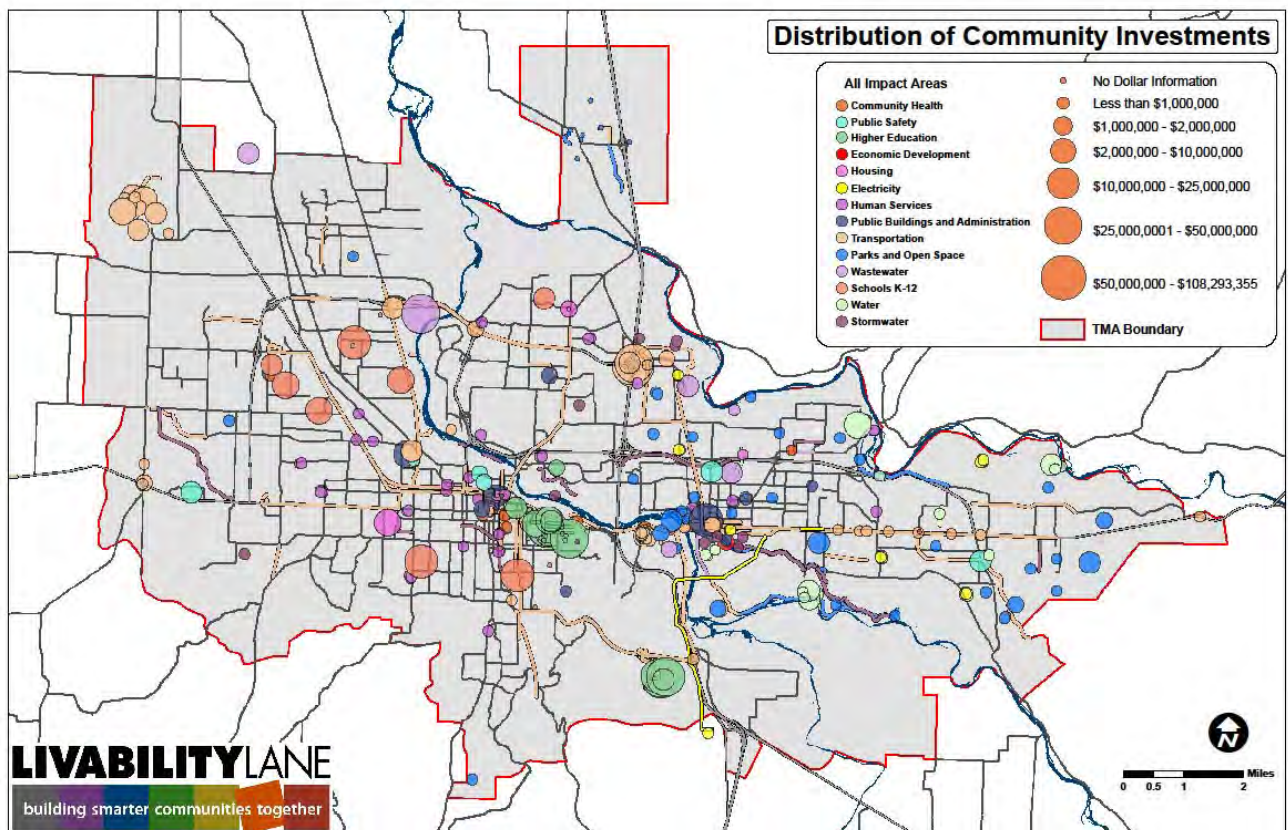


Figure 3.2 represents the compilation of the community investments that could be mapped. This map was used in the Community Workshops to guide conversations (see Section 4.0). Additional maps developed for each of the focus areas were also developed and are available in **Appendix C**.

### **3.2 Community Investment Key Observations**

Through the process of identifying, inventorying and mapping information from various jurisdictions and agencies in the Eugene-Springfield area, a number of key observations emerged.

**The region's needs for investment far outstrip known funding resources.** It is investment – by both the public and private sectors – that will provide the resources needed to realize the region's plans and its goals for vibrant, safe and prosperous communities. The investments the people, governments and organizations of this region have made together in everything from protection of open space to new housing and infrastructure have been key to building the region's economy and quality of life. But in many cases our future plans are threatened by lack of adequate funding. In order to protect our region in the face of current challenges, we must take even greater and more innovative steps forward.

**Agencies and jurisdictions spend considerable time and resources preparing capital improvement plans and programming investments.** LCOG reviewed 44 plans and programs from 20 different agencies and jurisdictions. While detailed investment information is often prepared to meet local, state and/or federal policies or requirements, documenting capital and programmatic investments is the foundation and cornerstone for implementing improvements and programs.

**Comparing and coordinating investments across different geographic service areas is challenging.** Since many of the 20 agencies and jurisdictions invest in different geographic service areas, comparing investment dollars was challenging. In addition, coordinating investments between agencies with different but sometimes overlapping service areas is also difficult. Various overlaps and gaps in investment areas of service were evident after mapping the organizational boundaries. For example, Lane Transit District often implements projects in corridors that cut across multiple jurisdictional boundaries and service districts, requiring enhanced coordination and cooperation.

**Public needs vary greatly across the region.** Residential neighborhoods, commercial centers and corridors, mixed-use communities, and industrial areas often require different types of investments. Different parts of our community have been built at different times or have different levels of use, resulting in different needs for repair and maintenance. In addition, different parts of our community have varied levels of access to opportunities. This broad array of investment types underscores the need for varied and flexible sources of funding

**Implementation of improvements and programs can be unpredictable.** While agencies and jurisdictions in this region have a robust process to make capital improvements and programs reality, some depend on voter-approved bond measures, state legislative approval, and federal funding to name a few, none of which are guaranteed. This unpredictability means that planning and projected timing for implementation can exist, but is not guaranteed. This can make leveraging dollars between different organizations and funding resources even more difficult. In addition, this instability may impact decisions on whether internal systems or maintenance are the focus as opposed to capital investments. Because funding is sometimes unpredictable there may also be an ebb and flow cycle to large-scale capital improvements. For example, recent renovations in and around University of Oregon's football complex at Autzen Stadium account for a significant amount of the Community Facilities total dollars.

**Information on capital improvement investments is more straightforward to summarize and map than programmatic investments.** Detailed information about capital improvements is available for many of the jurisdictions and agencies. However, programs and programmatic investments by the jurisdictions and agencies do not always lend themselves to database and mapping because of the nature of the programs. Therefore, a common database of capital and programmatic investments and subsequent maps do not reflect a “level playing field” of information. Capital investment plan documents typically provide more detailed information about where the funding comes from, where the funding will be distributed and the chronology of the project.

**Program and investment information is not always published or circulated.** Some capital improvement programs were not published; instead lists of services and/or improvements such as housing programs, successful bond measure investments, etc. were gathered from agency staff. After being contacted, organizations were extremely helpful with investment information sharing.

**Jurisdictions use different planning documents, descriptions and terminology in their capital improvements and programming documents.** While these terms are fitting and function well for the individual agency, without consistency the process of inventorying and creating a comprehensive picture of investments around the region can be problematic. For example, the following terms are used in capital improvement programs, budgets, and financial documents: Capital improvements, capital investments, current and future projects, current and future programs, expenditures, fiscal year spending, assets/liabilities, carryovers, financial obligations, etc. Interpretation of the varying terminology and descriptions required follow-up with the individual jurisdictions and agencies for more information.

**Plans and reports use different fiscal years for implementation as well as planning horizons.** Many jurisdictions use five-year increments for their capital improvements plans with annual updates that respond to changing conditions and funding. Some documents clearly indicate funding allocations by fiscal year, while others do not. Without a standard approach to reporting the way in which spending is programmed, it is difficult to compare information and to coordinate investments.

**Successful regional cooperation already exists in some areas.** Some jurisdictions and agencies already work together in order to receive and distribute funds. Successful multi-jurisdictional and multi-agency collaboration requires extensive cooperation, negotiation and agreement on strategies and what needs to be accomplished. The region’s transportation, housing, and human services funding processes provide existing examples of regional cooperation, but these are focused in particular sectors. Team Springfield provides an example of collaboration occurring across sectors, including local government, schools, parks and open space and utilities. Given these existing frameworks, continued collaboration to identify new pathways for the creation of shared strategies for prioritizing investments across the region has incredible potential.

**Some entities keep capital investment planning private due to competition.** Entities that operate in a competitive market do not publish or share their future investment plans.

**Planned private investments, which would show anticipated projects in the pipeline, are not catalogued together with public investments.** Private investments are a significant source of funding into the region, and a greater understanding of this “investment pipeline” can assist the region with a better understanding of where there may be growing needs and also potential new resources to leverage.

More information about the various plans and documents is located in the **Appendix A**.

## 4.0 Subject Expert Workshops

### 4.1 Subject Expert Workshops

Community investment data (dollar amounts, locations and projects) and interview findings were presented at individual subject expert workshops in four topic areas:

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

Information from these workshops is included in **Appendix D**.

### 4.2 Subject Expert Workshop Key Themes

Subject experts were asked about the following at the workshops:

- If there was other information that staff could use that they do not already get from existing processes
- Whether there were questions of each other that would facilitate working together more efficiently
- What information from other topic areas would be helpful
- How funding is changing and the impact this will have
- Whether there are assurances that funding source(s) will exist in the future

Although each workshop focused on a slightly different aspect of the community investment strategy framework and the implications for that topic area, the following key themes emerged:

**Information tells, and could be used to tell, a story** – where and how we currently invest, as well as how we could invest. It could also help stimulate communication and dialogue, identify where the region is already working together, and where there is need to improve internally and externally. Better information could mean more leveraged funds, more grant opportunities, better investment focus, cost savings, and identification of overlapping projects.

**Participants acknowledged the value of increased information sharing.** Participants expressed appreciation for the opportunity to review and share funding information from other disciplines. The tools created through this effort have the potential to help with grant writing; project phasing, planning, and coordination; and engaging community investors. However, there were some concerns expressed it may be too much work and too resource-intensive due to the challenges and complexities of compiling the information. For example: data and resulting maps are a snapshot in time that quickly becomes

outdated; the variability in document detail, location information and dollars can limit the use of the information; cartographic challenges can make it difficult to represent the impact area of a project or program (for example – linear projects, projects at some location); maps of the entire region were difficult to interpret and analyze; and subjective interpretation of data. In order for the information to be valuable, it should be current, standardized, and reliable.

**Databases and associated maps can be effective tools to convey information about capital investments and physical assets**, but programs need different tools to communicate their information. Capital investments and physical assets lend themselves to analysis and representation, be it at a neighborhood or community level. Queries could include information about what is accomplished in a neighborhood, comparisons with other areas, etc. However, depicting programs and services that are metro-, county-wide or even variable within the region, or entities that do not prepare capital plans, in a database or on a map does not paint an accurate picture or provide the entire story.

**Compiling and analyzing quantitative and qualitative data that conveys specific investment information does not result in a community investment strategy** because the structure, resources and visions of different subject areas do not align. This was not an anticipated outcome initially.

**To facilitate communication and information exchange, contacts or liaisons would be helpful and may be essential.** Often, staff does not know where to begin the conversation. Examples of existing coordination include Team Springfield quarterly meetings, University of Oregon dedicated liaison office, Lane Utility Coordination Council, etc. Accountability should be required so that coordination is a priority. Partners, including funders, need to participate in planning. There also should be support from chief executives and elected officials.

**Some regional coordination, including data gathering and associated mapping, already exists.** For example, in the areas of transportation, utilities, and housing there are regional bodies that meet regularly. Often this coordination is required in order to receive federal or state funding.

**For those topic areas that already coordinate and prepare associated maps and data** (for example – transportation and utilities), looking at all 14 impact areas on a single map was useful. However, for other groups (community facilities; housing-human services-community health), topic-specific mapping of investments was most helpful since they do not meet regularly or routinely coordinate investments.

**Better information sharing mechanisms should be established** in order to build cross connections, build synergies, and build non-traditional linkages (cross connection example – health and utilities working to encourage drinking tap water instead of bottled water).

#### **4.3 Potential Applications of Data and Maps**

Potential applications of the data and maps generated through this effort, as identified by workshop participants, included the following:

- **Agency consultation and collaboration.** This tool may help identify the links where interagency consultation and collaboration are happening and where it could be improved, which may in turn lead to consistency in interagency consultation. For instance, the maps show a multitude of investments along the Franklin Boulevard Corridor, an area which involves many different jurisdictions, agencies, as well as the University of Oregon. The maps could be used to see where

different agency investments are occurring or planned to occur, look for efficiencies in project design, engineering, acquisition and construction, consider how and where programs and services are needed to support desired community outcomes, and ensure that the investments work together to meet the overall community vision and reinforce the desired community identity for the corridor.

- **Identification of met/unmet needs and funding prioritization.** The information could be compared to other inventories that identify key barriers to opportunity or facility and service gaps, in order to evaluate how we are addressing these community issues.
- **Communication.** This information can help tell a story – where we invest, how we invest, how we could invest. The information could be presented at different geographical scales, such as for a particular neighborhood, to tell the story of what we are trying to accomplish and how we are investing to make this a reality.
- **Trend analysis.** If longer-term trend data were available, this resource could be used to identify how we are gaining or losing in terms of investments, both in different geographic areas, but also by funding focus areas.

See **Appendix C** for workshop community investment data in the four subject areas and **Appendix D** for detailed workshop information.

This information affects people's lives and telling the story of how we invest is what we want to tell.

There is much value in planning together. We need to sit down with other departments and agencies and look at long-range plans, look at funding, locations, and anticipate where we are going.

## 5.0 Findings and Recommendations

While much was gleaned from this project, findings and recommendations for a community investment strategy are preliminary. More discussion among the partners will need to occur to determine if a development of a shared strategy for prioritizing funding is feasible.

1. Collaboration and leveraging of resources among government and private entities is likely to become standard in the future. To support this effort, the region desires to improve its information sharing mechanism and networking opportunities. Many partnerships already exist and can provide a good foundation for this work, but agencies and entities that have not traditionally worked together may need to in the future.

### **Recommendations:**

- a. Establish better information sharing mechanisms and networking opportunities to build cross connections, synergies, and non-traditional linkages. Include public, non-governmental and non-profit entities.
- b. Create and maintain contact or liaison lists. Consider involving public information officers and intergovernmental relations staff. Formalize these partnerships.

### **Considerations:**

- a. Accountability and resources will be required. Formal alliances will help buffer staff changes.
2. Collaboration and leveraging of resources can work at multiple scales, from the region to a corridor or node, to a specific project. The region has already begun efforts to develop and implement a regional collaborative approach under the River Districts Plan developed through the Lane Livability Consortium (Task 10). This effort will serve as a great case example on how to work together, stay focused on efforts that have the greatest potential impact across political and organizational boundaries, and prioritize resources to support those efforts.

### **Recommendations:**

- a. Move forward with the strategy and implementation steps outlined in the River Corridor Study and use this as a case example for future regional collaboration.
- b. Identify other potential regionally-significant locations where there is a similar confluence of different agencies, plans and investments to begin the process of establishing a regional collaborative framework.

### **Considerations:**

- a. Accountability and resources will be required.
- b. There are potential logistical hurdles, such as varying values and priorities, which must be recognized and overcome.
3. This task has highlighted significant challenges that the community faces, both in terms of shrinking financial resources to fund ongoing and future needs, as well as current limitations on funding mechanisms. Some federal and state agencies have begun to innovate and allow for more flexible and outcome-based use of funds. Continued advocacy on the part of the region for more flexibility in funding may allow the region to better address its needs. However, this effort will take continuing "shifts" at the federal and state levels. In the interim, for existing projects and plans, it

will be beneficial to examine what are the most appropriate existing and potential financial mechanisms to employ, what new creative approaches can be used to continue to lower costs and leverage better outcomes, and what tools and resources can be developed to help prioritize limited funding to best meet the region's shared goals.

**Recommendations:**

- a. Advocate for continuing evolution of federal and state funding mechanisms to allow for more flexible, cross-cutting, outcome-based investments to be made in the region.
- b. Consider developing or amending current tools to provide staff and decision makers responsible for funding decisions with information on 1) potential contributing efforts or leveraging opportunities from other departments, agencies, private entities, and non-profit agencies; and 2) potential coordination opportunities with other governmental, private, and non-profit agencies. This could include databases or maps containing relevant information, decision support frameworks, or other tools that meet these information needs.

**Considerations:**

- a. Resources will be required.
- b. Case studies may be needed to develop appropriate tools and to highlight the best use of these tools. It may be beneficial to start with a capital project located at a node or along a corridor, and use this effort to investigate new opportunities to share information about other pending or future investments in the area from a variety of departments and agencies.

## 6.0 Conclusions

The region is looking for ways to innovate and collaborate across traditional department, agency, and topic area boundaries as the agencies within the region invest in new plans, programs, and services. In order to pursue increased collaboration, the region first needed more information and understanding of how investments were already occurring. Work under this Task of the Lane Livability Consortium enabled the assembly and cataloging of different financing plans and creation of a new coordinated database and mapping resource tool, which allowed partners the opportunity to examine location and details about investments throughout the region. In creating this new tool, partners also learned that collecting information on and mapping specific investments for the community as a whole is challenging, time consuming, and difficult to analyze and use. Despite these challenges, participants reaffirmed the value of continued coordination and developed specific recommendations for how to further the efforts initiated through this work.