

EUGENE CITY COUNCIL AGENDA

October 15, 2014

12:00 PM CITY COUNCIL WORK SESSION

Harris Hall

125 East 8th Avenue

Eugene, Oregon 97401

Meeting of October 15, 2014; Her Honor Mayor Kitty Piercy Presiding

Councilors

George Brown, President Pat Farr, Vice President

Mike Clark George Poling
Chris Pryor Claire Syrett
Betty Taylor Alan Zelenka

CITY COUNCIL WORK SESSION Harris Hall

12:00 p.m. A. WORK SESSION:

Multi-Unit Property Tax Exemption (MUPTE) Program Revisions

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^{*}time approximate

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EUGENE CITY COUNCIL AGENDA ITEM SUMMARY



Work Session: Multi-Unit Property Tax Exemption (MUPTE) Program Revisions

Meeting Date: October 15, 2014

Department: Planning & Development

Agenda Item: A

Staff Contact: Denny Braud

www.eugene-or.gov Contact Telephone Number: 541-682-5536

ISSUE STATEMENT

This work session is a continuation of the discussion on potential Multi-Unit Property Tax Exemption (MUPTE) program reforms. The council will review and discuss staff recommendations with an opportunity to provide direction for next steps. (Updated MUPTE criteria for council consideration is provided in Attachment A.)

BACKGROUND

The MUPTE program is enabled by state legislation and designed to encourage higher density housing and redevelopment in the core area and along transit corridors. The program provides a tax exemption for up to 10 years on qualified, new multi-unit housing investments that occur within a targeted area, meet program requirements, and are reviewed and approved by the council. MUPTE works by lowering the operating cost enough to make a project financially feasible. The MUPTE program is currently suspended through November 30, 2014.

In 2013, the council met to discuss the MUPTE program on April 22, May 13, June 24, July 24, and November 18. The council received input from key stakeholders at a workshop on May 22, 2013. In July 2013, the council highlighted the importance of:

- Aligning the MUPTE tool and availability of the tool with the goals of Envision Eugene.
- Consideration of affordable housing needs and the role that MUPTE can play in advancing this goal.
- Local hiring and the need to support local businesses and talent.
- Identifying community benefits and the need for MUPTE projects to advance community goals.
- Thoughtful and timely reforms that can be implemented to support redevelopment opportunities.

On November 18, 2013, the council added the West 11th area to the potential boundary and identified the following areas for further discussion: local hiring practices, financial gain cap, affordable housing (fee vs. providing units within the project), energy-efficient buildings, application scoring system, and percentage-of-median-income housing qualification. The council also expressed support for seeking stakeholder and community input opportunities.

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At the April 14, 2014, work session, staff presented revised criteria based on input from these several stakeholder groups:

- Housing Policy Board committee for feedback specifically related to Affordable Housing criteria;
- Development related fields including three developers, an appraiser, and a banker;
- Construction industry including general contractors, specialized trades, and union representatives;
- Human Rights Commission subcommittee; and
- Technical Resource Group (TRG) comprised of community members with expertise in real estate, land use, and business. This group provided independent review and a technical analysis that informed the March 2012 Envision Eugene Recommendations.

The council provided direction to reach out to the neighborhood organizations for input on the various program revisions under consideration. In May, staff held two meetings to collect feedback from neighborhood leaders on the changes the council reviewed in April. Based on those discussions, staff had several individual meetings with neighborhood leaders and then held a meeting on June 25 to collect feedback on a further revised concept. Neighborhood leaders were also able to complete two online surveys.

Following the April work session, the TRG invited councilors to learn more about the technical analysis and met with Mayor Kitty Piercy, Councilor George Brown, Councilor Mike Clark, Councilor Greg Evans, and Councilor Claire Syrett.

At the July 30 work session, the council reviewed the neighborhood leader feedback and continued the discussion. Staff provided an overview of a draft concept to activate the downtown area first, subject to new criteria, and proceed with other areas after neighborhood planning processes.

Based on the feedback received to date, updated MUPTE criteria for council consideration is provided in Attachment A, which includes a summary memo of the differences between the July 30 draft and the revised draft. The potential MUPTE boundary is in Attachment B. At the April work session, the council expressed interest in voting on individual aspects of the revisions as a process for moving forward. The decision guide in Attachment C provides key questions, staff recommendation and rationale, and comparison between the suspended program and the recommended changes. A major point of consideration is MUPTE's role in advancing affordable housing goals. As background for that topic, Attachment D provides information on the City's work to create stable, safe housing opportunities for Eugene residents, including property tax exemptions exclusively for affordable housing.

RELATED CITY POLICIES

Utilization of the MUPTE program to stimulate new multi-unit housing development addresses many goals for Eugene and downtown, including:

Envision Eugene Pillars

- o Promote compact urban development and efficient transportation options.
 - Integrate new development and redevelopment in the downtown, in key transit corridors and in core commercial areas.
 - Meet the 20-year multi-family housing need within the existing Urban Growth Boundary.
 - Make compact urban development easier in the downtown, on key transit corridors, and in core commercial areas.
- o Provide housing affordable to all income levels.
- o Plan for Climate Change and Energy Resiliency.
 - Make energy efficiency in buildings and vehicles the first line of action in reducing energy dependence and greenhouse gas emissions.
 - Align incentives, costs and city processes to promote resource efficient buildings, smaller homes and development towards the city core.

Regional Prosperity Economic Development Plan

- o Strategy 5: Identify as a Place to Thrive Priority Next Step Urban Vitality
 - As a creative economy is fostered, dynamic urban centers are an important asset. Eugene, Springfield and many of the smaller communities in the region recognize the importance of supporting and enhancing vitality in their city centers. Building downtowns as places to live, work and play will support the retention and expansion of the existing business community and be a significant asset to attract new investment. The cities of Eugene and Springfield will continue to enhance their efforts to promote downtown vitality through development and redevelopment.

City Council Goal of Sustainable Development

Increased downtown development

Eugene Downtown Plan

- Stimulate multi-unit housing in the downtown core and on the edges of downtown for a variety of income levels and ownership opportunities.
- Downtown development shall support the urban qualities of density, vitality, livability and diversity to create a downtown, urban environment.
- Actively pursue public/private development opportunities to achieve the vision for an active, vital, growing downtown.
- Use downtown development tools and incentives to encourage development that provides character and density downtown.
- Facilitate dense development in the courthouse area and other sites between the core of the downtown and the river.

Climate and Energy Action Plan

- Buildings & Energy Section:
 - Objective 2: Reduce GHG emissions from new construction by 50 percent by 2030.

- Action 2.2: Increase incentives for highly energy-efficient new buildings aiming toward net zero energy and carbon neutral buildings.

COUNCIL OPTIONS

- 1. Direct the City Manager to schedule a public hearing on an ordinance to modify the MUPTE program consistent with the criteria included in Attachment A.
- 2. Amend the criteria included in Attachment A, and direct the City Manager to schedule a public hearing on an ordinance to modify the MUPTE program as amended.
- 3. Take no action and continue the discussion on MUPTE program reform at another work session.

CITY MANAGER'S RECOMMENDATION

The City Manager recommends scheduling a public hearing on an ordinance to modify the MUPTE program consistent with the criteria included in Attachment A.

SUGGESTED MOTION

Move to direct the City Manager to schedule a public hearing on an ordinance to modify MUPTE program revisions consistent with the criteria included in Attachment A.

ATTACHMENTS

- A. Revised Draft MUPTE Program Criteria
- B. Potential MUPTE Boundary
- C. Decision Guide
- D. Creating Stable, Safe Housing Opportunities for Eugene Residents

FOR MORE INFORMATION

Staff Contact: Denny Braud Telephone: 541-682-5536

Staff E-Mail: <u>denny.braud@ci.eugene.or.us</u>



ATTACHMENT A

Memorandum

Date: October 15, 2014

To: Mayor & City Council

From: Denny Braud, Division Manager AIC

Subject: Revised Draft Criteria Cover Memo

Below is a summary of the differences between the July 30 draft and the revised draft (October 15, 2014) all based on stakeholder feedback and additional staff research, as further described in the Agenda Item Summary. The revised draft immediately follows the summary.

REQUIRED PUBLIC BENEFIT CRITERIA – All MUPTE projects must provide these benefits.

- 1. Eligible Project Types (no change)
- 2. **Compact Urban Development** (no change)
- 3. **Project Design / Compatibility** (no change)
- 4. Green Building

Added requirement to install conduit for future electric vehicle charging stations, for projects that provide onsite parking.

- 5. **Neighborhood Engagement** (no change)
- 6. **Boundary** (no change)
- 7. **Affordable Housing** (no change)
- 8. Local Economic Impact Plan

Added licensing to the laws that must be followed and a reminder reference to the program wide consequences of non-compliance (administrative civil penalty or exemption termination).

9. **Project Need** (no change)

ADDITIONAL PUBLIC BENEFIT CRITERIA – In the event that a project is not eligible for a 10-year exemption (due to Required Public Benefit #9 "Project Need"), the Additional Public Benefit Criteria shall be used to determine eligibility for qualifying for an exemption up to, but no longer than, 10 years.

- 10. **Documented Local Economic Impact** (no change)
- 11. **Location** (no change)

12. Project Features

Added to item I "transportation options" meeting LEED v4 'Green Vehicle' Credit Description, which includes installing electric vehicle charging stations.

OTHER PROGRAM REQUIREMENTS

13. Financial Reporting

Added requirement for year 1 reporting to include construction labor residency information (home city or zip codes only).

- 14. Program Volume Cap (no change)
- 15. MUPTE Review Panel (no change)

Revised MUPTE Criteria

Below are summaries of the nine Required Public Benefit criteria, the three Additional Public Benefit criteria, and Other Program Features. In the event that a project is not eligible for a 10-year exemption (see Required Public Benefit #9 "Project Need"), the Additional Public Benefit Criteria shall be used to determine eligibility for qualifying for an exemption up to, but no longer than, 10 years. Failure to comply with the requirements included in the MUPTE program ordinance and any subsequent individual project approval resolutions may result in an administrative civil penalty under EC 2.1996 and the procedures in EC 2.018. In addition, failure to comply with any applicable provision of ORS 307.600 to 307.637 [the MUPTE statutes], the applicable Eugene Code provisions, City administrative rules or any condition of approval may result in termination of the tax exemption under procedures described in Code and state law.

REQUIRED PUBLIC BENEFIT CRITERIA

To be considered for MUPTE approval, projects must provide the following public benefits.

1. Eligible Project Types

Multi-unit redevelopment housing projects (excluding "student housing") that are newly constructed, additions to existing multi-unit housing, or structures converted in whole or in part from other use to dwelling units. The commercial portion of a project is eligible for an exemption if deemed a public benefit by council.

"Student housing" is housing specifically built for living space for undergraduate and graduate students where the leasing unit is by room or bed (not an entire residential unit), and unit configurations take the form of several bedrooms with individual bathrooms and sparse common space. Project amenities and location are selected to appeal only to students and offer limited viability as potential housing for the general population, particularly families.

2. Compact Urban Development

For the Downtown boundary area:

- Residential zones: 175% of minimum density for the zone with five units minimum ¹
- Form-based zones with height limit of three or four stories: 30 units per acre with five units minimum
- Mixed-use development: five units minimum ²
- All other areas, including residential-only development in commercial or mixed use zones:
 50 units/acre with five units minimum

For all other boundary areas, the requirement would be based on the area plan or other neighborhood process.

¹ Projects on R1 property do not qualify for MUPTE as multi-unit projects are not allowed outright in the R1 zone.

² Mixed-Use Development incorporates both commercial and residential use in the same building.

3. <u>Project Design/Compatibility</u>

Application must include a detailed description of the proposed project and graphic information including site plans and elevations containing sufficient detail to demonstrate that the project addresses a set of basic design principals in the context of the project location. Design Principles include the scale, form, and quality of the building; the mix of project elements; and the relationship to the street and surrounding uses. The draft *Community Design Handbook* describes and illustrates a complete summary of design principles for Eugene. Although not all principles will apply to a given project, the *Community Design Handbook* will serve as the primary resource for achieving design outcomes. As a condition of MUPTE approval, the project will be required to adhere to the project design elements that were reviewed at the time of Council approval, unless the City Manager determines in writing that proposed deviations from the approved design provide the same or greater degree of adherence to the Design Principals.

4. Green Building

The green building criteria focus is on building energy performance, as prioritized within Envision Eugene and the Climate and Energy Action Plan. MUPTE projects must perform at least 10-15% more efficiently than the performance established in the Oregon Energy Efficiency Specialty Code.

Due to the complexity of building design, building code requirements, and certification programming, the MUPTE Green Building Required Public Benefit applies only to the residential occupancy and common areas associated with residential areas (e.g. hallways, stairwells, centralized HVAC or hot water heating, laundry facilities) and does not apply to the commercial areas or ancillary amenities (e.g. parking garage, swimming pools, recreation centers). Detailed requirements are provided below and in Table 1.

1-3 Story Multifamily Buildings: Pathways for complying with the 10-15% above code requirement include:

- A. Obtain LEED v4 for Homes Low-rise Multifamily basic certification and modeled at least 10% above current OEESC or:
- B. Obtain Earth Advantage Multi-Family-Silver level certification and provide a commissioning report or;
- C. Obtain NW ENERGY STAR certification through the Eugene Water and Electric Board (EWEB) program and provide a commissioning report.

4 Stories and above Multifamily Buildings: Pathways for complying with the 10% above code requirement include:

- A. Obtain LEED for Homes Midrise basic certification and modeled at 10% above current OEESC or;
- B. City of Eugene Building and Permit Services review of project. Model building energy performance, utilizing the LEED for Homes Midrise energy modeling methodology, showing the building performs 10% above current OEESC performance, construct to modeled plans, provide a commissioning report (prior to issuance of Certificate of

Occupancy), and work with the City to report multi-family occupancy energy use data to the City for the life of the MUPTE tax exemption.

Table 1: MUPTE Energy Performance Pathways

	Building Size		
Pathway	1-3 Stories	>3 Stories	
LEED v4 for Homes	Low-Rise: Certified + modeled at	Mid-Rise: Certified + modeled at	
	10% above Oregon code	10% above Oregon code	
Earth Advantage	Multifamily: Certified +	N/A	
	commissioning report		
EWEB	NW Energy Star + commissioning	N/A	
	report		
City of Eugene BPS	N/A	Model at 10% above Oregon code	
		+ commissioning report	

Additionally, all projects that will provide onsite parking are required to install conduit for electric future electric vehicle charging stations.

5. Neighborhood Engagement

Although neighborhood association support is not required for MUPTE approval, the applicant must make an effort to contact the appropriate neighborhood association to share project information and to seek input. Specifically, one or more of the principals of the applicant entity must attend two neighborhood engagement opportunities (discussions/presentations):

- One of the opportunities must be prior to MUPTE application submission.
- The second opportunity must be during the design process and before the final design drawings are completed.
- Additionally, the neighborhood must have the opportunity to review and comment on the final design before the project is submitted for permits.

Evidence of such effort must be included in the application and shall include a copy of the comments received from the neighborhood association or documentation of the applicant's attempt to solicit comments. For projects in neighborhoods without an active neighborhood organization, the applicant must complete engagement activities consistent with the requirements stated above.

In addition to providing comments to the applicant, the neighborhood association will have two neighborhood representatives seated on the MUPTE Review Panel who can voice project specific neighborhood issues and concerns, including additional neighborhood specific public benefits, during the application review process. (See "MUPTE Review Panel" under Other Program Requirements below for more information.)

6. Boundary

A MUPTE boundary to include sections along the six Envision Eugene Corridors and primary core commercial areas:

- A. Downtown (current boundary plus one property on 11th & Lincoln that was in the 2004 to 2011 boundary and EWEB property north of 4th Avenue),
- B. Mid-town.
- C. South Willamette,
- D. West 11th,
- E. 6th/7th Trainsong Highway 99 Corridor,
- F. Valley River Center commercial area,
- G. North Franklin,
- H. South River Road,
- I. Mid-River Road,
- I. North River Road,
- K. South Coburg Road,
- L. Mid-Coburg Road, and
- M. North Coburg Road.

A MUPTE boundary area would not become active (eligible for MUPTE project applications) until one of the following two actions occur:

- 1) Area planning is completed with the neighborhoods. (For example, the South Willamette area planning pilot project that will result in code provisions for that specific area that address transitions and compatibility.)
- 2) City-wide code amendments that address the transition between commercial and multifamily zoned properties with single-family zoned properties. If neighborhood organizations are satisfied that city-wide code amendments address their concerns regarding design and transitions, they can request MUPTE activation.

A specific site within an inactive boundary could be eligible for consideration if brought forward by a partnership of property owner / developer / neighborhood as an "Opportunity Site."

The Downtown area would be activated as soon as City Council lifts the MUPTE program suspension. This area would be subject to the new MUPTE criteria to be approved by City Council.

7. Affordable Housing

For rental projects, each owner will pay a fee to be dedicated to affordable housing/emergency shelter. The fee will be 5-10% of the total MUPTE benefit for the 10-year benefit. The owner can choose to pay the fee annually during years three through ten (to accommodate the project stabilization period each project experiences) or upfront with a discount. The fee is not paid in boundary area D (West 11^{th}) and area E ($6^{th}/7^{th}$ Trainsong Highway 99 Corridor), as an additional incentive for multi-unit housing.

The MUPTE affordable housing fee would generate a local, more flexible source of funding to support affordable housing not constrained by federal regulations. For example, the fee could

be a source of predevelopment funds to replace HOME funds that are no longer eligible for that use. If the potential volume cap of 1,500 MUPTE units is reached, and depending on the number, size, and value of projects, preliminary estimates indicate that the fee could potentially generate an estimated one to three million dollars dedicated to affordable housing / emergency shelter.

The City has a 20-year property tax exemption for affordable housing (LIRPTE), which the City of Portland does not currently have. Since 1990, LIRPTE has benefited 1,168 affordable housing units.

8. Local Economic Impact Plan

To ensure that a substantial portion of the local tax benefit yields a benefit to the local community, applicants must provide a plan to meet the following goal:

 Provide for more than 50% of the dollar volume of the combined professional services and construction contracts include local firms. A local firm is one based in Lane County. Trades not available locally will be identified and exempted when appropriate.

Additionally, the applicant must ensure that qualified Minority and Women Business Enterprises (MWBE) have an equitable opportunity to compete for contracts and subcontracts. The City supports the utilization of Minority, Women, Emerging Small Businesses, local businesses, Disadvantaged Business Enterprises and Qualified Rehabilitation Facilities at both a prime and subcontracting level.³

The City encourages approved applicants to use the following practices to promote open competitive opportunities for MWBE businesses:

- Access lists of certified minority, women, emerging small business or disadvantaged business enterprises from the Oregon State Office of Minority, Women and Emerging Small Business (OMWESB) by visiting their website at: http://www4.cbs.state.or.us/ex/dir/omwesb/
- Visit the Oregon State Qualified Rehabilitation Facilities Program website at http://dasapp.oregon.gov/qrf/index.aspx to search for Qualified Rehabilitation Facilities from whom to procure products or services.
- Advertise in general circulation, trade association, and minority focused media about prime and subcontracting opportunities.

Awarded MUPTE projects must follow wage, tax, and licensing laws. As a condition of receiving MUPTE:

The owner must ensure or exercise due diligence in ensuring that all the contractors performing work are licensed and in compliance with Oregon Revised Statutes Chapter 701 (Construction Contractors and Contracts). The owner must compile a list of all contractors performing work on the project before the contractor performs any work on the project. The owner must confirm the proper licensing, insurance, bonding and workers comp coverage for each contractor.

³ Admin Order No. 44-08-06-F, Exhibit A, Article 6, section 6.2.4

The contractor must provide an affidavit to the owner that the contractor, owner or responsible managing individual of the contractor does not have any unpaid judgments for construction debt, including unpaid wages. The contractor affidavit should also attest that the contractor is in compliance with Oregon tax laws described in ORS 305.620 (local taxes) and ORS Chapters 316, 317, and 318 (state income taxes).

The City's existing Rights Assistance Program is an available resource for the community at large and MUPTE project related parties. Awarded MUPTE projects must post information on the Rights Assistance Program in English and Spanish.

As noted in the introduction, failure to comply with these (and all MUPTE) requirements may result in an administrative civil penalty under or in termination of the tax exemption.

9. Project Need

Analysis of the project pro forma must establish that the project would not be built but for the benefit of the tax exemption. The applicant must submit documentation, including a pro forma and an analysis of the projected rate of return (as measured by the Cash on Cash return) for the proposed project demonstrating that the anticipated overall average annual rate of return for the project (with MUPTE) for the maximum period of exemption (10 years) will not exceed 10 percent. The pro forma and assumptions will be analyzed by the MUPTE review panel.

If the projected overall average annual rate of return for the maximum exemption period is:

- Less than 10 percent and the Required Public Benefits are met, then the project would be eligible to receive the maximum 10-year exemption.
- Greater than 10 percent, then:
 - The term of the exemption will be decreased by the number of years necessary to bring the rate of return down to 10 percent, or
 - The applicant can propose adding project elements from the Additional Public Benefit Criteria to increase the term of the exemption up to 10 years. The MUPTE Review Panel would consider any proposed Additional Public Benefit Criteria features and make a recommendation to the City Manager.

ADDITIONAL PUBLIC BENEFIT CRITERIA

In the event that a project is not eligible for a 10-year exemption (see Required Public Benefit #9 "Project Need" above), the Additional Public Benefit Criteria shall be used to determine eligibility for qualifying for an exemption up to, but no longer than, 10 years. The MUPTE Review Panel would consider any proposed Additional Public Benefit Criteria features and make a recommendation to the City Manager. The Additional Public Benefit Criteria would not be scored with the intent of providing a flexible menu of options to maximize public benefit based on individual location and neighborhood factors.

10. <u>Documented Local Economic Impact</u>

The extent to which the project meets the goal established in the Local Economic Impact Plan (Required Public Benefit #8 above), demonstrates solicitation of bids from WMBE, and commits to completing certified payroll.

11. Location

Projects located within the Downtown Plan Area or within a HUD Low-Mod Income Area, on a brownfield site, or projects that include the redevelopment of a valuable historic resource.

12. Project Features

The extent to which the project incorporates the following features:

- A. Payment of an increased affordable housing fee,
- B. Exceed the Green Building Required Public Benefit Criteria,
- C. Provision of Americans with Disabilities Act (ADA) *accessible* dwelling units. [This is beyond the code requirements. The building code requires that projects include a minimum number of Americans with Disabilities Act (ADA) *adaptable* dwelling units (Type A and/or Type B; the number depends on specific project details). ADA *accessible* units have already been adapted and include specific features in accordance with ICC/ANSI A1117.1, 2003 edition, for example, maneuvering clearances, grab bars, and hallway width.],
- D. Provision of dwelling units available for home ownership,
- E. Inclusion of open space, community gardens, or gathering space that is accessible to the surrounding community,
- F. Inclusion of ground floor commercial/retail that addresses a neighborhood need,
- G. Design excellence and neighborhood compatibility,
- H. Provision of embedded or structured parking,
- I. Encourage transportation options, including bus passes, car share, bike share, bus shelter, pedestrian connections, meeting LEED v4 'Green Vehicle' Credit Description, and minimum parking where appropriate, and
- J. Other features identified by neighborhood through the engagement process.

OTHER PROGRAM REQUIREMENTS

Financial Reporting

During the exemption period, the project's owner must submit annual accountant-prepared financial information (audited financial statements, tax returns, and 10-year operating cash flow with to-date rate of return) to evaluate a to-date cash-on-cash rate of return for the project. The financial information will be used by the City Manager to analyze the overall effectiveness of the MUPTE program and may be used in the aggregate as part of the Annual Report. Information submitted by owners would be kept confidential to the extent state public records law allows. Year 1 reporting will include construction labor residency information (home city or zip codes only).

Program Volume Cap

The MUPTE program goal is to assist in the creation of 1,500 new, multi-family housing units after adoption of the 2014 ordinance. The MUPTE Review Panel will review the cap as part of the Annual Report. At such time that the MUPTE-assisted number of dwelling units constructed

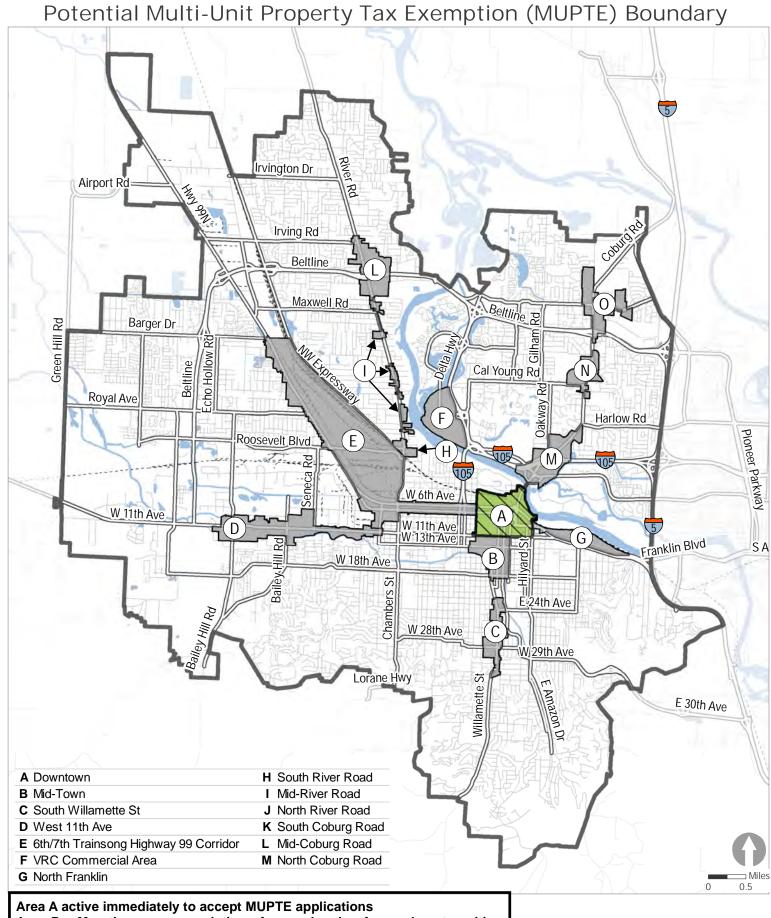
reaches the cap, council shall conduct a comprehensive review to determine if continuation of the program is desired.

MUPTE Review Panel

A newly formed MUPTE review panel to provide a third-party review of the MUPTE program for the City Manager including:

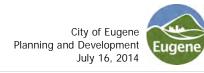
- Review of project applications, with emphasis on analyzing the project's financial projections.
- Review applicant's conformance with the Required Public Benefits and any proposed Additional Public Benefit Criteria and make recommendations regarding approval/denial of the tax exemption to the City Manager.
- Assist the City Manager in preparing an Annual Report on the MUPTE program that will also cover the program volume cap.
- The Panel will be comprised of eight members with equal representation from technical interests and neighborhoods:
 - o 2 at-large neighborhood representatives; appointed by the Mayor
 - 2 neighborhood representatives from the specific neighborhood in which a proposed MUPTE project is located
 - o 4 technical interests (such as, architect/green building, lender, labor, and developer)

Review Panel members would sign a confidentiality agreement.



Area A active immediately to accept MUPTE applications

Area B — M active upon completion of area planning focused on transition
zones and compatability. Opportunity sites could apply, if brought forward
with support of neighborhood, property owners, and developers.



ATTACHMENT C

Decision Guide

Each criteria or program feature has its own page(s) and lists the Question(s), Options, Recommendation, and Rationale followed by a table comparing the proposed draft (10/15) to the suspended program. There are nine Required Public Benefit criteria, three Additional Public Benefit criteria, and three Other Program Features for Council to consider.

As a reminder, the Additional Public Benefit Criteria come in to play in the event that a project is not eligible for the full 10-year exemption (see Required Public Benefit #9 "Project Need"), and are used to determine eligibility for qualifying for additional years of exemption up to, but no longer than, 10 years.

Additionally, the proposed draft includes enforcement language stating that failure to comply with the requirements included in the MUPTE program ordinance and any subsequent individual project approval resolutions may result in an administrative civil penalty under EC 2.1996 and the procedures in EC 2.018. Also, failure to comply with any applicable provision of ORS 307.600 to 307.637 [the MUPTE statutes], the applicable Eugene Code provisions, City administrative rules or any condition of approval may result in termination of the tax exemption under procedures described in Code and state law.

1. Eligible Project Type

Question: Should projects with "student housing" characteristics be ineligible?

Options: Yes or No **Recommendation:** Yes.

Rationale: Focuses program on creation of traditional market rate housing.

	Recommendation		Old / Suspended Program
0	Multi-unit redevelopment housing projects with 5+ units (per State law)	0	Multi-unit housing projects with 5+ units (per State law)
0	Commercial portion if deemed public benefit Not student housing	0	Commercial portion if deemed public benefit

2. Compact Urban Development

Question: Should requirement be:

- A. Same density as required by code
- B. Exceed minimum density code for downtown; per area planning or other process for all other areas
- C. Other

Options: Pick A, B, or C **Recommendation:** B

Rationale: For downtown, Option B promotes density beyond the code minimums where density is most easily absorbed. For other areas, Option B is in line with neighborhood engagement results from May and June and with neighborhood livability. Option B was deemed reasonable by the Developer Stakeholder group and the Technical Resource Group of Envision Eugene.

Recommendation	Old / Suspended Program
For the downtown boundary area, specific density based on zone (with minimum of 5	Not required public benefit.
units no matter the zone, per State law).	One of eight possible public benefit categories for scoring points, based on the
For all other boundary areas, the requirement would be based on the area plan or other neighborhood process (with	degree to which the project exceeds the minimum density requirements for the location:
minimum of 5 units, per State law)	 10 points/unit in excess of minimum required, with 50 points maximum. 100 points for "Opportunity Site"

3. Project Design / Compatibility

Question A: Should there be basic design principles (*Community Design Handbook*)

Options: Yes or No

Recommendation: Yes, design principles

Rationale: Aligns criteria with work already in progress in the Planning Division. Enables enforcement of design information submitted in the application. This was deemed reasonable

by Developer Stakeholder group.

Recommendation	Old / Suspended Program
Project must address basic design principles (Community Design Handbook) in the context of the location	Not required public benefit.
Project must adhere to the project design elements that were reviewed at the time of Council approval and attached to the approval resolution	Schematic drawing / site plan required with application

4. Green Building

Question A: Should requirement be:

- a) LEED v4 Certified
- b) 10-15% above Oregon Energy Code through specific pathways based on building size and selected by applicant
- c) Other

Options: Pick a), b), or c) **Recommendation:** b)

Rationale: The focus is on building energy performance, as prioritized within Envision Eugene and the Climate Energy Action Plan. Deemed acceptable by Green Building staff, the Technical Resource Group of Envision Eugene, and the Developer Stakeholder Group.

Question B: When onsite parking is provided, should an electric vehicle charging station requirement be included?

- a) Install conduit for future stations
- b) Installed number of stations

Options: Pick a) or b) **Recommendation:** a)

Rationale: The idea for including electric vehicle charging station related items came from Representative Barnhart through Councilor Zalenka. Having projects with onsite parking install conduit for future electric vehicle charging will provide the infrastructure needed for future installation when actual users or additional demand are identified. The downtown parking garages have had 16 charging stations in place since 2012 and have had an average of one use every two weeks per station. The Broadway Place South Garage with housing above has averaged one use per month for each of the two charging stations, for a total of 2 hours of charging over the two and a half years since being installed.

Recommendation	Old / Suspended Program
Focused on building energy performance -	Not required public benefit.
all projects would perform at least 10-15% more efficiently than the performance established in the Oregon Energy Efficiency	One of eight possible public benefit categories for scoring points, based on the
Specialty Code through one of several pathways.	certification program:
Additionally, all projects that provide onsite parking will be required to install conduit for future electric vehicle charging stations.	 100 points for LEED certification 25 – 75 points for Earth Advantage Silver, Gold, Platinum, respectively

5. Neighborhood Engagement

Question: Should contact requirement:

- A. Stay the same
- B. Expand to specify principal of applicant entity participate in outreach and increase amount of outreach:
 - o Pre-mupte application submission,
 - o During design before drawings final, and
 - Before project submitted for permits
- C. Other

Options: Pick A, B, or C **Recommendation:** B

Rationale: Based on feedback from May and June neighborhood leader outreach to support

neighborhood engagement and neighborhood livability.

Recommendation	Old / Suspended Program
Applicant required to contact appropriate neighborhood association to share project	Applicant required to contact appropriate neighborhood association to share project
information, to seek input, and to provide	information, to seek input, and to provide
received comments with application.	received comments with application.
 Specifically, one or more of the principals of the applicant entity must attend two neighborhood engagement opportunities (discussions/presentations): One of the opportunities must be prior to MUPTE application submission. The second opportunity must be during the design process and before the final design drawings are completed. 	
Additionally, the neighborhood must have the opportunity to review and comment on the final design before the project is submitted for permits.	
Neighborhood association where the project is located will have two neighborhood representatives seated on the MUPTE Review Panel who can voice project specific neighborhood issues and concerns, including additional neighborhood specific public benefits, during the application review process.	

6. Boundary

Question A: Should the Downtown area be activated immediately?

Options: Yes or No **Recommendation:** Yes.

Rationale: Puts program in place to respond to three known projects: Obie's development on 6th Avenue, Brokaw development on East Broadway, and EWEB Riverfront redevelopment.

Question B: Should the boundary include other areas (sections along the six Envision Eugene Corridors and another core commercial area) that would be inactive (not yet eligible for applications)?

- B. Mid-town
- C. South Willamette
- D. West 11th
- E. 6th/7th Trainsong Highway 99 Corridor
- F. Valley River Center commercial area
- G. North Franklin
- H. South River Road
- I. Mid-River Road
- I. North River Road
- K. South Coburg Road
- L. Mid-Coburg Road
- M. North Coburg Road

Options: Yes or No: If No. include which areas B through M?

Recommendation: Yes.

Rationale: Aligns with Envision Eugene implementation.

Question C: Should areas outside of downtown only be activated after one of the following two actions occur?

- 1) Area planning that addresses design and transitions such as in the South Willamette Pilot Project
- 2) City-wide code amendments that address transitions (also requires neighborhood request for activation)

Options: Yes or No **Recommendation:** Yes

Rationale: Supports neighborhood engagement and livability. Deemed reasonable by the Technical Resource Group of Envision Eugene and neighborhood leaders who attended the June meetings.

Boundary Required Public Benefit Continued...

Question D: Should individual sites in inactive boundary areas be eligible if brought forward by a partnership of property owner / neighborhood as an "opportunity site"?

Options: Yes or No **Recommendation:** Yes

Rationale: Aligns with Opportunity Siting policy direction. Supports neighborhood engagement and livability. Deemed reasonable by the Technical Resource Group of Envision Eugene and neighborhood leaders who attended the June meetings.

Recommendation	Old / Suspended Program
Boundary	Boundary
Downtown area activated as soon as City Council lifts program suspension (current boundary plus one property on 11 th & Lincoln that was in the 2004 to 2011 boundary and EWEB property north of 4 th Avenue) Area eligible for applications after area	Downtown Plan Area
planning or city-wide code amendments to	
include EE corridors & primary commercial area: - Mid-town - South Willamette - West 11th - 6th/7th Trainsong Highway 99 Corridor - Valley River Center commercial area - North Franklin - South River Road - Mid-River Road - North River Road - South Coburg Road - Mid-Coburg Road - North Coburg Road	
Site within inactive boundary eligible if brought forward by a partnership of property owner / developer / neighborhood as an "opportunity site"	

7. Affordable Housing

Question A: Should a fee be charged to each project that goes to a dedicated affordable housing/emergency shelter fund?

Options: Yes or No

Recommendation: Yes, fee

Question B: What % of the total MUPTE benefit for the 10-year benefit 5-10%?

Options: ___% or sliding scale reviewed by Panel

Recommendation: 10%

Rationale: The MUPTE affordable housing fee would generate a local, more flexible source of funding to support affordable housing not constrained by federal regulations. For example, the fee could be a source of predevelopment funds to replace HOME funds that are no longer eligible for that use. Based on the recommendation from the Housing Policy Board Committee. The fee is preferred over the provision of affordable units within MUPTE projects because:

- Provision of units would provide a shorter period of benefit when compared to the benefit periods attained through City affordable housing work. In addition, there could be difficult displacement issues when the period of affordability ends and the owner raises the rents;
- Paying the fee is more efficient for all parties. For-profit developers do not have experience in collecting income documentation. Record keeping, reporting, and monitoring are costly for owners and City staff.
- Mixed-income projects are highly unlikely (based on the MUPTE program history from 1989 – 2004, when the City last required an affordable housing component in MUPTE projects);
- Eliminates the need to reach agreement on the level of affordability for the units (percentage Area Median Income), which would be difficult; and
- o Funds collected through fee will leverage other funds in projects.

Additionally, the Committee agreed that the fee could be waived at Council discretion in existing low-income areas, due to both the economic feasibility implications and the Housing Dispersal Policy, in that any new housing in that area could be viewed as a public benefit. As a reminder, the Committee was comprised of Norton Cabell, Morgan Greenwood, Councilor Chris Pryor, Virginia Thompson, John Vanlandingham, Jacob Fox (HACSA), Kristen Karle (SVDP), Richard Herman (Metro), and Susan Ban (Shelter Care). The Developer Stakeholder Group also concluded that an affordable housing fee would be preferable to providing units.

The City has a 20-year property tax exemption for affordable housing (LIRPTE), which the City of Portland does not currently have. Since 1990, LIRPTE has benefited 1,168 affordable housing units.

If the potential volume cap of 1,500 MUPTE units is reached, and depending on the number, size, and value of projects, preliminary estimates indicate that the fee could potentially generate an estimated one to three million dollars dedicated to affordable housing / emergency shelter.

Affordable Housing Required Public Benefit Continued...

Recommendation Affordable Housing	Old / Suspended Program Affordable Housing
Required payment to dedicated affordable housing/emergency shelter of 10% of the total MUTPE benefit for the 10-year benefit.	Not a required public benefit. One of eight possible public benefit categories for scoring points, based on the number of
Not paid in the West 11 th or 6 th /7 th Trainsong Highway 99 Corridor areas as additional incentive for multi-unit housing.	units dedicated to rental housing that is affordable to households at 60% of area median income at 10 points per unit.

8. Local Economic Impact

Question A: Should a local economic impact plan be required with the following features:

- goal of a set percentage dollar volume of the combined professional services and construction contracts to local firms
- o local is Lane County
- o Minority and Women Business Enterprises (MWBE) efforts consistent with what City requires of itself and of contractors it hires
- o awarded projects be required to follow wage, tax, and licensing laws

Options: Yes or No **Recommendation:** Yes

Rationale: Construction stakeholder group and Developer stakeholder group recommended the focus be on firms (rather than employees) because:

- o local firms hire local works as normal course of business
- o tracking the many workers per project would be extensive
- o construction workers are transient
- o local firms have reputation at stake / motivated to comply with laws to increase likelihood of getting the next job
- o local firms pay local taxes

MWBE section is aligned with the City's internal practices. Wage, tax, and licensing laws section based on feedback from Representative Holvey and the Human Rights Commission subcommittee, with additional input from the City Attorney. Rights Assistance Program added based on feedback from Human Rights Commission subcommittee.

Recommendation	Old / Suspended Program
Applicant to provide a plan for meeting the goal to provide for more than 50% of the dollar volume of the combined professional services and construction contracts include local firms. A local firm is one based in Lane County.	Not a required public benefit.
Applicant must ensure that qualified Minority and Women Business Enterprises (MWBE) have an equitable opportunity to compete for contracts and subcontracts, with approved applicants encouraged to use specific practices.	
Awarded projects must follow wage, tax, and licensing laws, with specific due diligence and documentation steps.	
Awarded projects must post information on the Rights Assistance Program in English and Spanish.	

Recommendation Continued	Old / Suspended Program Continued
Local Economic Impact	Local Economic Impact
As noted in the introduction, failure to comply with these (and all MUPTE) requirements may result in an administrative civil penalty or termination of the tax exemption.	

9. Project Need

Question: For determining the number of years of exemption at the time of application, should the max cash-on-cash return be 10%?

Options: Yes or No, higher / No, lower

Recommendation: Yes

Rationale: As requested by several councilors and deemed reasonable by the Developer

Stakeholder group.

Recommendation	Old / Suspended Program
 Projected financials to show the project: Would not be possible "but for" the tax exemption, and Will not exceed overall average annual rate of 10% cash-on-cash rate of return for the project with MUPTE for the maximum period of exemption (10 years). 	Projected financials to show the project: O Would not be possible to build "but for" the tax exemption.
If the projected overall average annual rate of return for the maximum exemption period is: • Less than 10% and the Required Public Benefits are met, then the project be eligible to receive the maximum 10-year exemption,	
 Exceeds 10%, then: A. The term of the exemption will be decreased by the number of years necessary to bring the rate of return down to 10%, or B. The applicant can propose adding project elements from the Additional Public Benefits Criteria to increase the term of the exemption up to 10 years. 	
Submits with application: 10-year proforma and analysis of 10-year return.	Submits with application: 1 year proforma

ADDITIONAL PUBLIC BENEFIT

Additional Public Benefit Criteria Concept

Question: In the event that a project is not eligible for a 10-year exemption due to Required Public Benefit #9 "Project Need," do you want to have a way for an applicant to qualify for additional exemption years by providing additional public benefits: Documented Local Economic Impact, Location, Project Features.

Options: Yes or No **Recommendation:** Yes

Rationale: Having additional public benefits provides a flexible menu of options, can enable higher quality projects, provides ability for a project to be more responsive to needs expressed by neighborhood, and adds to the public benefits. Project features add cost to project and benefits to community. Item I. includes green vehicle LEED requirement to cover installation of electric vehicle charging stations as recommended by Representative Barnhart. Item J. based on feedback from May and June neighborhood leader outreach to support neighborhood engagement and neighborhood livability.

Recommendation	Old / Suspended Program
Applicants have the ability to earn additional	Council able to approve exemption for fewer
years by providing Additional Public Benefits	years. Nothing in the program ordinance
in the following three categories:	specifies the conditions under which the
	Council may limit the number of years.
 Documented Local Economic Impact The extent to which the project: Meets the goal established in the Local Economic Impact Plan (Required Public Benefit), Demonstrates solicitation of bids from WMBE, and Commits to completing certified payroll. 	Documented Local Economic Impact Not included
Location	Location
Projects located within: o The Downtown Plan Area,	Two of eight possible public benefit categories for scoring points, based on:
The Downtown Plan Area,A HUD low-mod income area,	
o On a brownfield site, or	 Location within the Downtown Area Plan at 100 points.
o Projects that include the redevelopment of a valuable historic resource.	 Historic Sensitivity for any project that is immediately adjacent or contiguous to a historic locale shall include a plan to mitigate impacts to the historic locale. The plan needs to be reviewed and accepted by a PDD staff person and have an accompanying confirmation letter for 25 points.

Recommendation Continued	Old / Suspended Program Continued			
Additional Public Benefit Concept	Additional Public Benefit Concept			
Project Features The extent to which the project incorporates the following features: A. Payment of an increased affordable housing fee, B. Exceed the Green Building Required Public Benefit Criteria, C. Provision of Americans with Disabilities Act (ADA) accessible dwelling units. [This is beyond the code requirements. The building code requires that projects include a minimum number of Americans with Disabilities Act (ADA) adaptable dwelling units] D. Provision of dwelling units available for home ownership, E. Inclusion of open space, community gardens, or gathering space that is accessible to the surrounding community, F. Inclusion of ground floor commercial/retail that addresses a neighborhood need, G. Design excellence and neighborhood compatibility, H. Provision of embedded or structured parking, I. Encourage alternative transportation options, including bus passes, car share, bike share, bus shelter, pedestrian connections, meeting LEED v4 'Green Vehicle' Credit Description, and minimum parking where appropriate, and J. Other features identified by neighborhood through the engagement process.	Project Features Three of eight possible public benefit categories for scoring points, based on: - ADA accessible units in the project at 10 points/unit. - Homeownership: 50% or more of the housing dedicated to homeownership earned 100 points. - Parking spaces provided beyond the number required by the Code (only for projects within the Residential Parking Permit Program zones) at 10 points/parking space.			

OTHER PROGRAM REQUIREMENTS

Financial Reporting

Question: Should the project owners submit annual accountant-prepared financial information to evaluate cash-on-cash return and, in the first year, provide a list of construction labor residence information?

Options: Yes or No **Recommendation:** Yes

Rationale: Used by City Manager to analyze the overall effectiveness of the program and may be

used in the aggregate as part of the Annual Report.

Recommendation	Old / Suspended Program
During exemption period, project owner must submit annual accountant-prepared financial information to evaluate a to-date cash on cash rate of return for the project: o Audited financial statements o Tax returns o 10-year operating cash flow with to-date	Not included
rate of return O Year 1 to include list of construction labor residence information (zip codes) Information submitted by owners to be kept	
confidential to the extent state public records law allows.	

OTHER PROGRAM REQUIREMENTS

Program Volume Cap

Question A: Should the program have a volume cap of 1,500 units?

Options: Yes or No (If No, Unit or monetary cap; cumulative or annual)

Recommendation: Yes

Rationale: Capping the cumulative number of units is aligned with Envision Eugene identified gap using updated information regarding the 20-year projection for multi-family homes and land capacity. Currently there is insufficient demand to warrant a competitive process. Having an annual cap would unnecessarily limit multi-unit housing redevelopment opportunities. Program has averaged just under one project per year over the 30 active years of the program.

Recommendation	Old / Suspended Program
Program goal is to assist in the creation of 1,500 new, multi-family housing units through redevelopment (after adoption of the 2014 ordinance).	Not included
Cap to be reviewed annually by the MUPTE Review Panel as part of the Annual Report. At such time that the MUPTE-assisted number of dwelling units constructed reaches the cap, council shall conduct a comprehensive review to determine if continuation of the program is desired.	

OTHER PROGRAM REQUIREMENTS

MUPTE Review Panel

Question A: Should a Review Panel replace the current Loan Advisory Committee review to advise the City Manager with the panel features listed below?

- o make recommendation related to Additional Public Benefit Criteria, when applicable (if Additional Public Benefit Criteria was approved above)
- o assist with an annual report that also covers the program volume cap
- o include members from the following sectors:
 - 4 with technical expertise, such as financial, development, architects/green building, labor/construction
 - 4 neighborhood leaders
 - o 2 at-large, standing representatives
 - o 2 project specific representatives
- o Mayor appointed the neighborhood leaders

Options: Yes or No **Recommendation:** Yes

Rationale: Panel composition includes feedback from the May and June neighborhood leader

outreach to support neighborhood engagement.

Recommendation	Old / Suspended Program		
A newly formed MUPTE review panel to	The City's Loan Advisory Committee reviews		
provide a third-party review of the MUPTE	the projects financial projections and comes to		
program for the City Manager including:	a conclusion on whether the tax exemption is		
 Review of project applications, with emphasis 	needed.		
on analyzing the project's financial projections.			
Review applicant's conformance with the			
Required Public Benefits and any proposed			
Additional Public Benefit Criteria and make			
recommendations regarding approval/denial			
of the tax exemption to the City Manager.			
Assist the City Manager in preparing an Annual			
Report on the MUPTE program that will also cover			
the program volume cap.			
• The Panel will be comprised of eight members			
with equal representation from technical interests			
and neighborhoods:			
 2 at-large neighborhood representatives; 			
appointed by the Mayor			
 2 neighborhood representatives from the 			
specific neighborhood in which a proposed			
MUPTE project is located			
- 4 technical interests (such as,			
architect/green building, lender, labor, and			
developer)			
Review Panel members would sign a			
confidentiality agreement.			



Creating Stable, Safe Housing Opportunities for Eugene Residents

The City of Eugene seeks to create a range of stable, safe, and affordable housing opportunities for area residents through a suite of funding, programs, and supportive policies. Eugene programs provide financial and regulatory incentives for the development of permanent, transitional and emergency housing by primary nonprofit partner organizations. City programs are guided through the Eugene-Springfield 2010 Consolidated Plan. Through the investments of the City of Eugene and many other organizations, our community has created over 3,000 units of permanent affordable housing,

Affordable Housing Development – Housing Development programs includes funding for acquisitions, new development construction, rehabilitation, and project-related soft costs incurred by the jurisdictions. Eugene awards funds in this category through an annual Housing RFP. Subsidies for development include land, HOME Investment Partnership Program funds, system development charge waivers, and property tax exemptions. Regulatory incentives include density bonuses and reduction of parking requirements. Projects receiving funds include small developments for special need populations as well as medium sized affordable housing development.

Low-income Rental Housing Property Tax Exemption (LIRPTE) and Low-Income Housing Property Tax Exemption (LITE): Both the low-income housing property tax exemption (LIRPTE) are enabled by state statute. A LITE provides an annual exemption for properties that are used for the purposes of a nonprofit corporation. This housing is not required to be rental housing. For more information, refer to Eugene City Code 2.910-2.922.The LIRPTE provides a 20-year exemption for properties constructed after February 12, 1990 and is offered for rent or held for the purpose of developing low-income rental housing. An applicant requesting a 20-year exemption is not required to be a nonprofit in certain instances. For more information, refer to Eugene City Code 2.937-2.940. Since 1990, LIRPTE has benefited 1,168 affordable housing units.

Housing Rehabilitation Fund – The Housing Rehabilitation Fund (HRF) is a revolving loan fund created with CDBG funds. The HRF generates \$400,000 per year in program income which is made available for low-interest loans for rehabilitation of rental and homeownership units for low-income persons. This is a critical resource for maintain the existing housing units available to low-income persons.

Emergency Home Repair – The program offers emergency repair grants and loans of up to \$5,000 to very low-income homeowners for minor repairs and accessibility features. Grants are available for accessibility improvements for rental units occupied by very low-income tenants with disabilities. About 30 repair projects are completed each year.

Capital Grants for Emergency and Transitional Housing Facilities – This program provides grants for acquisition or rehabilitation of facilities for nonprofit organizations that provide serves for low-income persons. Such facilities include emergency and transitional housing for people who are homeless or at risk of homelessness.

Temporary Residences for Persons Experiencing Homelessness – In addition, the City of Eugene supports programs for homeless persons to find safe spaces through the Homeless Car Camping Program, Opportunity Village, and Rest Stops.

Condominium and Manufactured Home Park Conversions – The City of Eugene regulates the conversion of rental units to condominiums and the closure of manufactured home parks in order to provide appropriate supports for the tenants residing in such properties.

Rental Housing Code – This code creates minimum standards for habitability of rental properties and establishes a process to help renters and owners resolve concerns.