

BASELINE ASSESSMENT

APPENDIX D: WORKSHOP MEMOS

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04 September 2012

To Stephanie Jennings, Lane Livability Consortium
From Michael Howard, Ian Foster, Paul Hicks, Paul Leitman and Steve Rafuse, Community Planning Workshop
SUBJECT SUMMARY OF HEALTH SYNTHESIS WORKSHOP

Introduction

On Thursday, 2 August, the Lane Livability Consortium hosted a Synthesis Workshop in the Health and Human Services Charnelton Building, Room 258 from 2 to 5 PM to discuss incorporating community health concerns into the region's plans. This included ideas about exploring linkages among community health agencies, programs, initiatives, plans and investments. The focus was to connect these with other areas, such as economic development, housing, and transportation.

Nineteen representatives from nine Eugene/Springfield-based agencies and organizations attended the workshop. The participants represented a cross section of public agencies and nonprofit organizations with interests in planning, economic development, transportation, housing and health issues. A list of attendees is attached to this memo.

The meeting was led by CA Baskerville and Stephanie Jennings from the Lane Livability Consortium and Paul Hicks, Michael Howard, Paul Leitman and Steve Rafuse from the Community Planning Workshop.

Objectives

The primary goals of this workshop were to:

- Discuss how community health fields are evolving as a result of federal and state changes.
- Identify opportunities to incorporate community health concerns into planning processes including identification of mutually beneficial outcomes, strategies, and investment strategies.
- Explore ways to improve ongoing communication between community health agencies and other agencies working on economic development, housing, and transportation concerns.
- Consider use of tools incorporating health concerns into plans and projects.

Identifying Participant Interests

The participants were asked to introduce themselves and describe what they hoped to achieve from the workshop. Below is a compilation of participant responses, followed by the frequency of responses in parentheses:

- Understand public health connections and how to help communities integrate public health. (7)

- Discuss and better understand Community Care Organizations (CCOs). (2)
- Discuss how to have consistent and effective messaging around bicycle/pedestrian projects and their ultimate benefit towards public health. (2)
- Discuss how neighborhood design impacts public health. (1)
- How to integrate health into Transportation System Plans. (1)
- Look at the important connection between people seeking housing programs and health. (1)
- Learn more about the changes in healthcare and how it will affect school-based health clinics and care for students. (1)
- Discuss the goal of a long-term (20-year) public health plan. (1)
- Discuss prioritizing competing projects, how does health care contribute as mutual benefit. (1)

Starting the Conversation

Karen Gillette, Manager, Lane County Public Health, and Bruce Abel, Chief Behavioral Health Officer at the Trillium Group began the conversation about incorporating community health concerns into plans by presenting information related to their work and experience. More specifically, they discussed Coordinated Care Organizations (CCOs) and the future of Oregon's plan for healthcare transformation.

Karen Gillette reported on the importance of public health and their mission to preserve, protect and promote the health of all people in Lane County. Prevention is the primary goal of Lane County Public Health's program. According to Karen, CCOs are raising the level of awareness of what public health can do for a community. CCOs are local health entities that will deliver health care and coverage for people eligible for the Oregon Health Plan (Medicaid), including those also covered by Medicare. CCOs must be accountable for health outcomes of the population they serve. They will have one budget that grows at a fixed rate for mental, physical and ultimately dental care. CCOs will bring forward new models of care that are patient-centered and team-focused. They will have flexibility within the budget to deliver defined outcomes. They will be governed by a partnership among health care providers, community members, and stakeholders in the health systems that have financial responsibility and risk.

Karen also reported on the policies regarding tobacco use and obesity, both of which are chronic problems that can be mitigated through a comprehensive prevention approach, particularly through policy. She also expressed a need to work more on equity issues and creating equal access to services. Lastly, Karen discussed the Community Health Assessment, which is a process that is currently under development with PeaceHealth. This will be used to develop the Community Health Impact Plan that will help guide local health strategies. .

Bruce Abel discussed further details of CCOs. About two and a half years ago a public/private partnership that included Lane County, and Trillium formed to discuss connections between public health groups with a focus on the fragmented and uncoordinated system. They explored ways to make healthcare coordination more effective.

This foundational work informed the state's healthcare reform directive and led to the creation of CCOs across the state. The CCO is intended to explore alternative programs that may deemphasize unnecessary services and pivot towards a model where health and prevention are emphasized.

Bruce Abel also informed the participants that 10 percent of healthcare services relate to disease. The remaining 90 percent is related to trauma, housing or income. If the focus was on the other 90 percent, Bruce said that healthcare could achieve better outcomes. Currently, about 1 percent of healthcare costs is dedicated to prevention. The CCO has 45 days to create a plan to transform the system. They are discussing how behavioral and physical health can work together, and are looking for a five-to-six person work group for this purpose.

One of the challenges they face is that money is funneled through the existing system. There will be resistance towards prevention and other major changes. There is an opportunity for CCOs to redirect funding to be more flexible for preventative care. One example of this was to use money to buy an air conditioner in order to prevent heat-related illness resulting in hospital visits.

The CCO is responsible for the Oregon Health Plan (OHP), which covers 55,000 residents in Lane County. The plan covers physical, mental and oral health. The OHP will continue to exist with minimal impact to members. The same actors will continue to be involved at the community level. The change to CCOs should be seamless, and nothing should be apparent to members. There will be the same doctors, same access to mental health, and the same access to health services.

The Affordable Care Act will be an advantage for the community because the CCO will allow for more individuals and families to enroll. Additionally, there have been conversations around enrolling state employees into the CCO, which will ultimately lower administrative costs, and increase the ability to purchase services at a lower cost. The triple aim of CCOs is ultimately to (1) reduce the costs of healthcare, (2) increase efficiency and access to healthcare, and (3) increase overall health of the population.

The United States has one of the highest healthcare related costs, but only ranks about 48th for health outcomes. Aligning efforts will be key to achieving better health outcomes.

CPW Baseline Assessment

Following these opening remarks, Steve Rafuse of the Community Planning Workshop presented some of the findings obtained during the Baseline Assessment. To frame the

discussion, the CPW team provided an overview of the primary policy influencers on the region's public health.

This was followed by a list of major gaps, opportunities and challenges of public health in the Eugene-Springfield area. A few of these are listed below:

- Gap – There is a need to increase the involvement of public health partners in traditional planning processes.
- Opportunity – Identify mutual benefits that prioritize mutually beneficial planning activities between public health and other core areas.
- Challenge – Making healthy choices easy and accessible for all community members.

The team then summarized ways in which each of the four core areas (Economic Development, Public Health, Housing and Transportation) can benefit from including public health in their planning efforts. There will be more opportunities to integrate health because of momentum from federal and state policies such as the Affordable Care Act and the CCOs.

Small Group Discussions

Following the opening remarks, attendees engaged in a World Café exercise. Each participant sat at one of four tables and then rotated after each question to give everyone an opportunity to interact with others and gain more perspectives. In these groups, they were asked to answer the following questions:

- How can we incorporate public health considerations into housing, economic development, and transportation planning processes and vice versa?
- What are the best ways for public health professionals to participate in economic development, transportation and housing planning efforts and vice versa?
- Based on the presentations today as well as discussions you've been part of previously, what is one health related issue or policy that strongly relates to your work area?

Below are some of the themes that came up during their discussion:

Question 1: How can we incorporate public health considerations into housing, economic development, and transportation planning processes and vice versa?

Among the four groups, there were common themes about incorporating public health considerations into the other core areas.

- The groups discussed the importance of having access to the upcoming Community Needs Assessment. They see it as a useful tool for their agencies.
- Finding opportunities for connecting health professionals to advisory committees and other inputs was identified as something that would be useful.
- Various programs, such as SmartTrips and Safe Routes to School, were identified as opportunities to change behaviors. Groups could be more active in collaborating with these programs. There needs to be motivation to make healthy choices. These programs can also help to focus on specific neighborhood health needs.
- CCO's can help provide funding for collaboration.

- Groups discussed how the built environment affects health outcomes. They expressed a need to get away from doing what city code requires, and look at what *should* be done.
- It would be useful to invite public health prevention specialists to the table when making planning decisions. A directory of local and state health professionals could be made available to aid in this effort.
- Align common goals and policy across disciplines, and work to better understand how all of the region's plans interconnect.
 - Review plans and determine public health issues
 - Use of inter-disciplinary teams to focus on common challenges such as funding and resource availability
- The groups identified the alignment of health goals with good planning as a mutual benefit.

Question 2: What are the best ways for public health professionals to participate in economic development, transportation and housing planning efforts and vice versa?

- The Community Health Advisory Committee can help lead idea sharing efforts.
- Outreach to public health professionals instead of requiring them to participate.
- Provide cross topic presentations at regularly scheduled meetings.
- Share contact information across topic areas.
- Invite health professionals to participate on planning committees and advisory boards
 - Look for community participation models to ensure all voices are heard (ex. 12 sector model).
- Fund staff time for cross-discipline participation.
- Search for champions within both planning and public health fields who can educate groups to think more holistically about public health and community health outcomes.
- Social determinants can affect health, jobs, housing, economic development.
- Identify opportunities for mutual benefits (combining resources).
- Public health professionals can advocate (traffic accident prevention, walkable neighborhoods).
- Create a coalition of professionals (and key community members) that value the importance of community health.
- Identify activities to promote public health:
 - Eugene Walks
 - Newsletter from CCO to members (eg Health Matters)
 - Network with primary care providers (spread public health message)
 - Group based sharing
 - One coordinated site that users could subscribe to different interest areas
- Focus on Outcomes
 - Where are desired outcomes aligned?
 - Where will my program affect outcomes of other programs?
 - Whose programs will impact my outcomes?

Question 3: Based on the presentations today as well as discussions you've been part of previously, what is one health related issue or policy that strongly relates to your work area?

- How do we keep the conversation going given the long-term nature of these changes?
 - Include public health

- Have actionable interim goals that show progress toward longer term goals
- Include public health professionals on advisory and planning committees.
- Sharing data to inform plans and investment decisions.
- Identify criteria for health that could be incorporated into plans and funding processes.
- Incorporate health into land use development review (i.e. bike parking requirements built into the code).
- Planners and public health professionals need to reach out to educate and involve multiple perspectives.
- Identify and leverage relations that currently exist through enhanced collaboration and communication
- Create more opportunities to work together (align on common issues, work on cross-sector issues and share information) such as an annual networking event.
- Encourage mid-managers (i.e. Planning Directors) to meet 2-3 times a year with counterparts in public health to talk about what is going on and make connections.
- Create a list of resources in public health field to invite participation in policy development.
- Designate contacts from agencies to be point of contact person.
- Create Consortium group that lives on a web page.
- Create a list of plans, programs, projects, and initiatives to inform professionals across fields of areas for potential collaboration and possible opportunities for co-benefits.
- Health Improvement Plans (HIPs) may be a good vehicle to develop working relationships.
 - Possibly create an HIP team.
- Coordinating with health care providers to spread message (i.e. physicians could provide information about programs such as Safe Routes to School).
- Community Health Centers as a resource for communicating with the public.
- Capacity Building – ask organizations to come and speak to your organization.
- Contact information sharing – list of key staff and responsibilities.
- Advisory Committees (public health, mental health).
- Quarterly inter-disciplinary team meetings.

Next Steps

The following were identified as next steps and questions for those interested in further opportunities for discussion:

- How do we stay involved in the CCO process? Bruce Abel responded that participants can get involved in the CCO planning process. Interested participants can contact him.
- For further information about Community Care Organizations, visit:
<http://www.trilliumchp.com/>

Incorporating Community Health Concerns into the Region's Plans Workshop List of Participants

Name	Organization
Bruce Abel	LaneCare/Trillium CCO
Lindsey Adkisson	Lane County Public Health/Prevention
Cindy Baskerville	Lane County Health & Human Services/Public Health
Barb Bellamy	Eugene School District 4J
Stacy Clauson	Lane Council of Governments
Reed Dunbar	City of Eugene
Karen Gillette	Lane County Public Health
Terri Harding	City of Eugene
Jennifer Jordan	Lane County
Matt McRae	City of Eugene
Mark Metzger	City of Springfield
Linda Pauly	City of Springfield
Amy Peterson	City of Eugene
David Reesor	City of Springfield
Lindsay Selser	City of Eugene
Sandy Shaffer	City of Eugene
John Tamulonis	City of Springfield

13 August 2012

To | Stephanie Jennings, Lane Livability Consortium
From | Michael Howard, Ian Foster, Paul Hicks, Paul Leitman and Steve Rafuse
SUBJECT | SUMMARY OF HOUSEHOLD FINANCIAL STABILITY WORKSHOP

Introduction

On Tuesday, August 7th, the Lane Livability Consortium hosted a Synthesis Workshop at the United Way of Lane County between 2pm and 5pm to discuss issues around household financial stability. This included issues around transportation, the gap between wages and household expenses, affordable housing, economic development and financial literacy.

Twenty-three individuals representing thirteen agencies and organizations within the Eugene-Springfield area attended the workshop. The participants represented a cross-section of public agencies and nonprofit organizations with interests in planning, transportation, housing, financial education, economic development, and health. A list of attendees is attached to this memo.

The meeting was led by Elena Fracchia from United Way of Lane County and Stephanie Jennings from the Lane Livability Consortium along with Michael Howard, Ian Foster, Paul Leitman and Steve Rafuse from the Community Planning Workshop. Kellie DeVore from United Way of Lane County and Lydia McKinney from Lane County helped plan the workshop.

Objectives

The primary goals of this workshop are to:

- Raise awareness of how an individual agency's work connects to household financial stability;
- Identify ways to better incorporate household financial stability into plans;
- Discuss to what extent financial stability is central to our work; and
- Discuss ways that the growing population could benefit from the outreach of services to enhance their financial stability.

Identifying Participants Interests

The participants were asked to introduce themselves and describe what they hoped to achieve from the workshop. Below is a compilation of participate responses in order of frequency:

- To develop new partnerships and solutions.
- To increase our knowledge base and learn what other planners are working on.
- An inventory of the resources that focus on financial security for households.

- Identify issues that lie at the intersection between affordable housing and financial stability.
- Identify issues that lie at the intersection between health and financial stability
- Better understand how income stability impact transportation choices
- To learn more about the Community Needs Assessment tool.

Starting the Conversation

Elena Fracchia from the United Way of Lane County, **Chuck Forster** from Lane Workforce Partnership, **Lydia McKinney** from Lane County, and **Stephanie Jennings** from the City of Eugene began the conversation about household financial stability by presenting information related to their own work and experience. Answering the following questions started the conversation:

1. How their agency includes topics of household financial stability, why it is important, and if/how their needs are changing.
2. Discuss what issues key programs are and discuss what issues are not on the table.

Elena Fracchia started the conversation with a short presentation of her work with the United Way and the ways in which the United Way is addressing issues of household financial stability. The presentation included a video that asked Lane County residents “what does financial stability mean to you?” Answers included “options, steady income, self-reliance, freedom, being able to pay the bills”. The video illustrated that financial stability means a lot of things to different people and that as a community we are all interconnected. The presentation included a slide on the foundations and components of success to achieving financial stability in Lane County.

- Foundations: stable income, stable financial resources, affordable household costs
- Components of success: family sustaining employment, income supports, manageable expenses, savings and assets, housing and utilities, transportation and food

Elena concluded the presentation with a discussion of the United Way of Lane County’s Financial Stability Partnership™ (FSP). The FSP supports a variety of services to increase income, build savings and grow assets for low to moderate income families. Projects include: free tax preparation, financial coaching and literacy, and connecting people with the resources and tools available in the community.

Chuck Forster from the Lane Workforce Partnership¹ discussed employment and the workforce in Lane County and how wages affect financial stability at the household level. One tool cited, the Prosperity Planner², points to the difference in average wages in Lane County compared to

¹ The Lane Workforce Partnership is a business-led workforce development organization dedicated to meeting the workforce skill needs of employers and to helping individuals gain the knowledge and skills to find a first, new or better job.

² Prosperity Planner Tool: <https://www2.prosperityplanner.org>

average household cost. For example, for a family with one school age child and one preschool age child, \$22/hour is what is needed to support a typical family that size; yet, average wages in Lane County are only \$14.83/hour. To close this gap, the Lane Workforce Partnership provides training programs that align the skills of the local workforce with the needs of employers. The Lane Workforce Partnership has also been working with state and local governments to become a “Certified Work Ready Community”. This program is a foundational tool of the National Career Readiness Certificate and can be leveraged for future economic development as a tool that indicates that the community has an educated, skilled, and trained workforce. Chuck also discussed the challenges working with low-income youth and the high rates of unemployment that plague this generation.

Lydia McKinney from Lane County spoke about transportation planning and the link to household financial stability. Within transportation planning, household financial stability is only indirectly addressed. For example, Transportation Systems Plans (TSPs) do not have goals or objectives related to financial security. However, transportation is the second highest household cost behind housing. One gap here is the “drive until you qualify” model, where lending institutions are not factoring in transportation cost into overall household cost.

Transportation planning today is more focused on multi-modal development that provides more access to transit, walking, and biking. This type of planning can cut household transportation cost by retrofitting communities to be less reliant on the automobile for day-to-day functions. Multi-modal planning also has the added benefit of lowering the government cost of building and maintaining expensive transportation infrastructure associated with auto-oriented development.

Stephanie Jennings from the City of Eugene and the Lane Livability Consortium brought a housing perspective to the discussion on financial stability. Stephanie points to opportunities that exist to increase income and make cost more manageable. From a housing perspective, the Eugene-Springfield 2010 Consolidated Plan addresses household financial stability by looking at housing affordability and poverty. Further, organizations such as St. Vincent de Paul and HACSA³ provide affordable housing as well as services to improve household financial stability. The question is “how do we better leverage these resources”? Foreclosure is also another major issue effecting household financial stability.

Throughout the panel discussion, participants provided input and shared their agencies experiences working on issues of household financial stability. The following ideas were expressed in this discussion:

- Financial Stability means a lot of things to different people – People tend to view financial stability differently depending on their social and economic situation.

³ Housing Authority and Community Services Agency (HACSA)

- There is a “serious lack” of financial literacy and education – The poor financial choices made by a large portion of the population points to either a lack of financial education or the poor financial literacy of the population.
- Comprehensive planning that focuses on outcomes – The issue of household financial stability crosses-over several planning areas. How do we incorporate financial stability into health, transportation, economic development and land use planning? Planning that focuses on outcomes can help link the work of planning professionals across silos and create opportunities for increased efficiency and greater collaboration.
- Leveraging partnerships to address issues of household financial stability – Forums such as the Lane Livability Consortium and the work the United Way’s Financial Stability Partnership provide professionals an opportunity to a network and share resources. These forums also provide a platform for addressing specific topics such as household financial stability.
- Closing the wage gap – In Lane County, there is a significant gap between wages and the cost of living. Creating greater prosperity is a major challenge facing economic development professionals and policy makers.
- Affordability of affordable housing – For many private developers, it is impossible to build affordable housing unless subsidizes are provided. On the demand side, there are limited options for buyers in the market and many chose to take on mortgages that are too high.

Gaps, Challenges and Opportunities

Following the extended large group conversation, the attendees broke out into smaller groups. Each group discussed the following questions:

- How does household financial stability relate to your work?
- What are the gaps, challenges and opportunities within your field to household financial stability?
- Where do we want to go as a region?
- What would you want a Financial Stability Partnership™ to provide? Identify groups that are working towards HFS and determine how particular areas can improve HFS.

How does household financial stability relate to your work?

- Economic Development: job creation and increasing wages
- Financial stability as a safety net
- Housing: affordable housing and housing programs
- Financial Literacy: education and financial literacy
- Public-private partnerships
- Business education
- Transportation: transportation cost are a top challenge to financial stability
- Land-use planning
- Connecting rural communities

What are the gaps, challenges and opportunities within your field to household financial stability?

Gaps and Challenges

Among the smaller break out groups, several gaps and challenges surrounding household financial stability were identified.

- **Cost of living:**
 - Agencies and organizations have various takes on what the true “cost of living” is in Lane County. Participants discussed the need for a more uniform and clear picture of the cost of living in Lane County.
 - Studies suggest that market rate housing requires an income of at least \$16/hr. For many residents in the region such wages are unattainable.
 - Participants stressed the importance of factoring in other household cost, such as childcare and transportation when evaluating household financial stability. When factored in, these additional costs paint a more complete picture of household financial stability.
- **Income:**
 - The region faces many economic challenges; among them is a lack of good high paying jobs and affordable housing options. Compared to the cost of living, median income is relatively low.
- **Financial literacy:**
 - An important component of household financial stability is financial literacy. Managing household finances requires financial literacy training and education. It was suggested by participants that schools have done a poor job of providing financial education to high school and college students. Additionally, the lack of participation in available financial programs may require a new approach to financial literacy training.
- **At the agency level:**
 - In organizing efforts across planning silos, it is important that agencies and organizations use “common language” to ensure that they share the same understanding of the issues. Greater coordination across agencies will also require a collective set of data for all programs that address issues of household financial stability.
 - Agencies are also facing external budget issues. Decreasing federal support equals fewer services, supports and programs. Participants sought to address the follow questions: “How do we find new ways to provide services?” and “Does this call for a reorganization of efforts?”

Opportunities

The groups also identified opportunities for improving household financial stability in the region.

- **At the agency level:**
 - Participants recognized the value in coordination and collaboration to address issues of household financial stability. Conversation focused around the question of “how do we coordinate the use of resources among agencies to provide services more efficiently?” Participants suggested meeting on a semi-regular basis to coordinate, network and communicate. This should help provide a regular forum to address cross-area issues and reduce the duplication of efforts.
 - Information sharing was another issue that arose in discussions. Participants highlighted the importance of “transparency to the public” as well as the importance of getting information to decision makers.
 - Having a “clear set of goals” that multiple agencies can work together to accomplish is important and a foundational part of any regional effort.
- **Housing:**
 - The cost of housing is most often the single highest household expense. Household income plays a major role in what type (single or multi-family) of housing a family can afford and where they live.
 - For many private developers, it is impossible to build affordable housing unless subsidies are provided. Several participants asked if money might be better spent on programs and initiatives to alleviate poverty and create jobs.
 - Participants expressed the need to shift/reshape public perception around the white-picket fence “American dream”. Given the high cost of housing and the relatively low wages in our region, we need to develop more (multi-unit type) condo/townhouse/duplex housing to accurately meet demand.
 - The aging baby boomer population is predicted to downsize in the years to come. However, participants say that not as many baby boomers are downsizing as earlier predicted. This raises concerns around seniors in outskirts communities (Creswell, Cottage Grove, etc.) and how well will they age there?
- **Neighborhood level:**
 - Neighborhoods retain strong individual identities in the Eugene-Springfield metro area. Neighborhood based organizations have the potential to innovate by identifying, creating, and supporting new industry. Planners looking to support this are focusing on reseeding neighborhoods for mixed activity. Neighborhood rehabilitation grants provide one opportunity. Participants suggest that incremental changes in land use code will be necessary to facilitate this.
- **Economic Development:**
 - Regional economic development is focused on increasing wages and prosperity. Efforts include entrepreneur mentor programs and business start-up assistance. Currently, many start-ups do not have enough capital or stability to be successful.

Where do we want to go as a region?

- The region needs a clear focus on economic development⁴ – “where do we want to go?” This includes a clear vision on infrastructure investments, land use and private/public partnership. Suggested strategies are listed below:
 - Focus on key industries, wage levels
 - Software, tech.
 - Health, biomedical, research
 - Continue to attract business
 - Small business development
 - Increase worker productivity (certified workforce program)
 - Retain college graduates (educated workforce)
 - Increase wages/living wage jobs
- Greater education around transportation options and their affect on household financial stability.
- Land-use planning that enables and supports more mixed-use development.
- Greater housing affordability and quality transit.
- Planning on the regional level to maximize efficiencies and cut cost.
- Increase cooperation and collaboration across agencies and organizations.
- To develop a regional understanding of the issues surrounding household financial stability. This includes developing a system of household financial stability metrics.
- Generational Considerations:
 - Financial planning for seniors and baby boomers.
 - Generational strategies tailored to the needs of individual groups (teens, young adults, gen. X, baby boomers, seniors).

What would you want a financial stability partnership to provide? Identify groups that are working towards HFS and determine how particular areas can improve HFS.

- United Way’s Financial Stability Partnership (FSP) provides an integrated approach to addressing issues of household financial stability. The FSP organizes various parties to bring forth a multi-discipline approach to financial stability.
- Financial education and outreach to the baby boomer generation.
- Mapping community resources
- Marketing and education outreach.
- 211
- Connecting the community to available resources

⁴ The regions guiding plan on economic development, the Joint Elected Officials *Regional Prosperity Economic Development Plan* establishes a series of strategies.

- Awareness/education on what partners and organizations are doing?
- Sharing “best practices” across organizations.
- Find some “short wins” to maintain the momentum.

Next Steps

Participants in the workshop had a strong interest in exploring ways to incorporate financial stability into their respective work programs. Both the Financial Stability Partnership of United Way and the Lane Livability Consortium offers forums for further discussion of next steps.

Household Financial Stability Workshop List of Participants

Name	Organization
Larry Abel	HACSA
Gordon Anslow	Anslow and DeDeneault Inc.
Sophia Bennett	St. Vincent de Paul
Karen Clearwater	OHCS
Kellie DeVore	United Way of Lane County
William Ellis	City of Eugene
Chuck Forster	Lane Workforce Partnership
Elena Fracchia	United Way of Lane County
Courtney Griesel	City of Springfield
Hank Hoell	United Way Board of Directors
Rick Kangail	Goodwill
Tracy Lampman	United Way of Lane County
Pat Luedtke	Lane County Public Health
Lydia McKinney	Lane County
Mark Metzger	City of Springfield
Heather O'Donnell	City of Eugene
Angela Phinney	LCOG
Mark Rust	Lane County
Lindsay Selser	City of Eugene
Colleen Stewart	St Vincent de Paul
Mike Sullivan	City of Eugene
John Tamulonis	City of Springfield
Anne Williams	St. Vincent de Paul

20 August 2012

To | Stephanie Jennings, Lane Livability Consortium
From | Michael Howard, Ian Foster, Paul Hicks, Paul Leitman and Steve Rafuse
SUBJECT | SUMMARY OF PUBLIC ENGAGEMENT WORKSHOP

Introduction

On Friday, August 3rd, the Lane Livability Consortium hosted a Synthesis Workshop in the University of Oregon between 9AM and noon to discuss issues around public engagement. This included issues around managing staff and issue fatigue, outreach strategies to underrepresented populations, networking and information sharing, partnership and capacity building, and the use of tools such as social media to engage the public.

Twenty-eight individuals representing ten agencies and organizations within the Eugene-Springfield area attended the workshop. The participants represented a cross-section of public agencies and nonprofit organizations with interests in planning, transportation, housing, economic development, and health issues. A list of attendees is attached to this memo.

The meeting was led by Stephanie Jennings from the Lane Livability Consortium and Michael Howard, Ian Foster, Paul Leitman and Steve Rafuse from the Community Planning Workshop. **Molly Markarian and Terri Harding participated in planning for this workshop.**

Objectives

The primary goals of this workshop were to:

- Develop a picture of our changing public engagement needs to achieve community goals
- Identify interconnecting public engagement needs and gaps
- Brainstorm challenges related to public engagement
- Consider actions taken by other regions to support public engagement capacity in local agencies
- Identify ideas for accessing and developing common training and tools that could be used by multiple agencies

Identifying Participants Interests

The participants were asked to introduce themselves and describe what they hoped to achieve from the workshop. Below is a compilation of participate responses in order of frequency:

- New ways to engage the public and improve community outreach (3)
- Sharing previous public engagement work across organizations (3)

- Better ways to integrate the public engagement process into work/projects (3)
- How to reach out and engage the Latino and other under-represented communities (3)
- Simple ways to invite, encourage and solicit public input (2)
- Sharing techniques and strategies for engaging the public (2)
- Strategies to reach the broader public beyond the usual participants (2)
- Low-tech. engagement methods (2)

Starting the Conversation

Terri Harding from the City of Eugene, Rebecca Gershow from Willamalane Park and Recreation District, Jon Evans from Lane Transit District (LTD), and Gerardo Sandoval of the University of Oregon began the conversation about public engagement by presenting information related to their own work and experience engaging the public. Answering the following questions started the conversation:

1. How does their agency approach public engagement and how are their needs changing?
2. What strategies and methods show promise for the future?
3. What challenges do they continue to face?
4. What resources would help?

Terri Harding started the conversation with a discussion of the public outreach process for Envision Eugene and the lessons learned. The public engagement process for Envision Eugene was a relatively inexpensive yet time intensive process. The process began with a Community Resource Group, which consisted of 60 community members and took place over 17 day-long meetings. The Community Resource Group brought together a wide variety of community perspectives (including historically polarized people) and placed them in large discussion groups. With the assistance of a well-trained facilitator (Bob Chadwick), groups sat down and engage those with opposing views. Conversations often lead to compromise and common agreement. Much of this process was about getting through the “fears” before getting to the “best outcomes”. One noted shortfall of this process was the time commitment needed to participate which limited participation to those who could afford to miss work.

In addition to the Community Resource Group, a Technical Resource Group was formed. This group included: the Chamber of Commerce, Neighborhood Groups, 1000 Friends of Oregon, and the Homebuilders Association. The primary task of this group was to help staff create and vet technical assumptions, with the hope of decreasing the likelihood of potential future land use appeals.

Rebecca Gershow from Willamalane Park and Recreation District (Willamalane) spoke about the use of community surveys to guide project prioritization. Willamalane uses a variety of surveys to reach out to the public. The Community Survey received over 1,000 responses. The survey was sent to a random sampling of the community in order to be statistically valid and to show support for project prioritization. Teenagers were identified as the number one group needing park and recreation services through the community surveys. To engage this group,

Willamalane went to Springfield schools and surveyed students. Willamalane also outreaches at public events (ESL classes, Springfield Summer Fare, Farmers Market) and administers intercept surveys¹.

Jon Evans from the Lane Transit District (LTD) spoke about the challenges facing the expansion of EmX on West 11th Ave. LTD has faced a well-organized opposition to the expansion of EmX. Often this position is against what government agencies or organizations are proposing, regardless of the project. Stephanie Jennings and Mike Sullivan from the City of Eugene offered additional examples (Bascom Village and Urban Renewal) from their work.

Gerardo Sandoval reported on his Latino Indicators Project (Task 2.3 of the LLC work program). Through open-ended and interactive workshops hosted at an elementary school in Springfield and Whiteaker Elementary in Eugene, Dr. Sandoval collected information about what the local Latino community considers to be important livability indicators. These indicators include: need for safety and security, a sense of community belonging, access to community gardens and other public spaces, the language barrier, housing affordability and discrimination, and transportation access. Dr. Sandoval also addressed techniques for engaging the Latino community in the public process.

Throughout the panel discussion, participants provided input and shared their agencies experiences engaging the public. The following ideas were expressed in this discussion:

- How to tell the story of the process. It may be useful to start telling the community about good public engagement.
- Creative engagement – Youth Art Project As part of the Envision Eugene process, middle school students were asked to draw their neighborhood. This work was shared with the larger community.
- Engaging silent stakeholders – Participants want to look for ways to engage the public beyond the usual suspects.
- Poll Surveys and Urban Renewal. There is no “easy” way to do public outreach. However, random polls can sample a broad population on a wide range of topics.

In addition to the topics covered in the panel discussion, Stacy Clauson discussed material provided to the participants that she received from the HUD: Peer-to-Peer Exchange. These materials include: Denver on-line polling; Des Moines, IA – long-term livability goals, “put your money where your mouse is”; and Opportunity Mapping; Metro Boston: Data Commons.

Gaps, Opportunities and Challenges

Following the extended large group conversation, the attendees broke out into smaller groups. Each group discussed the gaps, challenges and opportunities of public engagement.

¹ Intercept Survey’s are questionnaires administered face-to-face to a sample of respondents as they pass by the interviewer.

Gaps and Challenges

Among the smaller break out groups, several gaps and challenges surrounding public engagement were identified. These gaps and challenges fell into two basic categories: challenges at the agency level and issues that create gaps and challenges in engaging the public.

At the agency level:

- **Limited staff and financial resources:** A common theme across the board is “how do public agencies become more efficient in engaging the public in a time of limited resources?” Low technology approaches tend to be inexpensive but time and staff-intensive.
- **There is a lot of issue and staff fatigue:** Participants discussed the fatigue that comes with an extensive public engagement process. The question arises of “how to avoid issue burnout”?
- **Difficult to engage the public:** There is a gap, and therefore cynicism, around the public process with regard to the perception that the public sometimes fails to see the value in the process. New methods are needed to engage the public.
- **Information Management:** Many important issues require a lot of information for the public to make informed decisions. The question arose of “how do we manage this information?”

Issues engaging the public:

- **Managing “extremist” or “professional citizens”:** Managing citizens who consistently show up to public meetings to oppose public decisions and planning is a great challenge for many planners.
- **Issues of credibility:** Several participants mentioned that in their experience, facts don’t matter to some members of the community. There is an issue of values and that there is a culture war that is hard to win as a government agency.
- **Early Public Participation:** Getting the public to participate from the beginning and maintaining an ongoing continuous conversation requires proactive public engagement. One strategy mentioned recommends highlighting successful public engagement efforts to reduce the “burn out” of participation. One problem cited was the fact that the public often does not show up to events.
- **Social media presents both opportunities and challenges:** While it is easy and inexpensive for staff to engage the public through social media, it is easy for the opposition to mobilize and spread disinformation.

Opportunities

The groups also identified opportunities for improving the process of public engagement in the region. Opportunities fell into two basic categories: opportunities for improved public engagement at the agency level and strategies to engage under-served communities.

At the agency level:

- **Networking, sharing tools and working across agencies:** These are three themes that were commonly echoed across small group discussions. Addressing strategies for collaboration the following questions arose: How to structure these networks? How do we best work together and share information? Do more training opportunities exist?
 - Sharing contact list to facilitate staff level collaboration.
 - Sharing existing tools and public engagement models to facilitate more conversations around community needs (ex. United Way models of Public Participation)
 - Sharing what public engagement activities are taking place and to identify overlapping goals and objectives. Tools such as Listserv may help facilitate this.
 - Community shared Triple Bottom Line metrics.
 - Leverage the work of Lane Livability Consortium to facilitate greater collaboration.
 - The Bleiker Model of consent building in public participation was cited as a valuable public engagement tool/resource. (Institute for Participatory Management & Planning – <http://www.ipmp.com/about/>)
- **Building upon existing partnerships:** Participants cited the benefit of both professional and community partnerships.
 - Build upon existing organizational partnerships to maximize economies of scale at the agency level.
 - Build upon existing community partnerships with target or underrepresented communities.
- **Maximizing the utility of efforts through joint engagement processes:** Joint engagement such as joint polling, shared outreach and joint websites from regional processes are a few of the recommendations cited by workshop participants.
- **Leveraging LCOG:** LCOG has the potential to be an information clearinghouse for data, tools and training.
- **Utilizing social media as an engagement tool:** Social media is an inexpensive tool that is broad reaching. Yet, the use of social media can be a double-edged sword, as it allows opposition to easily mobilize.

Engaging under-served communities:

- **Community spaces are safe and comfortable places to engage the community:** Churches, schools, libraries and community centers are safe and comfortable places that allow planners to connect the broader community. Using community spaces provides an opportunity to engage the community in a space that is familiar and comfortable and may be particularly important when engaging underserved populations such as the Latino population. Example, Dr. Sandoval documented the importance of utilizing elementary schools as meeting spaces in order to provide a safe and comfortable environment for engaging the Latino community.

- **Engaging community leaders:** Engaging community leaders who represent the broader community is the first step to connecting with underserved populations.
- **Engaging the youth:** Youth often have little voice and access to decision makers. It is important that we take into account the opinions of the youth in particular as it pertains to services that they use such as parks and recreation. Social media technology, such as smartphone applications, are emerging, and important, tools.
- **Engaging the Latino Community:** Staffs need more training on how best to engage the regions growing Latino population.

Next Steps

The following were identified as next steps and opportunities for the Lane Livability Consortium and the region to pursue in the future:

- **Coordinating public engagement methods:** Find methods to coordinate various public engagement exercises.
- **Further developing networks:** Develop staff networks and periodically get together to exchange information.
- **Create common community surveys:** Collaborate to create a common community survey with information that multiple agencies can benefit from. Questions that were raised around how best to accomplish this:
 - How to collaborate on outreach?
 - How can we learn from each other? LCOG may be involved with this component.
- **Neighborhood outreach:** Work with neighborhood groups to outreach to neighborhood about planning in their community.

While this group was interested in periodic meetings, there was not a desire or need expressed to meet in the near future.

Public Engagement Workshop List of Participants

Name	Organization
Lindsey Adkisson	Lane County Public Health
Rachael Chilton	City of Springfield
Stacy Clauson	Lane Council of Governments
Matt Clifton	Lane County
William Ellis	City of Eugene
John Evans	Lane Transit District
Felicity Fahy	Eugene Water and Electric Board
Rebecca Gershow	Willamalane Parks and Recreation
Len Goodwin	City of Springfield
Laura Hammond	City of Eugene
Terri Harding	City of Eugene
Roanel Herrera	University of Oregon
Rob Inerfeld	City of Eugene
Jennifer Jordan	Lane County Public Health
Monique Lopez	University of Oregon
Molly Markarian	City of Springfield
Mark Metzger	City of Springfield
Todd Miller	City of Springfield
Meg Murphy	City of Springfield
Josh Newman	City of Springfield
Jeannine Parisi	Eugene Water and Electric Board
Linda Pauly	City of Springfield
Dave Reesor	City of Springfield
Gerardo Sandoval	University of Oregon
Mike Sullivan	City of Eugene
Claire Syrett	Lane Coalition for Healthy Active Youth
Paul Thompson	Lane Council of Governments
Kathi Wiederhold	Lane Council of Governments

16 August 2012

To | Stephanie Jennings, Lane Livability Consortium
From | Michael Howard, Ian Foster, Paul Hicks, Paul Leitman and Steve Rafuse, Community Planning Workshop
SUBJECT | SUMMARY OF DATA SYNTHESIS WORKSHOP

Introduction

On Monday, 30 July, the Lane Livability Consortium hosted a Synthesis Workshop in the Bascom-Tykeson Room at the Eugene Public Library between 2 and 5 PM to discuss issues around data. This included issues about accessing data, gathering and sorting data with limited financial and human resources, identifying opportunities to increase data sharing in the region, and considering how to organize and understand increased amounts of data.

Twenty-eight individuals representing fourteen agencies and organizations within the Eugene-Springfield area attended the workshop. The participants represented a cross section of public agencies and nonprofit organizations with interests in planning, transportation, housing, economic development, and health issues. A list of attendees is attached to this memo.

The meeting was led by Stephanie Jennings from the Lane Livability Consortium and Michael Howard, Ian Foster, Paul Leitman and Steve Rafuse from the Community Planning Workshop. Carolyn Burke, Jason Dedrick and Chris Pryor provided guidance for the workshop structure.

Objectives

The primary goals of this workshop were to:

- Develop a picture of our changing data needs to achieve agency and community goals
- Consider how to organize ever increasing amounts of data and sort it for meaning
- Identify interconnecting data needs and gaps
- Brainstorm challenges related to accessing, sharing and using data
- Consider actions taken by other regions to support data development and sharing
- Identify opportunities to address identified issues through other tasks of the Lane Livability Consortium

Identifying Participants Interests

The participants were asked to introduce themselves and describe what they hoped to achieve from the workshop. Below is a compilation of participant responses, followed by the frequency of responses in parenthesis:

- Discover ways to cooperate on data gathering and sharing (regional data storage) in order to decrease duplication of effort (3)

- Learn more about, and discuss a systematic approach, for the collection of data and its uses (3)
- Discuss Health Data that is available and needed (Comprehensive Health Assessment, Active Transportation) (3)
- Discuss how to use data more persuasively, to best tell the intended story (2)
- Agree on what data says/ transfer data to knowledge (2)
- Discuss ways to appropriately use statistics to avoid misrepresentation (1)
- Discuss methods of using data as a driver towards progress (1)
- Discuss shared data needs (data that is needed across, overlapping, the core areas) (1)
- Prof. Sandoval wanted to learn what is most useful for practitioners to receive from his research related to Latino Indicators (1)

Starting the Conversation

Chris Pryor of United Way, Dan Reece of PeaceHealth and Gerardo Sandoval of the University of Oregon began the conversation about data by presenting information related to their own work and experience compiling and using data. Answering the following questions started the conversation:

1. How their agency is using data, why it is important, and how their needs are changing.
2. Who wants access to data and why?
3. How does data help us get to the outcomes that we want?

Chris Pryor reported on United Way's efforts to gather key indicators and statistics about Lane County in the Leading Indicators Report, which focuses on trends in health, income, education, and other community trends. He stressed the importance of going beyond just measuring perceptual data by telling the story of what the aggregated information means, and that stories can be thought of as data with passion. Similarly, he also shared his feeling that we spend too much time trying to gather more information in an effort to put the puzzle together and not enough on understanding and analyzing the data that is already there. An important question is whether we focus on gathering more data or developing new tools for understanding the data that we already have available.

Dan Reece spoke about the development of the Community Health Assessment, and how data is important to the health care industry. He discussed the prevalence of illness data and lack of health data. Two key events are triggering a change in data collection: (1) the Affordable Care Act that requires a Community Needs Assessment and the implementation of an improvement plan; (2) the changes to the Coordinated Care Organizations (CCO), which will change how healthcare is organized and funded and the requirement for a needs assessment and improvement plan (same as stated above). The changes include a much more comprehensive view of health which is incentivized through a health finance program. The Lane County CCO is the Trillium Community Health Plan (URL: <http://www.trilliumchp.com>).

Gerardo Sandoval reported on his Latino Indicators Project (Task 2.3 of the LLC work program). Through open-ended and interactive workshops hosted at an elementary school in Springfield and Whiteaker Elementary in Eugene, Dr. Sandoval collected information about what the local Latino community considers to be important livability indicators. These indicators include: need for safety and security, access to community gardens and other public spaces, and perceptions regarding isolation from the greater regional community (lack of inclusivity). His work focuses on more qualitative aspects of data in an attempt to collect stories alongside traditional quantitative data.

Following the opening remarks, there was a short conversation about regional data among the group. The following ideas were expressed in this discussion:

- The problem is not the lack of data. One challenge is the unmanageable amount of data, which prevents public agencies from effectively sorting through and understanding the information. Additionally, some of the data used by agencies are not entirely adequate for what the agency needs to do. Attendees expressed a need for more organization and simplicity of the data to facilitate their daily work.
- Data has a trust issue. Since data can be manipulated and used to misrepresent reality, people must be cautious on how it is used and interpreted.
- Data should be a puzzle, not a mystery. All the information we need should be available, and we only need to put it together (like a puzzle). Data should not be something we need to go out and find (like a mystery).
- Data must tell a story. Agencies should use data to tell a story so that the public can easily digest and understand the information, rather than become encumbered with statistics and data (i.e., develop a story out of conditional data that interacts with behavioral aspect). Funders are keenly interested in data synthesis (and cooperation among agencies).

Gaps, Opportunities and Challenges

Following the short conversation, the attendees broke out into four groups. Each group, discussed the gaps, opportunities and challenges of data.

Gaps

Among the four groups, there were common themes about data gaps within the Eugene-Springfield area. These gaps are a lack of knowledge about data collection and management, time and financial constraints, and partnerships with other agencies.

- **Lack of knowledge about data collection and management of data:** Agencies know what information they want, but they do not where the data is stored or who they should speak with to get that data.
- **Time and financial constraints:** A lot of money and time are required when data needs to be collected. These temporal and financial gaps are difficult to fill, especially in times of financial hardship.

- **Interagency partnership:** A lack of communication and collaboration between agencies concerning data collection and use creates inefficiencies. Also agencies are unaware of what data has already been collected and each agency has different methods in which the information was gathered.

Opportunities

The groups also identified opportunities with data in the region. These opportunities ranged from the availability of data, public health reform, regional clearinghouses, and using data to tell a story.

- **Availability of data:** There is a large amount of data out there, and various new technologies that allow data to be easily collected or obtained.
- **Public health reform:** Changes in the public health sector have meant an increase in the amount of data collection related to public health. The Community Health Assessment, the Community Health Improvement Plan, and Mobilizing for Action through Planning and Partnerships (MAPP) are various health-related efforts undertaken in recent years.
- **Regional clearinghouse:** Attendees referenced the opportunity to have one agency coordinate region-wide data management efforts. A centralized “clearinghouse” could provide the region with a “one-stop data hub” that could be made available to store data that can be used across disciplines. LCOG and United Way were suggested as examples of agencies that could be the regional data-keeper. The concept would involve some centralized management; however, various agencies and individuals would contribute data.
- **Using data to tell a story:** People are more likely to respond to a story, emotion and feelings rather than a list of statistics. To support the various efforts of regional agencies and to provide context to the work they are doing, data can be presented as a story. The public will be able to associate with stories and understand the reasoning for the work being completed.

Challenges

The attendees of the workshop also identified the challenges faced by regional agencies concerning data. This included staffing limits, determining community needs, cost of data and transparency.

- **Staffing limits:** For the amount of data that is available, and the need to be able to manage that data, there is not enough staff time to have someone devoted solely to data. Most staff today are overworked and there are limited opportunities for data partnerships with other agencies.
- **Determining community needs:** In order to serve the community, public agencies need data and information about who the community is, what their needs are and what they want from their local governments. This itself poses a challenge because of the need for community surveys and other tools to assess public opinion.
- **Cost of data:** Collecting, managing and updating data is extremely expensive. In times of fiscal austerity and limited revenues, agencies do not have the capacity to devote resources to data.

- **Transparency:** There is a need to provide sources for data, information on how the data was collected and the how the data was interpreted. Due to the possibility of manipulating data and skepticism, increased transparency will ensure accuracy.

Next Steps

The following were identified as next steps and opportunities for the Lane Livability Consortium and the region to pursue in the future:

- **Cross-disciplinary discussions are invaluable for the region.** More networking and coordination opportunities will only improve long-term outcomes for each agency. Some innovative ideas for such collaboration opportunities are to have regular luncheons, meetings or wine socials.
- **Create an inventory** of what data already exists, what is being collected, and what data each agency would like to have. This will form a baseline understanding of the region's data needs.
- Use the opportunities arising in the public health sector to spur structural changes in other Core Areas and other planning fields.

Identified Planning Team for Next Meeting

The following people expressed interest in planning the next meeting:

- Carolyn Burke, City of Eugene
- Ellen Currier, Lane Council of Governments (recommended)
- Jason Dedrick, City of Eugene
- Angela Phinney, Lane Council of Governments
- Chris Pryor, United Way (Eugene City Council, Ward 8)
- Mike Sullivan, City of Eugene

Data Sharing Workshop List of Participants

Name	Organization
Megan Banks	Lane Council of Governments
Barb Bellamy	Eugene School District
Theresa Brand	Lane Transit District / point2point Solutions
Carolyn Burke	City of Eugene
Anne Celovsky	Lane County Public Health
Stacy Clauson	Lane Council of Governments
Karen Clearwater	Oregon Housing and Community Services (OHCS)
Nora Cronin	St. Vincent de Paul
Jason Dedrick	City of Eugene
William Ellis	City of Eugene
Michael Engelmann	City of Springfield
Felicity Fahy	Eugene Water & Electric Board
Karen Gillette	Lane County Public Health
Len Goodwin	City of Springfield
Courtney Griesel	City of Springfield
Jennifer Jordan	Lane County Public Health
Heather O'Donnell	City of Eugene
Abigail Ofori-Amoah	Neighborhood Economic Development Corporation (NEDCO)
Angela Phinney	Lane Council of Governments
Chris Pryor	United Way (Eugene City Councilor, Ward 8)
Dan Reece	PeaceHealth
Mark Rust	Lane County
Gerardo Sandoval	University of Oregon
Sandy Shaffer	City of Eugene
Mike Sullivan	City of Eugene
John Tamulonis	City of Springfield
Paul Thompson	Lane Council of Governments
Kurt Yeiter	City of Eugene
Sarah Zaleski	City of Eugene

20 August 2012

To Stephanie Jennings, Lane Livability Consortium
From Michael Howard, Ian Foster, Paul Hicks, Paul Leitman and Steve Rafuse, Community Planning Workshop
SUBJECT SUMMARY OF TOD/20-MINUTE NEIGHBORHOODS SYNTHESIS WORKSHOP

Introduction

On Wednesday, 1 August, the Lane Livability Consortium hosted a Synthesis Workshop in the HEDCO Building at the University of Oregon between 2 and 5 PM to discuss issues around Transit-Oriented Development (TOD) and 20-minute neighborhoods. This included issues about transit, mode share, development, density, land form and the market.

Twenty-one individuals representing nine agencies and organizations within the Eugene-Springfield area attended the workshop. The participants represented a cross section of public agencies and nonprofit organizations with interests in planning, economic development, transportation, housing and health issues. A list of attendees is attached to this memo.

The meeting was led by Stephanie Jennings from the Lane Livability Consortium and Michael Howard, Ian Foster, Paul Leitman and Steve Rafuse from the Community Planning Workshop. Robin Hostick and Rob Inerfeld participated in planning this workshop.

Objectives

The primary goals of this workshop were to:

- Develop an understanding of what should be included in the concepts of Transit Oriented Developments/Districts and 20-minute neighborhoods
- Identify plans and programs that relate to TOD and 20 minute neighborhoods
- Identify gaps, challenges, and opportunities related to TOD at the regional scale, corridor planning, station area planning, and for individual developments.
- Discuss technical assistance opportunities and identify priority needs
- Consider strategies for future coordination of plans, programs, and initiatives related to TOD and 20 minute neighborhoods

Identifying Participant Interests

The participants were asked to introduce themselves and describe what they hoped to achieve from the workshop. Below is a compilation of participant responses, followed by the frequency of responses in parentheses:

- Discover ways to catalyze and promote TODs (including using best practices) and determine what opportunities are available in the Eugene/Springfield area (6)
- Discuss the 20-minute neighborhood concept, and how that can be applied to specific neighborhoods (2)

- Learn about urban design considerations near transit centers and focus on the experience of pedestrians to help these areas be more successful (2)
- Discover what a Eugene/Springfield model of TOD and 20-minute neighborhoods looks like, and how this differs from other communities (2)
- Learn how communities can get assistance with planning for TODs and 20-minute neighborhoods (1)
- Ways to incorporate TOD topics into work that promotes healthy and active lifestyles, especially for children (1)
- Ways to connect parks and recreation with TODs and 20-minute neighborhoods (1)

Starting the Conversation

Len Goodwin of the City of Springfield, Robin Hostick of the City of Eugene, David Richey of the Lane Council of Governments, and Stephanie Jennings of the Lane Livability Consortium began the conversation about TOD by presenting information related to their own work and experience. Answering the following questions started the conversation:

1. How does their agency approach Transit-Oriented Development?
2. What are potential benefits? What are the gaps, challenges and opportunities?

Len Goodwin reported on his views of Transit-Oriented Development and his perceptions of such development for the Eugene-Springfield area. According to Len, the term “TOD” has confused the issue. We need to discuss compact, dense urban development that is most efficiently served by foot, bicycle and transit. In large cities, transit is ubiquitous and can be used for all aspects of daily living. One issue with the current conversation about TOD is that the focus is on transit as the mechanism for development. According to Len, the focus should be on the community and serving the needs of the people, with transit being a secondary focus.

Robin Hostick discussed the approach taken by the City of Eugene on TOD issues. The City has a policy to grow up, not out and this means increased density. To make the development of denser areas easier, the code should be streamlined and incentives should be used. The City recently completed a market study to determine the capacity for commercial development. The study looked at land values and rent levels to determine if properties are likely to be developed. The results showed that there was a large gap between the type of development that the city wanted and what could be built. To fill this gap, possible options are tax incentives and improving the presence of transit.

David Richey reported on a 20-minute neighborhood analysis conducted with the City of Eugene to look at factors of walkability and 20-minute neighborhoods. This analysis included bike facilities, pedestrian facilities, distances from bus stops, distances from retail and grocery stores, residential and employment density, intersection density and distances from parks. With all of these details, David was able to create a composite map that showed a rating of 20-minute neighborhoods for the entire Central Lane MPO. Next, David showed a map of select areas within the MPO that had the top 20 percent of population density and the bottom 20

percent of infrastructure scores. These were locations in which there were opportunities to develop infrastructure to encourage active transportation.

Stephanie Jennings spoke of the relationship between TOD and the needs of low-income and disadvantaged populations. She mentioned the gap between individuals' incomes and the expenses that are paid for transportation, food, healthcare and housing. There is a need to determine how to create denser development that also creates opportunities for disadvantaged populations. We have learned that commercial spaces in higher density residential buildings always struggle regardless of where the development is located. Additionally, there is always the dichotomy between where transit services are located and where there are the most opportunities for individuals. This presents the challenge of how to implement TOD and densify areas without increasing concentrations of poverty in our community.

CPW Baseline Assessment

Following these opening remarks, Ian Foster and Paul Leitman of the Community Planning Workshop presented some of the findings obtained during the Baseline Analysis. To frame the discussion, the CPW team provided definitions for TOD and 20-minute neighborhoods. This was followed by a list of major gaps, opportunities and challenges of TOD in the Eugene-Springfield area. A few of these are listed below:

- Gap - Most of the region's plans do not address TOD explicitly
- Opportunity - Local communities are committed to the development of mixed-use, high density centers
- Challenge - Lack of funding to make the investment in TOD

The team then summarized ways in which each of the four core areas (Economic Development, Public Health, Housing and Transportation) can benefit from Transit-Oriented Development and 20-minute neighborhoods. These co-benefits include increased physical activity which improves health, more boardings per mile of transit service, employment and retail opportunities integrated within residential areas, and increasing the density of residential areas in proximity to high quality transit services.

Gaps, Opportunities and Challenges

Following the opening remarks, the attendees broke out into four groups. In these groups, they were asked to answer the following questions:

- What should be included under the TOD umbrella? What are the gaps, opportunities and challenges at the regional scale, corridor scale, station area and for individual buildings/developments?
- What should be included under the 20-minute neighborhood umbrella? What are the gaps, opportunities and challenges?

Gaps

Among the four groups, there were common themes about TOD gaps within the Eugene-Springfield area. These gaps are between the market and what can be developed, density of the region, and public connection to TOD.

- **Gap between the market and what can be developed:** Despite the increasing market demand for denser, mixed-use areas, various factors have hindered the ability of private developers to develop TOD. This includes the high cost to develop such properties versus the relatively low rent and lease rates available in most areas of the community. This is related to low wage rates in the overall job market.
- **Financing Gap:** Similarly, developers are unable to secure financing for projects that are below market-rate (i.e. affordable housing), or that fall outside the experience and/or long-term history of lenders, including projects which may not be tested locally and/or which include new or unusual building types. Low-cost, alternative financing is unavailable.
- **Density of the region:** Some attendees noted the density of the Eugene-Springfield area is not high enough to be able to support quality, effective high capacity public transportation services. This in turn means there are likely to be fewer TOD developments due to the lack of effective transit to support such investments.
- **Public connection to TOD:** The message of TOD does not connect with people's immediate needs or experiences. There is also a lack of understanding by many people about the benefits and opportunities that can be achieved with TOD and 20-minute neighborhoods.
- **Transit Framework:** TransPlan, LTD's FTN plan, and local comprehensive plans provide general, policy-level guidance for regional transit planning. A stronger framework for TOD planning with greater community buy-in is needed, for example transit corridor and station area planning. This is critical for prioritizing and securing resources, incrementally preparing the community for change, and building a more direct and predictable path to TOD implementation.

Opportunities

The groups also identified opportunities within the region. These opportunities ranged from the EmX system, multi-family neighborhoods, Eugene's 20-minute neighborhoods, to code flexibility.

- **EmX system:** The region's EmX system provides a good basis on which to develop Transit-Oriented Development and to connect 20-minute neighborhoods throughout the region. The perceived permanence of the EmX system encourages investment and development in the areas adjacent to the EmX stations.
- **Multi-family neighborhoods:** There is likely to be a greater opportunity to add density and develop TODs in multi-family and commercial neighborhoods than in single-family neighborhoods. These areas already have density and are less likely to have opposition that comes from single-family neighborhoods.
- **Eugene's 20-minute neighborhoods:** Eugene has actively called for 20-minute neighborhoods in the Community Climate and Energy Action Plan for Eugene and in

Envision Eugene. This shows a commitment to the 20-minute neighborhood concept that should be highlighted and pursued.

- **Code flexibility:** Rigid codes and zoning laws make the development of TOD more prohibitive to developers. By relaxing the code and allowing flexibility and options, developers are more likely to invest in developing TOD in the Eugene-Springfield area.
- **Financing Support for TOD:** The opportunity exists to create a revolving, structured loan fund combining local resources (and/or state and federal allocations) with funds from nonprofits, philanthropic organizations, banks and other investors to support TOD, in particular affordable housing in station areas. The TOAH (Transit-Oriented Affordable Housing) fund created by the Bay Area Metropolitan Transportation Commission is a recent and successful case study.

Challenges

The participants in the workshop also identified the challenges confronted in the pursuit of TODs and mixed-use development. This included balancing various requirements for a successful station-area, lack of an apparent need for TOD, feasibility of TOD and past transportation decisions.

- **Balancing TOD variables:** Various factors can impact how successful TODs and areas near high-capacity transit stations are. Timing of the development, land use patterns, quality of transit service and right-of-way issues need to be balanced correctly to make TOD be successful. The challenge is to make all of these factors align correctly to provide the best conditions for the effective implementation of TOD.
- **Lack of apparent need for TOD:** Currently, there is no pressing and noticeable problem with the region's transportation-land use system. There are no major traffic issues or immediate problems that require remediation. Therefore, efforts to expand the EmX system and develop more TODs and 20-minute neighborhoods are likely to be met with skepticism and apathy by some community residents.
- **Feasibility of TOD:** Despite the community support for the development of TOD's and mixed-use buildings, these developments are risky for developers. The market is not at the point in which these developments can be profitable. Incentives and subsidies are needed to attract the desired type and amount of development.
- **Previous transportation and land use decisions:** Single-use, auto-centric and low-density development has been promoted by various levels of government and by the market over the past several decades. Transitioning to a new system in which a mix of uses, non-automobile transportation and higher densities are encouraged is a major step. Financial institutions, legal structures and cultural norms are all hurdles that must be overcome to promote this new model of development.

Next Steps

The following were identified as next steps and opportunities for the Lane Livability Consortium and the region to pursue in the future:

- Use community outreach to educate the community on the benefits of TOD and 20-minute neighborhoods.

- Link Task 9 (Community Investment Strategy) with issues of transit-oriented development and 20-minute neighborhoods.
- Request technical assistance to find ways to encourage more people to use transit and discover ways to create safe and friendly environments in areas near transit stations.
- Request technical assistance with creating a regional TOAH fund.
- Request technical assistance with transit corridor and station area planning to meet the unique needs and challenges of a mid-sized community.

TOD/20-Minute Neighborhood Workshop List of Participants

Name	Organization
Gordon Anslow	Anslow & DeGeneault
Megan Banks	Lane Council of Governments
Savannah Crawford	Oregon Department of Transportation
William Ellis	City of Eugene
John Evans	Lane Transit District
Len Goodwin	City of Springfield
David Helton	Oregon Department of Transportation
Robin Hostick	City of Eugene
Betsy Hunter	Housing and Community Service Agency
Greg Hyde	Willamalane Parks and Recreation District
Rob Inerfeld	City of Eugene
Kevin Ko	City of Springfield
Matt McRae	City of Eugene
Mark Metzger	City of Springfield
Linda Pauly	City of Springfield
David Richey	Lane Council of Governments
Natalie Stiffler	Lane Transit District
Mike Sullivan	City of Eugene
Claire Syrett	Lane Coalition for Healthy Active Youth
Trish Thomas	City of Eugene
Kurt Yeiter	City of Eugene