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# Oregon Transit and Housing Study Toolkit



This toolkit is intended to provide interested readers with an overview of different tools that could be employed by state and local (metropolitan, city, county, and tribal) agencies, transit providers, community-based organizations, or developers to encourage housing development, including affordable housing, well connected with transit service. The toolkit presents a summary of the lessons learned and strategies identified through this study's literature review, housing primer, case studies, and stakeholder survey. This toolkit is designed as an interactive PDF to allow readers to quickly access the information they are most interested in, or that is most relevant to them, by clicking on the appropriate hyperlinks. It is organized in the following four categories:

1. Transit System and Services - tools and actions ranging from coordinated transit and land use planning to expanding transit service and using remnant land for housing;
2. Land Use and Zoning Incentives and Tools - tools and actions ranging from comprehensive plan changes to rezoning for multifamily along transit corridors and waiving parking minimums;
3. Financial Incentives and Tools - tools and actions ranging from property tax abatements to waiving system development charges and free or reduced transit fares; and
4. Partnerships and Engagement - tools and actions ranging from identifying stakeholders to building coalitions and continually engaging with the public, operators, and community stakeholders.

Each category contains a variety of tools and actions. Clicking on a tool reveals further information including a detailed description, an assessment of the tool or action's level of complexity, information about where and by what entity the tool may be used, and real-life examples of the tool's application.

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September 2022

## Transit System and Services Tools



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## Transit System and Services Tools

### Responsible Parties:

Transit Providers and Local Agency

### Description:

Land use decisions could consider transit impacts and vice versa. State and local transit providers and land use departments should coordinate as much as possible to support the co-location of transit and housing. Examples include attending intergovernmental meetings concerning zoning, transit planning, collaboration during development review, jointly developed corridor or area plans, and monitoring of projects. Coordination may already be occurring on an informal basis, which can be strengthened with formal protocols and procedures.

### Context:

Part of the challenge in providing transit service in rural areas is a lack of coordination in transportation and land use planning.

Best practices to overcome this challenge (in both urban and rural areas) include:

- Implement access management to preserve capacity and manage land use on arterials and highways;
- Use growth management to preserve corridors and enable more efficient use of services and public infrastructure;
- Pursue compact growth strategies, such as transit-oriented developments, to concentrate housing, jobs, shops, services and healthcare in existing centers to increase opportunities to meet multiple needs in a single trip;
- Require street connectivity to minimize travel distances and increase modal options by planning for a grid network and roads that serve multiple developments; and
- Design complete streets to provide safe, direct connections between destinations and support all transportation modes.

### Level of Complexity: ●●○○○

Requires interdepartmental coordination.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel, corridor or sub-area, or jurisdiction-wide

## Transit System and Services Tools

**Responsible Parties:**

Transit Provider

**Description:**

Implement route changes, network redesigns, or new service models (such as Mobility on Demand or employee shuttles) to reach communities in need of transit service.

**Context:**

The redesign of the Palm Beach County (PalmTran) transit system depended on finding the right mix of routes/service designs that served high density corridors and low-density neighborhoods. By extending service into the neighborhoods through community shuttles and lower frequency routes, PalmTran was able to increase mobility for low income residents by feeding them into the high frequency routes, shortening overall travel times to key destinations.

**Level of Complexity:** ● ● ○ ○ ○

Financial implications may be less than traditional solutions and greater reliance on outreach.

**Additional Information:**

Potential Champions: Local Agency, Developer, Private Service, Community-based Organizations

Suggested Land Use Context: Rural, exurban, suburban, or urban areas

Suggested Scale of Use: At all scales

## Transit System and Services Tools

### Responsible Parties:

Transit Provider

### Description:

Integrating housing and transit service may increase overall household affordability. Low-income households need and benefit from transportation options that are more affordable than personal car ownership. If a developer or city chooses to place a housing development on the urban fringe where land is cheaper but transit service sparse, the financial benefits of the location can be eroded by higher transportation costs. Including transit agencies on site plan review helps to identify challenges and opportunities to extend or improve access to transit service.

### Context:

Traverse City, Michigan, collaborated with the transit agency and surrounding counties to prioritize placement of affordable housing within the transit service area. This partnership helped provide reliable transit service for the residents of these communities to jobs and education centers.

### Level of Complexity: ●●○○○

Dedicate transit staff to coordinate with land use agencies, review plans, and meet with developers to help integrate/provide transit service.

### Additional Information:

Potential Champions: Transit Provider, Local Agency, Nonprofit and Advocacy Groups

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: At all scales

## Transit System and Services Tools

**Responsible Parties:**

Transit Provider

**Description:**

Focus on the unique social and geographic needs of the community. Rural, tribal, and small urban areas benefit from a flexible approach to serving housing. Service types other than fixed route may overcome longer distances, lack of first mile/last mile connections, and specific service time needs. Consider service types, such as Deviated Fixed-Route, Shuttles, and Mobility on Demand. These flexible options may be more cost-effective to provide transit coverage in less dense areas.

**Context:**

As part of their transit program, the Stillaguamish Tribe of Indians in western Washington has a rideshare program that uses volunteer drivers to get people where they need to be.

**Level of Complexity:** ● ● ○ ○ ○

May be more cost effective than fixed-route, but still a cost. Operational costs may be greater.

**Additional Information:**

Potential Champions: Local Agencies, Developers, Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Corridor or areawide

## Transit System and Services Tools

### Responsible Parties:

Transit Provider

### Description:

Temporary transit service can be used to demonstrate and evaluate the efficacy of more permanent solutions. Pilot service can include temporary routes, shuttles, or transit stops.

### Context:

Deseronto, Ontario, used a federally funded pilot project to provide limited transit service within the town borders and into the surrounding urban areas. The purpose of the pilot was to provide additional transportation options for low-income individuals in meeting their daily needs or accessing employment and education opportunities. The pilot program was successful in meeting the community needs, leading to the service continuing after the pilot program ended.

### Level of Complexity: ● ● ○ ○ ○

May be a lower threshold to implement.

### Additional Information:

Potential Champions: Local Agency, Developers, Community-based Organizations

Suggested Land Use Context: All land use contexts

Suggested Scale of Use: At all scales

## Transit System and Services Tools

### Responsible Parties:

Transit Provider, Local Agency, Developer, Private Service

### Description:

For transit to be effective in meeting the needs of residents, including affordable housing residents, agencies could evaluate how social equity communities--youth; older adult; disabled; low-income; Black, Indigenous, and People of Color; or rural communities--interact with the system and have that guide vehicles used, the placement of infrastructure, and new route designs.

### Context:

According to Transit in Small Cities: A Primer for Planning, Siting, and Designing Transit Facilities in Oregon, there are three fundamental components that could be considered: Transit routing, the relationship between the facilities and surrounding destinations, and transit site location and design. When these elements are factored together, economic development and quality of life objectives are advanced.

### Level of Complexity: ●●●○○

Facilities must be inventoried and solutions require collaboration and funding.

### Additional Information:

Potential Champions: Transit Provider, Local Agency, Developer, Private Service, and Community-based Organizations

Suggested Land Use Context: Rural, exurban, suburban, or urban areas

Suggested Scale of Use: Corridor or areawide



## Transit System and Services Tools

### Responsible Parties:

Transit Providers and ODOT

### Description:

Expand transit service, routes, service hours and/or frequency, to provide better access to existing or planned housing. Service expansions could better support existing, high ridership routes or provide greater coverage to serve housing. Transit service could be fixed route, flex route, or on-demand. Flex route and on-demand transit are often workable solutions in low density areas.

### Context:

Valdosta, Georgia, a small city in southeastern Georgia, used Mobility on Demand to provide transit service to residents. The system launched on April 27, 2021 and provides same day transit service. It averages approximately 279 trips per day or 70,000 trips annually.

### Level of Complexity: ●●●○○

To generate ridership, transit service requires subsidies. Funding opportunities are competitive, complex to navigate, and limited overall.

### Additional Information:

Potential Champions: Local Agencies, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Corridor or areawide

## Transit System and Services Tools

**Responsible Parties:**

Transit Provider and Local Agency

**Description:**

At a city or countywide, corridor, or district level, integrate the planning of land use and transit so transit can better connect with existing and planned housing. If the transit and land use planning are separate, use land use plans as a basis that informs responsive transit.

**Context:**

To help alleviate barriers in accessing transit, the Transit in Small Cities primer recommends making sure other city/county departments are aware of the transit provider's needs and these needs are included in local planning documents. Additionally, states, such as Arizona, California, Connecticut, Delaware, and Florida require cities and counties to address transportation mobility in their Comprehensive Plans.

**Level of Complexity:** ●●●○○

Planning processes are often on independent timelines and integration must be highly coordinated.

**Additional Information:**

Potential Champions: Transit Provider, Local Agency, Developers, and Community-based Organizations

Suggested Land Use Context: All land use contexts

Suggested Scale of Use: At all scales

## Transit System and Services Tools

### Responsible Parties:

Transit Provider, Local Agency, Developer, Private Service

### Description:

At each transit stop/station, assess how different first mile/last mile modes could interact with the stop and what infrastructure is needed. Modes could include walking, bicycle riding, driving, and use of micromobility services, such as e-bikes or scooters.

### Context:

To improve connections between transit stops and other modes and key destinations, Denver, Colorado, developed the Denver Regional Transportation District's First and Last Mile Strategic Plan. In this report, they developed four strategies to guide local governments in the first mile/last mile process. The strategies are: identify a station typology, choose a representative transit location that is similar to the station of interest, conduct an analysis for each focus area, and implement the appropriate first mile/last mile strategies. Toolkit strategies include curbside management, adding charging stations, wayfinding, bike and micromobility parking and shuttle services.

### Level of Complexity: ●●●○○

Facilities must be inventoried and solutions require collaboration and funding.

### Additional Information:

Potential Champions: Transit Provider, Local Agency, Developer, Private Service, and Community-based Organizations

Suggested Land Use Context: Rural, exurban, suburban, or urban areas

Suggested Scale of Use: Corridor or areawide

## Transit System and Services Tools

**Responsible Parties:**

Transit Provider

**Description:**

When evaluating changes to existing routes, or implementing a system redesign, it is important to evaluate accessibility changes between jobs, services, and housing, particularly affordable housing, and to strive to increase accessibility. Consider additional transit stop locations to residential areas.

**Context:**

Palm Beach County, Florida, in an effort to improve access to low income residents, redesigned their transit system. The re-design was successful with increased access reported for rent-burdened and zero-vehicle households as well as serving more destinations.

**Level of Complexity:** ●●●○○

Route and stop changes require funding of related infrastructure and operations; additional stops or coverage have the potential to increase travel times.

**Additional Information:**

Potential Champions: Local Agencies, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Corridor or areawide

## Transit System and Services Tools

**Responsible Parties:**

Transit Provider

**Description:**

Transit agencies may acquire land for route infrastructure or stations. Remnant land that will not be used for transit could be developed into housing that is transit-oriented, particularly affordable housing.

**Context:**

The Lane Transit District (LTD) in Eugene, Oregon, acquired a site of approximately 8 acres to develop the planned Santa Clara station. The site is larger than required and LTD intends to sell the unused portion. Development of the surplus land with affordable housing has been under consideration.

**Level of Complexity:** ●●●○○

If remnant land exists, other uses aside from housing may be considered.

**Additional Information:**

Potential Champions: Local Agencies, Developers, and Community-based Organizations

Suggested Land Use Context: Urban and suburban

Suggested Scale of Use: Parcel

## Transit System and Services Tools

### Responsible Parties:

Transit Provider

### Description:

Due to the potential impacts to neighborhoods, different communities, businesses, and others meet with and develop coalitions prior to starting premium transit projects to make sure voices are heard, goals are established, and expectations are maintained. At this stage, different regulatory land banking and preservation tools could be used to keep current communities in place and mitigate the potential for gentrification.

### Context:

Purple Line Corridor Coalition (PLCC) offers an example of coalition-building, multi-sector collaboration, and community agreements to rally and align other resources to support housing preservation and affordability in tandem with an investment in the transit system. These efforts include the following strategies:

- Diverse, well-organized, and well-funded, collaborative coalition consisting of the University of Maryland, local governments, non-profits, philanthropic institutions, and community stakeholders;
- Placing persistent pressure on decision makers, keeping the community's priorities front and center;
- Produce a voluntary, non-binding agreement that publicly commits decision makers to uphold equitable development goals established by the community;
- Produce community oriented, equity-focused reports that clearly illustrate the needs of the corridor and the actions required to assure the light rail project provides the maximum opportunity to all residents and businesses along the corridor; and
- Leverage and align resources from public, private, and philanthropic sectors to support community goals.

### Level of Complexity: ●●●●○

Highly dependent on starting early and deliberate outreach that leads to agreements and actions.

### Additional Information:

Potential Champions: Transit Provider, Local Agency, Developers, and Community-based Organizations

Suggested Land Use Context: Suburban or urban areas

Suggested Scale of Use: Neighborhood or District

## Transit System and Services Tools

### Responsible Parties:

Transit Provider

### Description:

Assure some level of certainty of fixed routes with high frequency to help local agencies reinforce them with high density development, including housing, particularly affordable housing. Permanent high quality, high frequency transit routes can be defined by long-range plans or policy and reinforced through station area planning and station amenities.

### Context:

In an assessment of potential drivers that influence stop level ridership, researchers\* found that transit service variables (i.e., frequency) has the greatest impact on ridership in large urban communities.

### Level of Complexity: ●●●●○

Permanent high quality, high frequency transit has associated high capital and operational costs.

\*Dill, J., Schlossberg, M., Ma, L., & Meyer, C. (2013) Predicting Transit Ridership at the Stop Level: The Role of Service and Urban Form. 92nd Annual Meeting of the Transportation Research Board.

### Additional Information:

Potential Champions: Local Agency, Developers, and Community-based Organizations

Suggested Land Use Context: Rural, exurban, suburban, or urban areas

Suggested Scale of Use: Corridor or areawide

## Land Use and Zoning Tools



To learn more, click a tool located on the left side of this page.



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## Land Use and Zoning Tools

### Responsible Parties:

Local Agency

### Description:

Ensure that comprehensive plans include appropriate policies to support transit-oriented development and the alignment of transit and housing so that this consideration guides decision making on regulatory changes and discretionary land use reviews.

### Context:

Bend, Oregon, is using comprehensive plan policies specific to the area's needs along with deed restrictions and covenants to ensure affordability requirements are met for the Urban Growth Boundary Expansion pilot program.

Salem, Oregon, is in the process of updating its Comprehensive Plan, which includes guiding principles to ensure an adequate supply of affordable and accessible housing for current and future generations. The plan also includes a complete, integrated transportation network that ensures safe and efficient travel by all modes and enhances connectivity for residents and businesses.

Warrenton, Oregon, added a new section in its Comprehensive Plan to guide creation of master plans to help establish policy goals for new neighborhoods.

### Level of Complexity: ●●○○○

Easy to change plans but may face opposition

### Additional Information:

Potential Champions: Developers, Transit Providers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Jurisdiction or sub-area

## Land Use and Zoning Tools

### Responsible Parties:

Local Agencies and Transit Providers

### Description:

Land use decisions could consider transit impacts and vice versa. State and local transit providers and land use departments should coordinate as much as possible to support the co-location of transit and housing. Examples include attending intergovernmental meetings concerning zoning, transit planning, development review, jointly developed corridor or area plans, and monitoring of projects.

### Context:

Transit usage is dependent on route operations (stop placement, number of stops with amenities, and frequency), but also on the surrounding land uses and supporting infrastructure. For example, good pedestrian design can help mitigate long headways. Higher population and/or employment densities can lead to higher ridership. Therefore, transit providers could seek to be involved in Comprehensive Plan Amendments, reviewing new developments, and designing transportation facilities within their service area.

### Level of Complexity: ●●○○○

Requires interdepartmental coordination.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel, corridor or sub-area, or jurisdiction-wide

## Land Use and Zoning Tools

### Responsible Parties:

Local Agency

### Description:

Ensuring that transit corridors are properly zoned to allow (and encourage) higher density development can help to support transit-oriented development and transit ridership. This can be done through zone changes, area-specific plans, and/or overlay zones. Some transit-served areas with existing commercial zoning can be opportunities for residential development as part of a mixed-use development and/or as a stand-alone residential development. Because mixed-use development tends to be more complex and expensive, allowing stand-alone residential development creates the most opportunities for housing, though it can mean less land available for commercial development. This is most helpful when transit corridors are fixed and transit providers have committed to maintaining those routes.

### Context:

In Salem, Oregon, the transit provider (Cherriots) established a Core Network with frequent and reliable service. The City's regulatory changes, including a Comprehensive Plan update, have focused on incentivizing and intensifying mixed-use and multifamily development along transit routes, particularly the Core Network.

Salem, Oregon, has been rezoning parcels along major corridors, particularly those with frequent transit service, as mixed-use to allow multifamily as a permitted use in commercial corridors, rather than the current conditional use.

Ashland, Oregon, made changes to their land use ordinance to establish the Transit Triangle Overlay. The overlay offers additional development flexibility and regulatory incentives, including allowing multifamily in non-residential zones, allowing some commercial uses in residential zones, providing height bonuses, and reducing off-street requirements.

### Level of Complexity: ● ● ○ ○ ○

Zone changes and area-specific plans require input and consideration from a range of stakeholders and approval from local elected officials.

### Additional Information:

Potential Champions: Developers, Transit Providers, and Community-based Organizations

Suggested Land Use Context: Urban or Suburban

Suggested Scale of Use: Sub-area or corridor

## Land Use and Zoning Tools

### Responsible Parties:

Local Agency

### Description:

Some development code requirements may be overly restrictive and have a stifling effect on development. Code barriers that can prevent efficient multifamily and mixed-use development include density or height limits that are too low; landscaping/open space, parking, or setback requirements that are too high; and step-back or building materials requirements that can increase building costs. Reviewing development codes for barriers and other impediments can help to ensure that transit-oriented development and other higher density housing are feasible. Developers can help point out barriers and zoning impediments.

### Context:

Salem, Oregon has modified its multifamily design standards with reduced or no parking requirements to reduce the cost burden on developers and create an incentive for higher density. Generally, multifamily development within a quarter mile of the Core Network no longer requires off-street parking. The City also created an incentive to add housing to commercial developments by allowing a reduction in commercial parking requirements.

California reduces parking requirements for affordable housing projects.

Connecticut offers zoning flexibility to promote dense developments near transit infrastructure.

Survey respondents expressed a desire for additional zoning incentives to increase affordable housing, such as relaxing parking requirements, promoting transit-oriented development, and providing density bonuses.

### Level of Complexity: ●●○○○

Easy to change zoning but may face opposition.

### Additional Information:

Potential Champions: Developers, Transit Providers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel, corridor or sub-area, or jurisdiction-wide

## Land Use and Zoning Tools

### Responsible Parties:

Local Agency

### Description:

Most development is financed through debt, which means that the project incurs interest expense (called carrying costs) when delays occur. Streamlining and speeding up permitting processes can help reduce the total cost of development and improve development feasibility.

### Context:

The Oregon Housing and Transit Study Survey asked the question “What strategies could be employed to improve access to Transit and Affordable Housing.” Non-profit and transit agencies prioritized incentivizing or updating the Planning/Development/Zoning process in increasing access to transit in both urban and rural areas. Additionally, developers were asked about the challenges they experience when trying to include transit in their projects. Some of the developers highlighted the cost of transit-oriented development sites as a barrier to providing more affordable housing.

The Purple Line Corridor Coalition made an online geospatial tool that quickly identified all plans, regulations, and zoning codes that a developer would need to consider when designing a proposal.

### Level of Complexity: ●●○○○

May require additional staffing or changes to procedures to decrease permitting and review timelines.

### Additional Information:

Potential Champions: Developers

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel or sub-area

## Land Use and Zoning Tools

### Responsible Parties:

Local Agency

### Description:

Parking is expensive to provide and uses valuable, developable land that could be used for rentable space. Reducing the amount of parking required can allow more development and improved feasibility. Areas with access to transit and walkable access to other amenities and services can support lower vehicle ownership that reduces the need for residential parking. Implementing parking maximums would further reduce reliance on automobiles and support the integration of transit and housing, but overly restrictive maximums may not be supported by the market.

### Context:

Ashland, Oregon, reduced parking requirements within the Transit Triangle Overlay, and local planning staff thinks that establishing parking maximums would further incentivize transit-oriented development.

Salem, Oregon, reduced parking requirements for multifamily development, and eliminated them completely near transit corridors.

### Level of Complexity: ●●○○○

Easy to change regulations but may face opposition from nearby residents.

### Additional Information:

Potential Champions: Developers, Transit Providers, and Community-based Organizations

Suggested Land Use Context: Urban or Suburban

Suggested Scale of Use: Parcel or sub-area

## Land Use and Zoning Tools

### Responsible Parties:

ODOT and local jurisdictions that have similar traffic impact analysis requirements

### Description:

ODOT and local jurisdictions could establish stricter standards for when to require a traffic impact analysis in conjunction with an approach permit for a highway or major street, or with development. This may better facilitate transit-oriented development and development of projects that aid the co-location of transit and housing. Requiring traffic impact analysis is an additional cost to project sponsors that can act as a barrier to development.

### Context:

Ashland, Oregon, made changes to their land use ordinance to establish the Transit Triangle Overlay to incentivize mixed-use development in an underdeveloped area served by transit. The City felt that a traffic impact analysis might be unnecessary in this circumstance and suggested a threshold for such requirements.

### Level of Complexity: ●●○○○

Implementing consistent standards for when to require a Traffic Impact Analysis could be moderately complex.

### Additional Information:

Potential Champions: Local Agency and Developers

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable to state transportation roadway system

## Land Use and Zoning Tools

### Responsible Parties:

State Agencies

### Description:

Pilot programs provide an opportunity to test the potential benefits and unintended consequences of potential policy or regulatory changes (e.g., to support the co-location of transit and housing) before fully implementing new rules. They can be used as an option or alternative to current regulations prior to changing standard policies or regulations.

### Context:

Bend, Oregon, used a pilot program established under state law that allows cities to expedite Urban Growth Boundary expansions if at least 30% of the housing in the new development will be affordable to households earning 80% of the area median income or below. The plan calls for a mix of market rate and affordable for sale and rental units and is anticipated to break ground in late 2022 after significant delays. This test case has helped highlight both the potential of the program and the challenges with implementing it.

### Level of Complexity: ●●●○○

Local pilot programs could be established through updates to zoning code or other development regulations. Establishing pilot programs at the state level that allow deviation from current policies and regulations which may require statutory or administrative rule changes.

### Additional Information:

Potential Champions: Local Agencies, Developers, Transit Providers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel or sub-area



## Financial Incentives Tools



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## Financial Incentives Tools

### Responsible Parties:

Local Agency

### Description:

Community Development Block Grants (CDBG) are a federal program that provides annual grants on a formula basis to both local governments and States which can be used for acquisition and rehabilitation of existing affordable units, as well as new construction that prioritizes community development efforts. At least 70% of CDGB funds must be used for activities that benefit low- and moderate-income households. Jurisdictions that have CDBG funding can use these to support affordable or mixed-income transit-oriented development or for preservation efforts.

### Context:

Eugene, Oregon, acquired the site for Iris Place through its Land Acquisition for Affordable Housing program using CDBG funds in 2016. In addition to the land, the City awarded the developer housing development funds (federal HOME Investment Partnerships Program funds) along with other financial incentives.

### Level of Complexity: ● ○ ○ ○ ○

Relatively easy to use, but not all jurisdictions have access to CDBG funds.

### Additional Information:

Potential Champions: Transit Providers, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales

## Financial Incentives Tools

### Responsible Parties:

Transit Provider/Local Agency

### Description:

Transit providers may provide free or reduced transit fares within specific areas or provide transit passes to residents of nearby affordable housing developments. The result would be an increase in ridership, allowing the property to reduce the number of parking stalls needed.

### Context:

Kayak Public Transit, a tribal-owned transit provider, offers free fixed-route regional bus service in northeastern Oregon and southeastern Washington. Umatilla County received ODOT Public Transit Division funding to contribute to a Transit Development Plan for Kayak, which helped establish the mission of the transit service and the fare-free service.

### Level of Complexity: ●●○○○

Requires interdepartmental coordination.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in most land use contexts; greater density is helpful

Suggested Scale of Use: Applicable at all scales

## Financial Incentives Tools

### Responsible Parties:

Transit Provider

### Description:

Transit providers can have remnants of parcels acquired for transit infrastructure or construction staging. This remnant property can sometimes be suitable for affordable transit-oriented development. Current rules associated with federal transit funding generally allow transit agencies to transfer the land free or at a discount for the purposes of developing affordable housing. Land acquisition is typically the largest expense for new housing development; free or reduced (below market) cost land therefore makes a significant impact on overall feasibility.

### Context:

The Lane Transit District (LTD) in Eugene, Oregon, acquired an approximately 8-acre site to develop the planned Santa Clara station. The site is larger than required and LTD intends to sell the unused portion. Development of the surplus land with affordable housing has been under consideration.

The Seattle area Sound Transit's Resolution R2018-10 stated that 80% of surplus, Sound Transit-owned land that was adjacent to a high-capacity transit station, would be made available to public agencies, housing authorities, or nonprofits that were committed to developing quality affordable housing. Of those units, 80% are required to be affordable to those earning 80% of the area median income.

### Level of Complexity: ●●○○○

Transit agencies may not have experience with using land in this way.

### Additional Information:

Potential Champions: Local Agencies, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in most land use contexts

Suggested Scale of Use: Applicable at all scales

## Financial Incentives Tools

### Responsible Parties:

Local Agencies or Community-based Organizations/Community Development Commission

### Description:

Land banking is a strategy to acquire vacant or underutilized land in good locations close to transit, amenities, or jobs, for the purpose of developing affordable housing at a later date. If land is transferred to affordable housing developers at low or no cost, this supports affordable housing by reducing or eliminating land costs from development (typically the single largest cost).

### Context:

Lincoln City, Oregon, purchased two parcels for a workforce housing project in 2009. The Urban Renewal Agency was able to buy an adjacent parcel to contribute to the project in 2020, which helped increase the project from about 70 to 107 units. This site had been identified as appropriate because it includes access to transit, schools, a community/recreation center, and other amenities.

Eugene, Oregon, acquired the site for Iris Place through its Land Acquisition for Affordable Housing program using CDBG funds in 2016, and offered other funding and financial incentives to support development.

### Level of Complexity: ●●●○○

Requires funding subsidies and available land.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Urban or Suburban

Suggested Scale of Use: Parcel or sub-area

## Financial Incentives Tools

### Responsible Parties:

Local Agency

### Description:

There are several tax abatement programs available for local implementation in Oregon that can incentivize multifamily, mixed-use, and/or affordable or mixed-income development in transit-served areas. Property tax abatements lower ongoing operating costs and improve development feasibility. Available potentially relevant abatement programs include Vertical Housing Development Zones (VHDZ), which offer a partial tax abatement for mixed-use development and Multiple-Unit Property Tax Exemptions (MUPTE), which abate taxes on multifamily development that provides locally-defined public benefits (that can include a set-aside of affordable units) within a specific geographic area; and provide two full tax exemption programs available for income-restricted affordable housing citywide.

### Context:

Ashland, Oregon, adopted a VHDZ which offers a 10-year partial property tax abatement for qualifying multi-story, mixed-use development. However, building height limitations and step-back requirements for taller buildings limit the value of the VHDZ.

Eugene, Oregon, is providing a 20-year property tax exemption for the Iris Place affordable housing development, along with other financial incentives.

For the Sunshine Gardens development in Roseburg, Oregon, the developer created a non-profit low-income housing entity that was not subject to property taxes per the City's locally adopted tax exemption program.

### Level of Complexity: ●●●○○

Adopting a tax abatement program is no more complex than amending zoning regulations, but means foregoing property tax revenue.

### Additional Information:

Potential Champions: Transit Providers, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts, though the VHDZ program is most applicable in an urban or suburban context where vertical mixed-use development is more realistic

Suggested Scale of Use: Parcel or sub-area

## Financial Incentives Tools

### Responsible Parties:

State

### Description:

Under federal tax credit programs like the Low-Income Affordable Housing Tax Credits (LIHTC), the New Market Tax Credit, or Historic Tax Credits, institutional investors or high net worth individuals make investments by purchasing tax credits, which infuses cash equity into a project that does not require repayment. This brings down the cost to be funded with loans repaid out of operating revenues, which may be limited by affordability restrictions. Projects apply for tax credit allocations, and most are awarded through a competitive process. These programs have specific eligibility requirements that can limit where they can be used or make some areas more competitive than others. One part of the LIHTC program is typically paired with low-cost bonds issued by the State to further reduce debt costs.

### Context:

Several of the Oregon case studies included LIHTC funding: Iris Place in the Santa Clara Neighborhood in Eugene (9 percent); Sunshine Gardens in Roseburg (4 percent); Lincoln City Workforce Housing (4 percent); Trillium House in Chelsea Gardens in Warrenton (\$1.1M).

The Washington State Legislature required Sound Transit to develop a revolving loan fund (RLF) to support its Equitable Transit Oriented Development Plan. Sound Transit set aside \$20 million (\$4 million annually over five years) with the interest payments from loan recipients to help replenish the funds. The RLF is being used to fund affordable housing near transit stations by offering loans at below-market interest rates.

### Level of Complexity: ●●●○○

Tax credit financing is complex, competitive, and time consuming.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel

## Financial Incentives Tools

### Responsible Parties:

Local Agency

### Description:

SDCs are typically charged on a per-unit basis to new construction and used to pay for infrastructure upgrades that increase system capacity. They can add meaningful costs to development, thereby reducing feasibility. Jurisdictions can adopt exemptions that apply to income-restricted affordable housing units to reduce the costs of building affordable housing and/or incentivize mixed-use development. In addition, jurisdictions can review Transportation SDC rates and methodologies to ensure that rates account for transit impacts on vehicle usage, potentially offering lower rates for development in transit-served areas.

### Context:

Eugene, Oregon, acquired the site for Iris Place through its Land Acquisition for Affordable Housing program. The City awarded the developer housing development funds and \$234,000 in SDC exemptions and is providing a 20-year property tax exemption.

Bend, Oregon, is contributing local funding and incentives to support the affordable housing in the UGB expansion pilot project, including SDC waivers.

Roseburg, Oregon, has a SDC buydown program available to multifamily development in the Diamond Lake URA, allowing developers to offset up to \$5,000 per unit. The URA defers the SDC payments and pays them at a later date with tax increment financing. The developer of Sunshine Gardens, however, pursued another option.

### Level of Complexity: ●●●○○

Requires foregoing important revenue sources.

### Additional Information:

Potential Champions: Developers

Suggested Land Use Context: Applicable in most land use contexts

Suggested Scale of Use: Applicable at all scales



## Financial Incentives Tools

### Responsible Parties:

Local Agency

### Description:

Local jurisdictions can use flexible local funding sources or new, dedicated local funding sources such as a Construction Excise Tax, to directly invest in a specific affordable housing projects, using grants or low-cost loans as gap funding to improve development feasibility. Another option is to use local funds to contribute to other programs that are successfully operating, such as non-profit land trusts, or to pay for other strategies, such as infrastructure investments, or make up from lost revenue from other sources (e.g., SDC exemptions). An affordable housing Construction Excise Tax is a state-authorized, locally-adopted fee imposed on new development (assessed as a percent of permit value) that generates funding for local affordable housing programs and incentives.

### Context:

A variety of places in Oregon have implemented a Construction Excise Tax for affordable housing, including the City of Bend, which uses the funding to directly support affordable housing projects.

### Level of Complexity: ●●●●○

There is always substantial competition for flexible local funds, and Construction Excise Taxes increase the cost of development, which can make them politically challenging to implement.

### Additional Information:

Potential Champions: Transit Providers, Developers, and Community-based Organizations

Suggested Land Use Context: Applicable in most land use contexts; easier to administer and greater revenue potential in larger communities

Suggested Scale of Use: Citywide

## Financial Incentives Tools

### Responsible Parties:

State or Local Agency

### Description:

Development is often subject to exactions that require infrastructure improvements, such as sidewalks, bus stops, water/sewer/stormwater upgrades, crosswalks, intersection improvements, or other infrastructure needs. These added costs can make development less likely to move forward. If the local jurisdiction can find other funding sources to pay for needed improvements or prioritize City-led infrastructure projects in transit-served areas planned for future housing development, this can remove barriers to development. One option may be to use mechanisms such as Local Improvement Districts and Reimbursement Districts to help spread costs of improvements that benefit a particular area across multiple benefiting property owners, reducing the burden on a single developer. State and federal revolving loan funds may provide another option to pay for needed infrastructure.

### Context:

Lincoln City, Oregon, used land acquisition to advance a workforce housing project on a key site. However, infrastructure challenges along US-101 have delayed construction as additional funding is sought. This case highlights the importance of understanding a site's infrastructure needs and working with different private and public sector partners to fund these deficiencies.

### Level of Complexity: ●●●●○

Requires coordination of capital improvement plans with land use and housing planning, and availability of sufficient other funding to pay for infrastructure upgrades.

### Additional Information:

Potential Champions: Developers

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel or sub-area

## Financial Incentives Tools

### Responsible Parties:

State and Local Agencies, Community-based Organization

### Description:

Regulated affordable housing properties have income or rent restrictions that expire after a period of time, thereby putting affordability at risk. Preservation efforts focus on acquiring regulated properties that are about to expire (and sometimes rehabilitating and recapitalizing them) to preserve the affordable housing stock.

### Context:

U.S. Housing and Urban Development Report\* presents the following strategies to support established neighborhoods:

1. Identify existing affordable housing resources and neighborhoods with strong existing connections; and
2. Connect the city's economic development strategy with its transportation planning approach.

Additionally, California recommends incentivizing landlords to keep existing units affordable after initial covenants have expired through increasing contract terms and reducing the administrative burden to provide additional funds to help defray the costs of housing for low income tenants.

### Level of Complexity: ●●●●○

May be challenging to create; need to identify funding.

\*Center for Transit-Oriented Development 2014 Creating Connected Communities: A Guidebook for Improving Transportation Connections for Low- and Moderate-Income Households in Small and Mid-Sized Cities (p. 100). U.S. Department of Housing & Urban Development.

### Additional Information:

Potential Champions: Local Agency

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Parcel

## Financial Incentives Tools

### Responsible Parties:

Local Agency

### Description:

Urban renewal areas (URA) direct revenues from growth in property values to specific public investments through tax increment financing. This can be used to support transit-oriented development by creating an urban environment that is conducive to transit-oriented development (e.g., creating amenities that make a transit-served area more desirable to live in) and/or through direct financial support for projects that offer a public benefit (e.g., mixed-income or affordable housing).

### Context:

Roseburg, Oregon, adopted the Diamond Lake Urban Renewal Plan in 2018. The URA has been successful in attracting multifamily development. Sunshine Gardens is the third project to begin construction and a fourth was recently approved.

Salem, Oregon, has used targeted URAs to create development incentives. The current URAs were established over the years, reaching back as early as the 1970s, with the latest addition in 2020. The City has had success with targeted one-property URAs, and the Salem Housing Authority has played a more proactive role in recent years.

Dallas, Texas, and Dallas County set up four transit-oriented development Tax Increment Financing (TIF) districts. Combined, these districts cover 1,641.6 acres, surround eight stations, and are budgeted to produce more than \$21 million for affordable housing. These TIFs proved to be useful tools for capturing and re-using the increased property values associated within investments in the districts to support constructing affordable housing units.

### Level of Complexity: ●●●●○

Establishing a URA can be challenging; requires foregoing tax revenue

### Additional Information:

Potential Champions: Transit Providers, Developers, and Community-based Organizations

Suggested Land Use Context: Urban or Suburban

Suggested Scale of Use: Parcel or sub-area

## Partnerships and Engagement Tools



To learn more, click a tool located on the left side of this page.



To select a different category, click one of the four categories above.

Click 🏠 to go to the first page.

Click ⓘ to go to the information page.



## Partnerships and Engagement Tools

### Responsible Parties:

Local Agency and Transit Providers

### Description:

Due to potential impacts on neighborhoods, different communities, businesses, and others, meet with and develop coalitions prior to starting premium transit projects to make sure voices are heard, goals are established, and expectations are maintained and any land use action, such as land banking, occurs well in advance.

### Context:

The grassroots organizing done by 'Stops for Us' shows what happens when transit agencies do not form coalitions before starting major projects. The stations for the proposed Green Line were planned along University Avenue approximately every 0.5 mile apart. This spacing, however, led to gaps in areas where the largest populations of low-income people and People of Color lived. As a result, a wide coalition of organizations rallied together to get stations added to a proposed light rail transit corridor to serve distinct, historic communities of color.

### Level of Complexity: ●●○○○

Requires commitment to engagement.

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales

## Partnerships and Engagement Tools

**Responsible Parties:**

Local Agency and Transit Providers

**Description:**

Engagement is an ongoing process and involves all users of the transit system, stakeholders, and transit operators. Transit providers interact with riders daily and have the greatest opportunity to provide first hand knowledge of what riders are experiencing.

**Context:**

Part of the success of the Palm Beach County, Florida, (PalmTran) route redesign was meeting regularly with bus operators. Operators are on the front line and can explain the challenges riders face when using the system.

**Level of Complexity:** ●●○○○

Requires commitment to engagement.

**Additional Information:**

Potential Champions: Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales

## Partnerships and Engagement Tools

### Responsible Parties:

Local Agency and Transit Providers

### Description:

Meet periodically with housing authorities, community-based organizations, and other agencies who interact on a regular basis with social equity communities--youth or older adult; disabled; low-income; or Black, Indigenous, and People of Color communities--so they can be involved in the planning process and are able to market the service to their clients.

### Context:

When undertaking transit planning activities such as route redesigns or developing long-range transportation plans, the Florida Department of Transportation Affordable Housing and Transit Primer Final Report recommends including housing authorities on project steering committees.

### Level of Complexity: ● ● ○ ○ ○

Requires commitment to coordination and follow through.

### Additional Information:

Potential Champions: Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales



## Partnerships and Engagement Tools

### Responsible Parties:

Local Agency and Transit Providers

### Description:

Early in the planning of a transit project, work with community-based organizations to identify the stakeholders who would be impacted by the project to ensure they have a voice. Determine the level of engagement the project will undertake--inform, consult, involve, collaborate, and empower\*--and develop a communication or outreach plan accordingly. Strive towards collaboration and evaluate the demographics of those involved.

### Context:

The Purple Line Corridor Coalition (PLCC), formed in 2013, is a multi-sector collaborative of community organizations, state and local governments, nonprofits, philanthropies, and businesses established to support inclusive development along the Purple Line Corridor. The PLCC's Steering Committee includes representatives from both counties (elected officials and planning agencies); key philanthropic supporters; leading advocacy organizations and service providers for area small businesses and residents; and the University of Maryland's National Center for Smart Growth (NCSG), which provides research, grant-writing, and administrative support to the organization. The PLCC shows how having the right stakeholders at the table early and consistently is crucial to making sure the community's voice is heard when it really matters.

### Level of Complexity: ●●○○○

Requires upfront investigation and initial outreach.

\*Jaroszynski, M., Brown, J., and Bhattacharya, T. 2017. "An examination of the relationship between urban decentralisation and transit decentralisation in a small-sized US metropolitan area." *Urban Studies*, 54(6), 1500–1518. <https://doi.org/10.1177/0042098015626687>

### Additional Information:

Potential Champions: Developers and Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales

## Partnerships and Engagement Tools

### Responsible Parties:

Local Agency and Transit Providers

### Description:

Continually engage the public and key stakeholders through periodic customer satisfaction surveys, on-board surveys, stakeholder interviews, focus groups, online engagement, committee involvement, and/or meetings in targeted communities or attendance at targeted events. Increase outreach when implementing new projects. Report to stakeholders how their input made a difference and how the project is being responsive to their needs.

### Context:

In developing their route redesign, StarMetro relied on population and employment densities to design the new routes and create a system that prioritized the commute trip first. However, an academic analysis\* of the new system showed it was not adequately serving non-commute trips, leading to increased dissatisfaction. Conducting more surveys and focus group meetings with key constituents during the system design phase would have shown the importance of the non-work trip, potentially leading to a better outcome.

### Level of Complexity: ●●○○○

Requires commitment to engagement.

\*Jaroszynski, M., Brown, J., and Bhattacharya, T. 2017. "An examination of the relationship between urban decentralisation and transit decentralisation in a small-sized US metropolitan

### Additional Information:

Potential Champions: Community-based Organizations

Suggested Land Use Context: Applicable in all land use contexts

Suggested Scale of Use: Applicable at all scales

# Resources



The Transit and Housing Study website provides additional project information, including downloadable versions of all study products. Click this icon to explore the project website.

See the Oregon and Outside Oregon Case Studies on the project website for more information about the examples mentioned in the toolkit:

- [Oregon Transit and Housing Study - Memorandum 7: Oregon Case Studies](#)
- [Oregon Transit and Housing Study - Memorandum 8: Non-Oregon Case Studies](#)

These three pages contain collections of resources that can inform Transit and Housing efforts:

- [Transportation and Growth Management Program Publications](#)
- [ODOT's Public Transportation Division Resource Center Webpage](#)
- [ODOT's Planning and Technical Guidance Webpage](#)

The [Oregon Public Transportation Plan](#) contains statewide policy support for efforts to link public transit with housing and land use more broadly. Volume 2 of the OPTP contains additional research that can help, such as the last white paper: “Land Use and Transportation Coordination.”