

Equitable Development Scorecard - DRAFT

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When to Use the Equity Scorecard

This scorecard was originally created by Twin Cities, MN community leaders to ensure that the principles and practices of equitable development, environmental justice, and affordability are applied in all communities as they plan for economic development and wealth creation that benefits everyone.

The scorecard was adapted for local use in the Omaha-Council Bluffs metropolitan region by the Heartland 2050 Equity & Engagement Committee and a number of community members and subject matter experts. Find out more about the committee at www.heartland2050.org/equity-engagement/

This process should help you decide if a project or initiative meets your community's standards for equity.

Community members such as Urban neighborhoods, Suburban communities, Rural communities, and Cultural groups could use this Scorecard when:

- Community visioning/ planning with a focus on equity (e.g. small area plan, development plan, or master plan)
- Scoring a proposed development project
- Scoring a development project currently in progress
- Making policy change recommendations

Governments and Planners could use this scorecard when:

- Planning with a focus on equity
- Scoring a proposed development project
- Scoring a development project currently in progress
- Engaging residents, businesses and developers in measurable economic growth
- Evaluating the impacts of policy on the needs of the community
- Making policy change recommendations

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Principles of Equitable Development Overview

Public subsidies provided to developers and corporations should result in concrete and measurable community benefits for local residents as defined by their community.

- **Equitable Community Engagement** practices involve the local community members most affected in the development project (especially low-wealth people, people of color, neighborhood groups, community organizations, people living with disabilities, and new immigrants).
- **Equitable Transportation** practices integrate transit into walkable, livable, and affordable land use practices to enhance healthy living within low-income communities and communities of color.
- **Equitable Housing** practices give families of all income levels access to housing that costs no more than 30% of their household income.
- **Equitable Land Use** practices require that the overall vision, plan, and implementation includes local communities' assets, aspirations, potential, and preferences. They aim to keep current residents in the area and develop projects that promote people's health, well-being, and prosperity.
- **Equitable Economic Development** practices require evidence that policies and programs work to prioritize community based financial intelligence, sustainable wealth creation, and high quality job opportunities that prevent unwanted displacement of residents and small businesses from low-income communities and communities of color.

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Using the Scorecard

1. Fill out the Project Overview sheet.
2. Customize each Equitable Development Principle's scoring criteria according to your community's priorities. Not all criteria may apply to your community or project. You should tailor this Scorecard to be relevant to your specific purpose(s) and area.
3. Use the "Helpful Materials" section to clear up any questions of content or definition.
4. Hold conversations with your group around each criterion, and give each one a score.
5. Add up all of the scores below for the Final Score (see Scoring section), and you have completed the Scorecard!

Scoring

1. Write the score from each section below, along with the maximum possible score for the section. (*Points Earned/Max Possible*)

___/___ Equitable Community Engagement Score

___/___ Equitable Land Use Score

___/___ Equitable Economic Development Score

___/___ Equitable Housing Score

___/___ Equitable Transportation Score

2. Add up all of the above scores to get a Total.

___/___ Total (Points Earned/Max Possible)

3. Turn the Total into a Final Score.
 - a. Divide the total Points Earned by the Max Possible
 - b. Write the Final Score here: _____/100

4. Copy the Final Score into the "score" box on the Project Overview sheet.



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Project Overview Sheet

Project Name: _____

Score Received: _____

Person or group scoring the project: _____

Location of Project: _____

Is the project part of a bigger land use plan? Yes/No

If yes, what plan? _____

Public Investments being used for the project:

- Public Subsidy: Funding amount and source _____
- Tax abatement: Funding amount and source _____
- Tax Increment Financing (TIF): Funding amount and source _____
- Public land sale and amount _____
- Zoning changes/variances _____
- Infrastructure improvements (sewer/water, street, sidewalk, etc.) _____

Developer: _____

Developer Contact Info: _____

Public Agency: _____

Public Agency Contact Info: _____

Other Stakeholders: _____

Description of the Project:

Community Profile (please provide basic demographic info here or attach or link to a document):

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Equitable Community Engagement Practices

Equitable Community Engagement practices require evidence that local community members most affected, especially low-wealth people, people of color, neighborhood groups, community organizations, people living with disabilities, and new immigrants are involved in the development project.

Fill out the criteria below. Feel free to take notes in the empty space and add, change, or cross out criteria that do not apply to your community or project.

____/____ **Add up scores below for Equitable Community Engagement Practices Score**

| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Project was initiated by the community or is based on needs determined from recent planning efforts. | | 5 | |
| Project requires community engagement to establish priorities and criteria for land use and economic development to guide future development and growth. | | 5 | |
| Community Engagement engages local community members from the beginning of the planning process, before projects are submitted to government agencies for approval. | | 5 | |
| Stakeholders and community members have authority in the decision-making process for projects with substantial community impact (beyond single-family home building or rehab). | | 5 | |
| The plan and project are guided by the community's goals, priorities, and criteria for growth and reinvestment. | | 5 | |
| Significant changes to the scope of the plan and/or project trigger additional community engagement. | | 5 | |
| A plan has been created to engage the community throughout the project lifespan (through construction and/or opening, for example) to inform on project status, timeline, etc. | | 5 | |

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| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Members of non-dominant cultural communities were consulted as individuals and/or partnering institutions, and the outreach plan gathers feedback from people of all cultures, ages and religions. | | 5 | |
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Equitable Housing Practices

Equitable Housing practices require evidence that families at all income levels have access to housing that costs no more than 30% of the household income.

“Families who pay more than 30 percent of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation, and medical care. An estimated 12 million renter and homeowner households now pay more than 50 percent of their annual incomes for housing. A family with one full-time worker earning the minimum wage cannot afford the local fair market rent for a two-bedroom apartment anywhere in the United States.” (HUD, 2015)

Fill out the criteria below. Feel free to take notes in the empty space and add, change, or cross out criteria that do not apply to your community or project.

____ / ____ **Add up scores below for Equitable Housing Practices Score**

| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Housing projects include units that are long-term or permanently affordable for extremely-low (30% AMI), very-low (50% AMI), low (60% AMI), and/or moderate (80-120% AMI) income families. (AMI=Area Median Income) | | 5 | |
| All new or substantially-renovated housing is free from environmental hazards and is built with energy efficiency measures to reduce utility bills for the residents. | | 5 | |
| Affordable housing is located near or with access to amenities (health and social services, transportation, education, and quality job opportunities) that promote walkability, livability, and community. | | 5 | |
| Project is designed so that residents of all incomes pay less than 50% of household income for combined housing and transportation costs. | | 5 | |
| Project provides housing options to create or supplement mixed income neighborhoods. | | 5 | |
| Project includes displacement prevention strategies and policies to ensure that increased property values benefit current residents. | | 5 | |

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Equitable Transportation Practices

Equitable Transportation practices require evidence that transit is integrated into walkable, livable, and affordable land use practices to enhance healthy living within low-income communities and communities of color.

Fill out the criteria below. Feel free to take notes in the empty space and add, change, or cross out criteria that do not apply to your community or project.

____/____ **Add up scores below for Equitable Transportation Practices Score**

| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Development infrastructure provides or increases safe, attractive, and convenient access to pedestrian, bicycle, and transit systems. | | 5 | |
| Pedestrian, bicycle and transit trip times are comparable to vehicle trip times. | | 5 | |
| Parking facilities accommodate bicycle daily use and storage and do not limit access of pedestrians. | | 5 | |
| Attractive, comfortable, accessible transit facilities with adequate seating and protection from weather are available or provided. | | 5 | |
| Wayfinding and systems information for pedestrians, bicyclists, and transit users is provided. | | 5 | |
| Development promotes transit user, bicyclist and pedestrian safety. | | 5 | |
| Project utilizes Universal Design principles to ensure accessibility by people of all abilities. | | 5 | |
| Transit provider(s) are contacted early in the development process to coordinate with the project team and evaluate the need for enhanced or added services. | | 5 | |

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| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Community engagement plan includes multi-modal users and related community organizations and networks. | | 5 | |
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Equitable Economic Development Practices

Equitable Economic Development practices require evidence that policies and programs prioritize community based financial intelligence, sustainable wealth creation, and high quality job opportunities that prevent unwanted displacement of residents and small businesses from low-income communities and communities of color.

Fill out the criteria below. Feel free to take notes in the empty space and add, change, or cross out criteria that do not apply to your community or project.

____ / ____ **Add up scores below for Equitable Economic Development Practices Score**

| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|--------------------|-------------------------------|--|
| New capital and investment opportunities prioritizes nonprofits, arts/cultural institutions and entrepreneurial opportunities as well as local, small, and/or minority-owned businesses. | | 5 | |
| Project investments support a variety of employment opportunities across a range of skill sets. | | 5 | |
| Policies are in place to limit displacement of existing businesses and residents, and project land use decisions prioritize the retention and expansion of local businesses. | | 5 | |
| Project uses local workforce, economic development and/or education programs to connect residents and businesses to temporary and long-term employment opportunities related to the project. | | 5 | |
| Local community is given preference when hiring consultants, contractors, and developers for the project. | | 5 | |
| Project prioritizes partners who ensure that their workers have living wage jobs with benefits and the right to organize for labor agreements without fear of retaliation. | | 5 | |

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| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Project elements and design reflects distinct identities of local cultural heritage through the presence, preservation, or addition of architectural assets within a Universal Design. | | 5 | |
| Project includes environmentally responsible, healthy and resource efficient materials and processes throughout the project's life cycle. | | 5 | |
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Equitable Land Use Practices

Equitable Land Use practices require evidence that the overall vision, plan, and implementation includes local community's assets, aspirations, potential, and preferences with the intention of retaining current residents and developing projects that promote people's health, well-being and prosperity.

Fill out the criteria below. Feel free to take notes in the empty space and add, change, or cross out criteria that do not apply to your community or project.

____/____ **Add up scores below for Equitable Land Use Practices Score**

| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|---|-------------|------------------------|---|
| Impacts on environmental health, economic prosperity, and social vitality are assessed, and the project is updated to mitigate harmful impacts. | | 5 | |
| The project meets environmental standards on clean air, water and soil without increasing soil toxicity, air or water pollution. | | 5 | |
| Long-term site plans that align with a community-driven vision for development are created for areas undergoing environmental pollution cleanup or demolition. | | 5 | |
| Project land use and design is people-focused and accommodates multiple modes of transportation. | | 5 | |
| Project maintains or increases density in line with community needs to promote access to and an increase in amenities (such as housing, jobs, transportation options, healthcare, education, recreation, cultural institutions, healthy foods and green space). | | 5 | |
| Project supports economic opportunity which can include long-term or permanent affordable housing, small or local businesses, a variety of transportation options and access to amenities. | | 5 | |
| Project improves the livability of the local neighborhoods through site design, public infrastructure improvements, access to amenities, and transportation options and connections. | | 5 | |

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| Criteria | Score Given | Total Points Available | Responsible Sector (Developer/Community/Gov't) |
|--|-------------|------------------------|---|
| Protects, improves or adds routes for safe transportation to/from high traffic areas (schools, shopping centers, etc.). | | 5 | |
| Project supports or increases neighborhood diversity by mitigating displacement of existing residents, increasing opportunities for celebrating cultures and reducing cultural tensions. | | 5 | |
| Project is designed to promote positive interactions between residents (by providing community space, celebrating cultures and reducing cultural tensions, for example). | | 5 | |
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Glossary of Development Terms

- **Affordable Housing:** In general, housing for which the occupant(s) is/are paying no more than 30 percent of his or her income for gross housing costs, including utilities. (U. S. Dept. of Housing and Urban Development, 2015)
- **AMI – Area Median Income:** The amount that divides the area’s income distribution into two equal groups, half having income above that amount, and half having income below that amount. Income categories include: Extremely-low income = 30% area median income; Very-low income = 50% area median income; Low income = 60% area median income; and Moderate income = 80% area median-income.
- **Complete Streets:** Transportation policy and design approach that requires streets to be planned, designed, operated, and maintained to enable safe, convenient, and comfortable travel and access for users of all ages and abilities regardless of their mode of transportation. (CONNECT, 2015)
- **Community:** When federal, state or county governments use the word community they are most often referring to cities and municipalities. In this document when we use the term community we are referring to a group of families and individuals who are in relationship to each other either by culture or geography.
- **Community Benefits Agreement:** Contract signed by community groups, government and developer that requires the developer to provide specific amenities and/or mitigations to the local community or neighborhood. (Wikipedia, 2015)
- **Community Land Trust:** Nonprofit corporations that develop and steward affordable housing, community gardens, civic buildings, commercial spaces, and other community assets on behalf of a community. (Wikipedia, 2015)
- **Comprehensive Plan:** A geographic specific plan that includes all aspects necessary to guide future growth such as: land use, transportation, natural resources, parks and green space, housing, and economic development. Comprehensive plans are created for metropolitan regions, counties, and cities. A comprehensive plan may also include smaller neighborhood and site specific plans such as: small area plan, master plan, and development plan.
- **Environmental Justice:** The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. (Environmental Protection Agency, 2015)
- **Environmental standard:** State and federal laws that regulate pollution. See EPA <http://www2.epa.gov/lawsregulations> For Minnesota see <http://www.pca.state.mn.us/>
- **Equity:** Just and fair inclusion where all can participate and prosper. (PolicyLink, 2015)

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- **Equitable development:** A process for creating healthy, vibrant communities of opportunity. Equitable outcomes result when strategies are put in place to ensure that low-income communities and communities of color participate in and benefit from investments that shape their neighborhoods and regions. (PolicyLink, 2015)
- **Livability** is the sum of the factors that add up to a community's quality of life—including the built and natural environments; economic prosperity; social stability, equity, and capital; educational opportunity; and cultural, entertainment and recreation possibilities. (Partners for Livable Communities, 2015)
- **Living wage** affords the earner and her or his family the most basic costs of living without need for government support or poverty programs. A living wage is a complete consideration of the cost of living. Wages vary according to location, as costs of living vary. (Living Wage Action Coalition, 2015)
- **Mixed use development** is a development that combines two or more different types of land uses, such as residential, commercial, employment, and entertainment uses, in close proximity. In some communities, mixed use may be defined as different uses contained within the same physical structure. (San Joaquin Valley Councils of Government, 2015)
- **Placemaking** is a multi-faceted approach to the planning, design and management of public spaces. Placemaking builds on a local community's assets, inspiration, and potential, with the intention of creating public spaces that promote people's health, happiness, and well-being. (Project for Public Spaces, 2015)
- **Section 3:** Housing and Urban Development requires that recipients of certain HUD financial assistance, to the greatest extent possible, provide job training, employment, and contract opportunities for low- or very-low income residents in connection with projects and activities in their neighborhoods. (U. S. Department of Housing and Urban Development, 2015)
- **Social impact assessment** is a process of evaluating the likely impacts and the consequences (beneficial and adverse) to human populations of any public or private actions that alter the ways in which people live, work, play, relate to one another, organize to meet their needs and generally cope as members of society. The term also includes cultural impacts involving changes to the norms, values, and beliefs that guide and rationalize their understanding of themselves and their society. (Interorganizational Committee on Principles and Guidelines for Social Impact Assessment, 2003)
- **Smart growth** helps communities grow in ways that expand economic opportunity while protecting human health and the environment. (Environmental Protection Agency, 2015)
- **Streetscaping:** Public works programs to improve streetscape conditions that can include changes to the road cross section, traffic management, pedestrian conditions, landscaping, street furniture (utility poles, benches, garbage cans, etc.), building fronts, and materials specifications. (North Central Texas Council of Governments, 2015)

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- **Sustainable Communities:** Urban, suburban, and rural places that successfully integrate housing, land use, economic and workforce development, transportation, and infrastructure investments in a manner that empowers jurisdictions to consider the interdependent challenges of: 1) economic competitiveness and revitalization; 2) social equity, inclusion, and access to opportunity; 3) energy use and climate change; and 4) public health and environmental impact. (U. S. Dept. of Housing and Urban Development, 2015)
- **Tax abatement:** Reduction of, or exemption from taxes granted by a government for a specified period, usually to encourage certain activities such as investment in capital improvements and development projects. A tax incentive is a form of tax abatement. (City of Cocoa, Florida, 2015)
- **Tax Increment Financing (TIF):** Tax increment financing is a method of financing the public costs associated with a private development project. Essentially, the property tax increases resulting from development are targeted to repay the public infrastructure investment required by a project. (State of Nebraska, 2015). TIF funds can be dedicated for the development of affordable housing.
- **Transit Oriented Development (TOD):** Development of commercial space, housing, and job opportunities close to public transportation, thereby reducing dependence on automobiles. TODs are typically designed to include a mix of land uses within a quarter-mile walking distance of transit stops or core commercial areas. (U. S. Dept. of Housing and Urban Development, 2015)
- **Transit:** Public transportation in the form of buses, bus rapid transit, streetcars, light rail trains, and commuter rail.
- **Universal Design** is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. (Mace, 2015)
- **Walkability:** A walkable community is one where it is easy and safe to walk to goods and services (i.e., grocery stores, post offices, health clinics, etc.). Walkable communities encourage pedestrian activity, expand transportation options, and have safe and inviting streets that serve people with different ranges of mobility. (Laura Sandt, 2015)
- **Zoning:** The classification of land by types of uses permitted and prohibited in a given district, and by densities and intensities permitted and prohibited, including regulations regarding building location on lots. (Partnership for Working Families, 2015)