

Oakland Renaissance Incentive District:

Proposed Planning, Roll-out and Implementation Process

Step 1: Planning: Financial Modeling, Preliminary Plan, Timelines

- a) **Confirm DRD, NR, Local HD Boundaries**, 3 Meetings – **Deliverable:** Map for Zoning Dept Recording, Uploadable Xcell Parcels List

- b) **Existing Conditions of Oakland Properties Ranked-Targeted** (ID Targets for Rehab-Removal-Infill Lots) – Site Surveys, Photos, description. *We prioritize / rank them, in terms of recommendations which homes / vacant land are prioritized for immediate Land Bank acquisition, rehab-marketing., and also for Housing Code Issue use by City.* **Deliverable:** Map for EconDev Recording, Excell doc with conditions and Parcels List by classification

- c) **Financial Incentive Scenarios:** Identify financial incentives, 5 meetings with Staff. Determine applicant eligibility, determine activities allowed, requirements, terms, limits.- **Deliverable:** Report and Policy document for City Commission Review with Middletown Staff, (Optional Ordinance Draft)

- d) **DRD Financial Modeling-Scenarios-20 Years: 4 Options**
 - *Slow uptake, w/o Vail-With Carnegie-With New Condo and Rental Infill (Preliminary overview example)
 - *Moderate uptake, w/o Vail-With Carnegie-With New Condo and Rental Infill
 - *High uptake, w/o Vail-With Carnegie-With New Condo and Rental Infill
 - *With Vail-With Carnegie-With New Condo and Rental Infill (Version 3 from January 2018)**Deliverable:** 3 meetings, Xcell spreadsheets with assumption on DRD income, Incentive expenditures, budget allocations narrative and documentation on assumption sources. 3 Hard Copy binders, 5 CDs, email PDFs

- e) **Local Historic District-“HD-2” Ordinance:** Less restrictive HD ordinance, based on existing Dayton Ordinance, 3 meetings, **Deliverable:** Report and Policy document for City Commission Review with Middletown Staff, Ordinance Draft

- f) **Neighborhood Outreach Initiative:** Plan the development and roll-out of a neighborhood initiative group. Based on Dayton Priority Board System. **Deliverable:** Implementation plan and draft communication materials.

- g) **Infill Concept Design Framework:** Floorplan concept, Simple 2D elevation sketch, scope of amenities, specifications etc etc, (Simms Models) We create 4-8 design housing model floor plans and exterior elevations and a design criteria that the home builders work with for the infill units - **Deliverable:** We create concept housing model floor plans, 3-front facade exterior elevations and a design criteria/specification that the home builders work with on infill
- h) **Renovation/Rehabilitation Concept Design Framework:** Floorplan concept, Simple 2D elevation sketch, scope of amenities, specifications etc etc, (Simms Models) We create 3-4 design housing model floor plans and exterior elevations and a design criteria that the home builders work with for the infill units - **Deliverable:** We create concept housing model floor plans, 3-4 front facade exterior elevations and a design criteria/specification that the home builders work with on rehabilitation

Step 2.Groundwork: Initial HD Survey and Program Groundwork, Infill and Streetscape Design Elements

- a) **Neighborhood Outreach-Oakland Neighborhood Improvement Association Set-up:** Launch the development and start of a neighborhood initiative group. Based on Dayton Priority Board System. 10 meetings, 3 focus group sessions and final report. **Deliverable:** Oakland priorities report. Recommendations, for plan inclusion priorities. Set-up of Neighborhood council, with officers and meeting schedule. Report and Policy document for City Commission Review with Middletown Staff. Communication materials.
- b) **Rehabbers/1st Time Homebuyer Skills Training Support Process:** (engage St Mary Program) 4 meetings, **Deliverable:** Info on (St Mary Program + others),
- c) **NR Nomination Launched:** Begin survey, photo documentation, historical research and narrative for the Oakland National Register Historic District. **Deliverable:** Nomination documents, SHPO coordination, Updates to City.
- d) **Local "HD-2" Oakland Campaign-** Campaign plan coordinating with Oakland Neighborhood Improvement Association, decision support materials, 15-20 meetings -Process standard for approval TBD. **Deliverable:** Approved "HD-2" designation for Oakland Historic District, neighborhood consensus, Marketing and PR Materials, 3D drawings of streetscapes, building Renderings (Usable for future tasks)
- e) **DRD Set-up:** Coordination with City for draft ordinance for the DRD and Fund set-up. **Deliverable:** Approved DRD Ordinance, fund established with Auditors office, Marcom materials production.

- f) **Bank(s) Buy-down Agreement:** Coordination with Banks, Auditor, City for draft for procedures involving the DRD and Fund set-up and implementation. **Deliverable:** Assistance in establishing the approved DRD Fund, Policy, Ordinance, Implementation Agreement, Marcom materials production
- g) **Secure Vail Site-Clean Transfer:** Transfer of the Vail site from School Board to the City. **Deliverable:** Assistance to the City for clean site buildable standards.
- h) **Plans for Gateways, signage, Streetscape Improvements:** Identify and design elements in the Public right-of-way. Design/build specification and estimates. **Deliverable:** Build-ready plans, specs, to the City for Oakland DRD Improvements.
- i) **QUIET-Land Bank Acquisitions (Initial) Lots-Rehab Targets:** Initiate Land Bank acquisitions of properties in step 1b above. **Deliverable:** Updated target list
- j) **Infill Development Construction Plans:** Detailed Architectural Plans: Further develop infill Plans for Infill Condos. **Deliverable:** Elevations and Floorplans ready for pre-approved by Landmarks Commission.
- k) **Infill Developer Recruitment:** Outreach to builders and publish of an open an RFP? – **Deliverable:** Time allowance for recruiting builders into Oakland, development t of Terms for Land transfer, support, incentives.
- l) **Investor Recruitment:** TBD if plans require, per hour if requested

Step 3. Public Program Launch

- a) **PR Plan-Announcement:** PR Campaign, Infor release – **Deliverable:** Announcements to all Media Outlets
- b) **Gateway Public ROW Construction RFP -** Outreach to builders and publish of an open an RFP? – **Deliverable:** (NGO?) Release and approval of contracts for ROW improvements
- c) **Neighborhood Temporary Signage :** Temporary progress or availability signage indicating Oakland Renaissance Incentive District progress and site of opportunity, **Deliverable:** Signage
- d) **Neighborhood Association Launch:** -Oakland Neighborhood Improvement Association Events – **Deliverable:** Tours, Holiday events, Open Houses, Rehab Demonstrations, Ohio History Connection Event

4. Infill Development, Incremental Rehab, NTC Elements

- a) **Construct ROW Gateways** : Contracted ROW improvements Construction, **Deliverable:** Physical Improvements, project oversight
- b) **Construction of Initial Infill Housing-(Private Market Rate):** Contracted ROW improvements Construction, **Deliverable:** , Permit ready Architectural plans (12-borne by builder costs-or-by City) , Physical Improvements
- c) **Rehabilitation of Land Bank Sites** Contracted improvements Construction, **Deliverable:** Permit ready Architectural plans (12-borne by builder costs-or-by City) , Physical Improvements
- d) **Sales of Units:-** Contracted Realtor, **Deliverable:** Sales

5. Ongoing Evaluation-Adjustments

- a) **Program Incentive participation rates evaluation:** 6 months, 12 month, Annually: Review and update planning documents and revisit participation assumptions. **Deliverable:** Narrative document with xcell report back-up. Time and Materials
- b) **Yearly review of DRD Fund Baseline/Increment production:** Review and update planning documents and revisit cash flow assumptions. **Deliverable:** Narrative document with xcell report back-up. Time and Materials
- c) **Program Adjustments:** Planning for adjustments in policy, plans, and incentive programs. Revise to meet current objectives and goals. **Deliverable:** Narrative document with xcell report back-up. Time and Materials