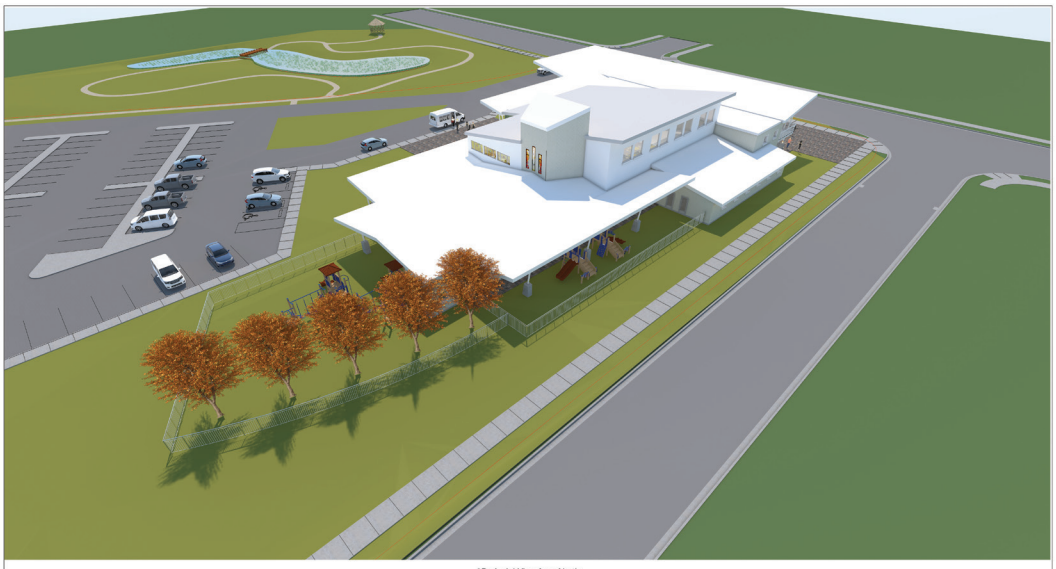
Woodburn Opportunity Center Feasibility Report

Immanuel Lutheran Church

July 2020



Casa of Oregon

dmta
Dennis Mitchel Thompson
ARCHITECTURE
AIA, NCARB
LEED AP, BD+C
3 Monroe Parkway, # P-303 Lake Oswego, OR, 97035
p: 503.515.1295 www.dmta.com

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Section 1: Introduction

Immanuel Lutheran Church (ILC), founded in 1910, was organized by Scandinavian immigrants moving to Woodburn from the Midwest. Its mission is: Loving God by accepting others, sharing God's grace and growing in Christ.

In 2004 a growing ILC Congregation determined the need for a new home beyond its present location at 1036 E. Lincoln St., so a 5 year Capital Campaign was established to acquire 8.2 acres of farmland in west Woodburn (Evergreen Road and Linfield Avenue), in the middle of open fields that would soon be developed into a residential neighborhood of subdivisions and apartment complexes. Property plans included a new Church Building along with parking facilities and outdoor park amenities. The 2008 Great Recession created a chilling effect on the capital campaign, putting the project on hold.

In 2015 ILC leaders determined that their faith called them to hear diverse voices beyond the ILC membership so a new, broader vision could be considered. It was recognized that the ILC congregation was shrinking (impacted by an aging membership, a series of interim pastors and member departures due to the 2009 ELCA vote to be inclusive of gay and lesbian clergy) and that perhaps God had greater plans for the 8 acres. What if ILC could seek potential partnerships that would both provide for a new spiritual home and meet compelling needs of the broader Woodburn community?

With a 2016 Ford Family Foundation grant, there was outreach to hear the voices of a diverse group of community and spiritual stakeholders. Two Opportunity Forums were attended by ILC and spiritual leaders, social service and Latinx group representatives, public agencies and other community members. A range of ideas resulted in three priority space concepts along with a call for a feasibility study:

1. Spiritual space – for ILC and other faith communities
2. Community Services Space – co-locating a number of social services in a shared space and one-stop model,
3. Community Gathering Space – providing for larger indoor public and private events and an outdoor green space/park.

The need for a formal feasibility study was affirmed and 2018 funding secured from the Meyer Memorial Trust, Oregon Community Foundation, Ford Family Foundation and the Oregon Lutheran Synod. The Feasibility Study from 2018 to 2020 assessed the potential development of a multi-cultural, multi-generational community services and gathering space.

The study elements were:

- Feasibility of the facility concept, including sites visits to local models
- Securing broad community input through outreach meetings and neighborhood survey
- Site renderings produced by an architect
- Identifying requirements for land use, zoning and utilities
- Projecting overall capital cost, funding sources and campaign timeline
- Model for ongoing project management

Funds supported a project coordinator, architect and specific consultants who could implement the proposed facility's feasibility study elements.

On March 8, 2020 the ILC congregation voted overwhelmingly (90%) in favor of a Resolution (Section 15) to proceed with the project outlined in Section 5. A reasonable projected occupancy date for the Woodburn Opportunity Center would be early 2024 if fundraising goals are met.

For the Woodburn Opportunity Center to become reality, a development project of this size and scope must be able to tell a clear, coherent story with solid key elements. These factors form the foundation for the study's findings and outcomes, and create the potential for achieving the study's designs and financial analyses. Funders, public officials, and the broader Woodburn community must understand this story in order to provide their support. For the WOC, we believe some of these elements are in place, while others are a priority to directly address.

Contact:

Terri Berkey Gonzalez, Building Team Chair
Immanuel Lutheran Church
1036 E. Lincoln Street
Woodburn, Oregon 97071
(503) 951-0549

SECTION 2: Executive Summary

For the Woodburn Opportunity Center to become reality, the project must be able to tell a clear, coherent story incorporating elements of the function of the proposed facility as envisioned and the path to achieve that dream. This Feasibility Study has provided or confirmed many of these elements. However, perhaps the most important findings in this report are those elements that are still missing, and must be in place before ILC and its partners can move forward to fundraising.

To aid Immanuel Lutheran and the rest of the project partners in moving forward now, below is a chart with a brief overview of these key elements. For each element we have noted whether or not it is currently in place as of July, 2020, and whether it is crucial for the subsequent fundraising campaign.

Foundation Elements for a Successful Fundraising and Development Campaign			
Project Element	In Place (Y/N)	Description	Needed for Fundraising (Y/N)
Compelling Purpose	Yes	Clear need has been documented and solutions proposed to benefit ILC and wider community.	Yes
Community Input	Yes	ILC has engaged 4 years of listening sessions both internally and externally with the Woodburn community of public officials, faith community, Latinx nonprofit, service clubs and residents of the surrounding neighborhood.	Yes
Clear Goals and Outcomes	Yes	The group of partners prioritized a set of values to guide design and development, devloped a set of users from community input and has concrete goals for what the Facility will deliver to Tenants and the wider community.	Yes
Site Control	Yes	ILC already owns the site and has committed its use to build a facility for spiritual renewal, community resources and community gathering space.	No, but very helpful
Potential Tenants	Yes	The building as designed has four organizations committed to renting dedicated space and a network of other providers in the Resource Center on an irregular basis.	Yes
Facility Operational Plan	Yes	The tenants with dedicated space are committed to helping operate the Resource Center and provide staff time for reception, intake, and coordinating use of common space.	Yes
Feasible Operational Budget	Yes	Research indicates the Facility can deliver below market rate rents to the Nonprofit Tenants while still covering operation expenses, but is unable to support loan payments	Yes
Site and Facility Designs	Yes	The preliminary designs from DMT Architecture provide for the needs of all committed Tenants and deliver the community uses called for from community input	Yes

Estimate of Capital Costs	Yes	The architect produced an initial estimate of cost which was then vetted through the Development consultant's catalogue of recent projects for cost comparison including construction, furnishing, and all "soft" development costs	Yes
Early Funding Commitments	Yes	ILC is willing to make the value of the land available, plus the proceeds of the sale of their current location	Not essential, but very helpful
Expertise w/in Project Team	Yes	ILC has sought out significant outside experience in organizational and strategic planning, community visioning, project coordination, real estate development, and architectural design	Yes
Multicultural Representation Within Partner Group	No	The project has conducted intentional outreach to, and solicited direct input from, Woodburn's minority cultural communities. The project has yet to convene a partner team that will be leading and making decisions for the project that includes representatives of these communities	Yes, given the project's stated goals to serve all of Woodburn
City/County Support	Not related to funding	The City has generally given indications that they may allow annexation or the proposed development. The City has yet to be asked to join a funding application or give financial support	No, but very helpful
Organizational Capacity	No	ILC has been clear that they don't have the experience or staff/volunteer time to lead a development project of this size. Partners have not yet emerged that can help share the full load of this work	Yes
Committed Leaders	No	Champions (Partners and Individuals) are needed that will commit to meeting regularly, advocating publicly, carrying the project forward and coordinating 3rd party expertise – a Leadership Group of some sort	Yes
Clear Funding Path	No	A number of funding options have been presented for which the project would be eligible. They can't all be pursued together and must be prioritized based on partner input and detailed analysis.	Yes
Reasonable Timeline	No	Due to elements missing above, the project timeline will involve significant guesswork	Yes

The Missing Pieces - What ILC Can Do Next:

It is our hope that ILC can use the chart above as guide for finalizing the foundations upon which the project partners can build a successful fundraising campaign, and can use this with funders to prove the project's readiness once all elements are in place. Below are some potential immediate next steps to address these missing elements.

- **Cultural Representation within the Partner Group** – Direct involvement in project leadership team is essential to achieve a multicultural project.
  a. Continue outreach to and conversations with Woodburn's minority communities, particularly Latinx/Spanish speaker and Russian Old Believer communities. This can include:
    i. Culturally specific service providers that intentionally serve those communities
    ii. Community Leaders (formal and informal)
    iii. Community Groups; faith communities, advocacy groups, etc.
  b. Review the outreach and input process conducted so far, identify barriers to the deeper involvement of those groups and communities, and take actions to remove those barriers.

- **City/County Support** – Direct support from the City of Woodburn makes the project's fundraising plan much more viable.
  a. ILC should track the outcomes of the Love INC facility (North Marion Family Resource Center Campus #1) and the City's proposed Community Center (active recreation) project. Both efforts will impact public focus and City time and attention for the WOC.
  b. Advocate, with Love INC, for the concept of two campus service model, building off the City's support of that facility.
  c. Provide City officials (staff and elected) with Feasibility Study presentation and invite formal support.
  d. Explore County support for the NMFRC Campus #2 to ensure full access to social and community services.

- **Organizational Capacity** – While the commitment of one, high capacity organization could fill this need, it is more likely that ILC will find a number of smaller partners willing to share the burden.
  a. Continue conversations with other faith communities, culturally specific organizations, and nonprofit service providers in Woodburn and Marion County. Make clear what the site and facility could offer each group and what is already in place to build upon. Conversations will include committed partners who can rent and oversee the facility.
  b. Dialogue with Feasibility Study funders to identify potential options/organizations/individuals able to develop this capacity.

- **Committed Leadership** –
  a. Champions are most likely to come from partners that are either committed to participating in the facility, or represent those the facility hopes to serve.
  b. Conduct intentional outreach to engage leaders from culturally-specific organizations and communities as part of WOC leadership bodies.
  c. Potential public champions should be identified through existing partner networks and presented with the vision and potential community benefit of the project.

- **Clear Funding Path** –
  a. Largely dependent on what other partners are willing to commit to, and who can give support to the project at the local, regional, and state level.
  b. Develop a comprehensive capital campaign plan, informed by Timeline to Occupancy.
  c. Conduct prospect research (major donors, corporations, institutions) to confirm potential success of a community-based capital campaign

Outcomes of the Feasibility Study

The main outcomes and findings of the Feasibility Study are summarized below pulling the main concepts from the major sections of the report for easy review.

Project Goals and Uses

Values Generated to Guide Design

- Welcoming and Accepting
- Multicultural and Multilingual
- Intergenerational

Proposed Uses for the Site

- Spiritual Space
- Community Services Shared Space
- Community Gathering Space & Café
- Natural area/community park/outdoor recreation

Proposed Potential Use – Latinx Senior Center

Partners

Primary Partners

Spiritual

- Immanuel Lutheran Church
- Pan de Vida
- Little Lambs Preschool

North Marion Family Resource Center - Phase 2

- Mid-Willamette Valley Community Action
- Family Building Blocks
- Love INC

Potential Secondary Partners

- Chemeketa Community College / Dental Hygiene
- Woodburn School District
- Salud Medical Center
- Catholic Community Services

Ownership Preference and Structure – ILC

After deliberation of potential ownership structure options, ILC's Council and Building team selected a preference for maintaining long-term control of the 8 acre parcel, but allowing ownership of all or some portion of the building by other project partners. This removes the full burden of owning and operating a nearly 25,000 square foot commercial office facility and event center from ILC, while giving the church long-term control over the uses of the property.

The feasibility study assumes that the final organizational structure will either include the project partners jointly participating in the ownership of the building, or the creation of a new entity that will own the building and within which the partners have a stake in decision-making.

Facility Architectural Design

The Process

1. Conduct review of prior 2008 ILC space needs
2. Participate in January 2019 site visits to model facilities.
3. Meet with City of Woodburn Planning on zoning and annexation process
4. Gain input from key stakeholders in iterative focus group meetings
5. Develop architectural renderings

The Proposed Design

Spaces/Tenants and Programs	**Area (SF)**
Community Action Agency	3,374
Family Building Blocks	2,151
Immanuel Lutheran Church	2,506
Little Lambs Preschool	2,250
Community Gathering Space (*Event Center and Lobby*)	5,250
Common Use Spaces (*Includes Kitchen and Café*)	8,802 (total)
Total	**24,333**

VIEW FROM LINFIELD AVE.

INSIDE THE COMMUNITY HALL

VIEW OF ENTRY PLAZA

ENTRY FOYER

Operating Budget Estimate

An estimate of operating costs and incomes included analysis of model facilities, quotes from vendors, analysis of current utility pricing, market research into regional commercial rents and event venues, etc.

Our main findings indicate:

1. The facility could be financially sustainable while offering below market rents to the main non-profit tenants of the Resource Center and Immanuel Lutheran and Little Lambs.
2. That in meeting these goals, the project likely cannot support debt and will need to be entirely grant and donor funded.

OPERATING EXPENSE ESTIMATE	**Annual Facility Costs**	***per SF***	**Notes on Proposed Facility Estimates**
Utilities	$53,100	*$2.18*	Power, Gas, Water, Sewer, Garbage Collection, Internet/phone
Maintenance	$91,000	*$3.74*	Janitorial, repairs, maintenance, landscaping, elevator
Management	$52,000	*$2.16*	Management, admin, security
Taxes and Liability	$25,200	*$1.04*	Taxes, insurance, reserves, miscellaneous
TOTAL OPERATING EXPENSES	**$224,000**	***$9.21***	

Income Producing Spaces	**Space Use**	**Rent/SF**	**Monthly Rent**	**Annual Rent**
Partner Tenants *(including ILC & Little Lambs)*	10,281	**$0.95**	**$8,710**	**$104,519**
Coffee Shop	300	**$1.60**		
Community Event Space	5,250		**$10,600**	**$129,600**
Common Use Rentable Space	2,450			
ESTIMATED MONTHLY INCOME			**$19,510**	**$234,119**

Capital Costs and Funding Sources

Our analysis included estimates of construction and furnishing costs from the project architect, analysis of construction cost trends, research into required approvals, investigations, and fees associated with development in the City of Woodburn and the use of public funding sources. The feasibility team also conducted research into the viability of public and private funding options and the potential for donations

Our main findings include:

1. A total project cost of approximately $9.77 million will be required to complete construction and occupancy.
2. There are many potential funding options to explore, however, the project may need to raise up to $2 million in donations and up to $1 million in foundation grants to be viable.
3. As noted on the first page of the executive summary, there are still decisions for the project team to make to select a viable path among the funding options presented in this report.

Capital Costs Estimate		
Acquisition Costs:	**$995,000**	*$124,000 / ac*
Construction Costs:	**$6,464,000**	*$265 / SF*
Development Costs:	**$2,311,000**	*$95 / SF*
TOTAL PROJECT COST	**$9,770,000**	*$400 / SF*

Potential Sources	**Estimated Amounts**
Immanuel Lutheran	~ $2.55 million
Community Campaign	$1.5 to $2 million
Foundations	$750,000 to $1 million
Comm. Dev. Block Grant	$1.5 million
Other Federal Grants	~ $500,000 to $1 million
New Market Tax Credits	$1.5 to $1.9 million
TOTAL POTENTIAL SOURCES	**$6.8 to $9.9 million**

Factors Impacting Project Feasibility

The project team has identified the following issues, largely outside of the project's control, that could impede the process.

The Planned City of Woodburn Community Center – The City of Woodburn is attempting to develop a new Active Recreation Facility (Community Center), which will have some overlap with the function of the WOC. This facility may draw attention and City support away from the WOC.

The Love INC Facility – Love INC, an initial partner in the WOC, was provided an opportunity by the City of Woodburn to pursue a $1.5 million grant towards turning an existing property in a resource center. This HUD grant was awarded in July, 2020. This action may impact initial interest in and resources for the WOC at the Cityand regionlal level; there is a recognized need for a NMFRC Phase 2 at the 8 acres.

COVID-19 – With the recent arrival of the COVID-19 pandemic, it is too soon to predict the medium and long-term economic and social impacts on Woodburn and this facility (demand, community support), and the availability of Federal funding.

Section 3: Project Team

The Woodburn Opportunity Center Feasibility Study Project Team was developed by the Immanuel Lutheran Church Building Team to conduct a feasibility study (e..g, community needs assessment, outreach and facility design, cost and funding projections) for a multicultural, intergenerational community gathering space on ILC's 8 acres at Evergreen Road and Linfield Avenue in Woodburn.

The Building Team is comprised of 7-10 ILC Council leaders and Congregation members who coordinate the internal and external relationships and activities in pursuit of the 8 acres' development to benefit ILC and the greater Woodburn community.

The Consulting Team Composition and their Roles Included:

Terri Berkey Gonzalez, Immanuel Lutheran Building Team Chair: Ms. Berkey and her family are multi-generational members of Immanuel Lutheran. Terri has served as chair of the Building Team since its inception in 2004 when it led the initial campaign to raise $500,000+ to acquire the 8 acres for a future ILC home.

William Weismann, Grassroots NW: Mr. Weismann served as Project Coordinator and guided the feasibility study from 2017 to 2020. He has a 20 year history of working with projects based in Woodburn; involving the Woodburn School District Afterschool Program, City of Woodburn Parks and Recreation Department and Woodburn Together! Project responsibilities included community outreach and presentations, setting up site visits to area facilities, facilitating stakeholder gatherings, seeking and securing feasibility study funding, assessing potential private funding for the capital project, and serving as communication liaison among project consultants.

Dennis Thompson, Architect: Mr. Thompson has a long-term relationship with Immanuel Lutheran and concentrates his practice with faith-based institutions. Responsibilities included assessing the space and design needs of Immanuel Lutheran and community stakeholders, assessing comparable facilities in the area, presenting schematic designs to Immanuel Lutheran leadership and priority stakeholders, examining the City of Woodburn's zoning, development and annexation requirements, estimated the planned facility's capital costs and providing final architectural drawings for ILC approval.

CASA of Oregon: Daniel Bullock and Eddie Sepeda served as Development Consultants. CASA of Oregon has a strong history of providing feasibility and development services for affordable housing and community facilities across Oregon. Responsibilities included evaluating development potential including options for ownership, management, and operations for the Woodburn Opportunity Center, identifying and assessing potential public sources of funding, and production of the final feasibility study report.

Connie Green: Ms. Green is a long-term College facilities administrator and helped lead a comparable faith-based capital project in Salem (Broadway Commons, developed by Salem Alliance Church). Her role with this project was facilitation for meetings of Immanuel Lutheran Church leaders to identify shared values to inform facility development and the Church's role in implementation.

Rev. Ron Werner: Rev. Werner is an ordained Lutheran pastor who has developed youth-based programming and advocacy on behalf of immigrant justice. His project role was to develop ILC leader skills with both in-reach (to engage authentic dialogue among ILC members) and outreach (to other faith community partners), and to assess Woodburn faith community interest in project collaboration.

Section 4: Background & History

Immanuel Lutheran Church (ILC), founded in 1910, was organized by Scandinavian immigrants moving to Woodburn from the Midwest. Its mission is: Loving God by accepting others, sharing God's grace and growing in Christ. ILC is a community institution that has evolved with changing community demographics and history.

A parish hall was built in 1922 and the first parsonage was purchased in 1948. In 1950 growth dictated the purchase of additional property. Groundbreaking ceremonies for a new church were held in 1954 and construction began the following year. In 1957 the church was dedicated, having been built with much volunteer labor from the congregation. In the summer of 1964 further construction took place when the parish education unit was built. A new parsonage was built in 1967. For many years, Immanuel was a part of a multiple parish, which included congregations in Canby, Needy, Monitor, and Mckee.

Currently the Church reaches and engages a broad majority Anglo and Latino population. Church programs serve all ages, genders, races, ethnic groups and sexual orientations.

Key areas of community service include:

1. Twice weekly Latino worship service in Spanish – Pan de Vida
2. Little Lambs Preschool, started in 1989, supports children and families through a play-based curriculum and
3. Since 2015 a weekly community meal provides free meals to 60-70 community members
4. Active support for Love INC faith-based social services program and a women's domestic violence support group.

In 2004 a growing ILC Congregation determined the need for a new home beyond its present location at 1036 E. Lincoln St., so a 5 year Capital Campaign was established to acquire 8.2 acres of farmland in west Woodburn (Evergreen Road and Linfield Avenue), in the middle of open fields that would soon be developed into a residential neighborhood of subdivisions and apartment complexes.

Preliminary property plans included a new Church Building along with parking facilities and outdoor park amenities - including walking paths, a gazebo, and a soccer field accessible to the general public. The 2008 Great Recession created a chilling effect on the capital campaign, putting the entire project on hold.

In 2011 ILC explored a partnership with the City of Woodburn to deed 2 acres of the property to the city for development and maintenance of a soccer field/playground. In return, ILC would have system development charges reduced. The intent was to be a win-win outcome to benefit neighborhood residents seeking additional outdoor recreation space in a neighborhood the city affirmed as a priority for a new park. An appraisal was done but a formal partnership did not move forward, as ILC could not meet the requirement that its own facility construction would break ground within a year or less.

The 8 acres of land, as well as ILC's existing church location, are located in a census tract (103.06) rated a high poverty hotspot by the Oregon Department of Human Services (DHS). Of the 9,000 residents:

- ☐ 59% are Latino (compared to Marion County 25% and State of Oregon 12%)
- ☐ 28% are below poverty (county 19%, state 16%)
- ☐ 55% are renters (county 37%, state 34%)
- ☐ 62% are English proficient (age 5 and older) (county 89%, state 94%)
- ☐ 40% have less than a high school education (age 25 and older) (county 17%, state 11%) *11% have at least a bachelor's degree (county 21%, state 30%).

In 2013 the natural landscape features of a 2+ acre section (delineated wetlands) of the 8 acres led ILC to plan its restoration as a public green space in an area rapidly increasing in housing density. The ILC congregation directed its Building Team to pursue a collaboration to achieve the project. An initial assessment found funding for a stand-alone green space was not achievable or sustainable.

In 2015 ILC leaders determined that their faith called on Immanuel to hear diverse voices beyond the ILC membership so a new vision could be considered. It was recognized that the ILC congregation was shrinking (impacted by an aging membership, a series of interim pastors and member departures due to the 2009 ELCA vote to be inclusive of gay and lesbian clergy) and that perhaps God had greater plans for the 8 acres.

What if ILC could seek potential partnerships that would both provide for a new spiritual home and meet compelling needs of the broader Woodburn community? With a 2016 Ford Family Foundation technical assistance grant, Phase I outreach was done to a diverse group of community and spiritual stakeholders as part of an active listening process.

Significant Phase 1 outreach events were two Opportunity Forums - October 2016 and February 2017 – each involving 30-35 participants. Attendees included ILC and faith community leaders, social service and Latinx group representatives, Marion County staff and other community members. A wide range of ideas were recorded with three priority space concepts emerging along with a call for a feasibility study:

1. Spiritual space – for ILC and other faith communities
2. Community Services Space – co-locating a number of services in a shared space and one-stop model,
3. Community Gathering Space – providing for larger indoor public and private events and an outdoor green space/park.

Forum participants identified the need for site visits to model projects and a formal feasibility study/ needs assessment. The events were facilitated by the project Consultant and the ILC Building Team and attended by a majority of the ILC Church Council.

Later in 2017 and in 2018 ILC, with strong support from community partners, sought and secured funding from the Meyer Memorial Trust, Oregon Community Foundation, Ford Family Foundation and the Oregon Lutheran Synod ELCA (Creative Ministry Fund) - to conduct Phase II of the project - a formal feasibility study.

The Feasibility Study's primary objectives - from mid-2018 to March 2020 - were to assess the potential development of a multi-cultural, multi-generational community services and gathering space. The study elements were:

- ☐ Feasibility of the facility concept, including site visits to local models
- ☐ Securing broad community input through outreach meetings and neighborhood survey
- ☐ Site renderings produced by an architect
- ☐ Identifying requirements for land use, zoning and utilities
- ☐ Projecting overall capital cost, funding sources and campaign timeline
- ☐ Model for ongoing project management

Funds supported a project coordinator, architect and specific consultants who could implement the proposed facility's feasibility study elements. **A key activity of the Feasibility Study was to consider existing local models to inform the project concept:**

- ☐ Broadway Commons (site visits, May 2017 and January 2019). Located at 1400 NE Broadway St in Salem, Broadway Commons - built in 2010 - is owned and operated by Salem Alliance Church (an independent Christian congregation). The 47,000 square foot building has 14 meeting rooms (capacity from 10 to 250), a coffee shop that opens into an outdoor plaza complete with waterfall, grassy slope and amphitheater. The building also houses a lunch cafe, professional office space, a prayer center and the Salem Free Clinic.
- ☐ Dallas Resource Center (site visits, July 2018 and January 2019). Owned and operated by Polk County since 2008, the Resource Center is a one-stop location for social service programs (including Salem-based agencies). The Resource Center uses a co-location model, involving a common entry point and intake form, that effectively serves its family clients by connecting them with multiple services. Two agencies involved from the DRC's inception are Mid-Willamette Valley Community Action Agency and Family Building Blocks, now committed partners with the North Marion Family Resource Center Phase 2.
- ☐ Canby Center (site visit, July 2018). Operated by a faith-based nonprofit, the Center provides poverty-alleviating, dignity-strengthening programs for youth and families. It helps meet a family's basic needs (food, clothing) as well as mentoring programs and life skills education. It is located in a warehouse next door to Canby High School.

The Immanuel Lutheran Church congregation and leadership has devoted over 10 years and more than a half million dollars to this project; with another $110,000 from its Legacy of Faith Fund available for project implementation. The Church's Building Committee has devoted 8 years and a few hundred hours in support of its mandate to improve the existing facility (for future resale) and to formulate plans for the development of the 8-acre parcel for the public benefit of the Woodburn community.

On March 8, 2020 the ILC Congregation voted overwhelmingly (90%) in favor of a Resolution (Section 14) to move ahead with implementation of the project outlined in the Feasibility Study.

Section 5: Securing Diverse Voices- Spiritual & Community

The Feasibility Study was driven and informed by a grassroots community engagement process involving a Season of Listening within both spiritual (Immanuel Lutheran and other faith communities) and community (social service, Latinx, and Russian Old Believers, service clubs and neighbors adjacent to the 8 acres) stakeholders. The elements included:

Spiritual Voice:

☐ **Season of Listening -** In 2018 Rev. Werner guided a series of ILC leader trainings that led to (1) 1:1 conversations with ILC members regarding their own history with ILC, and values that could inform ILC's future legacy including the use of the 8 acres, and (2) Informal conversations with external faith communities, including both Pan de Vida (a Spanish-language faith community that holds weekly services at Immanuel Lutheran) and other mainstream Protestant Woodburn churches (First United Methodist Church, First Presbyterian Church and Episcopal Church).

Recommendations from this work included:

1. Use storytelling as a means of building relationships of trust. This can be done by having ILC's leadership team write articles, share during service, and make one to ones a part of regular practice in and outside of worship.
2. Create ritual to help the community separate future plans around the eight acres from the past.
3. Continue one to ones with people we do not "usually listen to" within the congregation in order to build trust.
4. Practice meditation/contemplation as a means for listening to God. This might help us be faithful to listening for God's call without having a predetermined path

☐ **ILC Visioning -** A 2018-2019 process within ILC involved a majority of the Congregation in 1:1 conversations and two listening sessions (October 2018 and March 2019). The outcome was a growing majority in support of the project concept's three components, including a new spiritual home for Immanuel Lutheran. ILC members were assertive in their desire for their new home to retain key features of the existing worship space including stained glass windows.

ILC Visioning Continued:

- ☐ **Legacy for the Future** – 2070. ILC leaders affirmed a legacy vision for 2070:
  - Legacy of Welcoming and Accepting: A safe, fun place for all people
  - A Caring Community: caring, giving, building a foundation of relationships through com munity connections
  - Transformative: A place where all can be transformed and receive God's word, Space to receive God's Word
  - Family-Centered: A feeling of family, faith, love
  - Community Gathering: A space of multiple uses, multicultural and multi-generational
- ☐ **Key elements** - Bottom line, ILC's need is for a new worship space with familiar features (stained glass windows, color and décor that looks and feels like church, mobility friendly, music space, comfortable seating), a commercial kitchen with adjacent gathering space, home for Little Lambs Preschool, storage space, preschool and youth space.
- ☐ **Potential Names for the 8 Acres** - 2070 legacy were: Opportunity Center, Woodburn Commons, Linfield Commons, Unity Center, Hope Center, Woodburn United.

☐ Community Voice

Season of Listening - From 2017 to 2019 a series of 1:1 and group meetings were held with a wide array of community stakeholders. This included the Woodburn Senior Center, Farmworker Housing Development Corporation, Oregon Human Development Corporation, Salud!, PCUN (Pineros y Campesinos Unidos del Noroeste), Marion County Community Services, CAPACES Leadership Institute, Oregon Child Development Coalition, Mid Willamette Valley Community Action, Marion-Polk Food Share, Family Building Blocks, Woodburn Chamber of Commerce, Service Clubs (Kiwanis, Rotary) and Russian Old Believer leaders.

Latinx Community - A number of outreach meetings engaged community leadership as well as the view of front-line social service staff. A June 2018 event hosted by CAPACES Leadership Institute engaged 20 leaders and affirmed a strong need for both a community services one-stop center and a gathering space welcoming to all cultures (multicultural, multilingual and multi-generational). Some proposed values for the space were Body-Mind-Spirit, Safe & Inclusive and Breaking Down Barriers.

Community Forum and Service Integration Teams - Presentations and discussions were conducted with existing gatherings of social service providers: (1) Two monthly Community Forums - hosted by Oregon Human Development Corporation - provided input regarding community needs and design concepts.

Community Voice Continued:

Attendees are primarily Latinx staff members of agencies serving the farmworker and Latinx community. At one session, a compelling case was made for a Latinx Senior Center in Woodburn, (2) A monthly meeting of the North Marion Service Integration Team hosted by Love INC. affirmed the need for a co-located social services resource center.

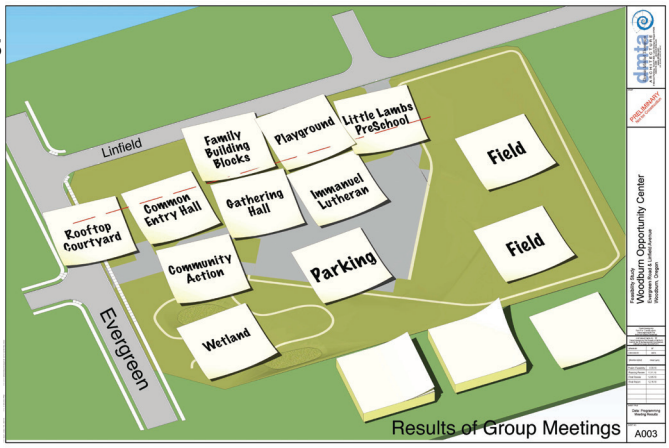
Community and Neighborhood Surveys - Two 2019 community surveys were conducted to gather grassroots input and to assess support for the project. Proposed elements that were strongly affirmed were (1) Co-located community services, (2) Meeting and event space for community and families, (3) Multi-faith spiritual space, (4) Healthy, fun and family friendly. Community members felt that city growth required more community spaces and services, and a comprehensive approach to space design.

- **Willamette University PACE** - (Practical Application for Careers and Enterprises). In early 2019 a cohort of MBA students developed and tabulated the results of a 200 person community survey seeking responses from a wide array of community influencers – from residents of Senior Estates, to business and community leaders active in the Chamber of Commerce and service clubs. The cohort's analysis of surveys led to these recommendations for space design:

1. Multi-purpose gathering space; event hall, spiritual space, meeting space,
2. Cafe; revenue generating coffeehouse, employment training, socializing space; and
3. Key not-for-profit partnerships; homelessness, at risk youth, food insecurity, family counseling services. Finally, the project should fulfill community needs, further ILC's mission and generate revenue for sustainability.

- **Neighborhood Survey** - On August 20, 2019, 20 project volunteers (bilingual pairs) conducted a door to door survey of single family homes and apartments within a half mile radius of the 8 acres. A total of 75 surveys were completed via mobile devices using a Google form-based survey. The results revealed strong overall support for the concept of a community gathering space, indoors and out. Residents affirmed interest in:

1. Gathering space for family parties and events (birthdays, wedding and quinceañeras),
2. Commercial kitchen
3. Coffee shop and/or café
4. Outdoor elements (playground and walking trails, as well as a splash pad and picnic area)
5. Co-located community services, easily accessible to neighbors



Section 6: Site Plan & Partnerships

Site Plan

The 8 acres is a relatively flat plot of land in a growing residential area of Woodburn. It has historic use as farmland, with two acres previously delineated as a wetland. The lot is located literally on the Woodburn city line, the north side of Linfield Street is in unincorporated Marion County and annexation is required for the facility to access city utilities.

This part of Woodburn continues to grow, with more residential development on the immediate horizon. The Smith Creek development plans to build on 694 residential lots, plus 105 multi-family units as Single Family Detached, Row House Alley, and Multi-Family units. It's expected that current dead end roads (like Evergreen Rd) will be extended soon to Parr Road along with expansion of Woodburn Transit services to this part of the city.

Proposed Land Uses for the Site

The Feasibility Study – through affirmation by internal and external stakeholders – developed a set of values to inform the facility and determined the best potential uses for the site. These values - detailed in Section 9's Design Process - include Welcoming and Accepting, Multicultural and Multilingual, and Intergenerational.

Values Generated to Guide Design

- ☐ Welcoming and Accepting – the facility is a safe place with an open design that encourages the participation of all residents as they nurture mind, body and spirit.

- ☐ Multicultural and Multilingual – the facility celebrates Woodburn's cultural history (visual displays of the immigration and achievements of Nordic, Latinx and Russian Old Believer communities), with bilingual reception staff and signage. Multicultural community leadership is essential to the Woodburn Opportunity Center's success.

- ☐ Intergenerational – space will serve people over the full life spectrum from infants to elders. Common spaces and facilities will be responsive to a range of needs.

The proposed use of the land consistent with these values and the input gathered affirmed a Woodburn Opportunity Center comprising a multicultural, intergenerational spiritual, community services and gathering space that utilizes ILC's 8 acres of land at Evergreen Road and Linfield Avenue in Woodburn.

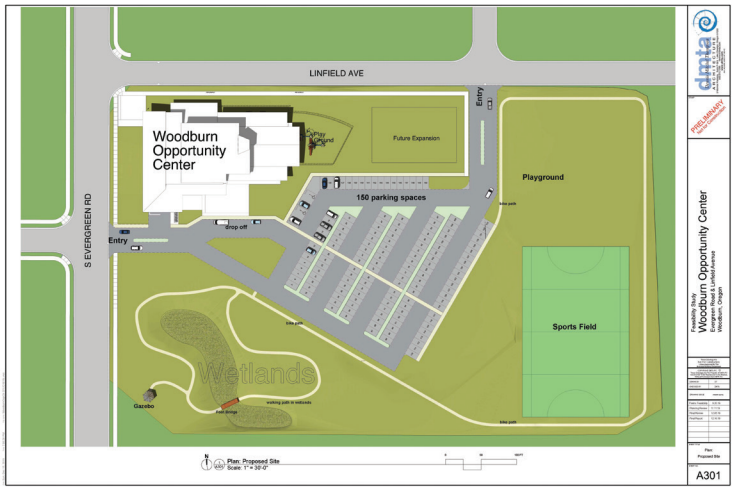
Spiritual Space - The WOC serves as a future home for Immanuel Lutheran Church, Pan de Vida, Little Lambs Preschool and one or more other faith communities. It includes being able to customize the event space as a sanctuary and adds a 2nd floor upper room as a private meditative space. The space can serve emerging, growing congregations as well as established ones that find a shared space to be responsive to their needs (e.g., a membership that is both aging and shrinking in total number).

Community Services/Resource Center - Responding to the repeated call for a one-stop social service center, this element will co-locate multiple community services as North Marion Family Resource Center Phase 2. The FRC's lead management agency would be Mid-Willamette Valley Community Action Agency, an anchor tenant for the Dallas Resource Center. As in Dallas, a common intake form would be utilized - saving a person time and increasing their access to a wide range of available services. The FRC is infused with the WOC values of Welcoming and Accepting, Multicultural and Multilingual (Spanish-speaking receptionist) and Intergenerational (the entire lifespan is engaged and served). See further partner descriptions below and in **Appendix A.**

Community Gathering Space & Cafe - Woodburn's growing need for public meeting space has been previously met by Wellspring and is now partially also met by Metropolis. The WOC event hall will be larger than both of those facilities and include a commercial kitchen. Post-COVID 19 protocols will likely require even larger spaces to accommodate groups of 100, 200 or more. This element is the facility's hub and leased for public/community and private/family events.

Natural area/community park/outdoor recreation –
This area of Woodburn lacks a public park or substantial playground. This has been a City of Woodburn priority location for a new park for more than 15 years. Potential elements to implement include a walking trail, playground, youth soccer field and/or green space; one or more of which could be funded by special project grants or through a City of Woodburn partnership:

1. A public playground could be accessible and inclusive, a cutting-edge facility modeled after Portland's Harper's Playground (inspiring vital communities by creating inviting playgrounds for people of all abilities).
2. A youth soccer or futsal field could be modeled after one recently installed at Woodburn High School by Fields for All.
3. A walking trail could encircle most of the 8 acres and include the wetland area, with a possible gazebo.
4. An amphitheater or flexible seating area could be in the immediate space outside the main entryway.



The Woodburn Opportunity Center has 24,333 square feet. The approximate breakdown for elements are spiritual space (2,506 square feet), community gathering space (5,250 square feet), Family Resource Center (5,000+ square feet) and common space (8,000+ square feet).

Partnerships

At its core, the Woodburn Opportunity Center is a partnership involving a range of potential spiritual and community stakeholders. The resulting array of primary uses has defined a number of dedicated space partners, as well as others who seek occasional use or will lend active support.

Primary Partners:

Primary partners are those stakeholders who have a long-term stake in the success of WOC and a commitment to dedicated space upon its opening. Some could have major ownership, management or program operational roles in the facility's operation.

Spiritual

There will be a dedicated spiritual space that involves Immanuel Lutheran offices (shared with Pan de Vida and potentially other faith communities), storage, sacristy and Little Lambs Preschool classrooms/playground.

- Immanuel Lutheran Church - Immanuel Lutheran will provide leadership and support for a community-wide fundraising campaign, participate directly in the long-term ownership of the land and the facility, and delegate property management (physical and administrative) to qualified partners.
- Pan de Vida - (Bread of Life) is part of a large Latino Church denomination (Iglesia Cristiana Interdenominacional) based in Southern California and has Northwest churches established in Woodburn, Newberg, Gresham, Vancouver, Yakima and the Seattle area. This Latino worship group has been holding twice weekly services at Immanuel since 2010. Pan de Vida will be an ongoing user of the spiritual/gathering space at the Woodburn Opportunity Center.
- Little Lamb Preschool - Established in 1989, the Preschool is a private Christian early learning center serving 3 to 5 year olds. Little Lambs will occupy 2,250 square feet of Opportunity Center space adjacent to ILC offices and the spiritual space. The current annual enrollment level is 30 children, able to serve up to 50 more.

North Marion Family Resource Center (NMFRC Phase II)

Primary Partners

- Mid Willamette Valley Community Action Agency - MWVCAA's mission is Empowering people to change their lives and exit poverty by providing vital services and community leadership. They have been an active partner in the Feasibility Study since the earliest meetings in 2017. In 2019 Executive Director Jimmy Jones and Director of Program Development Dana Schultz were active leaders in outreach to potential project stakeholders, and MWVCAA agreed to building management responsibility for scheduling and use of the FRC and the event space. The agency will provide a full-time staff person to manage the facility.
- Family Building Blocks - Since 1997 FBB has served Marion and Polk Counties with a mission to Keep Children Safe and Families Together. The agency has been an active project partner since 2017, represented by Executive Director Patrice Altenhofen and program staff Tanya Hamilton and Gabriela Cervantes. FBB's program services include therapeutic classrooms, home visiting, parent education and respite care – especially for families with children under age 5.
- Love INC - Love INC's mission is to connect people and families in need with local service agencies and community programs that can provide assistance. Love INC works with more than 20 faith communities and over 60 service providers in North Marion County to serve those in need. Love INC is managing Phase 1 of the North Marion Family Resource Center (970 Cascade Avenue, Woodburn). It will be a cooperating partner and directly participate in achieving implementation of Phase II of the NMFRC. See Appendix A for description of their role in NMFRC Phase 1.

Potential Secondary Partnerships (sharing space)

Secondary partners are potential regular or occasional users of specific leasable spaces or the event hall. They have not committed to an ongoing, long-term relationship.

- Chemeketa Community College/Dental Hygiene Clinic - This free community clinic is interested in utilizing classroom space one or two days a month to perform dental cleaning and exams. Dental Hygiene college students learn and practice dental hygiene skills in the clinic where they see and treat patients. Leadership for the CCC's Woodburn expansion is provided by Dora Sandoval, Oregon's first certified Community Dental Health Coordinator and a Woodburn High School graduate.
- Woodburn School District - The Woodburn School District has expressed a potential need for program and service space to accommodate their expected growth. This includes the Afterschool Program, Welcome Center and possible Preschool Promise classroom space.
- Salud Medical Center - Salud and Pacific Pediatrics are Woodburn's medical clinics serving the farmworker community, operated by Yakima Valley Farm Worker Clinic. Salud has expressed interest in being a possible mobile dental or health clinic location, once or more a month.
- Catholic Community Services - CCS, based in Salem and serving Marion and Polk Counties, champions the positive development of children and adults, strengthens families and builds community. CCS has expressed interest in having office space for staff on an occasional basis, as often as once a week.

Potential Multi-Cultural Use

Latinx Senior Center - Woodburn has the largest percentage of Latinx residents (56.2%) of all Oregon cities, and lacks a culturally-responsive senior center. It is also one of the few area cities lacking a senior center with a permanent home.

The volunteer-led Woodburn Senior Center is currently housed at the United Methodist Church and is not multi-cultural. This facility hopes to be included in the City of Woodburn's planned Active Recreation facility (Community Center) next to the existing Aquatic Center.

A Latinx Senior Center was a strongly expressed need at a November 2018 meeting of the Community Forum (a gathering of Latino-serving agency staff working in the Greater Woodburn area) and in several subsequent 1:1 interviews with Latinx leaders. A culturally-specific program could promote social networking and connections among elders who often lack peer contact.

There is available space in the Opportunity Center (activity and dining space, with a commercial kitchen) for this program, but a lead agency has yet to step forward or be identified to manage this program. A couple aligned agencies - Northwest Senior and Disability Services and Marion-Polk Food Share - have expressed interest to serve as program partners. Securing program funding could be possible from a combination of public and private funders.

Section 7: Ownership Considerations & Preferences

As design progressed and the project partners considered their level of commitment, it was essential for ILC to express their preference for their participation in the eventual ownership structure. A decision hinged on maintaining greater control of the final outcomes of the project versus sharing the burden of responsibility for operating and maintaining a large facility.

Three options were created by the project team and presented to a combined Fall 2019 meeting of the ILC Building Team and Council. These options did not represent final, detailed ownership structures, but represented the main paths which ILC could pursue with (or without) its partners moving forward.

The assumptions underlying each option were as follows:

1. ILC is never assumed to be the day-to-day manager of the building. This means ILC will NOT be doing things like directly hiring staff to patch drywall, unclog sinks, negotiate leases, and ensure the bathrooms get cleaned, the grass gets cut, etc.
2. There is always a partnership group of nonprofits that is interested in paying to lease space in the building to provide services, participating in how the service provision is coordinated, and giving input on physical spaces within the building, etc.
3. The timeline for the completion of construction is hard to predict but will likely be at least 2 years. Essentially, the larger the building, the greater the funding that needs to be raised, and the longer it will take to start construction.
4. The current proposed design of the facility is 24,333 square feet with a total cost of about $9.77 million, inclusive of land value. The project team should assume substantial funding needs to come from a fundraising capital campaign that seeks foundation grants and private donations.

The three options are outlined briefly below (See Appendix B for full draft of ownership options). Option 2 was the strong preference of ILC leaders in Fall 2019 and presented for Congregation support at the March 8, 2020 vote to proceed.

Option 1: ILC Owns the Building and the Land Entirely by Itself

This assumes that maintaining control of the final product is the Church's greatest priority. This option allows ILC to maintain full control over what gets built, and who gets to use the space, but consequently means that ILC bears the full financial risk and management burden for owning an $9.77 million building and acting as a landlord for all groups seeking space in the facility.

Option 2: ILC Owns the Land, Allowing Other Groups to Own All or a Portion of the Building

Under this scenario, ILC can maintain some control over the project as the leaseholder of the land in perpetuity. However, the financial risk of owning and maintaining a large public-facing facility either falls to another partner, or is shared among a group. The responsibility of managing this sort of facility on a year-to-year basis is also passed off or shared.

Option 3: Bring in an Outside Developer to Build and Own the Property

Representing the other end of the spectrum of control and responsibility, here ILC would be giving up most control of the final product and all risk and responsibility. ILC likely would not be able to find a buyer/developer who would be willing to build without also owning the land. At the very least they would not be willing to lease the land with restrictions on how they pursued income.

*ILC could possibly ensure space for themselves in whatever facility was built as a condition of selling the property, but that would likely be the limit of their control.

Section 8: Ownership & Operational Structure

Ownership and Management

The overwhelming preference of the Fall 2019 Immanuel Lutheran Building Team and Council gathering was for Option 2, moving forward with the assumption that ILC would own the land and that ownership and management responsibilities for the building were somehow shared with project partners.

While many of the organizational and ownership structure details will need to be determined much closer to the start of construction, the basic assumptions of both ILC and the nonprofit partners are outlined here.

Ownership Structure:

Ownership and operational responsibility will be shared, according to Option 2 above, along one of a few potential paths.

1. One large partner owns the building outright and takes on all management and owner risk,
2. All of the partners participate equally in the ownership and management of the building in a condo-like legal structure,
3. A new non-profit entity is created to own the building, and all partners have a say in the operation of that entity. ILC and other main partners get seats on its board and a share in decision-making.

Property Management

Separate from the considerations of an owner is the day-to-day management of the property. Whichever entity or group of entities owns the facility will be responsible for hiring and overseeing a property management company, or hiring staff to perform property management functions in-house.

This company or staff will be responsible for management duties like:

1. Negotiating and enforcing leases
2. Hiring or performing janitorial work
3. Ensuring proper maintenance of the facility and grounds
4. Site and event security
5. Overseeing events in the event center
6. Paying property taxes
7. Paying any staff payroll, taxes, benefits, etc.

The ownership entity will also have other duties like: maintaining proper insurance, reviewing annual incomes and expenses, and financially planning for the long-term replacement needs of the building's materials and systems.

Operational Plan

North Marion Family Resource Center - Phase 2

The non-profit partners interested in either owning or leasing space in the facility have agreed to participate in a co-located social service model, similar in concept to Dallas Resource Center. This model entails a shared system outlined below:

1. Single, shared point of intake for new clients and reception for the facility allowing for seamless client referrals between service providers
2. Common spaces shared by each provider as needed, reducing the size of the facility and costs for all
3. Ideally, at least one "Resource Navigator" who helps with referrals and very light case management, and assists providers.
4. A common Memorandum of Agreement, signed by all providers governing these relationships and the use of the common spaces of the facility
5. This shared resource center model includes the new NMFRC Phase 1 facility being created between Love INC. and the City of Woodburn. Phase 1 is focused on immediate and emergency service needs. The ILC NMFRC Phase 2 facility would emphasize strengthening families, creating opportunity, and building community capacity
6. Mid-Willamette Valley Community Action Agency has offered to serve as the lead agency for the Phase 2 facility. They have offered to provide the reception/intake position and serve as the central agency in the operation of the resource center.

Operational Considerations:

Event Center and Coffee Shop

The designed facility includes an event space and has proposed a coffee shop/café, both of which will be managed by the ownership group, or function semi-independently as separate businesses. Under either scenario each will need a business plan and to do market research on what makes sense for this site and for the Woodburn area.

The Event Space

As currently proposed, the event space within the potential facility will be a multipurpose space, with limited sacred adornments, that can serve as a worship space for ILC and Pan de Vida (and other faith communities) and an event space for the greater Woodburn Community. A more complete description of the space is included in the Design section of this report.

Comparision of Event Spaces in Woodburn

There are currently two similar event spaces for rental in Woodburn. They include Metropolis Marketplace (downtown at 347 N. Front St) and Wellspring Conference Center (1475 Hood Ave.).

	Metropolis Marketplace & Event Venue	Wellspring Conference Center	Woodburn Opportunity Center
Square Footage	4,630 *(includes changing/prep room and storage for renter use)*	3,930 total *(typically divided)*	4,150
Location	Downtown Woodburn	Northwest Woodburn	Southwest Woodburn
Max Capacity	400 people	350 people	500-estimate
Divisions	None	5 different spaces in 3 sizes: 380 sq ft, 920 sq ft, 1320 sq ft	3 spaces, roughly equal size, 1,380 sq ft
Seating	Table seating for 200	350 theater style 250 banquet 184 classroom	TBD
Other Amenities	6 buffet tables, 2 cocktail tables, linens for all tables, PA system, speakers and mics, lighting, can serve alcohol, have a small kitchen, a changing/prep room, storage, and allow oustide catering	Tables and linens, dance floor, AV system, food service equipment, additional linens and napkins, have small "exhibition kitchen" and can self-cater for up to 60 people and allow outside catering-*no alcohol*	TBD

Primary Clientele and Rental Usage

The Metropolis Marketplace and Event Venue (347 N. Front St) does not divide their space and essentially then only caters to larger groups for weddings, quinceañeras, and a few family events and graduation parties. Because of this, their events are much more seasonal than Wellspring. Their busy season is June through September when they will typically be booked three out of every four weekends for large events. Metropolis doesn't experience a lot of rentals during the week, with only occasional weekday evening events. They are also open to the public as a dance club one night a month. They only occasionally lose business because of a need for a larger space, most inquiries are for events for 200-250 people.

The Wellspring Conference Center (1475 Mt. Hood Ave) primarily serves corporate groups looking for space during the day for meetings, employee training and events. The busy seasons for these rentals are September through November and February to June. The Center does not allow alcohol or late evening events which limits demand from those looking for wedding venues. They get interest on weekends for quinceañeras, baby showers, and other more daytime-oriented social events or meetings of Kiwanis, Rotary Club, or similar groups. They are typically booked for 4 events per week (weekday and weekend) and are booked between 15 to 25 weekends a year. The Center's coordinator believed they only turn down about 5 events a year because they don't have a large enough space.

The Wellspring Center is operated by Legacy Health System within the Woodburn Health Center. Using the space is contingent on the Health Center not needing the space for medical purposes. There is an indication that the space may soon convert to medical use. This would create greater demand for the kinds of events that Wellspring typically hosts.

Takeaways and Advice for WOC Event Space:

- ☐ Allow outside catering, and have good relationships with preferred catering companies, including co-advertising and help promoting them
- ☐ To accommodate weddings - allow alcohol, late evening events, and if possible have good outdoor spaces for people to gather
- ☐ To attract corporate events, have smaller spaces for 40-75 people, and be prepared to do all of the set up and food delivery (or have that agreement with a caterer)
- ☐ Provide good coordination, catering, and support staff
- ☐ Provide flexible table and chair numbers and arrangements
- ☐ At a minimum offer a warming kitchen for preparing pre-made food before serving (the proposed WOC facility will have a commercial kitchen)

The Function of the Event Space within Overall Facility Operations

The costs for operating the event space are not included in the overall operating budget of the proposed facility, so the event space will need to support costs such as staff for coordinating space rentals, set up and tear down, coordinating with caterers, and coordinating cleaning after an event. The estimated operating model outlined in the Income and Expense Section below assumes net incomes from renting the event space and paying its operating costs.

In reality, the ownership group of the building will probably be able to find efficiencies in combining the operating of the event space with the overall operation of the entire facility. The duties and work involved in renting and managing the event space should have some synergy with renting the other classroom and meeting spaces. Non-tenant rental income can come from both event space usage as well as renting those smaller spaces for daytime use (corporate, government, service clubs, etc). Daytime use could be enhanced if one or more of the 3 event space sections was further divided, making rentable sections between 300-700 square feet.

Café / Coffee Shop

As noted previously, surveys of the community and neighborhood indicated an interest in the inclusion of a café/coffee shop within the proposed facility. There is also significant precedence for this choice in the comparable facilities that were researched during the feasibility study. Broadway Commons, the Wellspring Center and the Metropolis include coffee shops within their buildings. A coffee shop generally pairs well with daytime spaces as it gives a neutral space for gathering and refreshments, as well as the basis for some very basic catering of coffee and snacks for small meetings.

Operating a food services business will be a departure from the rest of the facilities operations in a way that operating the event center is now, with a number of additional concerns, and less overlap between required duties. The ownership group for the facility will need to decide whether they would like to:

1. Operate the coffee shop themselves (creating a business plan, branding, and marketing)
2. Recruit an outside group (e.g., a local small business, already engaged in this enterprise) to locate in or expand to the WOC.

Similar to assumptions made about the event space, the operational costs and incomes specific to the coffee shop are not included in the Income and Expenses section below. The income assumed is from the space rent with an outside entity managing this food business as the project team feels this is the most likely option.

Section 9: Design Process

Following the series of 2017-2018 input sessions, project architect Dennis Thompson was retained to design and create architectural renderings of the facility. Mr. Thompson has a long-term relationship with Immanuel Lutheran Church, involving the existing East Lincoln St facilities (assessment, repairs and renovations) and the 8-acre parcel (2008 design and pre-development stage of a new church).

Values Generated to Guide Design:

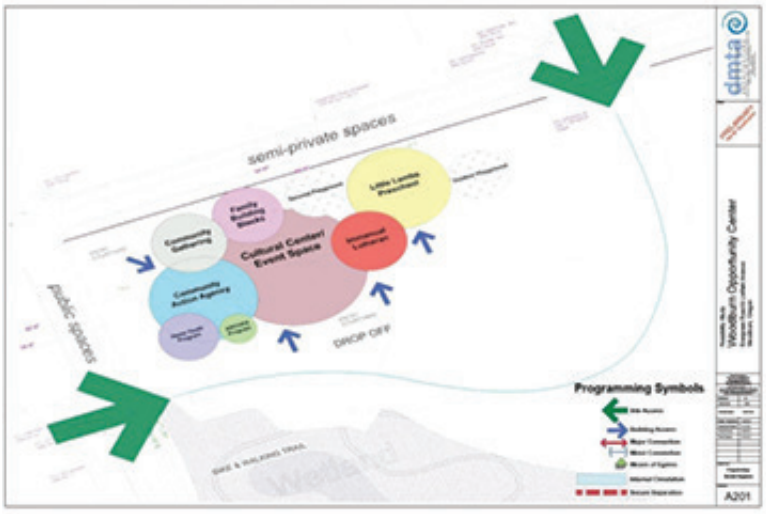
- **Welcoming and Accepting** – the facility is a safe place with an open design that encourages the participation of all residents as they nurture mind, body and spirit
- **Multicultural and Multilingual** – facility celebrates Woodburn's cultural history (visual history of immigration of Nordic, Latinx and Russian Old Believer communities), with bilingual reception staff and signage
- **Intergenerational** – space serves people over the full life spectrum from infants to elders. Common spaces and facilities will be responsive to a range of needs

The design process during this Feasibility Study followed these steps:

1. Conduct a review of prior 2008 space, ILC's needs, and the design and property layout.
2. Participate in January 2019 site visits to the Dallas Resource Center (Dallas) and Broadway Commons (Salem). Gather documents detailing site layouts for these facilities. Conduct interviews with managing operators to assess access and cost for utilities and public infrastructure.
3. Meet with City of Woodburn Planning staff (October 2019) to confirm existing zoning status and process to achieve annexation (city boundary is across Linfield Road from the 8-acre parcel) and possible zoning amendment. In that meeting it was learned that a Planned Unit Development was a preferred proposal.
4. Gain input from key stakeholders in focus group meetings (Summer through Fall 2019) of the:
   - ☐ Immanuel Lutheran Church Council and Building Team to identify Church design preferences and "must haves" for the community gathering/worship space.
   - ☐ Project partners – particularly those interested in the co-located social services resource center concept. This process defined which partners: (1) Seek dedicated space and their precise needs, or (2) Prefer regular or occasional access to private or shared space. The specific needs of four partners led to the design of dedicated spaces for:
     - Immanuel Lutheran Church
     - Little Lambs Preschool
     - Mid Willamette Valley Community Action Agency (space for HOME, ARCHES program and Child Care Resource and Referral)
     - Family Building Blocks (therapeutic classrooms, etc.)
5. Develop architectural renderings and present to stakeholder groups, allowing for 2 rounds of input and revisions prior to the schematics now represented in this section and in Appendix C. Presentations were made in November and December 2019 to (1) Immanuel Lutheran Church Council and Building Team, (2) More than a dozen project partners with particular interest in the Family Resource Center and Community Gathering Space. Partner representatives included Mid-Willamette Valley Community Action Agency, Family Building Blocks, Love INC, Little Lambs Preschool, Woodburn School District, Woodburn Chamber of Commerce, Salud Medical Center (Yakima Farm Workers Clinic), Catholic Community Services, Northwest Senior and Disability Services, Marion County Health Department and Marion-Polk Early Learning Hub.

Space Goals Discussed During the Design Process

- Immanuel Lutheran Church, Pan de Vida and Little Lambs Preschool - ILC leaders affirmed key elements as a new worship space with familiar features (stained glass windows, color and décor that looks and feels like church, mobility friendly, music space, comfortable seating), a commercial kitchen with adjacent gathering space and storage space.
- Little Lambs Preschool – sought 3-5 classrooms, office and storage space, kitchen and fenced playground space to serve current and expanded enrollment.
- Mid-Willamette Valley Community Action Agency – sought 4-6 offices for Resource Center reception, ARCHES Project, and HOME Youth Resource Center.



- Family Building Blocks – sought indoor classrooms, kitchen and meal prep room, child and adult bathrooms, laundry room, storage space, teacher office, HVOR office; plus outdoor playground.
- Other Partners - Several partners expressed interest in regular or periodic use of classrooms or offices. The 2nd floor was designed to allow for these types of itinerant uses.
- Event Space and Common Use Areas
    - Event Space - This open space would have a capacity of 300-400 people, with 3-4 dividers able to create smaller spaces of under 100 people. A commercial kitchen is needed for ILC and community/family events, as well as a location for Meals on Wheels or Latinx Senior Meals Site as part of a Latinx Senior Center (see final part of Section 5 - Site Plan and Partnerships).
    - Common Use Space and Entry Way - A 2nd floor room is dedicated as a family play space for WOC visitors. Additional undedicated classrooms and meeting rooms respond to users wanting regular or shared space. A café/coffeeshop would be utilized by WOC users and the public. The entryway would have significant light and glass, creating a welcoming experience similar to Salem's Broadway Commons. It could include a mural and/or rotating display cases featuring the multi-cultural story that is Woodburn.
- Outdoor Space - The neighborhood, Latinx leaders and potential WOC users expressed a need for an ADA accessible public playground (including water feature/splash pad), walking trails, small youth soccer field and an amphitheater (gathering space)

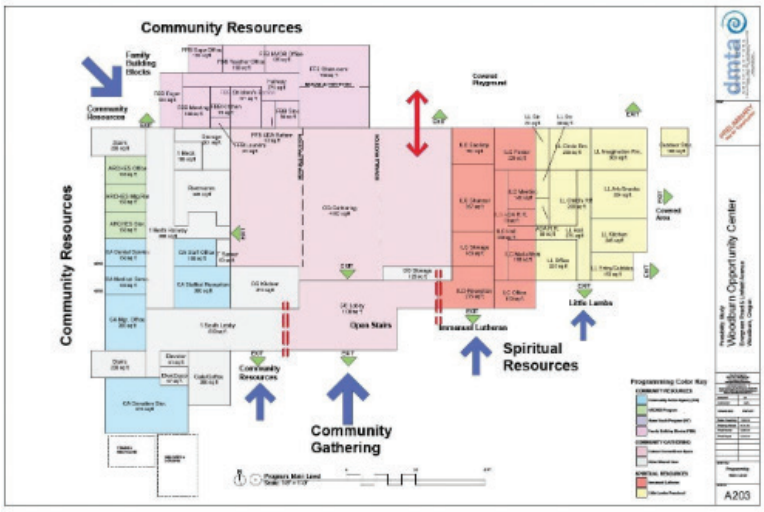
The Final Design

The full design package from DMTA is included as Appendix C. Below is a narrative of the main design outcomes from the Feasibility Study.

Woodburn Opportunity Center Space Program	
Spaces/Tenants and Programs	**Area (Square Feet)**
Community Action Agency	1,923
ARCHES Program	450
Home Youth Program	1,001
Family Building Blocks	2,151
Immanuel Lutheran Church	2,506
Little Lambs Preschool	2,250
Community Gathering/Event Space *(Includes Lobby)*	5,250
Common Use Spaces	8,802 (total)
Cafe/Coffee Shop	300
Commercial Kitchen	375
Common Use (*Classrooms/Meeting Rooms/Computer Room, Offices, Family Room*)	2,450
Common Use Storage	325
IT, AV, Mechanical, Elevator, Hallways and Stairs, Restrooms	5,352
Total	24,333

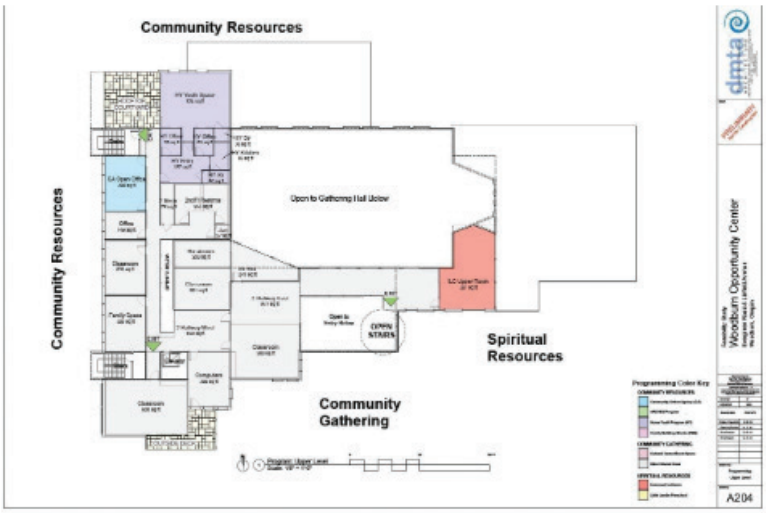
The facility delivers the desired event/cultural space large enough to house a 400 person gathering, with dividers for groups of as small as 50-75 people. There are individually tailored spaces for each primary partner, clustered to promote collaboration. Common use spaces are located nearby and are available for dedicated for occassional users of the co-located resources provision in the facility.

The Final Design



The fit of uses in the building was structured to allow some spaces to flow together, while leaving natural breaks between others. The Event space is the center of the facility and the hub around which all other uses function. This space has its own lobby and entrance directly off the parking lot, allowing for easiest access for event parking.

Areas dedicated to frequent public access are concentrated closest to the corner of Linfield and Evergreen Streets, which is likely to be the main entrance for individuals arriving at the facility as pedestrians or on public transit.



More private spaces which are not intended for frequent public access and foot traffic, are situated further from this intersection in the eastern end of the building. This includes the spaces generally dedicated to spiritual resources and designed for ILC and Little Lambs. Their dedicated areas have access to the event space hub of the facility, but can also easily be separated from the rest of the Opportunity Center service providers. However, Little Lambs is still connected to Family Building Blocks across a playground allowing sharing around their similar space needs for play and storage space.

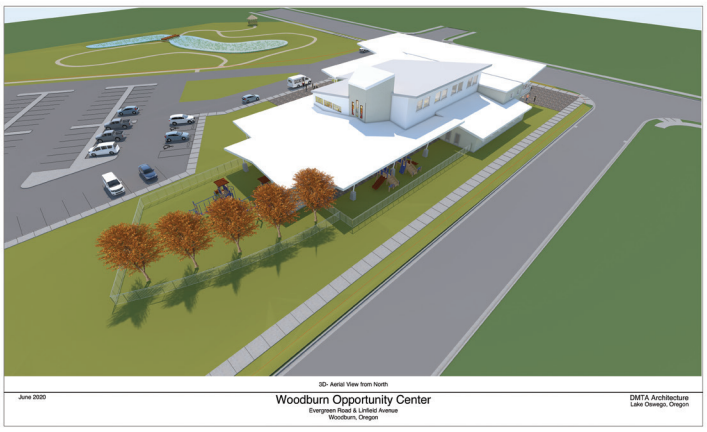
The more public, western end of the facility houses those service providers looking to assist Woodburn households in need. The close proximity of their offices allows for easy referral, integration, and collaboration. These spaces are also on the same end of the building as the common use/community gathering areas located on the second level. This will allow the partners, as needed, to make use of shared classroom and office space, the kitchen and event space, and to collaborate with non-tenant service providers who may periodically use these available common area.

The Final Design

The Site is laid out with the facility on the north west corner allowing for easiest access for pedestrians and those using public transit. The wetlands on the SW corner of the site have been designed to provide an additional amenity, rather than lost space, with a walking path through this area connecting to the sidewalk system through the property.

Parking is in the center of the site, off the street, which will aid in keeping the parking for facility use rather than spill over from neighboring residential areas. The 150 parking spaces currently in the design, may prove a little less than needed for a 400 person event, and street parking along Evergreen and Linfield may be something the project team explores as the plans are finalized with the City.

Putting the Parking on the center of the site, and building on the NW corner also allows the greatest flexibility for long-term future development on the site. Open areas on the site allow for potential future expansion as additional needs are identified or the demand for services outgrows the current design. These open areas can also be used for additional recreation and for outdoor events in the temperate months.



The eastern portion of the site is open, allowing space for playground areas and fields for public use as proposed in many listening sessions with the community. We recommend that the exact uses of this area be left for future discussions with the City and neighborhood.

Section 10: Required City & County Approvals

Required Approvals

Immanuel Lutheran's 8-acre parcel is currently located adjacent to but on the outside of the Woodburn City limits, as the south side of Linfield Street and the east side of Evergreen Road is unincorporated Marion County. To achieve the Woodburn Opportunity Center the project will require two approvals by the City of Woodburn – annexation and a Mixed Use Planned Unit Development (MUPUD) – within the year prior to beginning of construction.

Woodburn's priorities around growth corridors could be key to an annexation decision. This part of the city has recently expanded its Urban Growth Boundary. It is expected that expansion of the City limits in this area is a priority for Woodburn, since there have been or will be a number of adjacent developments. This is also an advantage for the project and will help in securing development approval of the annexation and MUPUD.

- Wetland - Approximately 2 of the 8 acres has been previously delineated as a wetland and will need to be reevaluated as part of the pre-development phase. The previous delineation of the wetland area has expired, as it is only valid for 5 years. The wetland area has likely changed due to hydrology and climate and may be larger or smaller, or have changed position. New delineation would likely be required under any federal or state funding to determine the exact boundaries of the wetland, as well as part of the annexation process.

- Annexation - Construction of WOC requires access to City of Woodburn utilities (water, sewer, etc.) and formal City support in order to seek and secure specific public funding opportunities. It is necessary, therefore, for Immanuel Lutheran to apply to the City of Woodburn to have the 8 acres formally annexed into the City.

- Zoning Regulations - The City of Woodburn's Comprehensive Plan has the 8-acre parcel zoned as Nodal Single Family Residential (RSN) – with the spiritual space, preschool/child care and playground being permitted uses. The potential uses of office space and a café/coffee shop are not allowed under RSN zoning but are allowed as part of a Mixed Use Planned Unit Development (PUD) application.

- Mixed Use Planned Unit Development - The RSN Zone permits planned unit developments, allowing for mixed uses so long as the space dedicated to non-permitted uses are within allowed limits. Immanuel Lutheran's best approach to property development will be to submit a combined request for annexation into Woodburn city limits along with a MUPUD within the existing RSN zoning designation. ILC's proposed uses and square footage for parking, patios, etc. are all within the City's MUPUD space requirements. In an October 2019 meeting with the City of Woodburn, it was decided that this would be the recommended route for ILC to take.

Timing for City Approvals

Consistent communication with City Planning staff is key to gaining the necessary approvals when required so that they don't slow down the rest of the development timeline.

Once the project has received roughly half its committed/pledged funding (not counting New Markets Tax Credits) the project team should fully re-engage with Dennis Thompson Architecture (DMTA) to start completion of project plans. Together with DMTA, the project team should connect with City Planning for initial conversations on facility design and site uses. This approach can achieve the best fit between the goals of the project and any City restrictions or use preferences. Conducted well in advance of the annexation application, these conversations will ensure that necessary City staff and eventually the Planning Commission have a strong understanding of the project.

The exact requirements of development plans to be met under Oregon and Woodburn annexation rules can be confirmed near the end of the capital fundraising campaign. The Annexation and MU-PUD process with the City will take about 6 months. This process should be completed 3-4 months before the project seeks to start construction.

Once the annexation and development plan have Planning Commission approval, and the full construction drawings and specifications have been completed by DMTA, the project can proceed to secure building permits. Permit approval is typically one of the final steps prior to closing financing (signing all final grant and loan agreements and other associated legal documents) and beginning construction. The permit application should occur at the completion of fundraising and a couple months ahead of starting construction.

Section 11: Operational Model

Operational Costs

Just as crucial to any real estate project as the cost of construction and matching capital funding, is an accurate estimate of the relationship between the cost to operate the facility and the potential incomes that can be generated to support those costs. This is particularly true for the Woodburn Opportunity Center as costs determine needed incomes, which in turn determines how much the project must charge the nonprofit Partners.

The estimated operational budget was developed using a combination of analyses. These included comparison to the operating costs of similar facilities, preliminary quotes from vendors, and calculations using existing City and County rates for things like garbage collection and property taxes based on the proposed designs. More detail on where the budget numbers come from is included below for each line item expense.

Before diving into the estimated budget it's important to note the limitations of this sort of early stage work. Between the completion of this report and the completion of the facility's construction, many things will likely change, prices will fluctuate, property tax or water rates will increase, and many remaining questions that impact this budget will need to be answered, particularly in regards to staffing the facility. The budget as of the end of the first year the facility is up and running will likely not remotely match the individual line item costs of the budget below. This budget then should not be used as a line by line predictor, but as a tool to shape the project team's ongoing thinking about the components of operating the facility, and a predictor of the overall magnitude of the cost to keep the facility going.

Comparable Facilities

The primary facilities that were investigated for useful operational comparisons were the Dallas Community Resource Center run by the Polk County Family and Community Outreach Department, and Broadway Commons (BC) owned and operated by Salem Alliance Church. For the purposes of budget comparison only the BC facility could provide useful numbers. The Dallas Center operates out of a building owned by Polk County housing other branches of County government.

Some costs for BC also had to be estimated as the budget for the facility is somewhat intermixed with that of the Church, sharing staff time, and maintenance and repair supplies. This cost sharing, and the fact that BC is nearly twice the square footage of the proposed facility means that there are economies of scale working more efficiently for BC than for the WOC. However, we believe the nature of the use will require less admin cost than BC, which has a high number of rentable meeting rooms that require staff prep and clean up every time they are rented. Property taxes will also make a big difference for the proposed facility, as most of the uses in the building will be tax exempt, while most uses at BC not. Overall, we feel the above costs of $224,000 a year and $9.21 per square foot (slightly less per sf than BC) are a reasonable reflection of the cost for keeping the facility running smoothly.

Estimated Annual Operating Budget

Operating Expenses	Annual Facility Costs	per SF	Notes on Proposed Facility Estimates
Cleaning/Janitorial	*$32,400*	*$1.33*	Every 3 weeks, event cleaning not included. Might find savings in directly employing janitorial staff, especially if the role is shared with other admin staff or event space work like event set up or clean up.
Power	*$37,500*	*$1.54*	Estimate based on the facility's size and mostly nonprofit office tenant uses. On months where the event space is heavily used or mostly unused these costs will likely rise and fall as well.
Gas	*$3,800*	*$0.16*	
Water/Sewer	*$4,400*	*$0.18*	
Garbage	*$7,100*	*$0.29*	Woodburn monthly rate for 6 yard dumpster.
Internet/Phone	*$3,000*	*$0.14*	This represents a cost for only the admin funtions under a typical scenario where tenantns get their own services. If tenants all share it could ultimately be cheaper fo everyone.
Repairs & Maintenance	*$45,000*	*$1.85*	Based on annual per sf costs of Broadway Commons. Could represent an outside service or in house staff plus a supply budget.
Landscape	*$8,400*	*$0.35*	Quote based on $700 per month, averaging twice a month site visits shifting with seasonal need: grass cutting, trimming planting etc. soccer field and wetland not included.
Elevator Maintenance	*$5,200*	*$0.21*	Based on the Broadway Commons elevator maintenance contract
Security	$ -	$ -	Assuming cameras, locks and pass code locks in R&M budget above, no monthly monitoring servie or guards. Any event security paid from event income.
Property Management/Admin	*$52,000*	*$2.16*	A number of crucial roles fall into this category. If one of the nonprofits can provide a reception person, like at the Dallas Center, the project could see significant savings here.
RE Taxes	*$17,000*	*$0.70*	Assumes significant reduction (roughly 70%) for nonprofit service uses. If no nonprofit use reduction it could be closer to $65,000 per year.
Insurance	*$5,200*	*$0.21*	Estimate for owner property & liability coverage (if new entity is created to be owner it will also need Medical, and Executive policies)
Tenant Improvement Reserve	*$1,000*	*$0.04*	Commercial facilities often have funds available to alter spaces to fit new tenants. Given who the project is intending to serve it makes sense that if possible the project should set money aside for this prupose to help new nonprofit service providers who move into the facility.
Miscellaneous Expenses	*$1,000*	*$0.04*	There will always be a few unexpected expenses that crop uo throughout the year and it's a good idea to plan for them.
Replacement Reserve	*$1,000*	*$0.04*	The actual annual or monthly amount set aside for future repairs will depend on how much the project can afford. Ideally, more is put away early in the building's lifecycle when repair costs are low.
TOTAL OPERATING EXPENSES	***$224,000***	***$9.21***	*Broadway Commons was the most comparable property of the facilities the team toured and researched. Their annual budget was estimated at 10.91 inclusive of all staff time.*
Monthly	*$18,667*	*$0.77*	

Areas of Potential Variance:

Property Taxes: How much the property will owe in taxes in any given year ultimately depends on who is renting the space. Commercial facilities are given exemption off their tax burden proportional to the square footage of the exempt uses to the total square footage of the facility. As proposed, every space within the facility is rented by nonprofit entities except for the open meeting rooms and classrooms, and the event space. If the facility is owned by a nonprofit there may be some additional savings. Conversely, if more space is rented for non-exempt uses then the more the facility will owe, though the increased cost should be balanced by a for-profit use that can pay more in rent.

Utilities: The majority of the utility costs included in the estimated budget above are based on per sf costs from the BC facility, adjusted for the difference between rates for particular services between Salem and Woodburn. The ultimate monthly costs will vary with the exact work the tenants of each space are engaged in and the seasonal variance of rentals of event and meeting spaces.

Budget Takeaways:

Staff and Vendor Functions - The major areas of operating expense are the human work required to operate the facility, including janitorial, repairs and maintenance, and administration and management of the facility. The ownership group of the facility will have the option to choose between hiring outside contractors or directly hiring staff to oversee these functions.

- Janitorial – The monthly amount in the budget above is based on quotes from outside vendors to clean all spaces except the event space. Typically, in a facility like this the event space would only be cleaned after each use, not part of a normal schedule. Cleaning intensity and frequency will need to be high enough to keep the facility usable, but must also fit within the income restraints of the property and new post-COVID 19 norms. The amount included is only for a thorough cleaning every three weeks by an outside firm. This may not ultimately be enough given the preferences of tenants and ownership, and new cleaning best practices. In the long term, ownership may find some savings in hiring in-house janitorial staff.

- Repairs and Maintenance – the monthly amount included above is based on per sf costs of the Broadway Commons facility, which uses in-house maintenance staff for most of these needs. These staff are shared with the rest of the Salem Alliance Church facilities. In the years immediately after construction this budgeted amount should be more than required, allowing some savings to go toward replacement reserves. The ownership may find hiring an outside firm as needed to be most economical in that stage, but may ultimately move again towards in-house staff and supplies.

- Administration and Management – There will be a number of tasks requiring staff attention to keep the building operating smoothly. Bilingual reception and intake staff will be crucial to the shared social services function, and there will be a need for someone to oversee leasing relationships with tenants, coordinate rentals of the common area meeting and classrooms, track long term repair and maintenance needs, marketing the facilities services, and coordinate any contracts with outside vendors providing services like landscaping, janitorial, and the delivery of supplies.

Changes Over Time

- Cost Increase – The cost to operate the facility will always increase over time. The rents that the nonprofit partners can afford may not rise as fast. Charging an appropriate amount for market rate rentals of the event space and the meeting and classroom spaces will be crucial to covering costs. Controlling how fast operational costs rise will also be crucial in ensuring the facility remains a social service hub for the community.

- Physical Condition – The facility will physically deteriorate over time. Saving as much as you can in replacement reserves, and staying on top of annual routine maintenance will help keep the building structures in good, usable condition over time. Ideally, in the first 3-7 years, ownership will achieve a greater increase in reserves than currently budgeted because repair and maintenance costs will hopefully begin lower than estimated.

- Tenant Turnover – Hopefully, the main partners stay in the facility for many years, but eventually some may leave, or reduce space usage. When this happens new tenants will need to be found, adding greater marketing cost. In many commercial facilities, owners offer Tenant Improvement funds to assist a new tenant with outfitting their space the way they want. These funds are typically saved on an annual basis to be spent when needed. A small annual Tenant Improvement deposit has been included in the budget above and may be enough to cover needed expenses if no turnover is experienced in the first 5-7 years. Tenant Improvements could also be offered as a rent reduction for the first few months, assuming a nonprofit tenant had the upfront funds to pay for the outfitting of the space themselves.

- Neighborhood Change – The neighborhood will continue to change and grow around the facility. New housing will be built and the City limits expanded. The long-term plan for the City is for this area to connect more directly into the street network extending from downtown Woodburn; two examples are (1) Extending Smith Road to Santiam and Linfield Roads and (2) Extending Evergreen Road to Parr Road. It will be important for the facility to maintain a relationship with the neighborhood and City to ensure being a good neighbor and offering desired services. The facility will thrive if it achieves and sustains full use.

Rent, Tenants & Partners

How Large a Role Do Individual Tenants Play - One important question that still needs to be fully answered is exactly what will be the responsibilities and duties of the tenants, and what will be the responsibilities and duties of the ownership and management. Even for market-rate commercial development there can be a range of responsibility, cost sharing, and provided amenities. For the most part the budget above represents most admin functions, and costs being borne by the facility ownership. However, there could be significant savings if the partnering groups could take on a greater share of responsibility. This could include; paying more of their own utility costs, sharing certain building wide costs like internet and phone, paying to outfit their own spaces with furniture, carpeting, etc., and providing staff time towards administrative functions, cleaning, etc.

Rent, Tenants & Partners

What These Expenses Mean for Rents and Incomes: At Woodburn Opportunity Center, where positive social outcomes are the driving factor, the expenses, rather than the market for commercial space, will determine the rents to be charged tenants. While co-location is a major benefit to the facility's nonprofit partners, it would all be for nothing if the facility had to charge rents at or above what those partners would have to pay elsewhere for space in Woodburn. The estimated expense budget ultimately represents an opportunity to do this (based also on the project teams' assumptions around other income), but means that any errors in assumption may mean rents need to be increased to make up the difference. Conversely, if ways can be found to reduce the overall operational costs, that can be passed through to the partners in the form of lower rents. A more thorough exploration of potential rents and incomes is below.

Facility Incomes

The facility's incomes will be generated in the following ways:

1. Tenant Rent from the Nonprofit Resource Center Partners
2. Event Space Rentals
3. Tenant Rent from the Potential Coffee Shop/Café
4. Common Area Classrooms and Meeting Rooms Rentals

The project team explored each of these options in turn to estimate reasonable income assumptions for the facility.

Tenant Rent – Nonprofit Partners

The intention behind this facility is to provide space, with at least below market rate rents, for nonprofits looking to serve Woodburn and northern Marion County. As a first step in determining what the ranges of the rents need to be we investigated both what these and other nonprofit partners currently pay at the Polk County Resource Center, and completed an analysis of the current market rate for commercial office space in Woodburn.

Polk County Resource Center Rents

It is important to note that many of the service providers who operate out of the Polk County Resources Center do not pay rent. Many of these groups that don't pay rent also don't have dedicated space, using common areas on a weekly or monthly basis as needed. At the time of our research, MWVCAA and Family Building Blocks were the only two groups with dedicated space and which were paying rent. Over the history of the Resource Center other groups have taken dedicated space and paid rent.

Smaller groups using common spaces also rotate through the space as demand and staff availability dictate. MWVCAA contributes $900 per month for their space, as well as providing a staff person for intake. Family Building Blocks pay $1,100 per month for roughly 2,000 square feet of dedicated space plus access to shared storage and the building's gym. MWVCAA and Family Building Blocks pay about $0.65 per square foot in rent. This is an ideal level of rent for the nonprofit partners to be paying to ensure their rent is not an ongoing financial burden or a barrier to maintaining a presence in Woodburn. We have also assumed that Immanuel Lutheran Church and Little Lambs Preschool will pay the same rents as the project's nonprofit partners.

Woodburn Commercial Rents

Woodburn is a small market and when we conducted our research there were a limited number of properties for rent, and only one new space that became available during the period we were watching the market. It was necessary to include both office and retail space in our assessment. We also expanded our search to include Wilsonville and Salem to round out our analysis.

A total of 17 spaces for rent were analyzed between the three markets representing a wide range of sizes, prices, lease types, and space types, as shown below.

Comparable	City	Type	Size	Rent/	Class	Lease Type**
1	Woodburn	Retail	3180	$0.84	C	Triple Net
2	Woodburn	Office	960-2050	$1.00	C	Triple Net
3	Woodburn	Office	3000	$1.17	C	Unclear
4	Salem	Office	4810	$1.25	C	Inclusive less janitorial
5	Salem	Office	1850	$1.35	B	Triple Net
6	Woodburn	Office	5000	$1.60	B	Triple Net
7	Wilsonville	Office	1310	$1.65	C	Unclear
8	Salem	Office	920	$1.65	B	Inclusive
9	Wilsonville	Office	200	$1.67	B	Inclusive
10	Wilsonville	Office	705-1670	$1.67	B	Triple Net
11	Salem	Office	920	$1.68	B	Unclear
12	Wilsonville	Office	1580	$1.75	B	Triple Net with common amenities
13	Salem	Office	180	$1.85	A	Inclusive
14	Wilsonville	Retail	1350-2250	$1.92	A	Inclusive-sublease
15	Salem	Office	1730	$2.25	A	Inclusive
16	Wilsonville	Office	4220	$2.46	A	Inclusive
17	Woodburn	Retail	2200	$3.17	A	Inclusive with common amenities

**Class* *is a generally accepted measure of the quality of commercial space, assessing age, condition, amenities, proximity to transit, and traffic, available parking, condition of nearby businesses, etc.*

***Triple net indicates tenant pays share of all costs including property taxes, and building maintenance and insurance, in addition to utilities, while Inclusive indicates all utilities and other costs are included with the rent payment. Common amenities indicates shared spaces like break rooms, kitchens, reception desks, etc.*

Woodburn Commercial Rents Continued

In our analysis Woodburn represented both the low and high ends of the market. The low end was one of the older spaces in the analysis, in an aging commercial area off Highway 99. The top was a brand new retail oriented space adjacent to the Woodburn Outlets off I-5, which guaranteed significant traffic and exposure. Dropping these two outliers and doubling the weight of the remaining Woodburn properties gave us a market average of about $1.60 per sq ft in rent. We've used this as the upper rent limit for nonprofit tenants to ensure that the facility is providing the intended value to its partners.

In order for the Opportunity Center to achieve its core purpose, rents paid by the nonprofit tenants must be no greater than $1.60 per and as close to $0.65 per as possible. Ideally rents will be below the market bottom of $0.84 per sf. Therefore, the project should support its operational costs - based on the estimated operating expenses and the income parameters.

Event Space Rentals

Incomes produced by the event space will ideally help keep the nonprofit rents low. Conversations with the two existing event spaces in Woodburn indicated a market for both evening and weekend rentals of larger spaces capable of holding events for between 150 – 340 people, as well as smaller weekday and weekend daytime events of between 25 and 100 people. Takeaways from these conversations and recommendations on operational decisions to help the new event space meet demand are included in the previous section on Facility Ownership and Operations.

The project team's analysis of the comparable event spaces has led us to conclude that the space is likely to generate about $600 for a portion of the space serving a 25-80 person meeting, training etc., and about $2,500 for a large evening event like a wedding. Our assumptions on incomes in the chart below include 6 smaller events and 2 large events a month on average throughout the year. There will undoubtedly be seasonal variance in demand. The incomes noted have accounted for paying cleaning costs, but are not accounting for staff coordination time both for rentals and during events. We believe that this work should be shared with overall coordination of the facility to save staff time and money.

On an ongoing basis the Ownership of the facility will need to decide on fair rental rates for these spaces and adjust accordingly.

Tenant Rent – Coffee Shop/Café

Our income analysis assumes that the coffee shop/café business is being operated by an outside entity as discussed in the Facility Operations section. Because it will not be a nonprofit we have assumed that the business will pay market rate rents. The space designed for this purpose is only 300 meaning the rent at the market average of $1.60 per would be $480 per month. While the ownership of the building may see some value in assisting the business in getting set up in the space, this should not be a prohibitive rent for this business.

On an ongoing basis the Ownership of the facility will need to decide on the fair rent for this space and adjust accordingly.

Rent, Tenants & Partners

Common Area Meeting and Classroom Rentals

The facility is also designed to have a number of spaces that are not dedicated to a particular tenant. They are available for the use of the nonprofit partners and any service providers who don't need permanent space but who wish to serve the populations that make use of the Opportunity Center. These rooms can be income-producing: rented for a meeting, educational programming, employer training, etc.

While we imagine that first choice for use of these rooms will go to non-tenant service providers, we believe there is still likely to be plenty of unused time that these spaces could be rented for other public uses the way it works at Broadway Commons. Some of the non-tenant service providers may also be able to afford to pay a small amount for their use of these spaces.

Rents for each space have been determined based on size and comparable rooms for rent within Broadway Commons and the Wellspring Center. In the income table below we have assumed that each space could be rented to a paying group an average of twice each month.

Common Area		Estimated Rent
Classroom	500	$400
Classroom	301	$225
Classroom	300	$225
Classroom	600	$450
Computer Space	300	$225
Family Space	300	$225
Office	149	$100

Estimated Annual Incomes

Income Producing Spaces					
Tenant/Renter	**Program**	**Space Use**	**Rent/SF**	**Monthly Rent**	**Annual Rent**
Community Action Agency	Primary	1923	**$0.95**	$1,826.85	$21,922.20
	ARCHES	450		$427.50	$5,130.00
	Home Youth Program	1001		$950.95	$11,411.40
Family Building Blocks		2151		$2,043.45	$24,521.40
Immanuel Lutheran Church		2506		$2,380.70	$28,568.40
Little Lambs Preschool		2250		$2,137.50	$25,650.00
Coffee Shop		300	**$1.60**	$480.00	$5,760.00
Gross Monthly Tenant Income		**10581**		**$10,246.95**	**$122,963.40**
Vacancy (15%)				*$(1,537.04)*	*$(18,444.51)*
Expected Gross Tenant Income				**$8,709.91**	**$104,518.89**
Community Event Space		5250		$7,100.00	$85,200.00
Common Use Rentable Space Run By Ownership	Classroom	500		$800.00	$9,600.00
	Classroom	301		$450.00	$5,400.00
	Classroom	300		$450.00	$5,400.00
	Classroom	600		$900.00	$10,800.00
	Computer Space	300		$450.00	$5,400.00
	Family Space	300		$450.00	$5,400.00
	Office	149		$200.00	$2,400.00
Publically Rented Space Subtotal		**7700**		**$10,600**	**$129,600**
ESTIMATED MONTHLY INCOME				**$19,509.91**	**$234,118.89**

Income Takeaways

Nonprofit Tenant Rent

Our analysis determined that the project can afford to rent the dedicated space to the project nonprofit partners for an average of $0.95 per sf. This ends up being well above the target of $0.65 that is paid at the Polk County Resource Center. However it is still well under the market average of $1.60 per sf, and would have been the second cheapest rent in our market analysis. In the end we have demonstrated that the project can potentially offer a reduction on the market rate but each nonprofit tenant is going to have to decide how the numbers above fit within their available budgets.

The Importance of Non-Tenant Incomes

Despite representing 7,700 square feet as compared to 10,581 square feet, the non-tenant spaces within the property are projected to generate greater income than the dedicated tenant spaces. We believe these spaces will need to be marketed to the public, well-coordinated, and kept clean and functional in order to meet these income projections and be compliant with post COVID-19 norms and guidelines. Regardless, there is sufficient demonstrated demand that the income from these spaces can subsidize the rents paid by nonprofit partners.

Vacancy Rate

When assessing a building's income producing potential, whether commercial or residential, some income is projected to be lost compared to the building's maximum potential income if every space was fully rented. This loss is called a Vacancy Rate, as it's largely a prediction of the average minimum amount of empty space there will be within the facility. Standard vacancy rates for commercial properties can run anywhere from 20% to 50% of maximum income.

The project team has used a relatively low vacancy rate of 15% for this project for two primary reasons. First, the project is being developed with specific partners in mind who have committed to rent space once the project is built. Second, the project will be able to offer nonprofit and faith-based tenants lower rents than they could find elsewhere in Woodburn for comparable offices. A 15% vacancy rate represents about 1,600 square feet, or the equivalent of losing the ARCHES Project and HOME Youth and Resource Center but not all of MWVCAA's rented space.

Space That Does Not Produce Income

The total square footage of the facility as currently designed is 24,333. The total income producing space is only 18,281, meaning about 25% of the facility's space does not produce income under our assumptions. Most of this other space can only be used for common areas, like hallways, foyers, stairwells and elevators, and bathrooms. But it's in the best interest of facility ownership to figure out ways for these other spaces to produce income and/or community benefit. One example is the kitchen space, which is an amenity for event rentals, and possible for tenants, but might also be a rentable space in its own right if designed and marketed correctly.

Non Income Producing Spaces	
Hallways	2727
South Lobby	800
Restrooms	604
Stairs	400
Kitchen	375
Storage	201
Break Room	200
AV Room for Event Space	241
Event Space Storage	125
Mechanical	175
Elevator & Equipment	128
IT Server	50
Janitorial	27
Total Non-Rentable Common Area	6053
Percentage of Total Building SF	*25%*

Income Takeaways

Expected Cash Flows

Given the estimated operating expenses and project incomes, below is a projection of net Incomes for the first 10 years of the facility's operation. To stress test income and expense assumptions for revenue producing properties real estate developers analyze the trending of these numbers over time. This is primarily a tool to determine whether the property can support debt payments to help fund the construction with loans. To be conservative, especially regarding socially driven projects, the increase in expense costs are typically assumed to outpace the increase of incomes.

The table below assumes that expenses will increase 3% annually and that incomes will only increase 2.5% annually. The outcome is that while the property produces $10,118 in net cash flow in year 1, under these assumptions it starts to run out of extra income after year 10.

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Expected Annual Gross Income	$234,118	$239,972	$245,971	$252,120	$258,423	$264,884	$271,506	$278,294	$285,251	$292,382
Total Annual Operating Expenses	$224,000	$230,720	$237,642	$244,771	$252,114	$259,677	$267,468	$275,492	$283,756	$292,269
Annual Net Operating Income	**$10,118**	**$9,252**	**$8,330**	**$7,350**	**$6,309**	**$5,207**	**$4,038**	**$2,802**	**$1,495**	**$113**

Loan Repayment

The financial model described in this section on Incomes and Expenses does not assume that loans will be an option for this project as keeping rents low is a foundational goal for the partners. Even with the extra income expected in year 1 above of roughly $10,000, this would not represent a large enough loan payment to make much of a dent in the project's construction and development cost. A loan of $1 Million would be roughly the minimum amount it would make sense for the project partners to pursue. Below is a simple analysis of what debt payments on a loan of that size might represent under some loan options available to the project. Given these findings we do not believe that permanent loans are an option for the WOC.

Examples of Annual Payments Under Different Loan Program Options at a $1 Million Loan Size:

	USDA Community Facility Loan Guarantee Program	ELCA Mission Investment Fund	Standard Commercial Bank
Loan Amoritization	40 years	Up to 25 years	Up to 20 years
Loan Term	40 years	Up to 10 years	10-15 years
Estimated Interest Rate	4.0%	4.5%	5.0%
Annual Payment	**$50,523**	**$67,439**	**$80,243**

Section 12: Capital Costs

Total Development Budget

The capital budget below includes all costs directly related to getting the facility approved by local jurisdictions, constructed, and furnished. These costs are generally broken into "hard" costs related to the physical construction of the building and site, and "soft" costs, which is used as a catch-all term for the other monies that have to be expended before and during construction to complete the project. The capital cost budget and explanations below is intended as a guide for the kinds of costs and processes that the team will need to complete in order to get the building built, and as a rough estimate of what the total cost of the project will be for fundraising purposes. Prices may fluctuate and individual line items will undoubtedly shift based on City requirements, the particular funding secured, and the findings of site assessments, etc. This budget should not be considered an exact, line by line projection of what the final budget will be, but a safe, round number estimate of what the entire process will cost, and where the largest expenses will be. Explanations of these items are included to help the project team envision the process of development and the kinds of expenses the project will accrue.

Before we present the project budget there are some elements of real estate development that we believe it makes sense to cover to put the capital costs into context.

Pre-development

There will be a number of expenses the project must pay before construction can even begin and it's unlikely that any of the Partners have sufficient cash set aside to cover these costs, the first of which may come a full year before any permanent funding is disbursed to the project for construction.

We believe potential pre-development expenses will run around $375,000, covering things like a market study and business plan for the event space, an appraisal of the site, an environmental site assessment, updated wetland delineation, geotechnical report, and legal costs. The largest expense however, will be related to design as about 60-70% of the total fees paid to the architect and engineer are charged prior to the start of construction.

There are generally two ways to cover these costs. The first (and least expensive and most difficult) is to find a funding source willing to allow the use of their funds prior to all other funding being secured. The second is to find a lender who will provide a loan to the project owner to pay those upfront costs who will then be paid back when the main funds are disbursed to the project at the start of construction. This is more expensive to project as interest must be paid on this loan but it's a lot easier to find as it's less risky for the lender. There are a number of commercial banks that provide this funding, but State-level Community Development Financial Institutions (CDFIs) are likely a better fit for this project. The budget below includes an estimate of origination and interest costs for a $375,000 predevelopment loan.

Construction Cost Estimate

Estimating the cost of future construction projects is a complicated task and a skillset fully separate from building design or construction. Contingencies and guesswork increase with greater time between the estimate date and the expected construction start date. Getting these numbers right on any development project is crucial as construction represents by far the largest costs involved in bringing a project from a design on paper to a physical space. The initial estimate for the construction costs below was provided by the project Architect, Dennis Thompson. This estimate was then compared against per square foot costs for the region, adjusted for project size and complexity, based on CASA of Oregon's past projects and the recent trending of construction costs on CASA's current projects and conversations with General Contractors.

Construction Cost Inflation

Construction costs don't drop unless the economy is experiencing a recession, and the rate of inflation on a yearly basis can be hard to predict. If construction were going to start this summer, then this estimate without inflation would be a pretty safe bet on the total construction cost. However, because it will take time to fundraise, apply for grants, line up tax credit timelines, etc. the earliest construction is likely to begin is 2022. Over the past 12-18 months cost inflation has been slowing from a peak 2-4 years ago when annual inflation was over 10%. The impacts of COVID on construction and the overall economy will likely see inflation decrease further but impacts by 2022 are very hard to predict. The inflation amount included in the budget below should be sufficient to cover costs for 2022, but any further delay should be priced as at-least an additional 3% of construction costs per year.

Construction Cash Flow and Lending

It is rare in any large construction project that all funds needed to finish the project are secured by the start of construction. Only a small portion of the New Market Tax Credit equity will be paid into the project at the beginning of construction, with the rest coming once construction is complete. It is likely that some of the other funding the project receives is under similar restrictions. We have assumed that the project needs about $3 million of loans to make it all the way through the construction period and have included origination fees, legal costs, and the interest paid on a loan of this size.

Capital Budget

Acquisition Costs			
	Land	$950,000	This budget assumes that the value of the land is entered into the partnership to increase the NMTC equity the project can capture. We believe that tax credit partnership can be structured so that ILC retains the land after the tax credit compliance period is complete.
	Closing/Recording Costs	$45,000	Costs related to property transfer, title insurance, deed recording etc.
	Acquisition Costs:	**$995,000**	*Roughly $125,000 per acre*
Construction-Hard Costs			
	Site Work and Utilities	$978,000	Construction costs related to getting the site ready: grading, sidewalks, curbs, gutters, power, water and sewer connections, initial landscaping, walking trail, playground, etc.
	Building	$3,778,000	Costs related to the vertical building construction.
	Common Area Fixtures and Furnishings	$320,000	Carpets, chairs, wall hangings, art, cabinets and shelving, etc. within the non-tenant spaces of the building. Assumes tenants furnish their own spaces.
	IT & AV Systems	$118,000	Information technology for the building and audio visual equipment fo rhte event space.
	Gen. Conditions, Overhead & Fee	$655,000	Additional costs in the construction contract related to site supervision, safety, clean up, a job trailer, and the Contractor's profit.
	Contractor Insurance and Bonds	$115,000	The project owner will be covered during construction by the Contractor, who will also provide a bond guaranteeing completion of the work.
	Owner's Hard Cost Contingency	$300,000	It's always a good idea for the project to have additional money for unforeseen issues that arise during construction. For new construction the industry standard is to set aside an additional 5% of the total construction costs.
	2022 Price Inflation	*$200,000*	*This additional amount would cover expected inflaction between current pricing and starting construction in the summer of 2022.*
	Construction Costs:	**$6,464,000**	*Roughly $265 per square foot of building space*

Capital Budget

Development- Soft Costs			
	Approvals, Permits, City Charges	$360,000	Annexation into City limits, building and other various local and state permits, Woodburn system development charges
	Market Study and Appraisal	$20,000	The cost of getting the property appraised prior to any loans or transfer, and a study on market demand for an event center.
	Surveying and Site Investigation	$44,000	A topographic and property title survey, environmental and geotechnical reports, traffic impact analysis, etc.
	Owner's Insurance	$50,000	Additional insurance coverage for the owner's liability not covered by the Contractor's insurance during the construction period.
	Marketing/Advertising	$10,000	Initial outreach and advertising for the facility and the event space.
	Taxes (During Construction)		If the land (for tax credit purposes) ever leaves sole ownership of the church, it won't be owned by a tax exempt entity any longer.
General Fees			
	Architectural and Engineering	$415,000	Costs for architectural design and engineering, both in plan development and oversight during construction.
	Legal/Accounting	$40,000	Costs for the ownership group specifically related to their legal considerations in owning and developing the facility and tax accounting during construction.
	3rd Party Construction Manager	$70,000	Depending on the involvement and role of the architect, and the construction experience of the ownership team, having a construction manager working directly for the owner to oversee the architect and contractor is recommended.
	Special Inspections/Testing	$30,000	Additional testing and inspections costs during construction as required by the City building department.
	Developer Fee	$720,000	A fee to cover the time of the ownership team and any other consultants hired to assist with development.
Construction Loan Costs/Fees			
	Lender Inspection Fees	$20,000	Assuming the construction funding process needs loans, the lender will require a 3rd party review of the construction process.
	Lender TItle Insurance	$25,000	Title insurance for the construction lender during construction.
	Lender Legal Fees	$25,000	The legal costs of the construction lender.
	Loan Fees	$35,000	A fee charged by the construction lender to originate the loan.
Permanent Loan Fees			
	Perm. Loan Closing Fee		No loan assumed because the incomes don't appear to support debt. The typical fees are 1% of the loan amount charged at the beginning or end of construction.
	Rate Lock Fee		A fee to lock the interest rate on your permanent loan at the start of construction.

Capital Budget

Tax Credit Fees			
	Tax Credit Syndication Costs	$70,000	Assuming the project use NMTCs: Review, investigation, and other due diligence costs of the new market tax credit investor.
	Tax Credit Cost Certification	$12,000	A full accounting review of expenses on the project at the end of construction, required for tax credits.
	Tax Credit Legal/Advisor Fee	$50,000	The legal costs of the new market tax credit investor and community development entity that puts the deal together.
Interest			
	Construction Period	$175,000	It's rare that all the capital funding raised is available right when construction starts, particularly tax credit equity. This assumes that about $3 million in loans will be needed to complete construction and be paid off once the project is built.
	Predevelopment Loan interest	$15,000	The feasibility team estimates that the project will need about $375,000 before construction even gets started and since most funding is contingent on finalizing all of our funding this will need to be a loan. This line represents the interest on that loan
	Predevelopment Loan Origination Fee	$5,000	This line represents the initial fee on that predevelopment loan. Most of the predevelopment costs will be design charges for the architect and engineer.
	Development Contingency	$100,000	In addition to the contingency for unexpected construction expenses, it's important to also have funds set aside for unexpected non-construction issues and costs. Recommendation is an additional 3-5% of soft costs.
Reserves/Cash Accounts			
	Tenant Improvements-Lease Up	$20,000	Since WOC will lease mostly to nonprofits, it's best to set aside some funds to help with furnishings and equipment so they can be effective from the start.
	Initial Replacement Reserves	$0	It's also common to put aside money at the beginning of the project for long term maintenance if there are funds available. Because of high costs up front we have not assumed any funding for this purpose, but any remaining contingency at the end of construction should be put aside in an initial reserve account
	Development Costs:	**$2,311,000**	*Roughly $95 per square foot of building space*
	TOTAL PROJECT COST	$9,770,000	*Roughly $400 per square foot of building space*

Capital Budget

What is NOT included in this budget

Capital Campaign Consultant - Fundraising for large capital campaigns is a time consuming process and separate skill set from project management or real estate. Whether the project team hires an outside consultant or has a team member manage the capital campaign to raise funds from individual and corporate donors, and grants from foundations, their time will be significant, and their consistent involvement will be crucial in moving fundraising forward. Because this is an early expense, with the potential to be funded separately through a grant or foundation, it has not been included in the project budget.

Permanent Financing Costs - Because of the project's limited ability to bring in income on a monthly basis as determined during the feasibility research, we are not assuming the project will be funded with any debt. This has advantages and disadvantages.

- Disadvantages; it increases the burden of fundraising for donations and grants, as those sources are typically not as easily available as loans.

- Advantages; it reduces the total development cost of the project by not having to pay upfront fees a lender would charge. It also reduces the income the project must bring in, allowing rents to stay low long-term and any excess income to pay for keeping up the facility, rather than make payments on the loan.

Upfront Project Management - One of the costs not included in the predevelopment charges in this budget is the time of a project manager/real estate developer during the predevelopment period prior to construction. There are likely sufficient funds set aside within the developer fee to cover this time but it either needs to be added to the predevelopment loan, which would increase the total project cost, or the project would need to find a consultant or staff time for this role that can wait to be paid once construction begins and funds are available.

Section 13: Funding Sources for Capital Campaign

To achieve the $9.77 million goal for developing and constructing a facility of this size, the Woodburn Opportunity Center (WOC) will need to bring in an array of public and private funding sources - as there is no single path for funding this kind of nonprofit-driven community venture.

If this project is to come to fruition the layers of funding the project will piece together will likely come from a combination of public grants and tax credits, private foundations and individual donors. Subsidized and unsubsidized loans are another potential option but as noted previously, the project likely cannot pay debt while offering low rents to the service providers.

Private Funding Sources

Significant private investment will be derived from three primary sources:

- Immanuel Lutheran Church (~ $2 - 2.5 million). This includes ILC's existing properties, the 8 acres and ILC's Legacy of Faith Fund.
- Community Campaign ($1.5 to $2 million). This community-based campaign will target individual major and small donors and corporate support.
- Foundations ($750,000 to $1 million). This includes major Oregon foundations and others capable of providing capital grant funding.

Immanuel Lutheran Immanuel Lutheran brings several assets as resources needed to achieve the campaign goal:

- **Appraised value of existing Church properties:** $1.4 million. A May 2019 appraisal (Powell Banz Valuation LLC, Salem) of ILC's current East Lincoln Street properties estimated a value of $1,400,000. This includes the 1036 E Lincoln Street church property and the adjacent Little Lambs Preschool building. The sale of these properties can coincide with the capital campaign and construction completion.
- **Appraised value of 8 acres to be used for Woodburn Opportunity Center:** $950,000. A May 2019 appraisal (Powell Banz Valuation) of the 8 acres at Evergreen Road and Linfield Avenue estimated a value of $950,000. This value is incorporated into the total capital campaign budget goal. This value may continue to increase prior to construction starting.
- **Legacy of Faith Fund:** $110,000. This Fund was the original source of revenue derived from members of the ILC Congregation used for the purchase of the 8 acres. The Fund is now available to invest in the construction and maintenance of the Woodburn Opportunity Center.

Community Campaign - Achieving a community-based fundraising goal of $1.5 to $2.0 million is a key element of the overall capital campaign. The campaign would be led by a committee of ILC and other key project stakeholders and target major donors (to be identified and qualified), community residents, and corporate supporters. The campaign and Center's leadership and decision-making bodies require strong multi-cultural representation (especially Latinx), consistent with the values that infuse this community-based endeavor. Outlined in Appendix D and with a Gift Range Chart, the campaign can consist of five phases:

Phase 1: Campaign Readiness. This phase will identify and recruit the Campaign Committee, hire dedicated staff/counsel to manage the campaign, create organizational structure and conduct prospect research to identify/qualify top potential donors.

Phase 2: Cultivation Phase. Conduct solicitation activities with existing ILC leaders, project partners and internal supporters.

Phase 3: Leadership Phase. Committee volunteers cultivate and solicit leadership gift prospects ($25,000+). Each prospect is moved through a process of becoming informed, interested, involved and invested. Donor cultivation should be in person and attuned to the donor's interests and abilities. This may include 1:1 meetings as well as exclusive cultivation tours and events.

Phase 4: Major Gifts Phase. Committee volunteers cultivate and solicit major gift prospects ($5,000+). General cultivation events and awareness activities during the major gifts phase raise awareness and cultivate all major gift prospects and top community phase prospects and social network leaders.

Phase 5: Community Phase. Community-wide awareness-raising will be engaged through community and media partnerships. Solicitation will be conducted through direct response (e-mail, direct mail and select telefunding if budget or volunteers allow) and community events.

Giving Opportunities – Recognition - Campaign leaders should identify a variety of recognition opportunities for giving, including permanent recognition through naming rights (gathering hall, entry foyer, wings, rooms, playground, etc.). This could also include honoring family members and community leaders through permanent recognition opportunities for gifts above $500. Gifts to the community phase will be larger if donors have the option to fund with monthly pledges on credit cards or through auto-withdrawal (i.e., give $1,000 at $84 per month).

Engraved or personalized bricks are one example of an excellent way to provide capital campaign contributions with inexpensive recognition. Each personalized brick brings a donation and strengthens the bond between the donor and the nonprofit organization.

- Offer brick pavers with laser engraved messages in a special entryway or sidewalk.
- Design and construct an attractive landscaping display in front of the Opportunity Center or in the wetland area.
- Build a reflection garden or water fountain area and then incorporate these engraved bricks in the sidewalks, planters, and rest/reflection areas.
- Create a donor wall in the entryway or foyer, where each contribution earns the right to place a long-lasting commemorative message on a brick or decorative tile.

Funding Sources

Foundations - An essential revenue element for the capital campaign will be philanthropic foundations, public and private. Some of the state's major foundations were key to funding the Feasibility Study: Ford Family Foundation (Phases 1 and 2), Meyer Memorial Trust and Oregon Community Foundation.

Foundations that commonly give to Oregon capital campaigns for community projects are listed below. These sources typically will not consider a grant award until the capital campaign has exceeded 50% of its goal, preferring to be the last money in to complete the campaign. Collectively they have the potential of contributing upwards of $1 million to the Woodburn Opportunity Center capital campaign.

PRIORITY SOURCES	ESTIMATED AMOUNT	DEADLINE/Comments
Meyer Memorial Trust	$300,000	April
Oregon Community Foundation	$100,000	Jan 15 & July 15
Ford Family Foundation	$250,000	Open
Collins Foundation	$100,000	Bimonthly
Swindells Charitable Trust	$100,000	Open
Maybelle Clark Macdonald Fund	$50,000	Feb 15 & Aug 15
OCF Joseph Weston	$50,000	Sept 15
Burlingham Trust	$350,000	Open
Murdock Charitable Trust	$250,000	Open
Spirit Mt. Community Fund	$50,000	Quarterly

Potential Secondary Sources are Key Bank, Bank of America, Chase Bank, Gates Foundation, Kinsman Foundation, Wells Fargo, NW Natural, Columbia Bank, US Bank, Northwest Health Foundation, Portland General Electric, Standard Insurance, Paul G Allen Foundation, Clark Foundation, Ralph Hull (Corvallis) and Branaw (Delaware).

Public Funding Sources

A combination of State or Federal grants, credits and loans have the potential of raising $4 million+. Future budgets, timing and eligibility will determine the chances for success from any one source - realistically it will take a number of specific successes in order to achieve the total public funding needed.

Community Development Block Grants (CDBG) - The best source of public funding for community facilities is the CDBG program administered by the State of Oregon, through its economic development arm, Business Oregon. Larger cities and urban counties receive their own CDBG funds directly from the federal government, but smaller cities apply to the State's annual pool of CDBG funds for specific projects.

The primary restrictions are that an application must include a City or County government as at least a co-applicant, and to have an ownership stake in the completed project. This means the City of Woodburn would need to support the project and submit the application through Business Oregon to HUD. This is a challenge in the short term as the City of Woodburn is currently going through this process, seeking a $1.5 million CDBG grant to purchase a facility on Cascade Avenue to serve as a Woodburn Family Resource Center managed by Love INC (described as North Marion Family Resource Center Phase 1 in this report - see Appendix A). A HUD funding decision is expected by July, 2020.

Eligible projects must meet one of the following objectives:

1. Benefit low and moderate-income individuals
2. Aid in the prevention or elimination of slums or blight
3. Urgent need that poses a serious and immediate threat to the health and welfare of the community

The awarded funding amounts are based on the applicant's need, availability of funds, program guidelines by project type. This project most likely fits the program category of a Community or Public Facility, which comes with a funding cap of **$1,500,000 per application.**

Business Oregon has regional development officers that can provide the project team with assistance in preparing an application.

In 2020, there are two application periods, February through April, with awards announced in June, and July through September, with awards announced in November.

Public Funding Sources

Federal Grants

There is a myriad of grant programs administered directly by federal departments that address all aspects of supportive services and government programs that those departments oversee. It will be a decision for the WOC leadership team to determine which individual grants to pursue.

Federally distributed grants are all listed on the Grants.gov clearinghouse website. The site is a comprehensive but unwieldy tool and includes all federal grants across every federal department.

The Feasibility Study consultant team has conducted initial research into potential options that may fit the intended WOC services and goals. Below is a brief outline of these grant options:

Department of Health and Human Services (HHS)

In general, HHS is a likelier source of applicable federal grants than most, as the recently-defined social determinants of health include anti-poverty and access to opportunity efforts.

Community Services Block Grants – program intended to alleviate the causes and conditions of poverty in communities. Eligible applicants include State Governments and Community Action Agencies. Project partner Mid-Willamette Valley Community Action Agency (MWVCAA) would be an eligible entity to apply directly for funds.

The State of Oregon also gets CSBG funds directly to distribute to individual communities. The State's portion flows through Oregon Housing and Community Services and is generally allocated through the Housing Stabilization Division.

Leeann Marx, CSBG Program Coord; Housing Stabilization Division, Oregon Housing and Community Services; 725 Summer St NE STE B; Salem, OR 97301-1266; Ph: 503-986-6892; Email: Leeann.Marx@oregon.gov - https://www.acf.hhs.gov/ocs/programs/csbg/about

Department of Housing and Urban Development (HUD)

HUD has a few programs that may fit the WOC project, with the exception that both programs require the applicant to be a Public Housing Agency. Should the possibility of pairing the proposed facility with housing, particularly affordable housing, the project team should pursue the potential of working with the Marion County Housing Authority to access the following opportunities.

HUD Office of Capital Improvements - Branch of HUD that oversees a number of shifting grant programs that generally fund capital costs related to the development, financing, and modernization of public housing development and for management improvements. Funding opportunities through this Office must for used for capital costs, and cannot be spent on services or programming.

The WOC may be able to pursue these funding opportunities if there is a presence onsite of the local Public Housing Agency, for example in the administration and additional services related to the Family Self-Sufficiency Program or Self Help Homeownership Opportunity Program.

The most obvious fit of the programs through this HUD Office was the Capital Fund Education and Training Community Facilities Program (CFCF), which provided funds to Public Housing Agencies for the construction, rehabilitation or purchase of facilities to provide early childhood education, adult education, and job training programs for public housing residents based on identified need. It's currently de-funded and unlikely to be renewed under the current administration, but gives an example of the kinds of fund offerings made through this branch of HUD, based on presidential directive. https://www.hud.gov/program_offices/public_indian_housing/programs/ph/capfund

Public Funding Sources

US Department of Commerce, Economic Development Administration

Should the project team decide to pursue the options of including or working with business development or a startup/small business accelerator there are potential options for capital sources through the Economic Development Administration. The two primary grant programs are described briefly below.

Regional Innovation Program – an annual funding opportunity for activities designed to develop and support regional innovation initiatives. The program currently emphasizes scalability of economic development and technology-based companies, particularly in areas with lower economic growth. Nonprofits, City and County governments, institutions of higher education, public-private ventures, and combinations of those groups, are all eligible applicants. The 2020 cap per award is $1,500,000 per project.

Public Works and Economic Adjustment Assistance – this program is intended to provide economically distressed regions and communities with comprehensive and flexible resources to address a wide variety of economic needs by leveraging existing local and regional assets. Projects funded through this program are intended to achieve creation and retention of jobs, increase private investment, advance innovation, and provide workforce development opportunities.

Nonprofits, City and County governments, institutions of higher education, public-private ventures, and combinations of those groups, are all eligible applicants. The 2020 guidelines allow for awards of between $100,000 and $3 million. Projects can include construction work, and non-construction planning, technical assistance, and revolving loan fund work.

New Markets Tax Credits

New Markets Tax Credits (NMTC) are a federal program that provides tax credits for the development of commercial or other non-housing projects intended to provide communities with economic or social benefit. There are annual allocations of credits through the Community Development Institution (CDFI) Fund, which distributes credits to registered Community Development Entities (CDEs). These CDEs are then tasked with finding the individual projects to which they allocate credits and spur equity investment.

The limits of the City of Woodburn are a NMTC qualified zone, meaning that the project should be eligible once the parcel is annexed into the City. The proposed uses of the facility, and project partners, also should be eligible for the program.

NMTCs will be the last funding source the project secures, as NMTCs typically fund between 20-25% of the total project cost, and can only be disbursed when all other sources are committed. Once the NMTCs are committed, there is a quick deadline for the project to begin construction. However, the project team should maintain regular contact with a CDE familiar with Oregon throughout the process of fundraising as it's crucial for CDEs to be familiar with the project both when they apply on an annual basis for NMTCs and so they know roughly when the project will be ready to use credits.

New Markets Tax Credits Continued:

An example funding cycle timeline for NMTC would be:

- Spring 2021: The project leadership team begins fundraising and meets with a CDE interested in funding community facility projects in rural Oregon.
- Fall 2021 to Spring 2022 - When $3+ million has been raised, start proces of seeking public and private grants, keepiong the CDE apprised of progress.
- Summer to Fall 2022: All funding is committed, and the NMTCs are awarded to the project.
- By Spring 2023 Final legal details are decided, finance closing and the start of construction.

For an equity partner to join the deal and capture the awarded tax credits, the overall legal entity that owns the project must include a for-profit entity, which can partner with a nonprofit that has led the development process. This structure might ultimately be easier if all partners participated in a new nonprofit or partnership entity specific to the project.

United Fund Advisors (UFA) of Portland was the CDE the feasibility team contacted for an initial consultation on the project's fit for NMTCs. As a next step UFA is always willing to make NMTC 101 presentation to the project leadership team once that group has solidified and the project enters the fundraising phase.

Business Oregon – (Oregon's Economic Development Agency)

Business Oregon's mission is to invest in Oregon Businesses and communities to promote competitive, diverse and inclusive economies. Their programs are primarily geared toward large scale manufacturing, transport, technology, and infrastructure efforts, but they do have some programs that might fit well with the Event Space business operating in the facility, and if the WOC ends up pursuing small business/start up incubation type services.

Business Oregon's Local Small Business Development Center program has a number of campuses offering small business supportive services throughout the state. One of these is housed at Chemeketa Community College. This will be a useful place to start exploring the kinds of support available to create a business plan and securing funding for event space startup costs.

Business Oregon also has programs that provide support for entrepreneurs, including the Rural Opportunity Initiative, and network of Business incubators and accelerators.

Important Aspects of Using Public Funding

Prevailing Wage Standards – Using federal grant funds almost always means that the project will be subject to prevailing wage requirements under the Davis-Bacon act or the Oregon Bureau of Labor and Industry (BOLI), which dictates the minimum pay levels for construction trades and labor included in the project. This will add roughly between 15-25% to the cost of the project's construction budget. Not all general contractors are familiar with Davis-Bacon procedures, and hiring a contractor experienced in administering government projects is highly recommended. It's also recommended that the project team hire a firm, or have a team member who is familiar with auditing prevailing wage expenditures so as to avoid potential penalties.

Environmental Compliance – Federal and State grants funds also require the project to avoid disturbing ecologically important and fragile ecosystems like wetlands and waterways, and archeological sites. There will be added cost and time associated with environmental site investigation and governmental review. The project should also avoid disturbing the site's existing wetlands to the extent possible.

Public Contracting – Some federal funds also come with requirements regarding how contracts and vendors for services are chosen. The project may be required to engage in a competitive bidding process for some kinds of contracts, and to ensure that Disadvantaged, and Minority and Women-Owned Business are included in the process of development and construction.

Non-Displacement – This likely won't be an issue since the site is currently vacant, but federal funds come with strict limitations on, and guidelines for, the displacement of individuals or businesses for construction projects. This is particularly true for the removal or displacement of historically marginalized communities.

Potential Sources of Debt

There are commercial loan products which would be available at most of the major banks in Oregon that could be sized appropriately for this scale of project. However, given the nature of the incomes expected it is unlikely the project can support market-rate debt. Below is a brief investigation of subsidized debt sources the project might be able to secure.

United States Department of Agriculture Rural Development

The USDA Community Loan Guarantee Program is a good option for subsidized loans. Under this program, USDA provides a pre-approved lender a guarantee for the majority of the loan's value, removing much of the lender's risk and allowing them to offer below market interest rates and 40 year loan terms. Unfortunately, Woodburn is slightly too large a city to get community facility grants through USDA.

Community-based nonprofits are eligible borrowers, and community centers offering supportive services are eligible projects. The USDA Oregon office in Portland can provide assistance to potential applicants, assessing project fit, and providing lists of pre-approved lenders that work with the program in Oregon.

Interest rates can be fixed or variable, and the loans are required to be fully amortized up to 40 years. USDA does charge an annual fee to oversee the loans and guarantees on an annual basis.

Community Development Financial Institutions (CDFIs)

Community Development Financial Institutions range in size from groups that can offer loans of a few thousand dollars to those who can loan tens of millions at a time. In most cases these loans will only be slightly below market rate but can be much more flexible, tailored exactly to the project's needs, and willing to take much greater risks than a commercial bank.

Mission Investment Fund, Evangelical Lutheran Church in America

The Mission Fund is a loan fund that only lends to ELCA congregations looking to finance capital projects, primarily the construction of new worship facilities. ILC would need to be the borrower for this loan specifically, and it may be a better fit funding or furnishing ILC's portion of the building.

Interest rates vary depending on the size and length of the loan. Loan terms can be 3, 5, 7, or 10 years with amortization periods of up to 25 years.

ELCA also has contacts for capital campaign consultants that specialize in working with faith communities. ELCA has separate contacts that they call "Church Building Consultants" that work with congregations looking to expand or move facilities to help them determine their goals and then assess how those goals should play out in the physical space of their facility.

ELCA Mission Investment Fund: Joel Wudel (based in Idaho), (773) 682-1765, Joel.wudel@elca.org

Other Ways to Raise Capital

Selling a Portion of the Site - One of the simplest ways to raise additional funding for the project would be to sell a portion of the site not being occupied by the facility, parking lot, and wetland, for another use. The most straightforward mission-fit for the organization would be for low or middle income housing. The site is already zoned for residential development, and a local nonprofit housing development agency, Farmworker Housing Development Corporation (FHDC), has already expressed interest in the location.

Architect Dennis Thompson determined that the most the facility could carve off for sale would be roughly 2.8 acres, with 2 acres being the minimum needed to build a viable housing project. The amount the project could bring in varies with the amount sold and the intention of the buyer. Based on research into the price per acre for vacant land either for sale or sold in the last few years in Woodburn and surrounding areas, the parcel would likely sell for between $3-4 per square foot. We estimate this portion of the property could bring anywhere between $200,000 and $400,000 depending on the size of the portion and the market conditions at the time.

Pairing with Other Uses that have Dedicated Funding Sources - One of the biggest issues facing the development is that there are few public funding sources dedicated to the development of community facilities. The primary avenue of public funds in Oregon is the CDBG program which the State caps at $1.5 million for community facility projects.

Other Ways to Raise Capital

There are however, other potential uses with public benefits that have more dedicated funding. Pairing with any one of them would either require giving up some common use space or redesigning the facility, or adding another building onto the site. All would likely increase construction and development costs a little bit, but with increase in scale there are usually efficiencies in construction cost the larger the project gets. Some potential uses of the facility with dedicated funding include:

- ☐ **Low-Income or Workforce Housing:** Housing projects can target dedicated HUD funding, Federal and State tax credit programs, and State grants and bond programs. It is important to note the additional housing is a priority for the City of Woodburn, and the area around the 8 acres is an area of priority housing growth for the City.

- ☐ **Entrepreneurship and Small Business Development:** Small business development is a focus of Business Oregon, which has funding support for business incubators and accelerators. The federal Department of Commerce, and Small Business Administration also have grant funding for those kinds of efforts.
  - The Woodburn Chamber of Commerce has also been seeking to create a local Business Resource Center and the WOC could be a good potential fit for this effort.

- ☐ **Government or Other Large Institutional Renter:** Finding a large, financially stable organization that could afford to rent space in the project for market rate can go a long way toward reducing risk and allowing the mission-based tenants to pay reduced rents. This sort of renter would avoid the typical legal complications and upfront logistical burden of providing a grant. However, this path would also require a redesign of the facility.

- ☐ **Senior Services:** There are federal funding sources for the provision of services to seniors, including nutrition programs, healthcare and other supportive care access, and transportation. A Latinx Senior Center was a priority from the community listening sessions, though no particular group has as yet emerged to lead such an effort. If it does become a reality within the partner mix of the WOC, there are funding sources that can support ongoing services. We have not been able to find regular grant opportunities that provide capital funds to construct senior center facilities, but, given the response of support for a senior facility focused on serving Woodburn's aging Latinx population, there is likely a donor base to support the project on those grounds that might not otherwise donate.

Section 14: Factors Impacting Project Feasibility

Several mostly external factors will directly impact project completion. Challenges to be addressed include Woodburn's population size and limited wealth, long history of being underserved and under-resourced by public and private funders, and current competing efforts to expand the community's services infrastructure. COVID-19 adds one more uncertain variable.

Achieving A Multi-Cultural Project - To be an authentic multicultural project, it is essential that the Woodburn Opportunity Center take bold intentional steps towards inclusion. Some concrete examples of how the active participation of culturally-specific communities (especially Latinx and Russian Old Believer) can be represented are:

- ☐ The Capital Campaign and Woodburn Opportunity Center's leadership and decision-making bodies need strong multi-cultural representation, even if the facility has yet to secure culturally specific partners who will use dedicated space in the facility.
- ☐ Facility spaces infuse cultural elements that highlight Woodburn's diverse history and composition (e.g., mural and/or visual displays, historical vignettes, etc.). This can be present inside and outside the Center, including the two entryways and floor levels.
- ☐ Facility program elements that promote cultural heritage and pride, including a potential futsal court (outside) and Latinx Senior Center (inside). Outreach to culturally-specific community and faith groups could help ensure display spaces are used to promote their history, culture and traditions.
- ☐ Facility signage: for name (e.g, Spanish: Centro de Oportunidad de Woodburn), directional and directional/interpretive (outdoor features and nature areas/trail).
- ☐ Ongoing outreach to community-based culturally-specific service providers to encourage their regular or occasional use of the WOC common spaces within the Resource Center.

Success starts with extending invitations to leaders within the Latinx and Russian Old Believer communities, representatives of culturally specific service providers, and potential users of WOC services from these communities. Key tasks are identifying barriers to direct participation and working to remove or overcome those barriers.

City of Woodburn Community Center - The City of Woodburn has designed a new Community Center (active recreation facility) to be located adjacent to its existing Aquatic Facility in Legion Park. The intended uses of the 40,000 square foot facility include gymnasiums, workout rooms, multipurpose room with a small kitchen, and space for some social services (Boys and Girls Club after school program, senior center).

The facility's price tag has been as high as $50+ million, it's now estimated at $40 million. Funding sources include private contributions (individual donors, corporate support and Immanuel Lutheran leaders have met with City officials multiple times to share each other's project plans and to avoid duplication of purpose or elements. Funders outside Woodburn require clear messaging to understand the distinct differences between the two projects.

Love INC - Immanuel Lutheran has a decade-long partnership with Love INC, serving the basic needs of Woodburn's marginalized families and residents. In Spring 2019 the City of Woodburn offered to secure an existing facility with a $1.5 million CDBG grant, eventua;ly applied or in September 2019 and awarded in July, 2020.

This led to the 2 campus North Marion Family Resource Center concept, with a different lead agency (MWVCAA). The timing of NMFRC Phase 2 may be directly impacted by the funding and fate of NMFRC Phase 1. It's expected that the growing unmet demand for added social and community services will further highlight the need for the 2nd campus.

COVID-19 - The COVID-19 pandemic came at the conclusion of the years-long Feasibility Study, yet it could have a profound impact on the ability to move forward. Unknown in this moment is its impact on the Woodburn area's ability to recover economically and socially. What is known is that Woodburn has had among the highest COVID-19 infection rate of any zip code in Oregon. This experience may take a substantial toll on employment, small business survival, along with personal giving (one-time, pledged or planned gifts) and public spending on the local, state, and federal levels. *Will the need to build a 300-500 person event space remain an urgent one at a time when larger group gatherings are prohibited? When will community norms accept or promote gathering of 100 or more residents in a single Woodburn space?*

Questions to be Answered:

Project Roles - Partner Organizational Capacity and Participation - While MWVCAA has expressed the ability and interest to participate in a leadership role in the NMFRC, the exact involvement of MWVCAA and the other project partners needs clarification. It is anticipated that the partners will have a supportive role in securing capital construction funding, and the ongoing operational funding section assumes active partner participation in lease payments. A new entity's responsibility for owning and managing the facility would likely involve participation of many/all partners.

The exact level of management participation hasn't been fully confirmed. Neither has the exact relationship between the partners and the ownership entity. The partners could be anywhere from simple renters to participant owners/managers who financially support the facility and assist with governance. Each makes a sizable difference in the project's long-term financial and functional operation and increased clarity and commitments from each group will strengthen the fundraising and development process.

Project Roles, Leadership - For a project of this magnitude to succeed it is essential to have project champions that are always committed to carrying the project forward. This should be individuals or a group that can dedicate time and leadership in promoting the project, tracking the timeline and progress, seeking funding from major donors, and galvanizing community support. The capital campaign's primary current champion is Immanuel Lutheran, and now more are needed - both individual and institutional. Champions can serve on the project team or in other leadership roles.

A crucial factor in the success of the Dallas Resource Center and Broadway Commons is the continuity of leadership from Brent DeMoe of the Polk County Family and Community Outreach Department, and Robb Childs of Salem Alliance Church. Both have been with their organizations from the beginning of the project and provided consistent effort through each stage of the process. Having a clear, long-term champion for the project will be an important piece of fundraising and project development. Certain areas of expertise can be brought in from the outside but there still needs to be someone or some group intimately tied to the project in that leadership role.

Picking a Funding Path - Research into potential sources produced a long list of options for the project team to pursue. A primary one is a community capital campaign focused at corporate, institutional and individual donors. Outside of donations, not all options fit well together and most are not guaranteed, requiring competitive applications or support from parties that the project has not yet secured. Some options relate to potential uses for the project or site that still need to be affirmed by project leadership, including the economic development and small business related grants, selling a portion of the property, building additional housing, and partnering with the City on a future CDBG application. Project leadership will also need to secure technical legal knowledge to ensure the entity structures created meet the requirements of the proposed funding sources.

Section 15: ILC Congregation Vote

ILC Congregation Vote-March 2020

Following three years of input and progress reports on the feasibility study, the Immanuel Lutheran Church Council held a special vote of the Congregation on March 8, 2020 to consider a resolution the Church Council supported to move forward with the proposed use of the 8 acres. By a vote of 35-5, the resolution was approved by 88% of the ILC members present and voting.

The Resolution affirmed the following approach for potential use of the 8-acre property:

1. Purpose - The Facility will comprise three main elements:
    - Future home for Immanuel Lutheran, Pan de Vida, Little Lambs Preschool and other faith communities
    - Community Gathering Space (event center)
    - Family Resource Center (co-location of social services)
2. Financial Participation - ILC will need to contribute financially towards this $8.5 million project, this is expected to include:
    - The sale of the current ILC buildings and land on East Lincoln Street,
    - Consideration for the value of the current 8 acre parcel (though not in a way that gives up permanent ownership).
    - The Legacy of Faith Fund that exists to create a new home for Immanuel Lutheran.
    - Provide our members the option of contributing through gifts and memorials.
3. Ownership - The following terms will inform ownership and control of the land and facility:
    - The Church will maintain some form of long-term control over the ownership of the land on which the future facility is built.
    - While the Church may participate in the final ownership structure, ILC will not solely bear the responsibility of owning the facility itself.
    - The Church will be an active partner in developing details of the ownership structure.
4. Management - Responsibility for the physical and administrative considerations of the entire facility will be delegated by Immanuel Lutheran to qualified partners. This includes:
    - Maintenance of the physical building and grounds.
    - Management of the facilities programmatic administration, commercial function, and property management.
5. Ongoing Communication - ILC members acknowledge that this project will take time, possibly a few years. To ensure accountability, Church Council will keep ILC members and project partners informed as changes are made to facility plans.

Within a week of the vote, the COVID-19and subsequent Oregon "stay at home" edicts impacted ILC's Sunday services and weekly activities, like the community meal. As of July 2020, ILC's Sunday services are being held via Zoom and Community Meals have resumed in a new Grab'n Go format, serving 160-200 people per week.

Section 16: Next Steps

The process for developing the Woodburn Opportunity Center prior to construction will be a dynamic one made with ever-changing information. The project team can be guided by the list of initial steps below and the following Timeline to Occupancy chart on its path to success.

Elements that need attention during 2020 and early 2021 include:

- Immanuel Lutheran Church: ILC should take steps to strengthen its internal capacity and vision (strategic plan), actively build trusting relationships with existing and new faith community partners, clearly define its own campaign leadership role, identify and cultivate project champions, and present Feasibility Study findings to key public and community stakeholders.

- Project Team: An initial step is to confirm the lead agency or agencies that have the ability to dedicate time to coordination of the project and what roles each will play (see Section 7 - Ownership Considerations). The members of the project team and various consultants should possess a variety of skill sets including conducting capital campaigns, community fundraising, real estate development, grant writing, and possess connections to and be able to authentically represent Woodburn's Latinx and Russian Old Believer communities. This team should also contain committed champions and representatives of organizations willing to participate in the ownership of the Woodburn Opportunity Center.

- Engagement with City and County Government: The last half of 2020 should include public presentations to City and County officials, exploring a potential City of Woodburn investment in a public park/playground elements, and tracking the outcome of the City of Woodburn-Love INC CDBG application to fund NMFRC Phase 1.

- Capital Campaign - Phase 1: Campaign Readiness: A campaign team of project partners and champions can secure funding for Year 1 of the campaign, retain a capital campaign manager/consultant, conduct prospect research to identify lead and major donors, develop collateral materials and plan a comprehensive campaign. This Campaign Team, in collaboration with the Project Team above, can explore creation of a new nonprofit corporation to be the public face of the campaign to unite partners in shared purpose, manage outreach and maintain relationships over time, serve as the applicant agency for grants and other funding, and be an eventual ownership entity of the facility.

The following 2 pages have a Timeline to Occupancy that incorporates these initial steps, along with completion of the capital campaign, pre-development and construction. A reasonable estimate of a potential occupancy date is late 2023 or early 2024. This target is highly dependent on the project meeting it's fundraising goals and any delays in fundraising will proportionally push out the timeline of pre-construction, construction, and occupancy.

Timeline

WOODBURN OPPORTUNITY CENTER TIMELINE TO OCCUPANCY								
	Who	2020		2021		2022		2023	
Immanuel Lutheran Church									
Develop a 5 + year strategic plan for Immanuel Lutheran Church	ILCC/P								
Present Feasibility Study results to community stakeholders/service clubs	ILCC/BT								
Continue relationship building with Woodburn faith communities to ID space partners	ILCC/P								
With existing project team, continue to seek out partners with capacity to join in ownership of the facility									
Engage process to sell existing Church property (enlist broker, appraisal, market property)	ILCC/BT								
Engagement with City and County Government									
Public presentations to elected officials/ City Council & Council & County Commissioners	ILCC/ CCC								
Explore potential City investment in public park/playground	ILCC/ CCC								
Track City-Love INC progress on North Marion Family Resource Center Phase 1	CCC/PT								
Cultivate support for 2021/2022 CDBG proposal--other state-federal grant applications	CCC/PT								
Capital Campaign									
Phase 1: Campaign Readiness									
Recruit Campaign Committee (ILC, partners, supporter champions)--clarify roles	ILCC/BT								
Secure funding to implement Year 1 of Capital Campaign	ILCC/ CCC								
Retain Capital Campaign consultant to manage campaign	ILCC/ CCC								
Create new nonprofit corporation to act as Capital Campaign*	ILCC/ CCC								
Conduct prospect research to identify and assess potential major donors (lead gifts)	CCC/PT								
Develop campaign collateral materials--billboard at 8 acres, website presence	CCC/PT								
Develop detailed campaign plan--inc. grant prospects/timeline, naming opportunities, etc	CCC/PT								
Phase 2: Cultivation Phase									
Conduct solicitation activities with Campaign Committee (lead gifts)	CCC								
Develop and submit Grant Requests to priority public and private sources	CCC								

*Nonprofit will be the public face of the campaign, serve as a vehicle to move partners forward in shared purpose, manage outreach and maintain relationships over time, serve as the applicant agency for grants/other funding, possibly serve as eventual ownership entity (depending on funding sources/legal structures).

Timeline

	Who	2020		2021		2022		2023	
Phase 3: Leadership Phase									
Cultivate and solicit leadership gifts ($25,000 +)	CCC								
Phase 4: Major Gift Phase									
Cultivate and solicit major gifts ($5,000+)	CCC								
Goal: $1.5 million + by mid 2022	CCC								
Phase 5: Community Phase									
Community wide awareness campaign--direct mail, naming opportunities	CCC								
Seek and secure grants for Year 1 operational costs following occupancy	CCC								
Campaign Compeleted--construction and occupancy	CCC								
Development & Construction									
Pre-development: once~$4 million has been served									
Determine definitive funding path targeting sources	PT								
Re-engage with New Markets Tax Credits specialist and Secure NMTC allocation	PT								
Engage architect/professionals to complete construction plans	PT								
Secure pre-development funding	PT								
Conduct planning and review meetings with City Planning Department	PT								
Conduct site investigation and reporting	PT								
Apply for Annexation--Planned Unit Development approval	PT								
Engage with Title Company	PT								
Submit for building and other required City/County permits	PT								
Construction Period-Once all Funding is Secured									
Close Financing (sign all necessary loan & grant agreements, construction contract, etc)	PT								
Facility and Site Under Construction	PT,GC								
Complete Final Furnishings and Move in Tenants	PT								

Glossary
BT - Building Team
ILCC - Church Council
P - Pastor
CCC - Capital Campaign Committee - (Made up of partner agency representatives)
PT - Project Team (partner agency representatives, (reps from BT?), & outside consultants)
GC - General Contractor

Section 17: Acknowledgments

The Woodburn Opportunity Center Feasibility Study was made possible through the support and advice of a wide array of community leaders and residents.

Jimmy Jones and Dana Schultz, Mid Willamette Valley Community Action – for leadership in convening stakeholders for NMFRC Phase 2.

Patrice Altenhofen and staff, Family Building Blocks – for leadership in development of the Woodburn Opportunity Center and NMFRC Phase 2

Curt Jones and Rev Bill Park, Love INC of North Marion County – for strategic advice and leadership in convening the North Marion Family Resource Center (NMFRC)

Tamra Goettsch, Marion County Community Services – for connections to social service stakeholders and resources

Brent DeMoe, Polk County Family Services Director – for site visits and operational information of Dallas Resource Center and input on the DRC's model

Jaime Arredondo, CAPACES Leadership Institute – for hosting a Latinx leadership gathering and providing valuable input

Robb Childs and staff, Salem Alliance Church – for site visits and operational information on Salem's Broadway Commons.

Frances Alvarado, Oregon Human Development Corporation - for hosting two Community Forums, providing connection to other stakeholders and offering strategic advice

Eric Swenson, Mayor of Woodburn – for strategic advice, support and connection to stakeholders

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Chris Vogel, Oregon Community Foundation – for asssessing the need for and recommending financial support to the feasibility study

Tony Cadena, Willamette University PACE Program – for providing access to graduate student resources in support of a community survey

Appendix A

North Marion Family Resource Center Fact Sheet

North Marion Family Resource Center

A partnership providing coordinated and accessible services at two campuses for the North Marion County community

Our Vision: We dream of a place where residents access services from agencies that work together in close proximity - sharing a physical location that is a one-stop shop for social services in the greater Woodburn area. We believe the ability to function as an integrated team of service providers will make us better together and allow all of us to better serve people and families in our community.

Phase I

Love INC and the City of Woodburn, with support from Mid-Willamette Valley Community Action Agency, will open the first site – Cascade campus - at 970 North Cascade Drive in Woodburn. This site will be fully developed in 2020 and ready to meet urgent needs for North Marion community members. The initial site will offer free work spaces to service providers interested in collaborative, coordinated, one-stop services. As the pilot for our community's co-location model to exemplify a 'better together' spirit, the Cascade Campus will be focused on meeting the immediate needs of the community.

Phase II

Immanuel Lutheran Church and Mid-Willamette Valley Community Action Agency, with support from Love INC, will open the second site - Evergreen campus - on 8 acres of land currently owned by Immanuel Lutheran and located at Linfield Ave and Evergreen Rd. in Woodburn. This site will be an expansion of our co-location model to include more service providers and provide a community gathering space (event center), meeting rooms, and classrooms. Phase II will focus on building community capacity by providing a place to learn, to grow, to support one another, and to celebrate our community.

The two campuses will work in tandem to provide services, sharing necessary information and collaborating to meet changing community needs, under the North Marion Family Resource Center brand.

Primary Partners: Love INC, Mid Willamette Valley Community Action Agency, Immanuel Lutheran Church
Program Partners: Family Building Blocks, Little Lambs Preschool
Supporting Partners: Casa of Oregon, City of Woodburn, Northwest Senior and Disability Services, Woodburn School District, Marion County Health and Human Services, Yakima Valley Farmworkers Clinic, Catholic Community Services, Woodburn Area Chamber of Commerce, Farmworker Housing Development Corporation, Marion-Polk Food Share, CAPACES Leadership Institute, Pineros y Campesinos Unidos del Noroeste (PCUN), Chemeketa College

Appendix B

Ownership Considerations for the Proposed Woodburn Opportunity Center

ILC's primary decision on ownership hinges on the balance between taking on risk and responsibility, and giving up control over the property and project outcomes.

There are three broad categories of option at this stage that ILC should consider. They roughly represent the range from ILC taking on the most risk and responsibility, and having the most control, to ILC giving up the most control and removing the greatest amount of risk and responsibility from the church.

OPTION 1: ILC Owns the building and the land itself (Most control, most risk)

OPTION 2: ILC Owns the Land and provides a long-term lease to another group to own and operate the building (the medium option)

OPTION 3: Bring in an outside developer to build and own the property (Least control, least risk)

Some underlying assumptions in place regardless of the ownership situation:

1. ILC is never assumed to be the day to day manager of the building. This means ILC will NOT be doing things like directly hiring staff to patch drywall, unclog sinks, negotiate leases, and ensure the bathrooms get cleaned, the grass gets cut, etc.

2. There is always a partnership group of nonprofits that are interested in paying to lease space in the building to provide their services, and who are interested in participating in how the service provision is coordinated, and giving input on their physical spaces within the building, etc.

3. The timeline to the completion of construction is hard to predict but will likely be at least 2 years. Essentially, the larger the building, the greater the funding that needs to be raised, and the longer it will take to start construction.

4. The current proposed design of the facility is about 25,000 sq ft. To complete the construction of this proposed building is likely around $8.5 million. The project team should assume that about half of this funding is going to need to come from a fundraising capital campaign that seeks out foundation grants and private donations.

*It should be noted up front that Option 3 represents a very different process to the start of construction from the one that has been envisioned so far

OPTION 1: ILC Owns the building and the land itself

Basic Parameters:

The most straightforward option that gives ILC the most control but also the one that puts the greatest burden on the church.

ILC is still participating in something like the existing partner meetings of nonprofits, that will help guide what gets built, get suggestions for securing City and County buy-in for the resource center, what funding to pursue, etc. Because ILC will be the owner, the church should plan on continuing to be the coordinating agency for this group, and the driving force ensuring forward progress.

Because the church doesn't have the capacity to operate the building on a day to day basis a property management company would need to be found that could handle overseeing the day to day functions of what is essentially a commercial building. This work is separate from the coordination of services and resources among the nonprofit tenants of the facility as part of a two campus service program in Woodburn.

In this option, ILC would need to be the lead agency in a significant fundraising campaign. It is hoped that this would be supported by the project's partners. However, the primary burden would rest on ILC as the main beneficiary as the future owner of the building. ILC could lead this campaign directly, or through a new nonprofit entity created specifically for this project. Either way a Capital Campaign Committee broader than ILC will be needed to lead the fundraising effort.

Pros:

- ☐ ILC gets full control:
  - ☐ over what gets built,
  - ☐ how the property is used,
  - ☐ what organizations lease there,
  - ☐ any future phases of development
- ☐ Simplest option from the perspective of decision-making, coordination, and the final legal ownership of the project.
- ☐ Possible City and County support (as opposed to option 3)

Cons:

- ☐ Puts the largest amount of leadership, funding, and administrative burden on ILC. This includes coordinating the nonprofit partners, their input in the design of the building, the fundraising campaign, setting parameters for leasing to the partners, hiring of property management company, landscape maintenance company, etc.
- ☐ ILC is solely responsible for the risks during pre-development, construction, lease up, and building upkeep once it's built.
- ☐ Requires a number of skill sets that would need to hired in from the outside, in addition to the roles that have already been hired for like project coordination (because the Church doesn't have anyone who can be a full time coordinator – currently Bill Weismann), and Architecture (Currently Dennis Thompson).
  - ☐ Real Estate Development, preferably someone familiar with public funding sources (currently CASA of Oregon)
  - ☐ Fundraising (not just a donor campaign but pursuing foundation grants and public funds)
  - ☐ Property Management (It would be prudent to start early in the process, of seeking out potential PM options, vetting and selecting one, then having them involved in some of the final rounds of decision-making.)

OPTION 2: ILC Owns the Land and provides a long-term lease to another group to own the building

Basic Parameters:

Like the option above, ILC is still participating in something like the existing partner meetings of nonprofits, that will help guide what gets built, get suggestions for securing City and County buy-in for the resource center, what funding to pursue, etc. In this scenario, ILC will not need to be as much of the driving force, especially once the eventual owner of the building is determined. In terms of roles, function, and process, this option is probably the most like the feasibility process so far.

The most obvious choice here is to have the church work as part of a team that funds and builds the building, then provide ownership of the building to another agency, like Mid-Willamette Valley Community Action Agency, with a long-term land lease. The lease needs to be for a significant period of time. I'm guessing at least 30 years, but will need to be negotiated with whoever this ownership agency is.

It is in ILC's best interest to have some idea early in the process of who the organization is that is going to own the building. Otherwise ILC runs the risk of having a building they weren't planning on owning, can't give away, and are essentially forced into option 1 above.

In this option, ILC would need to be the lead agency in a significant fundraising campaign. Because there will be another agency with a significant future stake in the project, ILC can probably expect more support than under option 1, but will still need to be the lead agency and face of the partnership group. CAA and most of the nonprofit partners already regularly request funding from the foundations that would most likely support this project so the ask needs to come from a different entity, and ILC makes the most sense.

Pros:

- ☐ It removes the risk of owning and maintaining a building from ILC, both financial and insurance liability.
- ☐ It removes the burden of month to month decision-making in how the facility operates, who is leasing what space, whether you're bringing in enough money to cover expenses, negotiating with vendors for services like landscaping and janitorial, etc.
- ☐ It provides the foundation for a more collaborative process, and the designation of a lead agency in the process of coordinating partner input and services at the Center, meaning ILC will not need to be in this role.
- ☐ Possible City and County support (as opposed to option 3)

Cons:

- ☐ It means a little less control over what happens with the facility. Technically ILC would be in an unusual position of being the leaseholder for the land, renting the land to whoever owns the building, and being a leasing tenant of that same group, for the Church's space in the building.
- ☐ The nonprofits like MWVCAA that are most likely to want to be involved in the project as it is currently envisioned cannot afford to purchase the building on their own. There are for-profit owners that might be able to do so, but they are going to require more control over decision-making, and may not be interested in just leasing the land (more on that option below)

ALTERNATE: A combination of Option 2 and Option 3 below, would be to give the property, land and building, to another nonprofit (probably CAA) once it's built. It could incentivize them to take a lead role in both real estate development and fundraising (maybe through a new nonprofit "shell" as noted in Option 1).

OPTION 3: Bring in an outside developer to build and own the property.

Basic Parameters:

Under this scenario a 3rd party group with experience in developing and owning real estate, like Mountain West Investment Corporation in Salem, could be engaged to build and own a facility on the property. It is important to note that this is a concept only and that no development entity has been contacted about the project, or expressed interest in the project. This option is predicated on finding someone who is interested and willing.

ILC would most likely be selling the land to this developer. It is highly unlikely that an outside group like this, especially a for-profit entity, no matter how altruistic, would be willing to develop the property without owning the land and the building. They may still be willing to have ILC and the rest of the nonprofit partners engaged in the process to help shape the outcome of the project if they are committing to rent space, but control and ownership ultimately lies with this new developer. ILC can create covenants or agreements in the sale allowing for ILC use of the space, mission-driven decision-making but these will only go so far.

Ultimately, this option represents giving up control of what gets built, ILC can have no guarantees that the project as currently envisioned will be what gets built.

Pros:

- ☐ This outside group would already have much of the expertise and experience that ILC and the partnership team would need to hire anyway
- ☐ It may also come with its own financial capital, which would reduce the need for loans or lengthy fundraising, and might mean the project happens on a shorter time frame.

Cons:

- ☐ Even if ILC sells the land with covenants or stipulations that this new developer maintains the use of the building they will likely insist on provisions that allow them to do whatever is necessary to protect their financial investment (such as changing the uses, raising rents, renting to more for-profits) if the building is starting to lose money.
- ☐ ILC is giving up control of the vision, and giving up control of the vision of the project's current partners.
- ☐ While it removes the fundraising burden, and a developer coming in with their own money can save fundraising time, this option represents a significant negotiating period with whomever this developer would be.
- ☐ It's less likely under this scenario that the City or County would see a responsibility to directly support the project as they have the current Love INC property. They may still support the nonprofit participants directly.

ADDITIONAL CONSIDERATIONS AND CONTEXT

1. Things to know about building a building:

a. It takes a long time. ILC should plan on being involved in this project for 2-4 years before construction seriously gets underway. This will be a function of the timelines of the funding sources chosen: public subsidies, foundation grants, a private donor campaign, etc.

b. There is a lot of money that needs to be paid up front. Architectural design will represent the largest cost (likely upwards of $150k) but the project will also have to pay for environmental and engineering investigation of the site, a capital fundraising consultant, some attorney costs, an updated appraisal, surveying, potentially some funding application fees, etc.

i. The simplest way to fund these costs is to find a pre-development lender who will essentially make a line of credit. They are then paid back with interest when the full funding comes through

ii. The less likely option is to find grant funders that are willing to spend money prior to the entire project being financed. (Pre-Development is a little different than Feasibility)

c. Construction costs are always increasing. Cost inflation in construction is finally starting to slow down after years of steep annual increases, but it's still climbing, and the longer the funding takes to get in place, the more things will cost.

d. The process is messy and complicated. Not only are there the potential nonprofit partners involved, the project team will be dealing with the City and County, funders (whether they be public entities, banks, or foundations), architects, engineers, building inspectors, appraisers, surveyors, an attorney, contractors, etc.

e. The greatest risks are on whoever owns the site and building while it's being built. Things can go wrong and be delayed during construction, costing further money. Once the building is finished a lot of the risk is gone because you have a physical asset but until then the project will be spending significant sums of money without a guaranteed end product. Insurance for the owner will be required during construction and will be a cost that the project must also figure out how to raise up front.

2. Things to know about owning a building:

a. You're running a business. The costs to run a building of the proposed size will run upwards of $120k-$145k a year.

i. This is rough estimate based on the size of the building and site, and includes: utilities, repairs and maintenance, security, admin, cleaning, taxes (may be exempt from property taxes), insurance, and landscaping.

b. The building will need to ensure that its rent prices and the income from the event space cover those cost, plus funding a replacement reserve for future costs (see below). A property management company can help maintain the building on a day to day basis but someone should be tracking the financial performance on a month to month basis to recognize issues before they become serious, identifying when rents need to be increased, etc.

c. If it breaks you have to fix it. In theory the building won't have significant upkeep costs in the first 5-10 years, but the things that break are expensive, and require long-term planning to keep from being an exorbitant burden on the owner. Whoever owns the building will want to build into their finances a reasonable annual budget to set aside in a reserve fund that will cover the expected costs of major system replacement over the life of the building; *replacing the roof, windows, HVAC systems, fixing curbs, and repaving the parking lot, etc.*

3. Things to consider in owning a business (The community event space):

a. This business is operating somewhat independently of the business of owning and managing the building and will need its own business plan.
b. Some investigation should be done into the demand for an event space in Woodburn. The sizes required, the price that can be charged for its use, what sort of uses will occur on what days of the week, and in which seasons, to determine scheduling options and potential income.
c. Someone will need to be responsible for marketing the space for use by the community and coordinating its schedule, on top of the general responsibilities of running the building.

4. Additional Ownership Considerations for Major Public Funding Sources:

Main public funding options for new community facilities:

- ☐ **Community Development Block Grants (CDBG)** – requires partnership with the City or County and the public entity has to own the portion of the building financed with public funds, at least for the first period of time.
- ☐ **New Markets Tax Credit** – Will require a shell ownership entity made up of a for-profit tax credit investor, and the day to day ownership entity (could be a nonprofit, or an LLC the church sets up and wholly owns).
- ☐ **USDA Rural Development Loan Guarantee Program** – requires project's ability to pay debt. Applicant must be a public entity or a nonprofit

IMMANUEL LUTHERAN CHURCH – OWNERSHIP OPTIONS
OWNERSHIP OPTIONS

OWNERSHIP OPTIONS	*PROS*	CONS
#1 ILC owns the building and the land itself	* ILC gets full control: o over what gets built, o how the property is used, o what organizations lease there, o any future phases of development * Simplest option from the perspective of decision-making, coordination, and the final legal ownership of the project. * Possible City and County support (as opposed to option 3)	* Puts the largest amount of leadership, funding, and administrative burden on ILC. This includes coordinating the nonprofit partners, their input in the design of the building, the fundraising campaign, setting parameters for leasing to the partners, hiring of property management company, landscape maintenance company, etc * ILC is solely responsible for the risks during pre-development, construction, lease up, and building upkeep once it's built. * Requires a number of skill sets that would need to hired in from the outside, in addition to the roles that have already been hired for like project coordination (because the Church doesn't have anyone who can be a full time coordinator – currently Bill Weismann), and Architecture (Currently Dennis Thompson). o Real Estate Development, preferably someone familiar with public funding sources (currently CASA of Oregon) o Fundraising (not just a donor campaign but pursuing foundation grants and public funds) o Property Management (It would be prudent to start early in the process, of seeking out potential PM options, vetting and selecting one, then having them involved in some of the final rounds of decision-making.)
#2 ILC owns the land and provides a long- term lease to another group to own and operate the building	* It removes the risk of owning and maintaining a building from ILC, both financial and insurance liability. * It removes the burden of month to month decision-making in how the facility operates, who is leasing what space, whether you're bringing in enough money to cover expenses, negotiating with vendors for services like landscaping and janitorial, etc. * It provides the foundation for a more collaborative process, and the designation of a lead agency in the process of coordinating partner input and services at the Center, meaning ILC will not need to be in this role. * Possible City and County support (as opposed to option 3)	* It means a little less control over what happens with the facility. Technically ILC would be in an unusual position of being the leaseholder for the land, renting the land to whoever owns the building, and being a leasing tenant of that same group, for the Church's space in the building. * The nonprofits like MWVCAA that are most likely to want to be involved in the project as it is currently envisioned cannot afford to purchase the building on their own. There are for-profit owners that might be able to do so, but they are going to require more control over decision- making, and may not be interested in just leasing the land (more on that option below)
#3 Bring in an outside developer to build and own the property	* This outside group would already have much of the expertise and experience that ILC and the partnership team would need to hire anyway * It may also come with its own financial capital, which would reduce the need for loans or lengthy fundraising, and might mean the project happens on a shorter time frame.	* Even if ILC sells the land with covenants or stipulations that this new developer maintains the use of the building they will likely insist on provisions that allow them to do whatever is necessary to protect their financial investment (such as changing the uses, raising rents, renting to more for- profits) if the building is starting to lose money. * ILC is giving up control of the vision, and giving up control of the vision of the project's current partners. * While it removes the fundraising burden, and a developer coming in with their own money can save fundraising time, this option represents a significant negotiating period with whomever this developer would be. * It's less likely under this scenario that the City or County would see a responsibility to directly support the project as they have the current Love INC property. They may still support the nonprofit participants directly.

Appendix C
Woodburn Opportunity Center Architectural Design Report

PROJECT INFORMATION

PROJECT DESCRIPTION
Project includes, but is not limited to:
- Sitework and Utilities for new multi-Use Building
- Construction of New Worship & Community Service Building
- New Parking Area and Site Landscaping

SITE INFORMATION

Map Tax Lot:	052W13 00301
Account:	R338925
Legal Description:	P.P. 2010-233, PARCEL 2, ACRES 8.10
County:	Marion County, Oregon
Site Address:	Evergreed Road & Linfield Avenue
Site Area:	8.10 Acres

ZONING INFORMATION

Current Zone:	Marion County – UT-20 (Urban Transition)
City of Woodburn Zone:	RSN- Nodal Single Family Residential
Conditional Use	Religious organizations
Front/Street Setback	20 feet
Side Setbacks	5 feet
Rear Setback	30 feet
Maximum Height	45 Feet
Floor Area Ration (FAR)	None
Parking	One space per 4 occupants
ADA Parking	One ADA space per 25 spaces provided
Bicycle Parking	8 Spaces

BUILDING INFORMATION

Ground Floor:	17,170 SF
2nd Floor:	7,163 SF
TOTAL AREA:	24,333 SF
Jurisdiction:	City of Woodburn
Building Code:	2019 Oregon Structural Specialty Code
Occupancy:	A3+B, Assembly, Business, Office
Occupants:	550

CONSTRUCTION INFORMATION:

New Construction:	OSSC Type V-A (Fully Sprinklered)
Separation:	1- Hour Separations between Occupancies

ANNEXATION PROCESS

A. Annexation into the City of Woodburn is required. Designated Zone is RSN.

B. Annexation to be a "Mixed Use" Planned Unit Development (PUD) .

C. WDO Section 3.09.02. Allowed Uses, it states: "Mixed-Use PUDs are limited to a maximum of one third of the gross area of the non-district uses.

D. Table 2.02A the Allowed District Uses that would pertain to our proposal includs the following:
- House of worship
- Off-street parking
- Deck or patio
- Parks, play grounds and associated activities
- Community club buildings and facilities

PROJECT TEAM

OWNER
Immanuel Lutheran Church
1038 E Lincoln St, Woodburn, OR 97071
p: 503.981.1036
Contact: Terri Gonzalez
e: terrib.gonzalez@gmail.com

PROJECT COORDINATOR
Bill Wiemann
1720 N.E. Buffalo St., Portland OR 97211
p: 503.477.2502
e: bill@grassrootsnw.com

ARCHITECT
DMTA Architecture P.C.
3 Monroe Parkway, #P-303, Lake Oswego, OR 97035
p: 503.816.1396
Oregon MWESB Certified (#7083)
Contact: Dennis Thompson AIA, LEED AP, BD+C
e: dennis@dmta.com

CONSULTANTS:
Rev. Ron Wiemer, Jr.
Connie Green
Casa of Oregon (Daniel Bullock, Eddie Sepeda)

PROJECT PARTNERS:
Mid Willamette Valley Community Action Agency
Love INC
Family Building Blocks

SHEET INDEX

FEASIBILITY STUDY

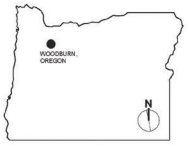
A001 Data: Project Information
A002 Data: Programming Area Calculations
A003 Data: Meeting Results

A101 Site: Existing 8.0 Acre Property
A102 Site: Analysis
A103 Site: Proposed Site

A201 Programming: Bubble Diagrams
A202 Programming: Relationship Blocks
A203 Programming: Main Floor
A204 Programming: Upper Floor

A301 Plan: Proposed Site
A302 Plan: Main Floor
A303 Plan: Upper Floor

A401 3D: Exterior Views
A402 3D: Interior Views

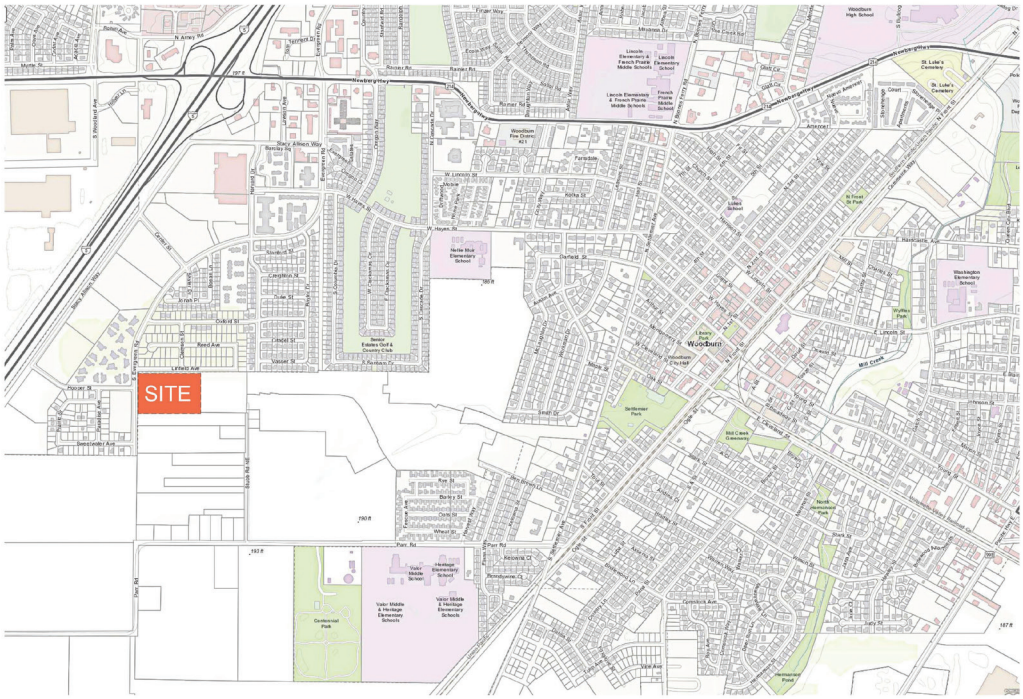


Feasibility Study - Programming Phase 12/16/19

Woodburn Opportunity Center

Centro Oportunidad de Woodburn

Evergreen & Linfield Ave,
Woodburn, Oregon



dmta Dennis Thompson ARCHITECTURE

PRELIMINARY Not for Construction

Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon

Feasibility	9.20.19
Planning Review	11.11.19
Final Review	12.05.19
Final Report	12.16.19

Data: Project Information

A001

COMMUNITY RESOURCES

Community Action Agency

Size (Sq. Ft.)
Total Program Space 1,923

Program Spaces	Size (Sq. Ft.)	Specifications
CA Dental Service	150	Open room with sink
CA Donation Stor.	572	w/food pantry, storage for diapers, formula, clothing, etc.
CA Medical Servs.	150	Open room with sink
CA Mgr. Office	300	
CA Open Office	300	on 2nd Floor
CA Staff Office	150	
CA Staffed Reception	300	

ARCHES Program

Size (Sq. Ft.)
Total Program Space 450

Program Spaces	Size (Sq. Ft.)	Specifications
ARCHES Mtg Rm	150	Open room with sink
ARCHES Office	150	Open room with sink
ARCHES Stor.	150	Open room with sink

Home Youth Program

Size (Sq. Ft.)
Total Program Space 1,001

Program Spaces	Size (Sq. Ft.)	Specifications
HY Entry	187	
HY Kitchen	66	
HY Office	75	View into Youth Space
HY Office	69	View into Youth Space
HY Str	30	
HY Str	50	
HY Youth Space	524	.

Family Building Blocks

Size (Sq. Ft.)
Total Program Space 2,151

Program Spaces	Size (Sq. Ft.)	Specifications
FBB Children's Bathrm	171	Located with or adjoining to classrooms. Min. 3 stalls, changing table (or space for freestanding one), diaper storage space, 2 handwashing sinks. Toilets to be child's height and 1 sink at child's height, the other adult height.
FBB Foyer	158	Private office preferred
FBB Kitchen	78	Needs to have a dish sanitizer and food prep sink (separate from hand washing sink) at adult height and counter space
FBB Meeting	150	Private office preferred
FBB Stor.	84	Classroom and home visiting supplies
FBB Teacher Office	150	2 teachers per classroom (can be shared with HVOR office space)
FFB ADA Bathrm	52	with shower/tub for accidents/incidents
FFB Classroom	750	15 Occupants; Counters are important with built in cabinets for storage
FFB HVOR Office	125	Up to 3 additional desk spaces (can be shared with classroom teacher's office space)
FFB Laundry	29	Large sink for sanitizing toys and washing out supplies, washer/dryer, counter space and storage
FFB Supv Office	125	Private office preferred
Hallway	279	

COMMUNITY GATHERING

Community Gathering Space

Size (Sq. Ft.)
Total Program Space 5250

Program Spaces	Size (Sq. Ft.)	Specifications
CG Gathering	4150	Seating for 500
CG Lobby	1100	

Common Use Spaces

Size (Sq. Ft.)
Total Program Space 8,802

Program Spaces	Size (Sq. Ft.)	Specifications
1 Mech.	100	
1 North Hallway	800	Open, Glass, Natural Light
1 South Lobby	800	Open, Glass, Natural Light
2 Hallway East	977	
2 Hallway West	950	Upstairs
2 Mech.	75	Upstairs
2ndFl Restrms	255	
AV Rm.	241	Upstairs
Breakroom	200	Upstairs
Cafe/Coffee	300	with seating
CG Kitchen	375	
CG Storage	125	
Classroom	500	
Classroom	301	
Classroom	300	Upstairs
Classroom	600	
Computers	300	Upstairs
Elev.Equip	67	
Elevator	61	
Family Space	300	Upstairs?
IT Server	50	
Jan.	27	Upstairs
Office	149	Upstairs
Restrooms	349	
Stairs	200	
Stairs	200	
Storage	201	

SPIRITUAL RESOURCES

Immanuel Lutheran

Size (Sq. Ft.)
Total Program Space 2,506

Program Spaces	Size (Sq. Ft.)	Specifications
ILC ADA R.R.	58	
ILC Chancel	367	
ILC Hall	250	
ILC Mail+Work	150	
ILC Meeting	142	
ILC Office	150	
ILC Pastor	225	
ILC Sacristy	195	
ILC Storage	188	
ILC Upper Room	507	
ILC-Reception	275	

Little Lambs Preschool

Size (Sq. Ft.)
Total Program Space 2,250

Program Spaces	Size (Sq. Ft.)	Specifications
ADA R.R.	50	
LL Art+Snacks	354	
LL Child's RR	200	
LL Circle Rm.	225	
LL Entry/Cubbies	150	
LL Hall	275	
LL Imagination Rm.	300	
LL Kitchen	246	
LL Office	225	
LL Str	75	
LL Str	50	
Outdoor Stor.	100	

Programming Area Summary

Woodburn Opportunity Space Program	
Spaces/Programs	Area (Sq. Ft.)
Community Action Agency	1,923
ARCHES Program	450
Home Youth Program	1,001
Family Building Blocks	2,151
Community Gathering Space	5,250
Common Use Spaces	8,802
Immanuel Lutheran Program	2,506
Little Lambs Preschool	2,250
Total	24,333

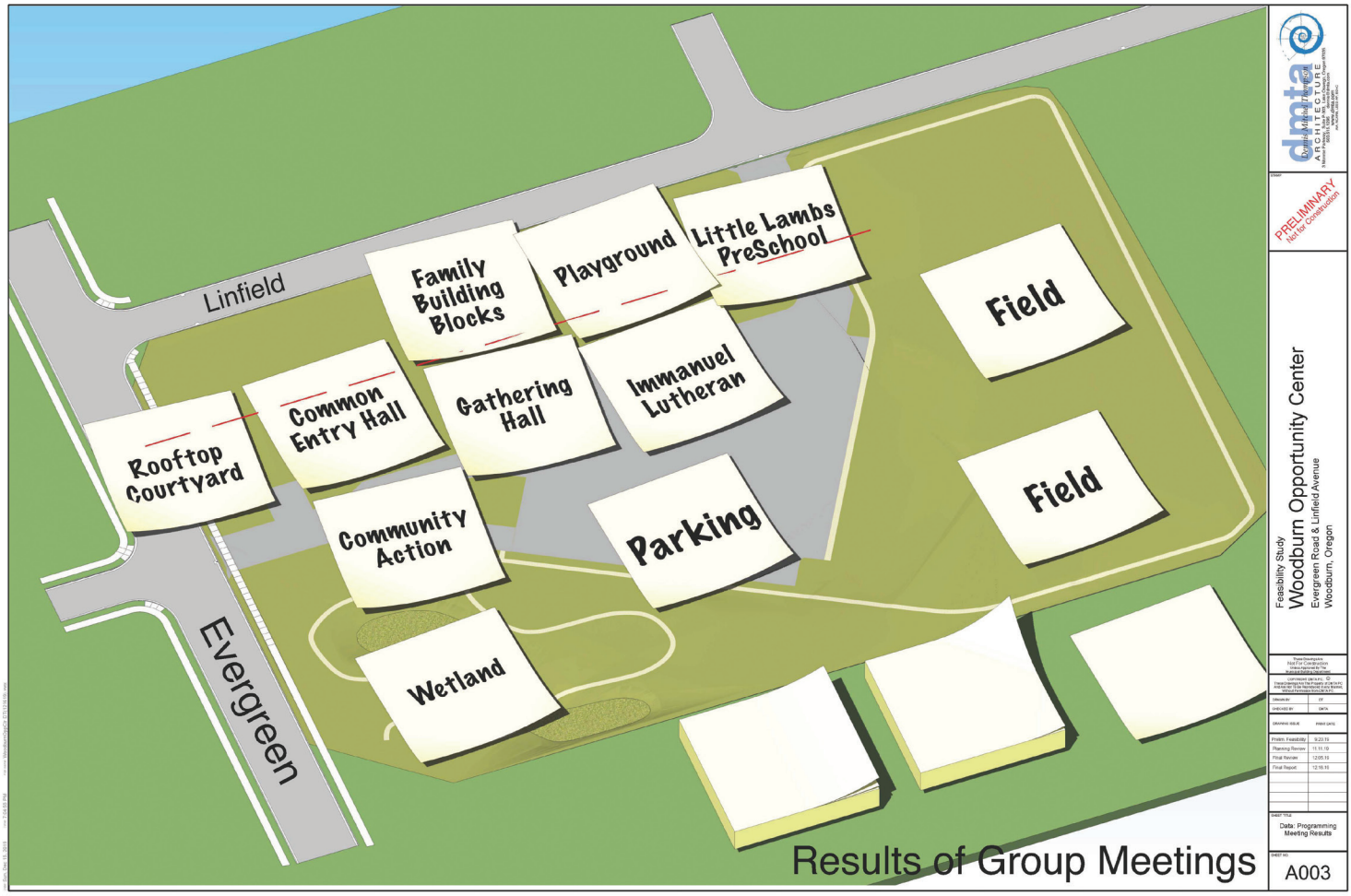
dma Dennis Mathis Architecture
2 Monroe Parkway, Suite P, Lake Oswego, Oregon 97035
p: (503) 635-3338 f: (503) 635-3339 www.dmarchitecture.com

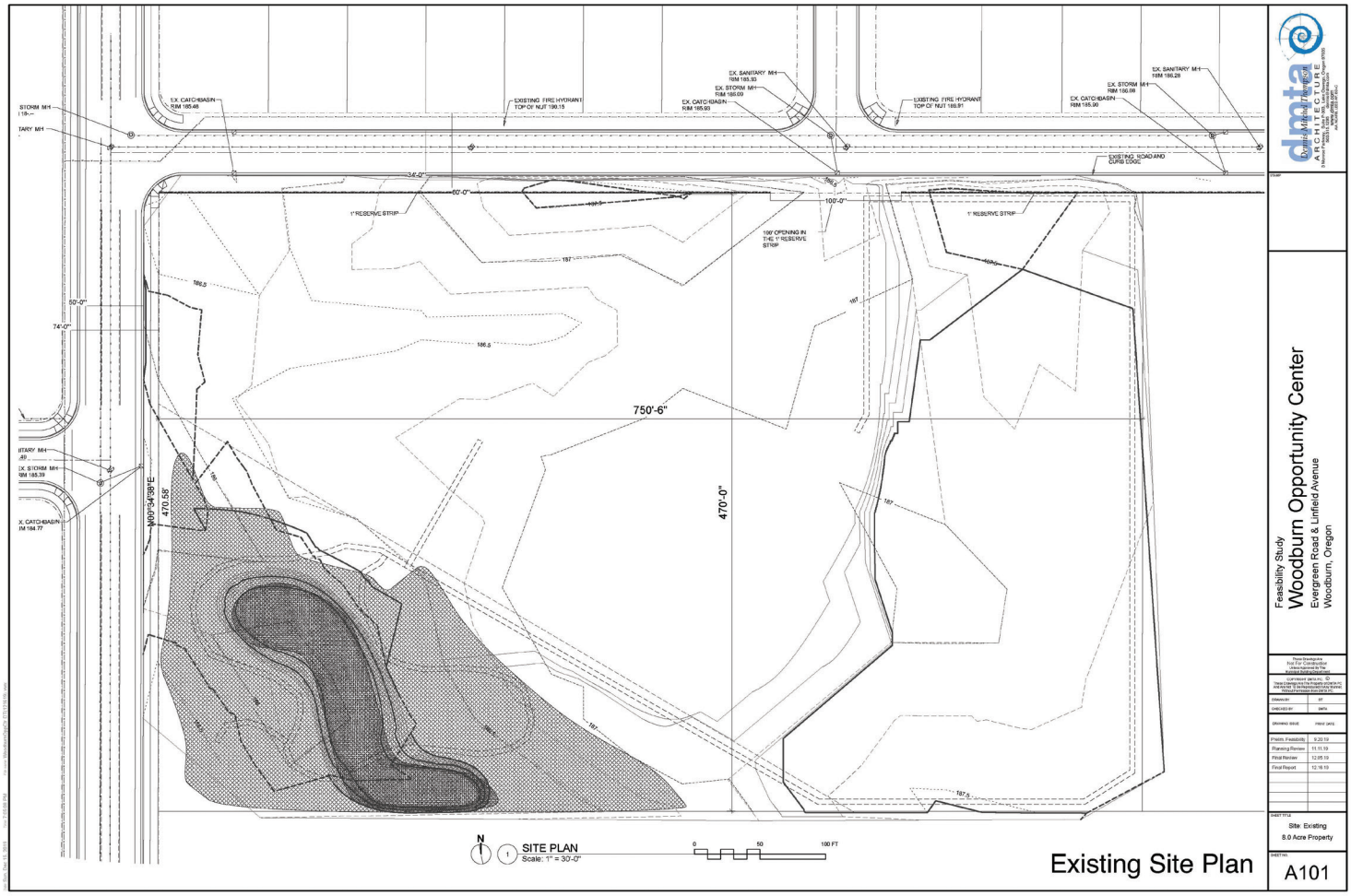
PRELIMINARY Not for Construction

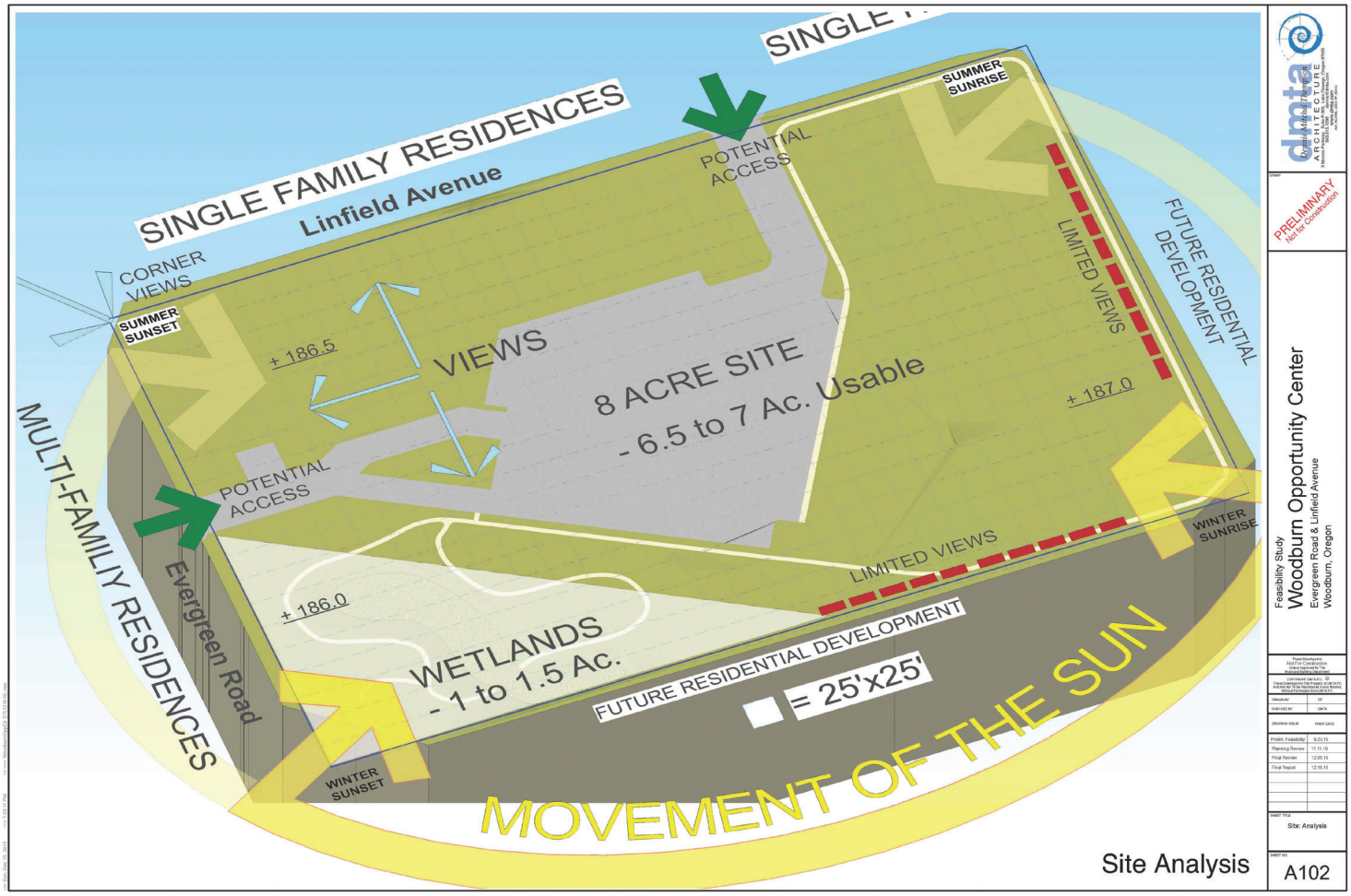
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon

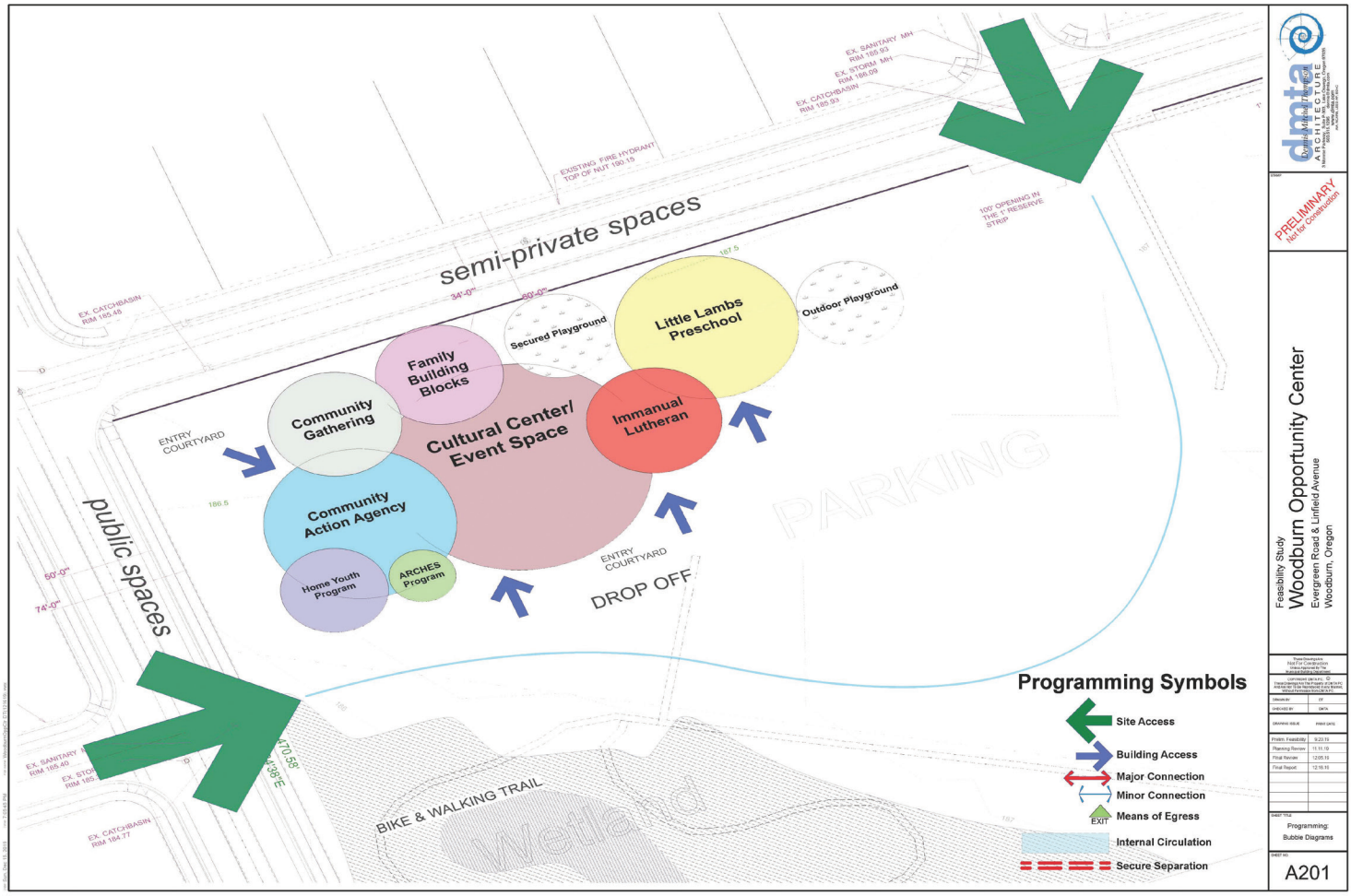
Data: Programming Area Calculations

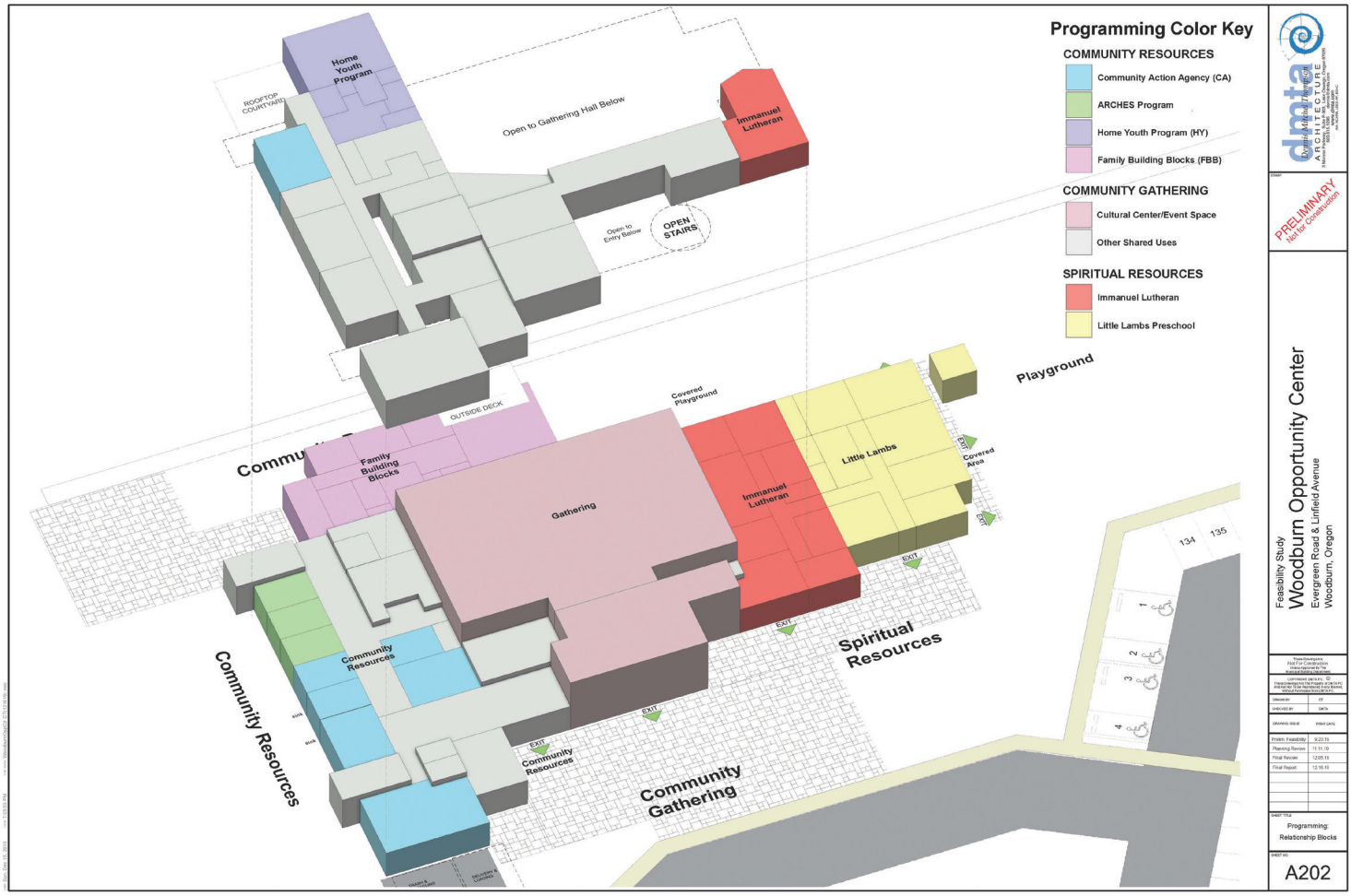
A002

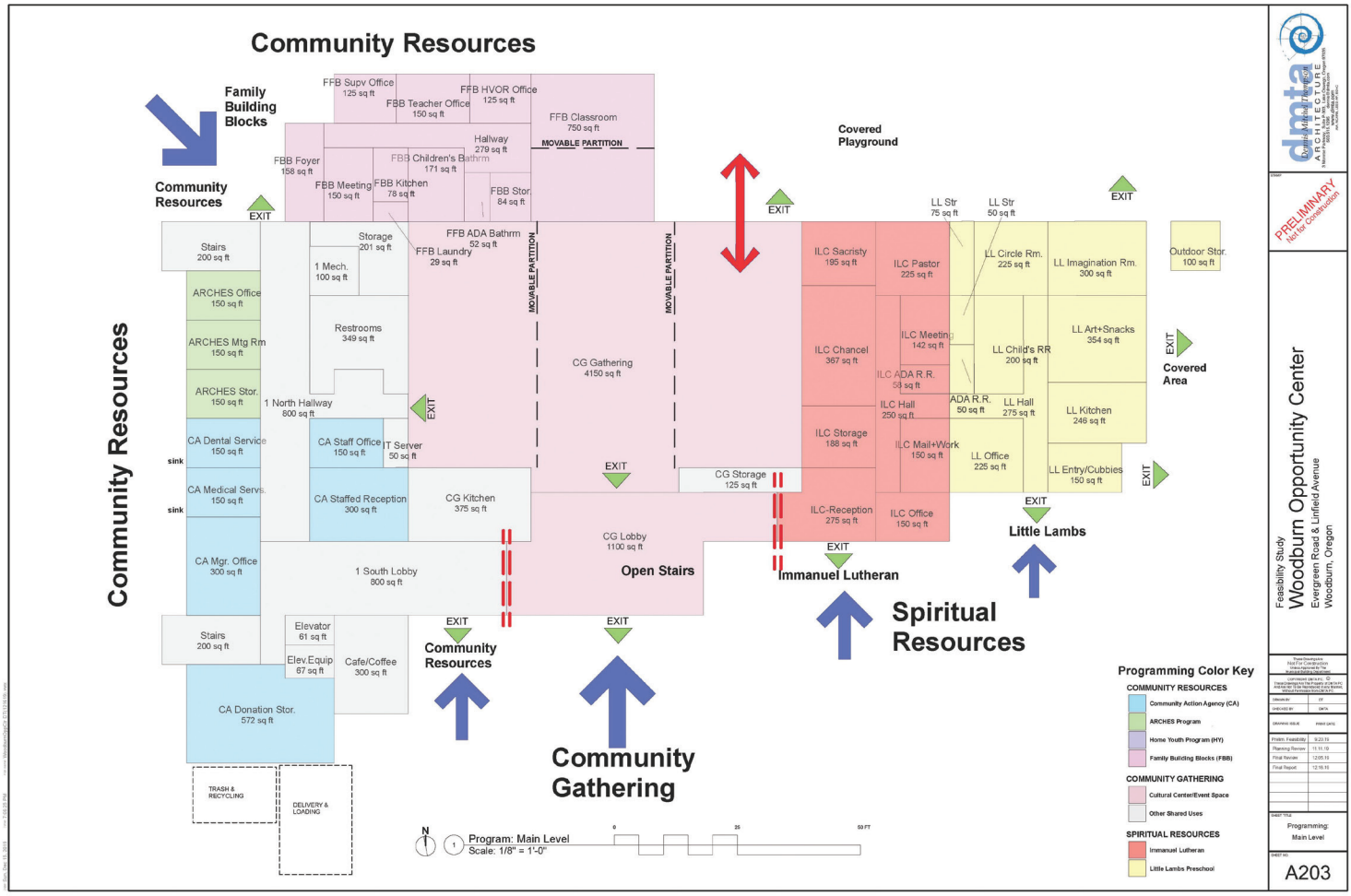

Linfield
Evergreen
Family Building Blocks
Playground
Little Lambs PreSchool
Rooftop Courtyard
Common Entry Hall
Gathering Hall
Immanuel Lutheran
Community Action
Parking
Wetland
Field
Field
Results of Group Meetings
dma
ARCHITECTURE
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Prelim. Feasibility 9.20.19
Planning Review 11.11.19
Final Review 12.05.19
Final Report 12.16.19
Data: Programming Meeting Results
A003

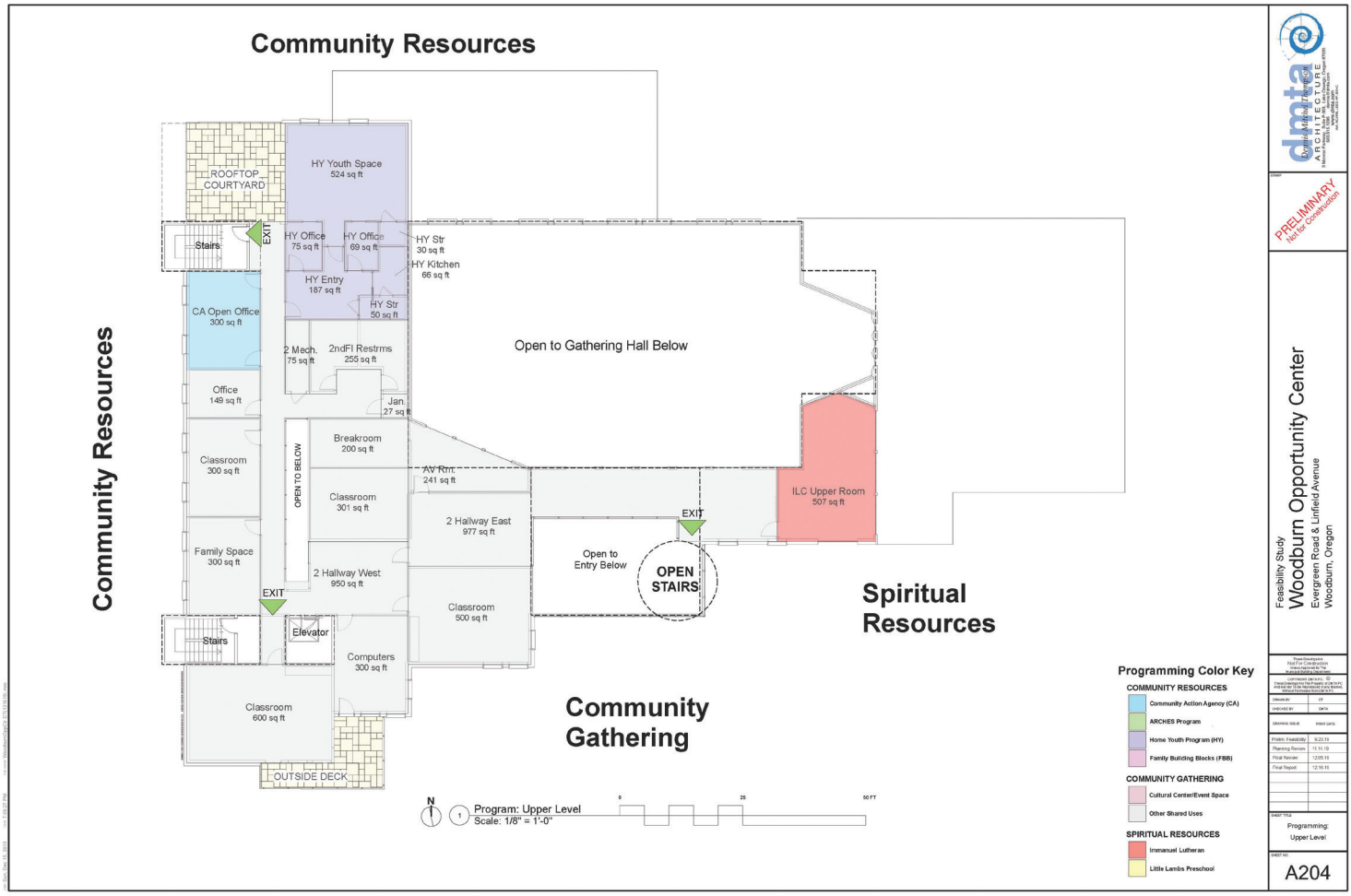

STORM MH
RIM 185.46
EX. CATCHBASIN
RIM 185.48
EXISTING FIRE HYDRANT
TOP OF NUT 190.15
EX. SANITARY MH
RIM 185.93
EX. STORM MH
RIM 185.69
EX. CATCHBASIN
RIM 185.93
EXISTING FIRE HYDRANT
TOP OF NUT 189.91
EX. STORM MH
RIM 186.08
EX. CATCHBASIN
RIM 185.90
EX. SANITARY MH
RIM 186.26
EXISTING ROAD AND CURB EDGE
34'-0"
50'-0"
100'-0"
1' RESERVE STRIP
100' OPENING IN THE 1' RESERVE STRIP
1' RESERVE STRIP
50'-0"
74'-0"
750'-6"
470'-0"
470.58'
N00°34'38"E
SITE PLAN
Scale: 1" = 30'-0"
0
50
100 FT
Existing Site Plan
dmta
ARCHITECTURE
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Prelim. Feasibility 9.20.19
Planning Review 11.11.19
Final Review 12.05.19
Final Report 12.16.19
Site: Existing
8.0 Acre Property
A101

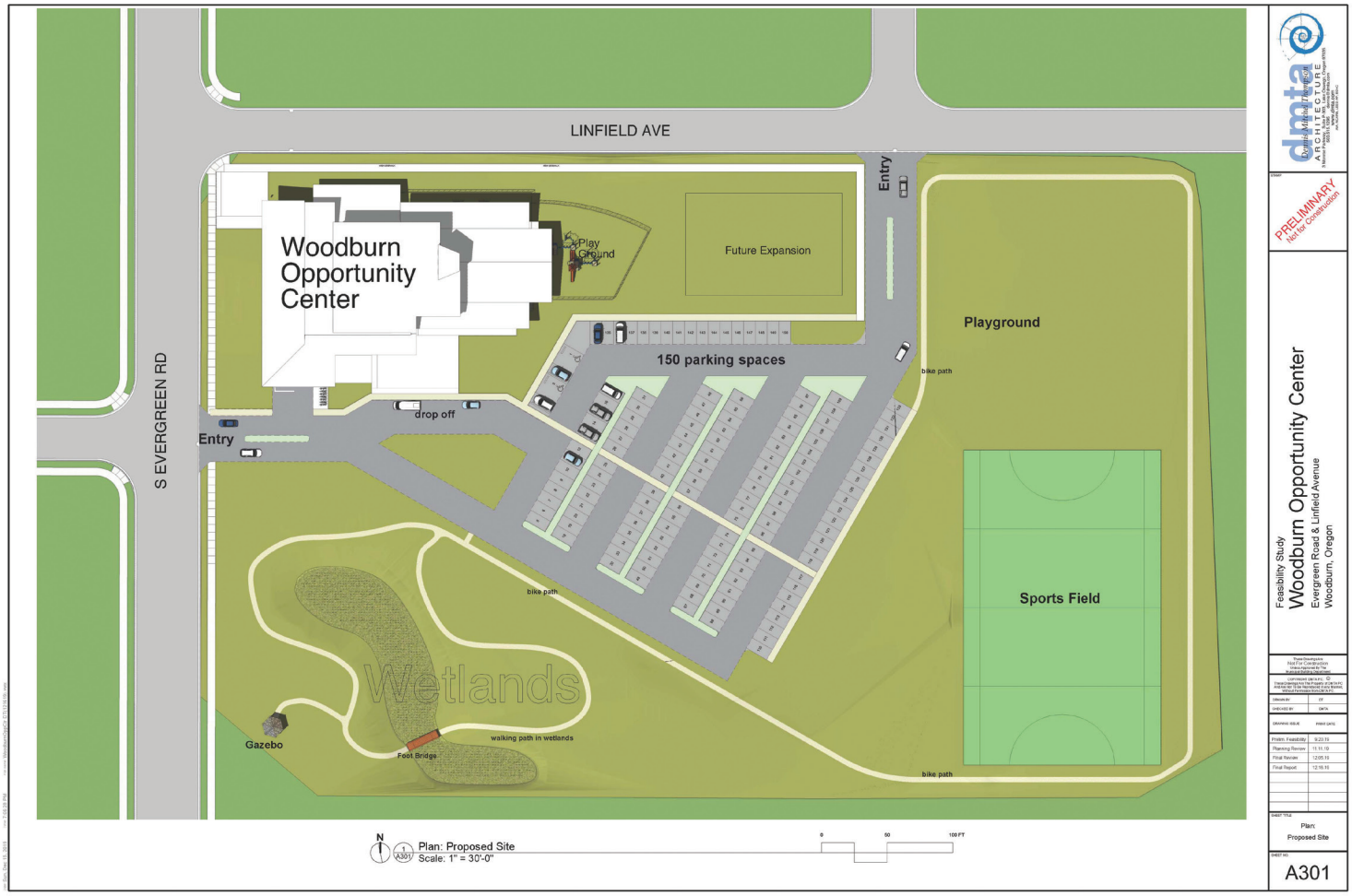

SINGLE FAMILY RESIDENCES
Linfield Avenue
POTENTIAL ACCESS
SUMMER SUNRISE
CORNER VIEWS
SUMMER SUNSET
+ 186.5
VIEWS
8 ACRE SITE
- 6.5 to 7 Ac. Usable
LIMITED VIEWS
FUTURE RESIDENTIAL DEVELOPMENT
+ 187.0
POTENTIAL ACCESS
MULTI-FAMILIY RESIDENCES
Evergreen Road
WINTER SUNRISE
LIMITED VIEWS
+ 186.0
WETLANDS
- 1 to 1.5 Ac.
FUTURE RESIDENTIAL DEVELOPMENT
= 25'x25'
WINTER SUNSET
MOVEMENT OF THE SUN
Site Analysis
dmta
ARCHITECTURE
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Site Analysis
A102

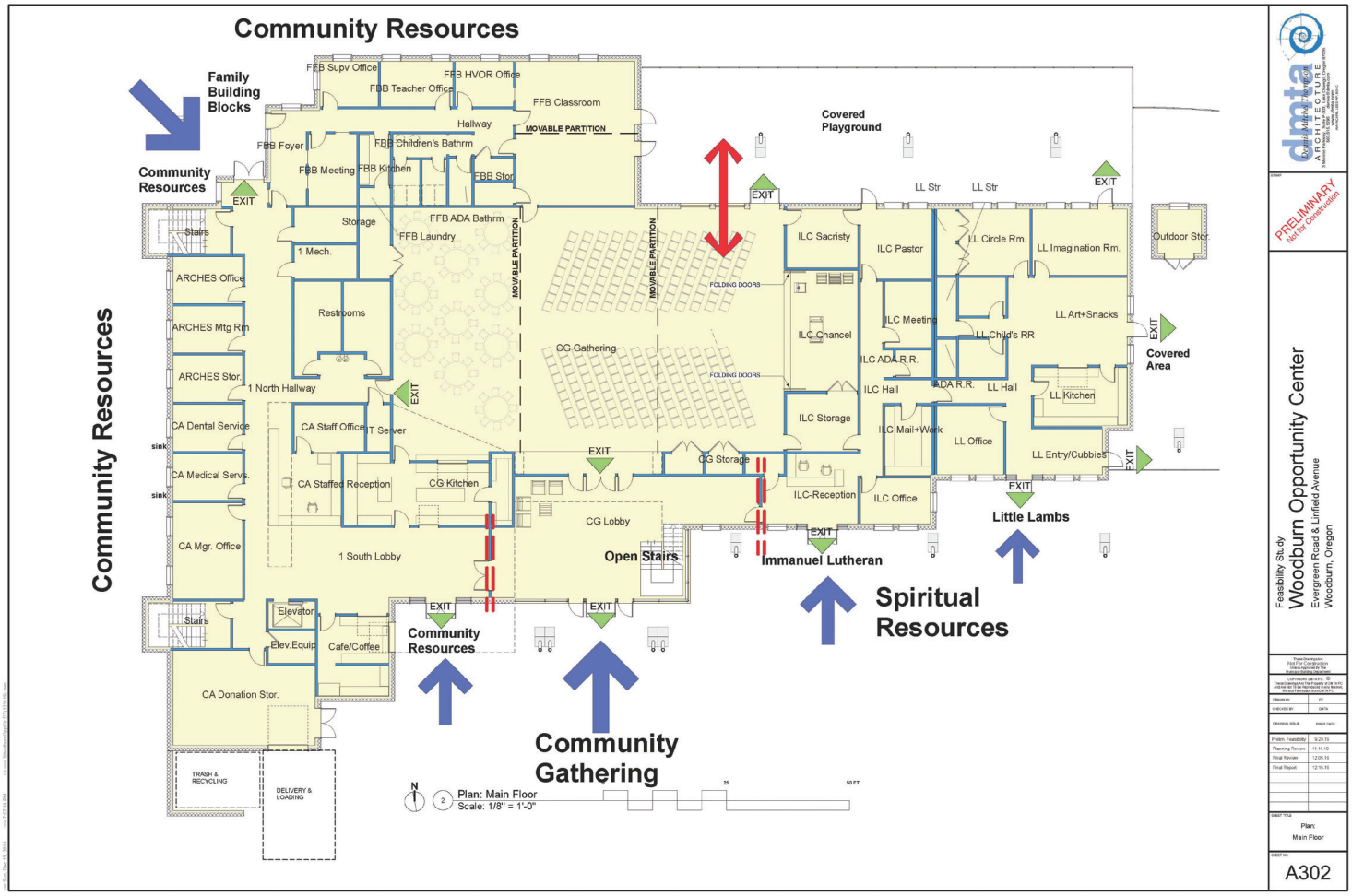

semi-private spaces
public spaces
Family Building Blocks
Secured Playground
Little Lambs Preschool
Outdoor Playground
Community Gathering
Cultural Center/ Event Space
Immanual Lutheran
Community Action Agency
Home Youth Program
ARCHES Program
ENTRY COURTYARD
ENTRY COURTYARD
DROP OFF
PARKING
BIKE & WALKING TRAIL
Wetland
Programming Symbols
Site Access
Building Access
Major Connection
Minor Connection
Means of Egress
EXIT
Internal Circulation
Secure Separation
dmta
ARCHITECTURE
PRELIMINARY
Not for construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Programming:
Bubble Diagrams
A201

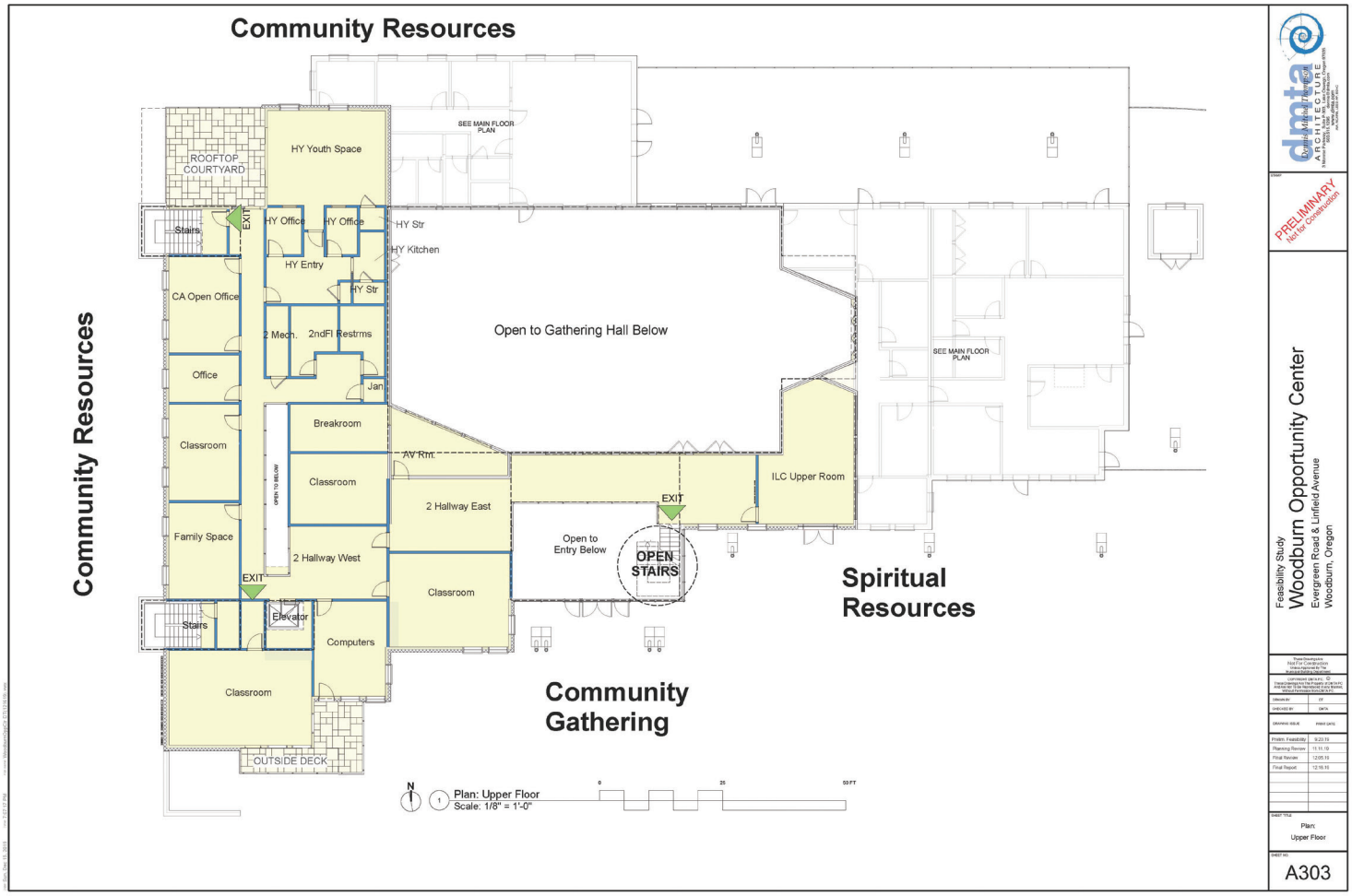

Programming Color Key
COMMUNITY RESOURCES
Community Action Agency (CA)
ARCHES Program
Home Youth Program (HY)
Family Building Blocks (FBB)
COMMUNITY GATHERING
Cultural Center/Event Space
Other Shared Uses
SPIRITUAL RESOURCES
Immanuel Lutheran
Little Lambs Preschool
Home Youth Program
ROOFTOP COURTYARD
Open to Gathering Hall Below
Immanuel Lutheran
Open to Entry Below
OPEN STAIRS
OUTSIDE DECK
Family Building Blocks
Covered Playground
Gathering
Immanuel Lutheran
Little Lambs
Playground
Covered Area
EXIT
Community Resources
Community Resources
Community Resources
Spiritual Resources
Community Gathering
134
135
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Programming:
Relationship Blocks
A202


Community Resources
Family Building Blocks
Community Resources
FFB Supv Office 125 sq ft
FFB HVOR Office 125 sq ft
FFB Teacher Office 150 sq ft
FFB Classroom 750 sq ft
MOVABLE PARTITION
Hallway 279 sq ft
FBB Foyer 158 sq ft
FBB Children's Bathrm 171 sq ft
FBB Meeting 150 sq ft
FBB Kitchen 78 sq ft
FBB Stor. 84 sq ft
Covered Playground
EXIT
LL Str 75 sq ft
LL Str 50 sq ft
Stairs 200 sq ft
Storage 201 sq ft
FFB ADA Bathrm 52 sq ft
FFB Laundry 29 sq ft
1 Mech. 100 sq ft
ILC Sacristy 195 sq ft
ILC Pastor 225 sq ft
LL Circle Rm. 225 sq ft
LL Imagination Rm. 300 sq ft
Outdoor Stor. 100 sq ft
ARCHES Office 150 sq ft
ARCHES Mtg Rm 150 sq ft
ARCHES Stor. 150 sq ft
Restrooms 349 sq ft
CG Gathering 4150 sq ft
ILC Chancel 367 sq ft
ILC Meeting 142 sq ft
LL Child's RR 200 sq ft
LL Art+Snacks 354 sq ft
ILC ADA R.R. 58 sq ft
Covered Area
1 North Hallway 800 sq ft
ILC Hall 250 sq ft
ADA R.R. 50 sq ft
LL Hall 275 sq ft
LL Kitchen 248 sq ft
CA Dental Service 150 sq ft
CA Staff Office 150 sq ft
IT Server 50 sq ft
ILC Storage 188 sq ft
ILC Mail+Work 150 sq ft
LL Office 225 sq ft
LL Entry/Cubbies 150 sq ft
sink
CA Medical Servs. 150 sq ft
CA Staffed Reception 300 sq ft
CG Kitchen 375 sq ft
CG Storage 125 sq ft
ILC-Reception 275 sq ft
ILC Office 150 sq ft
Little Lambs
CG Lobby 1100 sq ft
Open Stairs
Immanuel Lutheran
CA Mgr. Office 300 sq ft
1 South Lobby 800 sq ft
Spiritual Resources
Stairs 200 sq ft
Elevator 61 sq ft
Elev.Equip 67 sq ft
Cafe/Coffee 300 sq ft
Community Resources
CA Donation Stor. 572 sq ft
Community Gathering
TRASH & RECYCLING
DELIVERY & LOADING
Program: Main Level
Scale: 1/8" = 1'-0"
Programming Color Key
COMMUNITY RESOURCES
Community Action Agency (CA)
ARCHES Program
Home Youth Program (HY)
Family Building Blocks (FBB)
COMMUNITY GATHERING
Cultural Center/Event Space
Other Shared Uses
SPIRITUAL RESOURCES
Immanuel Lutheran
Little Lambs Preschool
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Programming: Main Level
A203


Community Resources
Community Resources
ROOFTOP COURTYARD
HY Youth Space 524 sq ft
Stairs
EXIT
HY Office 75 sq ft
HY Office 69 sq ft
HY Str 30 sq ft
HY Kitchen 66 sq ft
HY Entry 187 sq ft
HY Str 50 sq ft
CA Open Office 300 sq ft
2 Mech. 75 sq ft
2ndFl Restrms 255 sq ft
Open to Gathering Hall Below
Office 149 sq ft
Jan. 27 sq ft
Classroom 300 sq ft
OPEN TO BELOW
Breakroom 200 sq ft
AV Rm. 241 sq ft
Classroom 301 sq ft
2 Hallway East 977 sq ft
ILC Upper Room 507 sq ft
EXIT
Family Space 300 sq ft
2 Hallway West 950 sq ft
Open to Entry Below
OPEN STAIRS
EXIT
Spiritual Resources
Stairs
Elevator
Classroom 500 sq ft
Computers 300 sq ft
Classroom 600 sq ft
Community Gathering
OUTSIDE DECK
N
1
Program: Upper Level
Scale: 1/8" = 1'-0"
0
25
50 FT
Programming Color Key
COMMUNITY RESOURCES
Community Action Agency (CA)
ARCHES Program
Home Youth Program (HY)
Family Building Blocks (FBB)
COMMUNITY GATHERING
Cultural Center/Event Space
Other Shared Uses
SPIRITUAL RESOURCES
Immanuel Lutheran
Little Lambs Preschool
dmta
ARCHITECTURE
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Programming:
Upper Level
A204


LINFIELD AVE
S EVERGREEN RD
Entry
Entry
Woodburn Opportunity Center
Play Ground
Future Expansion
150 parking spaces
drop off
Playground
bike path
bike path
bike path
Sports Field
Wetlands
walking path in wetlands
Foot Bridge
Gazebo
N
Plan: Proposed Site
Scale: 1" = 30'-0"
0
50
100 FT
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Plan:
Proposed Site
A301


Community Resources
Family Building Blocks
Community Resources
Community Resources
FFB Supv Office
FFB HVOR Office
FFB Teacher Office
FFB Classroom
Hallway
MOVABLE PARTITION
FFB Foyer
FFB Children's Bathrm
FFB Meeting
FFB Kitchen
FFB Stor
Storage
FFB ADA Bathrm
FFB Laundry
1 Mech.
Stairs
ARCHES Office
ARCHES Mtg Rm
ARCHES Stor.
Restrooms
1 North Hallway
CA Dental Service
CA Staff Office
IT Server
CA Medical Servs.
CA Staffed Reception
CG Kitchen
CA Mgr. Office
1 South Lobby
Elevator
Stairs
Elev.Equip
Cafe/Coffee
CA Donation Stor.
TRASH & RECYCLING
DELIVERY & LOADING
CG Gathering
CG Lobby
CG Storage
Open Stairs
Covered Playground
ILC Sacristy
ILC Pastor
ILC Chancel
ILC Meeting
ILC ADA R.R.
ILC Hall
ILC Storage
ILC Mail+Work
ILC-Reception
ILC Office
LL Str
LL Str
LL Circle Rm.
LL Imagination Rm.
LL Art+Snacks
LL Child's RR
ADA R.R.
LL Hall
LL Kitchen
LL Office
LL Entry/Cubbies
Outdoor Stor.
Covered Area
Little Lambs
Immanuel Lutheran
Spiritual Resources
Community Resources
Community Gathering
EXIT
FOLDING DOORS
Plan: Main Floor
Scale: 1/8" = 1'-0"
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Plan:
Main Floor
A302


Community Resources
Community Resources
ROOFTOP COURTYARD
HY Youth Space
SEE MAIN FLOOR PLAN
Stairs
EXIT
HY Office
HY Office
HY Str
HY Kitchen
HY Entry
HY Str
CA Open Office
2 Mech.
2ndFl Restrms
Open to Gathering Hall Below
SEE MAIN FLOOR PLAN
Office
Jan
Classroom
Breakroom
AV Rm.
Classroom
OPEN TO BELOW
2 Hallway East
ILC Upper Room
EXIT
Family Space
2 Hallway West
Open to Entry Below
OPEN STAIRS
Spiritual Resources
EXIT
Classroom
Stairs
Elevator
Computers
Classroom
Community Gathering
OUTSIDE DECK
N
1
Plan: Upper Floor
Scale: 1/8" = 1'-0"
0
25
50 FT
dmta
ARCHITECTURE
PRELIMINARY
Not for Construction
Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon
Problm. Feasibility 9.20.19
Planning Review 11.11.19
Final Review 12.05.19
Final Report 12.16.19
Plan:
Upper Floor
A303

VIEW FROM LINFIELD AVE.

AERIAL VIEW - NORTH

AERIAL VIEW - SOUTH

VIEW OF ENTRY PLAZA

VIEW FROM EVERGREEN RD.

dmta
Community Planning + Design
ARCHITECTURE

PRELIMINARY
Not for Construction

Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon

Prelim. Feasibility	9.23.19
Planning Review	11.11.19
Final Review	12.05.19
Final Report	12.16.19

3D Views:
Exterior

A401

INSIDE THE COMMUNITY HALL

INSIDE THE UPPER ROOM

MAIN FLOOR SOUTH HALL

ENTRY FOYER

dmta
Community Planning + Architecture

PRELIMINARY
Not for Construction

Feasibility Study
Woodburn Opportunity Center
Evergreen Road & Linfield Avenue
Woodburn, Oregon

Problm. Feasibility	9.23.19
Planning Review	11.11.19
Final Review	12.05.19
Final Report	12.16.19

3D Views:
Interior

A402

Appendix D

Woodburn Opportunity Center - Capital Campaign Strategy

To achieve the larger goal of $9.7 million, a community-based capital campaign is needed to raise up to $2 million in private funds. First steps are to develop and test a list of donor prospects, create a gift range chart (see page 6), staffing plan and activity timeline.

The capital campaign will require a level of administrative and strategic focus that has not been needed by Immanuel Lutheran (ILC) to date. This is an opportunity to create systems that will both support the campaign and prepare ILC for the future. These will include:

☐ A donor and prospect database appended with donor information, participation, interests, etc.;
☐ Donor recognition and stewardship practices and guidelines; and
☐ Dedicated staff or counsel to provide fundraising cultivation, solicitation and follow up consistency.

Donor and Leader Prospect Identification and Qualification - A key step is identifying and qualifying prospects for the campaign. Initial planning has identified the following potential criteria for selecting these elements:

☐ **Leadership** - It is recommended that ILC consider creation of a new nonprofit organization dedicated to achieving the capital campaign goal (alternative is using a DBA). The Woodburn Opportunity Center generates broad community benefit and the campaign's public face can be represented through authentic stakeholder participation. The campaign leadership can include:
- **Immanuel Lutheran leaders** - ILC leaders can be drawn from current and former ILC Church Council and Building Team members.
- **Other Spiritual Communities** - Pan de Vida, Woodburn Area Ministerial Association and other interested faith communities should be recruited.
- **Family Resource Agencies** - Representation should include Board level leadership from committed partners (Mid Willamette Valley Community Action Agency, Family Building Blocks and Love INC) and others (e.g., Northwest Senior and Disability Services and Marion-Polk Food Share) dedicated to achieving the capital campaign goal.
- **Woodburn Latinx Leaders** - Leadership from CAPACES Leadership Institute, PCUN and others are needed to ensure strong representation.
- **Community Leaders** - Other key elements of the community to be represented include the Woodburn Area Chamber of Commerce and Chemeketa Community College | Woodburn.

☐ **Donors** - In Phase 1 the potential donor prospects need to be identified. These individuals will be be identified through the following methods:
- Members of ILC who have a history of giving and capacity to do so
- Persons identified by members of the Campaign Committee
- Individuals who have a history of making significant gifts to community capital campaigns in Marion County
- Individuals with generational wealth (e.g., farmers) living in North Marion County
- Major donors to committed project partners (e.g., Community Action, Family Building Blocks, Love INC, etc.)

Staffing - To provide the level of management and attention to detail needed during the campaign, ILC will need someone dedicated to managing both the data and day-to-day tasks generated and to providing strategy and cultivation support for campaign volunteers.

ILC could either hire a (1) Campaign manager who will be responsible for all aspects of managing the campaign or (2) Campaign coordinator who will manage the data processing and other day-to-day duties in concert with a campaign consultant.

In addition to ensuring smooth operations, having campaign staff will help alleviate coordination needs and potential donor concerns about efficacy and efficiency of the community campaign structure. An added benefit to hiring a coordinator is the demonstrated professionalization of ILC/campaign, which will underscore the project's viability moving forward.

Campaign Coordinator:

- ☐ Will require 3-5 years of development and administrative experience
- ☐ Strong data management and communication skills
- ☐ Position could be funded through a capacity building grant and/or built in as a part of the overall campaign cost.

Campaign Manager:

- ☐ Will require 7 to 10 years of campaign and development experience
- ☐ Strong prospect research, communication and donor cultivation skills
- ☐ Position could be through a capacity building grant and/or built in as part of the overall campaign cost.

Campaign Counsel

- ☐ Depending on the level of involvement with the daily operations of the campaign, counsel could cost $3,000 to $5,000 a month as a retainer for the life of the campaign.

Data Management - The ILC prospect list needs to be entered and maintained in a fundraising database. Donor data will need to be updated on an ongoing basis and driven by prospect research and donor cultivation activities. All new data (contact report content, pledge and gift activity, event attendance, etc.) should be entered into the database within a few days to ensure that the database is accurate and reflects current information.

ILC should establish a single point accountability on ownership and additions to the database—a role that lies ideally with the campaign coordinator. The campaign counsel could also maintain this database, but the costs will be higher.

Campaign Volunteer Leadership - While there is a group of people that is passionate about the project and has given much of its time and focus, it is unknown who will remain involved once the campaign gets going, how much time current volunteers will be able to give to the project and how willing they are to fundraise (contact, cultivate, solicit and steward donors). Yet to be developed is an official leadership committee structure, job description, or specific commitments of leadership volunteer prospects.

As ILC moves into an active campaign, it is important to provide a clear request of what roles are needed and to determine the level of their ongoing involvement. Once their level of involvement has been established, it's essential to identify and recruit additional/new leadership.

The Campaign Committee's role will be to:

- ☐ Identify, qualify and serve as a pathway to leadership and major gift prospects.
- ☐ Actively participate in cultivation events and direct cultivation of individual prospects.
- ☐ Make a personally significant gift to the campaign.
- ☐ Participate in direct solicitation of leadership and major gifts.
- ☐ Provide input and advice on campaign strategy and adjustments through the phases of the campaign.
- ☐ Serve as champions and spokespeople for the campaign in the broader community.

The makeup of the Committee could include:

- ☐ Committed donors and/or ILC volunteer leaders to provide deep mission connection and immediate trust.
- ☐ Individual philanthropists with a known leadership track record in campaigns.
- ☐ Business leaders with a track record of civic leadership and campaign involvement, as well as strong peer networks.
- ☐ Early recruitment should focus on building a committee of six to eight members, possibly growing to 12 people over time.

As the campaign grows, subcommittees will be created as needed. All volunteer leaders and Committee members will need cultivation and solicitation training, communication/message training and donor cultivation coaching prior to donor outreach to ensure that the case and key messages are communicated consistently and powerfully and so that members and leaders are prepared for any project questions.

Leadership Donor Cultivation

Committee volunteers cultivate and solicit leadership gift prospects (potential gifts above $100,000).

- ☐ A leadership phase matching gift should be secured to create credibility and incentive.
- ☐ Cultivation and solicitation will move each prospect through a process of becoming informed, interested, involved and invested. This donor cultivation should be in person and be highly attuned to the donor's interests and abilities.
- ☐ General cultivation events and awareness activities during the leadership phase will raise awareness and cultivate all leadership gift prospects and top major gift prospects.

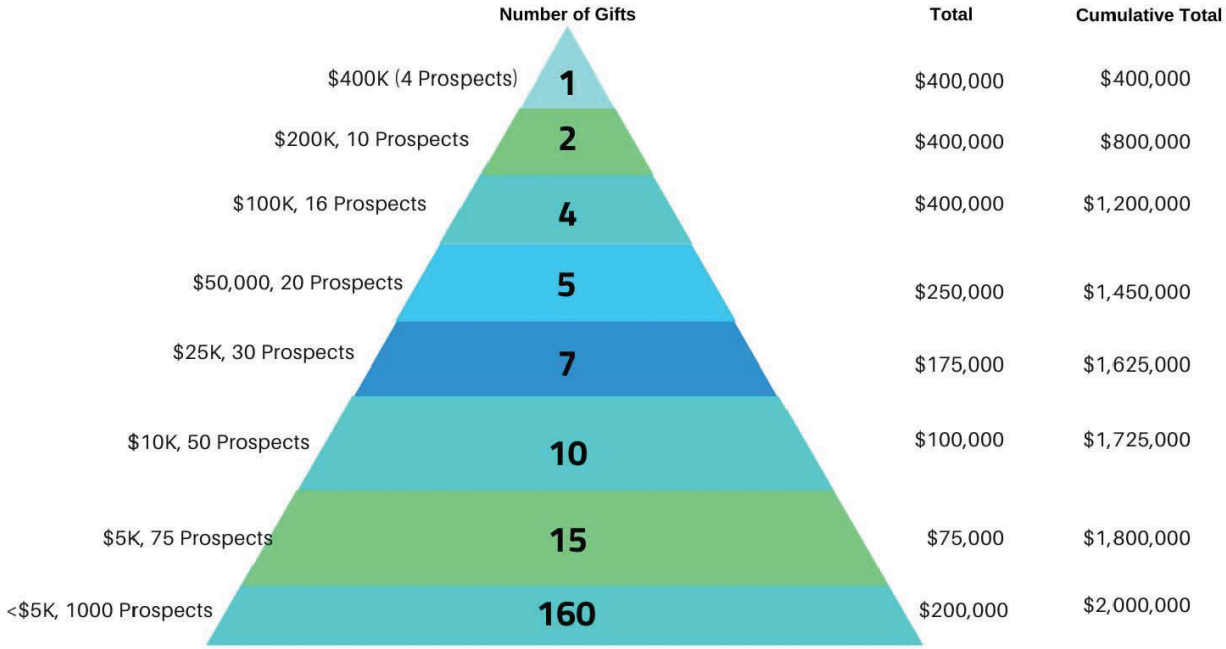
Major Gift Cultivation and Solicitation

Leadership volunteers will cultivate and solicit major gift prospects (potential gifts $10,000 - $99,000). General cultivation events and awareness activities during the major gifts phase raise awareness and cultivate all major gift prospects and top community phase prospects and social network leaders. During the major gift phase, secure a matching gift for the community phase/gift levels and secure promotional partnerships/incentives.

Community Engagement

Community-wide awareness-raising through media partnerships, earned media and cultivation tours. Solicitation will be conducted through direct response (e-mail, direct mail mail and select tele funding if budget or volunteers allow). The campaign should highlight permanent recognition opportunities for gifts above $500.

Campaign leaders should identify a variety of recognition opportunities for giving. Gifts to the community phase will be larger if donors have the option to fund with monthly pledges on credit cards or through auto-withdrawal (i.e., give $1,000 at $84 per month).

1

Woodburn Opportunity Center
Sample Gift Range Chart - $2 Million Goal