

Memorandum



CITY OF DALLAS

DATE May 5, 2023

TO Honorable Mayor and Members of the City Council

SUBJECT **2024 Bond Program Development – Technical Scoring Criteria**

Background

On April 17, 2023, during the Quality of Life, Arts, and Culture (QOL) Committee meeting, the Parks and Recreation Department discussed the technical scoring criteria the department would be using to score projects to be recommended as part of the 2024 Bond Program. Through the technical scoring criteria discussion on April 17, 2023, the QOL Committee requested the 2024 Bond Technical Scoring Criteria presented to other City Council committees. Given the request from QOL Committee and that the Office of Bond and Construction Management (BCM) will be briefing the City Council on May 17, 2023, the purpose of this memorandum is to provide all 2024 Bond Technical Scoring Criteria ahead of the May 17th briefing.

2024 Bond Technical Scoring Criteria

As BCM is scheduled to brief City Council May 17, 2023, aside from an update on the 2024 Bond Program development, the briefing will include a discussion of the technical criteria. City Council feedback will then be considered and any proposed revisions to the technical criteria will be briefed to the City Council in June 2023.

For reference, attached to this memorandum is a summary of the technical criteria that will be used by each department to score potential bond projects. Additionally, attached to this memorandum are the technical scoring criteria briefings that have been presented to City Council Committees. Should you have any questions regarding the information within this memorandum, please contact Jennifer Nicewander, P.E., Interim Director of the Office of Bond and Construction Management, at jennifer.nicewander@dallas.gov or 214-671-8450.

A handwritten signature in black ink, appearing to read 'Rob Perez'.

Robert M. Perez, Ph.D.

Assistant City Manager

[Attachments]

c: T.C. Broadnax, City Manager
Tammy Palomino, Interim City Attorney
Mark Swann, City Auditor
Billierae Johnson, City Secretary
Preston Robinson, Administrative Judge
Kimberly Bizer Tolbert, Deputy City Manager
Jon Fortune, Deputy City Manager

Majed A. Al-Ghafry, Assistant City Manager
M. Elizabeth (Liz) Cedillo-Pereira, Assistant City Manager
Carl Simpson, Assistant City Manager
Jack Ireland, Chief Financial Officer
Genesis D. Gavino, Chief of Staff to the City Manager
Directors and Assistant Directors

Summary of All Technical Criteria by Proposed Proposition

Streets Proposition

Category	Pvmt Cond. Index	Street Class.	Time in Needs Inventory	DWU Work Plan	SWMP High Priority	Rear Entry	Garbage Pickup	Existing ROW Avail.	Outside Funding Avail.	Time to Provide Local Match	Region -ally Signif.	Cond. of Com - ponents	Critical Service Disrup tion	Age of Struct.	Overlay & Equity Score	Total
Improved Streets	50	15	10	5										20	20	100
Unimproved Streets	50		10	5	15									20	20	100
Alleys (Improved &Unimproved.)	30		20			10	10	10							20	100
Partnership									50	20	10				20	100
Bridges & Culverts		10										50	20	20	0	100

Transportation Proposition

	Overlay Score	Equity Score	Safety	Environ. Sustain.	Economic Vitality	Housing	Innovation	Critical Failure	Public Input	Project Readiness	O&M Costs	Total Points
Intergovernmental Partnership Projects	10	10	15	15	10	10	5	5	10	5	5	100
Traffic Signal & Technology Upgrades	10	10	20	5	5	5	5	30	0	5	5	100
Traffic Signals - Warranted Signals	10	10	20	15	15	10	0	0	5	5	10	100
Street Lighting	10	10	30	10	10	5	5	5	5	5	5	100
Vision Zero/Safety	10	10	40	5	5	5	5	5	5	5	5	100
Quiet Zones	10	10	20	10	10	20	5	0	5	5	5	100
Complete Streets	10	10	15	20	15	5	5	0	10	5	5	100

Strategic Corridors/Thoroughfares	10	10	10	10	20	10	5	5	10	5	5	100
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Flood Control, Storm Drainage and Erosion Control Proposition

Category	Frequen cy of Flooding	Depth of Flooding	Velocity	Depth x Velocity	No. of Structures	Ratio of project Costs Per Protected Structure.	Type/ Effects of Flooding	Depth of 100-yr Flood	Ratio of Cost/ Affected Structure	Ratio Distance to Structure/ Depth of Erosion	Rate of Bank Loss	Ratio of Cost/ # Structures Protected	Type of Threat
Flood Management	25	30			3x# of Structure	10							
Storm Drainage Relief	25				3x# of Structure		20	30	10				
Erosion Control										40	40	20	15

Critical Facilities Propositions – New Build or Renovations

Criteria No.	Technical Criteria	Description	Max Score
1	Community & Stakeholder Support	Request from Community and Stakeholders for development	15
2	Site Acquisition Status	Site identified and acquisition is in progress or has been acquired	10
3	Design Status	Consultant selected, project designed or is shovel ready for bids	5
4	Economic Vitality	Integrate development investments with land use and economic priorities to improve quality of life	10
5	Current Master Plan	Comprehensive evaluation, new permanent facility will meet program needs for 30-40 years.	10
6	Leverage Funds	Project will leverage funds such as grants or private matching funds	10
7	Prior Phase Complete	for multi-phase projects, if prior phase(s) has been completed	10
8	Safety	Address health and safety issues identified in current facilities and to meet 21st century challenges.	10
9	Equity & Overlay Tool	Citywide initiative that provides the framework for utilizing the Equity Impact Assessment Score and multilayer overlay tool.	20
Total Possible Score			100

Note: BCM & BSD have been working with their client departments to ensure that the priority projects are identified then scored based on Technical Criteria.

Critical Facilities Propositions – Major Maintenance

Criteria No.	Technical Criteria	Max Score
1	Priority Level Based on Building Condition Priority 1 - Currently Critical - 30 points Priority 2 - Potentially Critical (Year 1) - 20 points Priority 3 - Necessary / Not Yet Critical (Year 2-5) - 10 points	30
2	Improves O&M	20
3	Design Status	5
4	Identifies on 2017 Facility Condition Assessment	10
5	Improves Facility's Resiliency, safety and/ or CECAP goals	15
6	Equity & Overlay Tool	20
Total Possible Score		100

Parks Proposition

Technical Criteria Park Projects	Weighted Score up to 50 of 100	Weighted Percent Up to 50%	Technical Criteria Definition
Leverage/ Funding Match	5	5.00%	Project will leverage funds from other sources such as grants, matches, or donations from other agencies or private entities.
Revenue Generation	3	3.00%	Project will generate revenue for the city
Economic Stimulant	3	3.00%	Project affects adjacent property values, stimulates other development
Safety/Code/Human Health	10	10.00%	Project will address safety concerns or resolves codes and regulatory violations, hazardous conditions
Impact on O&M Costs & Energy Use	8	8.00%	Project will have an impact on operating and maintenance costs
Existing Master Plan	4	4.00%	Project has an approved master plan(s)
Prior Phase Complete	4	4.00%	Project is a subsequent phase of another project or initiative that is already complete. Example, trail connection
End of Service Life	7	7.00%	Project will replace a facility that has a long history of service tickets/ requests and/or per Manufacturer's recommended end of service life
Meet Level of Service Gap	6	6.00%	Project will improve adopted level of service standards per 2016 Comprehensive Plan Update. Pg. 83
Total Maximum Technical Score	50	50.00%	The technical criteria is used to help prioritize projects within the same category only. (Parks, Trails, Site Development, Playgrounds, Aquatics, Service Centers, Recreation Centers, Amenities, Land Acquisition, etc.)

Parks Proposition, continued

Council/Park Board Criteria	Weighted Score up to 25 of 100	Weighted Percent up to 25%	Council/Park Board Criteria Definition
A1. Park Board / City Council Priority	15	15.00%	Project is determined by Park Board and/or Council member to be a priority in the district
A2. Community Input	10	10.00%	Project is determined by the community and/or a friends' group to be a neighborhood priority in the district. Project has support from a local friends' group, partnership organization, or the community expressed support during community input, bond meetings, or through request to the Park Board Member or Parks Department.
Total Optional Criteria	25	25.00%	Optional Criteria Based on Council and Citizen Driven Priorities

Parks Proposition, continued

Equity Criteria	Weighted Score up to 25 of 100	Weighted Percent up to 25%	Equity Criteria Definition
Social Vulnerability	10	10.00%	<p><u>Social Vulnerability Index</u>: CDC SVI uses U.S. Census data to determine the social vulnerability of every census tract. Census tracts are subdivisions of counties for which the Census collects statistical data. CDC SVI ranks each tract on 15 social factors, including poverty, lack of vehicle access, and crowded housing, and groups them into four related themes: Socioeconomic Status, Household Composition, Race/Ethnicity/Language, Housing/Transportation.</p>
Park Access	10	10.00%	<p><i>Project falls within a Park Access Gap – Project is in an area of the city that serves a population currently lacking a park within a 10-minute walk (1/2 Mile). Does take into account physical barriers within the 10-minutes walk.</i></p>
Park Investment	5	5.00%	<p><i>Areas lacking recent investment (10-15+ years); includes unprogrammed parks/areas. Includes investment per evaluation category.</i></p>
Total Equity Score	25	25.00%	Equity Criteria being reviewed with Office of Equity and the Office of Bond and Construction



City of Dallas

2024 General Obligation Bond Program Technical Criteria for Economic Development

**Economic Development Committee
February 6, 2023**

Robin Bentley, Director
Kevin Spath, Assistant Director
Office of Economic Development

Adriana Castaneda, Director
Office of Bond and Construction Management
City of Dallas

Overview

- Technical Criteria
- Technical Criteria for Economic Development
- History: Previous GO Bond Programs
- 2017 Bond Program: Proposition I
- Project Evaluation



Technical Criteria

What are Technical Criteria?

- set of measuring tools that City staff uses to rate project from a technical standpoint
- allows staff to categorize and prioritize projects objectively
- projects in the needs inventory undergo a technical criteria review by “infrastructure departments”
- needs inventory projects are compared within categories



Technical Criteria for Economic Development/



Criteria for project funding with Economic Development propositions differ from typical needs inventory/technical criteria utilized by “infrastructure departments”

- projects are not necessarily known in advance
- projects are not scored and compared based on point accumulation basis
- availability of bond funding allows City to capitalize on moments of opportunity as they arise
- provides for flexibility of utilization in order to achieve City policy goals



History: Previous GO Bond Programs

- Previous propositions approved by voters for economic development (1998, 2003, 2006, 2012, 2017)
- **2006: Proposition 8 (for southern area and TOD areas): \$41,495,000**
 - \$21,495,000 for Office of Economic Development
 - \$20,000,000 for Housing Department
- **2012: Proposition 3 (for southern area and TOD areas): \$55,000,000**
 - \$35,000,000 for Office of Economic Development (including \$5 million specifically for UNT-Dallas area and \$10 million for The Canyon area)
 - \$20,000,000 for Housing Department



History: Previous GO Bond Programs

- **2017: Proposition I: \$55,400,000**
 - “discretionary” allocations across 11 City Council Districts and a city-wide allocation for Mayor
 - shared between Office of Economic Development and Housing Department



2017 Bond Program: Proposition I



Purpose: providing funds for promoting economic development throughout the city

- through planning, designing, constructing, improving, extending and expanding public street, utility, and other infrastructure facilities, including the acquisition of land therefor, and
- through the City's programs for economic development and housing including the acquisition of improved and unimproved properties, the demolition of existing structures, making grants of bond proceeds and otherwise providing assistance for private commercial, industrial, retail, residential and mixed-use development, neighborhood revitalization projects, and mixed-income development

Staff is anticipating a similar proposition for 2024 GO Bond Program



Project Evaluation

Project evaluation criteria include:

- alignment with Economic Development Policy 2022-2032
- satisfaction of parameters outlined in the voter-approved Proposition
- compliance with Economic Development Incentives Policy
- eligibility under Chapter 380 Economic Development Program or Chapter 373 Community Development Program (baseline criteria for grant negotiation)
- ability to leverage direct and indirect private (and non-City public) investment and public benefits
- fiscal impact analysis (business and community development projects)
- underwriting/gap analysis (real estate development projects)





City of Dallas

2024 General Obligation Bond Program Technical Criteria for Economic Development

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City of Dallas



City of Dallas

**2024 Capital Bond Program
Technical Criteria
Infrastructure Departments
Transportation &
Infrastructure Committee
February 28, 2023**

Ali Hatefi P.E., Director - PBW
Ghassan Khankarli, P.E., Director – TRN
Jennifer Nicewander, P.E., (I) Director - BCM
Matt Penk, P.E., Assistant Director- DWU
Amani Saleh, PhD. Assistant Director - BSD

City of Dallas

Purpose

- Provide overview of how projects are identified/scored
- Explain technical criteria to categorize and prioritize projects
- Review Technical Criteria for:
 - Public Works (PBW)
 - Dallas Water Utilities (DWU)
 - Transportation (TRN)
 - Bond & Construction Management (BCM)/Building Services Department (BSD)



Proposed Bond Technical Criteria

Background:

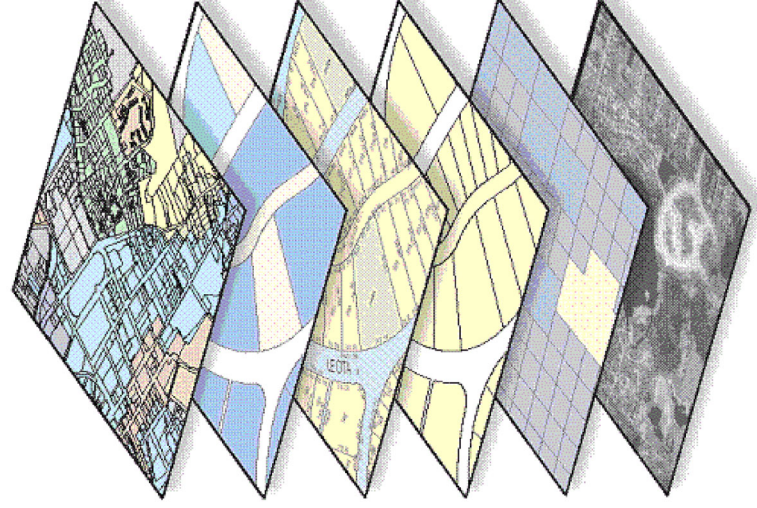
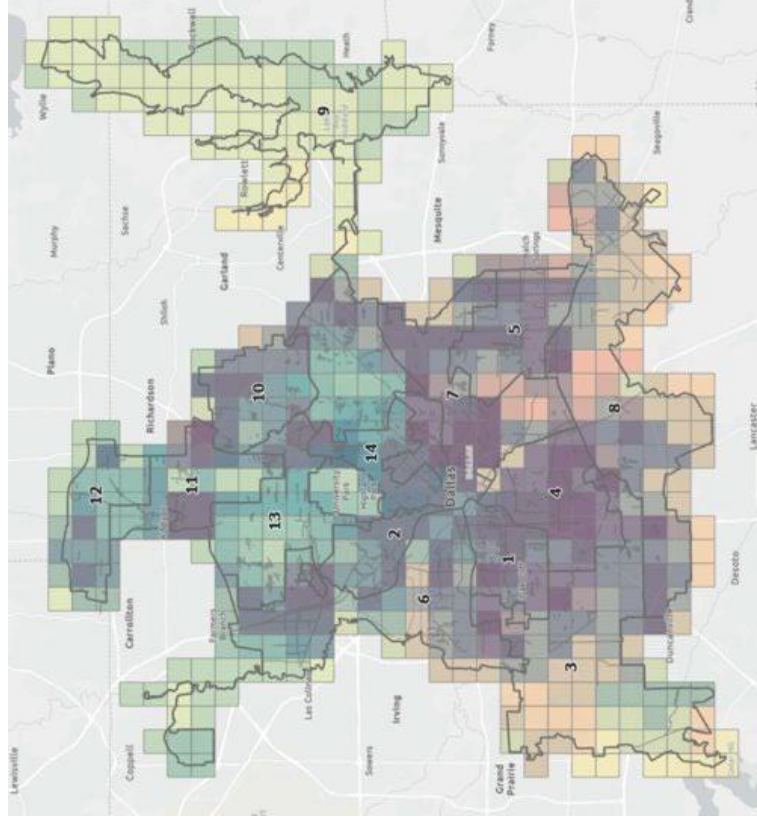
- Each Department develops their own Technical Criteria based on departmental needs/concerns
- Departments score the Needs Inventory with a maximum of an 80-point technical score
- After the technical score has been assigned the points for the 'Priority Areas-Overlays' will be assigned to each project by the Department of Data Analytics and Business Intelligence.
 - 10 points for priority overlays
 - 10 points for Equity



Priority Areas – Overlay Process



- The priority areas were determined by overlaying multiple data layers (see image below) and have been added to the 'GIS Technical Scoring Tool' for reference.



2 Points Each

High Crime Areas

TOD (DART Sites)

Market Value Analysis

311 Service Requests

Identifying calls for Flooding, Speeding, Traffic Calming, Potholes, Street Resurfacing, and Illegal Dumping

Intersection/ Project Overlay

Equity Impact Assessment (EIA) Score Up to 10 Points

Working with Office of Equity & Inclusion

- Entire city is given a ranking; 1-5
- EIA score multiplies ranking by 2 for total points used.



Proposed Bond Technical Criteria



What are technical criteria

- Set of measuring tools that City staff uses to rate projects from a technical standpoint
- Allows staff to categorize and prioritize projects objectively
- Projects are placed in the needs inventory with an initial technical score and periodically reviewed and updated by staff
- Needs inventory projects are grouped by category.



Proposed Bond Technical Criteria

- Department of Public Works



Proposed Bond Technical Criteria - PBW



Improved Streets

Criteria	Maximum Points
Pavement Condition Index	50
Street Classification	15
Time in Needs Inventory	10
DWU Work Plan	5
Total Score	80

Unimproved Streets

Criteria	Maximum Points
Pavement Condition Index	50
SWMP High Priority Areas	15
Time In Needs Inventory	10
DWU Work Plan	5
Total Score	80



Proposed Bond Technical Criteria - PBW



Improved Alleys Unimproved Alleys (new)

Criteria	Maximum Points
Pavement Condition Index	30
Time In Needs Inventory	20
Alley used for Rear Entry	10
Alley used for Garbage Pickup	10
Availability of Existing Right-of-Way	10
Total Score	80



Proposed Bond Technical Criteria - PBW



Partnerships

Criteria	Maximum Points
Outside Funding Available	50
Timeline to provide local match	20
Regionally Significant	10
Total Score	80

Bridges & Culverts

Criteria	Maximum Points
Condition of Components	40
Critical Structural Element Evaluation	20
Street Classification	10
Outside Funding availability	10
Total Score	80



Proposed Bond Technical Criteria

- Department of Transportation



Proposed Bond Technical Criteria – TRN

- Intergovernmental Partnership Projects
- Traffic Signal and Technology Upgrades
- Traffic Signals - Warranted Signals
- Street Lighting
- Vision Zero/Safety
- Quiet Zones
- Complete Streets
- Strategic Corridors/Thoroughfares



Proposed Bond Technical Criteria – TRN

- Projects will be scored and ranked within each project category. The top-scoring projects would then be selected based on the amount of funding allocated to that category.
- All project categories use the same scoring criteria, but the weighting of the criteria varies.
- The Driving Principles are the basis of the criteria. Other criteria were also added, like Preventing Critical Failure, Public Input, Project Readiness, and Operations & Maintenance (O&M) cost implications.
- All projects have a maximum of 100 points.



Proposed Bond Technical Criteria – TRN

Technical Scoring Criteria:

1. Overlays Score ^a
2. Equity Impact Assessment Tool Score ^{a, b}
3. Safety ^b
4. Environmental Sustainability ^b
5. Economic Vitality ^b
6. Housing ^b
7. Innovation ^b
8. Preventing Critical Failure
9. Public Input
10. Project Readiness
11. O&M Cost Implications

^a Criteria that will be scored by Office of Data Analytics and Business Intelligence
^b Driving Principles



TRN Technical Scoring Criteria

	Overlays Score	Equity Score	Safety	Environ. Sustain.	Economic Vitality	Housing	Innovation	Critical Failure	Public Input	Project Readiness	O&M Costs	Total Points
Intergovernmental Partnership Projects	10	10	15	15	10	10	5	5	10	5	5	100
Traffic Signal & Technology Upgrades	10	10	20	5	5	5	5	30	0	5	5	100
Traffic Signals - Warranted Signals	10	10	20	15	15	10	0	0	5	5	10	100
Street Lighting	10	10	30	10	10	5	5	5	5	5	5	100
Vision Zero/Safety	10	10	40	5	5	5	5	5	5	5	5	100
Quiet Zones	10	10	20	10	10	20	5	0	5	5	5	100
Complete Streets	10	10	15	20	15	5	5	0	10	5	5	100
Strategic Corridors/ Thoroughfares	10	10	10	10	20	10	5	5	10	5	5	100



Proposed Bond Technical Criteria

- Dallas Water Utilities

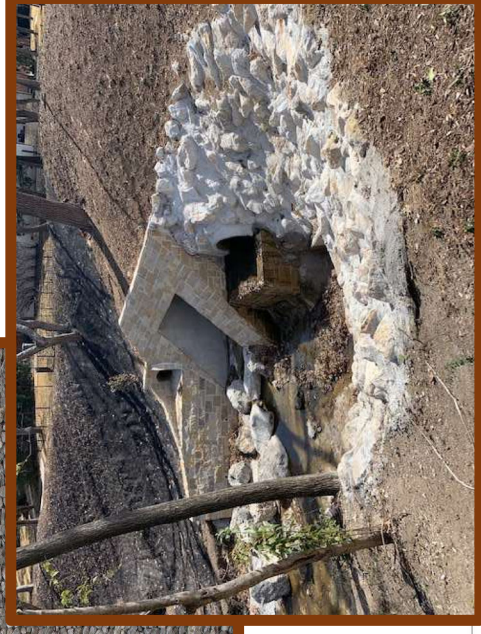


Proposed Bond Technical Criteria - DWU



Flood Protection and Drainage Categories

- Flood Management
- Storm Drainage Relief
- Erosion Control



Proposed Bond Technical Criteria - DWU



Flood Management Category

Implements recommendations from Floodplain Management Plans and studies including bridges, channels, street pump stations, stormwater dams, voluntary purchase of flood prone properties, and major maintenance.

Technical Ranking Criteria	Points
Frequency of flooding	Up to 25
Depth of flooding (100-year frequency event)	Up to 30
Depth x velocity of flow over bridges	Depth x velocity 3 points/structure
Number of structures affected	
Ratio of project costs per protected structure	Up to 10

*Raw score to be normalized to 80-point scale consistent with participating Bond departments



Proposed Bond Technical Criteria - DWU



Storm Drainage Relief Category

Provides drainage relief for areas served by undersized drainage systems including upgrades and/or extensions of storm drain systems, also can include repetitive loss areas.

Technical Ranking Criteria	Points
Type/effects of flooding	Up to 20 points
Frequency of flooding	Up to 25 points
Depth of 100-year flooding	Up to 30 points
Number of affected structures	3 points per structure
Ratio of cost/affected structure	Up to 10 points

*Raw score to be normalized to 80-point scale consistent with participating Bond departments



Proposed Bond Technical Criteria - DWU



Erosion Control Category

Provides armoring and erosion control for public and private** property along natural creeks including protection for streets, bridges, alleys, and homes.

Technical Ranking Criteria	Points
Ratio of Distance to structure/depth of erosion	Up to 40 points
Rate of creek bank loss	Up to 40 points
Ratio of cost to number of structures protected	Up to 20 points
Type of threat: 1: Homes, garages, streets, alleys, bridges 2: Pools and other permanent structures 3: Fences, yards, privately owned retaining walls	Up to 15 points Up to 5 points 0 points

*Raw score to be normalized to 80-point scale consistent with participating Bond departments

**1985 City Council Ordinance authorized City to provide erosion protection on private property with bond funding, subject to willing property owners/easements/etc.



Proposed Bond Technical Criteria - DWU



2024 Bond Proposition Considerations

- Consider city-wide vs. neighborhood focus?
- Consider distribution of projects and funds by need category?
- Consider continuing to provide erosion control to private property? Emphasis on erosion control projects that protect public infrastructure?
- Consider purchasing flood prone properties? Properties where cost of related improvements exceeds the cost of purchase?
- Consider higher weight for ability to match/leverage other funds?



Proposed Bond Technical Criteria

- Office of Bond and Construction Management



Proposed Bond Technical Criteria – BCM/BSD



City Public Facilities consists of the following:

- Public Safety Facilities (DPD and DFR)
- Library
- Cultural Facilities
- City Facilities

Technical Criteria was developed for Major Maintenance (BSD) Items and for New Buildings (BCM).



Proposed Bond Technical Criteria – BCM



City Public Facilities New and Existing			
Criteria #	Technical Criteria	Description	
1	Community & Stakeholder Support	Request from community and stakeholders for development	
2	Site Acquisition Status	Site Acquisition status - Site identified and acquisition is in progress or has been acquired	
3	Design Status	Design Status - consultant selected, project designed, or it is shovel ready for bids	
4	Economic Vitality	Integrate development investments with land use and economic priorities to improve quality of life	
5	Current Master Plan	Facility Master Plan - Comprehensive evaluation, new permanent facility will meet program needs for 30-40 years, minimum	
6	Leverage Funds	Leverage Funds - Project will leverage funds such as grants or private matching funds	
7	Prior Phase Complete	For multi-phase projects, if prior phase(s) has been completed	
8	Safety	Improve health and safety for all new city facilities to meet 21st century challenges	
9	Equity & Overlay Tool	Using Equity Impact Assessment Score and Overlay Tool	



Proposed Bond Technical Criteria – BCM



Technical Criteria for New Buildings.

City Facility Scoring Sheet						
Project Name:						
City Vertical New Facility Scoring Worksheet						
Criteria #	Criteria Description	Facility Category				City Facilities
		Public Safety Facilities (DPD & DFR)	Library	Cultural Facilities		
1	Community & Stakeholder Support	15	15	15	15	
2	Site Acquisition Status	10	10	10	10	
3	Design Status	5	5	5	5	
4	Economic Vitality	10	10	10	10	
5	Current Master Plan	10	10	10	10	
6	Leverage Funds	10	10	10	10	
7	Prior Phase Complete	10	10	10	10	
8	Safety	10	10	10	10	
9	Equity & Overlay Tool*	20	20	20	20	
Totals		100	100	100	100	



* City-wide initiatives that provides City leadership with a strategic framework for ongoing decision making.

Proposed Bond Technical Criteria

- Department of Building Services



Proposed Bond Technical Criteria – BSD



Major Maintenance Criteria Description

- Capital expenditures needed beyond routine building maintenance and repair
 - Repairs or replacements of failed systems
 - Improvements to comply with regulations, codes, and standards
 - Projects to address health, safety, and environment-related issues
- Six technical criteria were developed to assess major maintenance needs for the 2024 Bond
 - Criteria 1-5 assessed by Building Services Department (BSD)
 - Criterion 6 is the Equity Priority Zones assessed by DABI

Criteria No.	Criteria Description	Criteria Points
1	Priority Level Based on Building Condition	30
	Priority 1 - Currently Critical - 30 points	
	Priority 2 - Potentially Critical (year 1) -20 points	
	Priority 3 - Necessary/ Not Yet Critical (year 2-5) -10 points	
2	Improves O&M	20
3	Design Status	5
4	Identified on 2017 Facility Condition Assessment	10
5	Improves Facility's Resiliency, Safety and/or CECAP goals	15
6	Equity and Overlay Tool (assessed by DABI)	20
	TOTAL	100



Proposed Bond Technical Criteria – BSD



Major Maintenance Criteria Description

Criteria No.	CRITERIA	CRITERIA DESCRIPTION
1	Priority Level Based on Building Condition	<p><u>Priority Level 1</u> – 30 pts; Building has failed or facing imminent closure</p> <p><u>Priority Level 2</u> – 20 pts; High risk of failure and requires extremely high O&M Service life ends 1-2 years</p> <p><u>Priority Level 3</u> – 10 pts; Moderate risk Service life ending 2-5 years</p>
2	Improves O&M	Project will reduce facility operation and maintenance cost
3	Design Status	Design Status - consultant selected, project designed, or is ready for bids
4	Identified on the 2017 Facility Condition Assessment (FCA)	The major maintenance project is identified as a need in the 2017 FCA
5	Improves Facility Resiliency, Safety and/or Supports City's CECAP Goals	Major maintenance project provides facility resiliency, improves weatherization, renewable energy, and/or improves security/safety



Planning & Development Update



City of Dallas Needs Inventory

	2017 Cost Estimates (as of June 2022)	2022 Cost Estimates (as of October 2022)	2024 Cost Estimates* (as of January 2023)	2025 Cost Estimates* (as of January 2023)
Streets	\$3,198,521,298	\$3,499,475,584	\$3,858,171,829	\$4,051,080,420
Transportation	\$1,925,671,224	\$2,189,274,542	\$2,413,675,183	\$2,534,358,942
Park & Recreation	\$2,130,505,495	\$2,834,979,024	\$3,125,564,374	\$3,281,842,593
Flood & Storm Drainage	\$2,132,930,500	\$2,470,803,500	\$2,724,060,859	\$2,860,263,902
Public Safety Facilities**	\$552,351,359	\$777,781,149**	\$857,503,717	\$900,378,903
Library Facilities	\$66,945,569	\$83,780,700	\$92,368,222	\$96,986,633
Cultural Facilities	\$89,718,140	\$120,837,456	\$133,223,296	\$139,884,460
City Facilities	\$288,196,851	\$280,042,496	\$308,746,852	\$324,184,195
TOTAL	\$10,384,840,436	\$12,256,974,451	\$13,513,314,332	\$14,188,980,048

*Cost Estimates include an annual 5% cost escalation.

** DFR = \$290,682,737 and DPD = \$487,098,412.



Next Steps



Month/Year	Tasks
<p>June 2022 - June 2023 (in-progress)</p>	<ul style="list-style-type: none"> • Finalize the Technical Criteria, • City Needs Inventory, • Meetings with council districts, • Finalize a district project list for City Council feedback, • Community Engagement Strategy, • Establish Community Bond Taskforce, • Engage Office of Procurement/Small Business Center to identify opportunities for small-businesses, • Meet with contractor associations and • Meet with the American Council of Engineering Companies.
Feb./March 2023	Committee briefings on policies and technical criteria.
February 2023	Distribute CBTF Guidelines and Appointee Form to City Council.
May/June 2023	<ul style="list-style-type: none"> • City Council briefing to finalize technical criteria and policy considerations. • Begin monthly public outreach campaign.
July/Aug. 2023	2024 Capital Bond Program – Townhall Meetings.



Next Steps



Month/Year	Tasks
Sept./Oct. 2023	Finalize City Needs Inventory, conduct public input, select size and goals for the bond program.
Sept./Oct. 2023	City Council briefing on updated financial capacity based on Tax Year 2023 Certified Property Values.
Oct.2023/May 2024	Community Stakeholder Engagement.
November 2023	Present Proposed Bond Program Themes and Financial Capacity to City Council.
December 2023	City Council briefing of draft proposed bond program and second round of public input (1 st round of public meeting).
January 2024	City Council briefing of recommended bond program and second round of public input (2 nd round of public meeting if needed).
January 2024*	City Council finalizes bond program and calls the election for May 2024.
May 2024	Bond Election.

- 90 days requirement to call election
 Tentative May 4, 2024, Election date, 90-day requirement - February 3, 2024





QUESTIONS?





City of Dallas

**2024 Capital Bond Program
Technical Criteria
Infrastructure Departments
Transportation &
Infrastructure Committee
February 28, 2023**

Ali Hatefi P.E., Director - PBW
Ghassan Khankarli, P.E., Director – TRN
Jennifer Nicewander, P.E., (I) Director - BCM
Matt Penk, P.E., Assistant Director- DWU
Amani Saleh, PhD. Assistant Director - BSD

City of Dallas



Dallas Park & Recreation

2024 BOND PROGRAM: SCORING CRITERIA

Quality of Life, Arts & Culture Committee

April 17, 2023

Chris Turner-Noteware, P.E.,

Assistant Park and Recreation Director

Jared White

Manager, Park and Recreation Department

Purpose

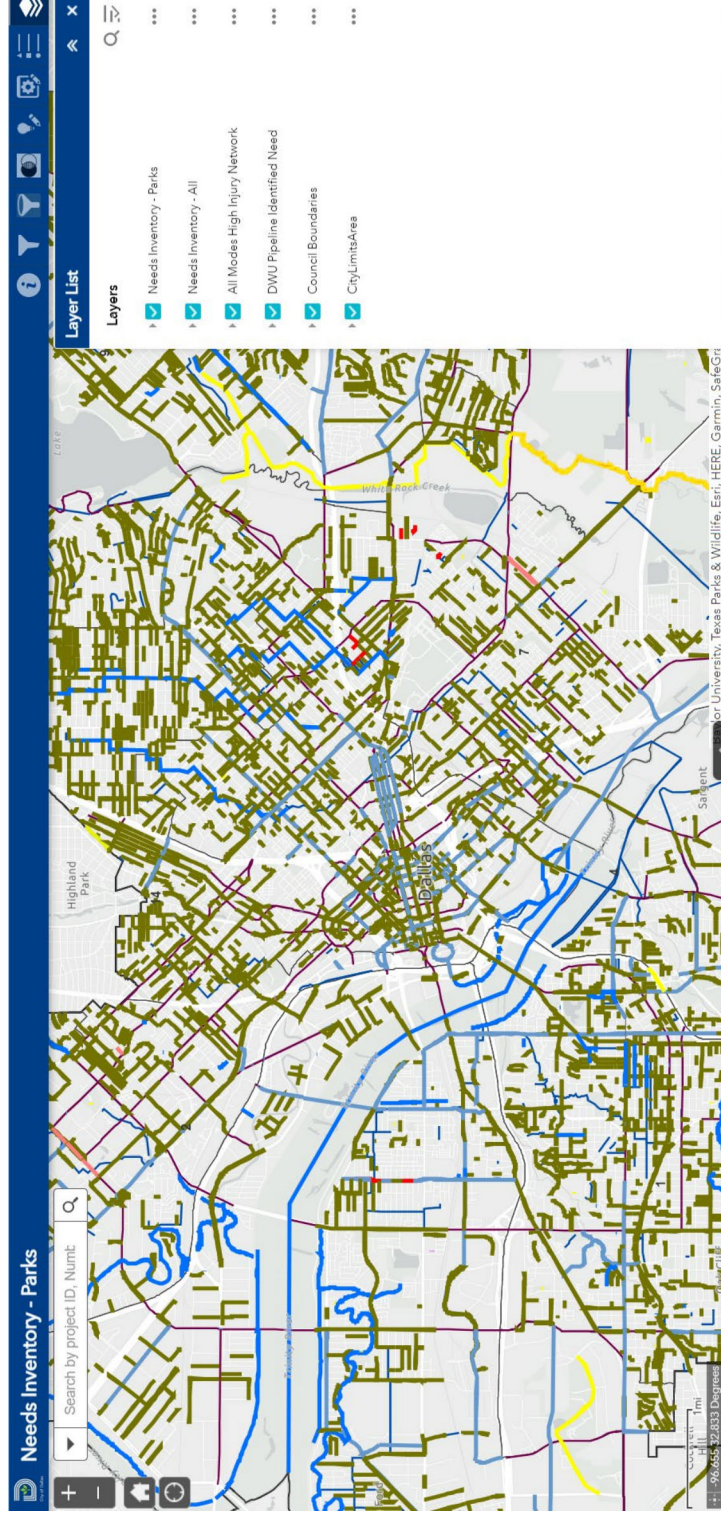
- Review and approve the Scoring Criteria for the Park Department for the 2024 Bond Program

Background

- January 26, 2023
 - Presented to Planning and Design Committee – Modifications Requested
- February 8, 2023
 - Presented to Planning and Design Committee – Approved with Modifications
- February 23, 2023
 - Presented to Full Park Board – Approved with Modifications

2024 Score Criteria Guidelines

- **Office of Bond & Construction Management**
- Each department's scoring criteria must equal 100 points
- Equity guidelines determined by each department
- Overlapping department projects are accounted for using a calculated percentage factor, interactive project map



2024 Proposed Scoring Criteria

- **Department Technical Scoring Criteria**

- Leverage/ Funding Match
- Revenue Generation
- Economic Stimulant
- Safety/Code/Human Health
- Impact on O&M Costs & Energy Use
- Existing Master Plan
- Prior Phase Complete
- End of Service Life
- Meet Level of Service Gap

- **City Council / Park Board Priority**

- Park Board/City Council Priority
- Community Input

- **Equity Criteria**

- Social Vulnerability
 - Park Access
 - Park Investment History
-

2024 Proposed Technical Scoring Criteria

Technical Criteria Park Projects		Weighted Score up to 50 of 100	Weighted Percent Up to 50%	Technical Criteria Definition
Leverage/ Funding Match	5	5.00%	Project will leverage funds from other sources such as grants, matches, or donations from other agencies or private entities.	
Revenue Generation	3	3.00%	Project will generate revenue for the city	
Economic Stimulant	3	3.00%	Project affects adjacent property values, stimulates other development	
Safety/Code/Human Health	10	10.00%	Project will address safety concerns or resolves codes and regulatory violations, hazardous conditions	
Impact on O&M Costs & Energy Use	8	8.00%	Project will have an impact on operating and maintenance costs	
Existing Master Plan	4	4.00%	Project has an approved master plan(s)	
Prior Phase Complete	4	4.00%	Project is a subsequent phase of another project or initiative that is already complete. Example, trail connection	
End of Service Life	7	7.00%	Project will replace a facility that has a long history of service tickets/ requests and/or per Manufacturer's recommended end of service life	
Meet Level of Service Gap	6	6.00%	Project will improve adopted level of service standards per 2016 Comprehensive Plan Update. Pg. 83	
Total Maximum Technical Score	50	50.00%	The technical criteria is used to help prioritize projects within the same category only. (Parks, Trails, Site Development, Playgrounds, Aquatics, Service Centers, Recreation Centers, Amenities, Land Acquisition, etc.)	

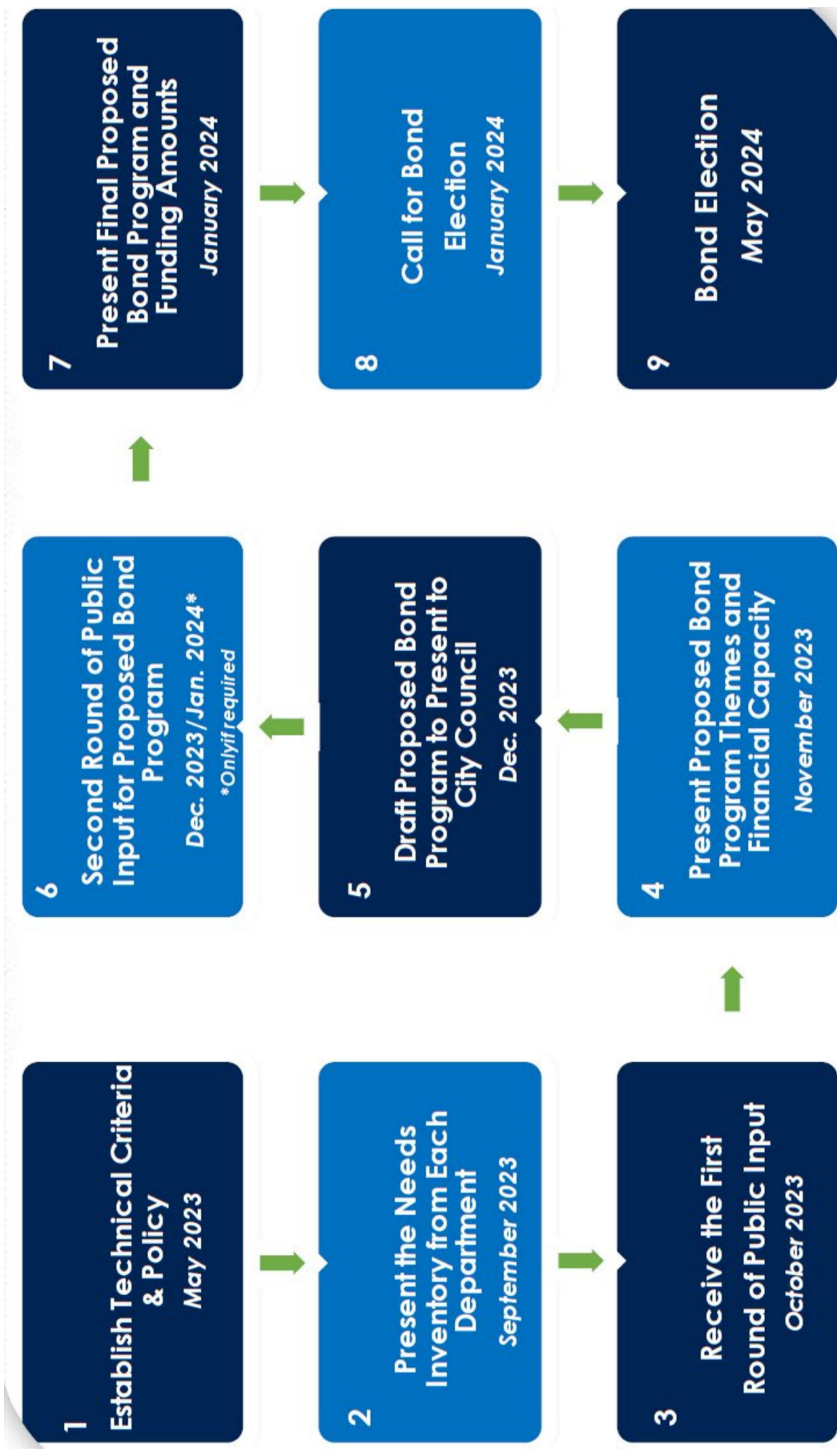
Proposed City Council / Park Board Criteria

Council/Park Board Criteria	Weighted Score up to 25 of 100	Weighted Percent up to 25%	Council/Park Board Criteria Definition
A1. Park Board / City Council Priority	15	15.00%	Project is determined by Park Board and/or Council member to be a priority in the district
A2. Community Input	10	10.00%	Project is determined by the community and/or a friends' group to be a neighborhood priority in the district. Project has support from a local friends' group, partnership organization, or the community expressed support during community input, bond meetings, or through request to the Park Board Member or Parks Department.
Total Optional Criteria	25	25.00%	Optional Criteria Based on Council and Citizen Driven Priorities

Proposed Equity Criteria

Equity Criteria	Weighted Score up to 25 of 100	Weighted Percent up to 25%	Equity Criteria Definition
Social Vulnerability	10	10.00%	<p><u>Social Vulnerability Index</u>: CDC SVI uses U.S. Census data to determine the social vulnerability of every census tract. Census tracts are subdivisions of counties for which the Census collects statistical data. CDC SVI ranks each tract on 15 social factors, including poverty, lack of vehicle access, and crowded housing, and groups them into four related themes: Socioeconomic Status, Household Composition, Race/Ethnicity/Language, Housing/Transportation.</p>
Park Access	10	10.00%	<p><i>Project falls within a Park Access Gap – Project is in an area of the city that serves a population currently lacking a park within a 10-minute walk (1/2 Mile). Does take into account physical barriers within the 10-minutes walk.</i></p>
Park Investment	5	5.00%	<p><i>Areas lacking recent investment (10-15+ years); includes unprogrammed parks/areas. Includes investment per evaluation category.</i></p>
Total Equity Score	25	25.00%	Equity Criteria being reviewed with Office of Equity and the Office of Bond and Construction

Proposed 2024 Bond Program Process





Prior Approvals

- Planning and Design Committee Approved February 9, 2023
- Park and Recreation Board Approved February 23, 2023

Questions (?)



Dallas Park & Recreation

2024 BOND PROGRAM: SCORING CRITERIA

Quality of Life, Arts & Culture Committee

April 17, 2023

Chris Turner-Noteware, P.E.,

Assistant Park and Recreation Director

Jared White

Manager, Park and Recreation Department



City of Dallas

Housing Bond: 2024 General Obligation Bond Program Technical Criteria for the Department of Housing & Neighborhood Revitalization

**Housing and Homelessness
Solutions Committee
April 24, 2023**

David Noguera, Director
Department of Housing & Neighborhood
Revitalization
City of Dallas

Presentation Overview

- Purpose
- Background
- Past Bond Allocations
- Past Bond Projects
- Production Forecast
- Cost to Administer
- Comparable Cities
- Alignment with Dallas Housing Policy 2033 (DHP33)
- Timeline for DHP33
- Engagement
- Next Steps



Purpose

- Provide the identify the need for additional funding of up to \$400 million in Bond funding and other funds to support affordable housing development and preservation through an equity lens

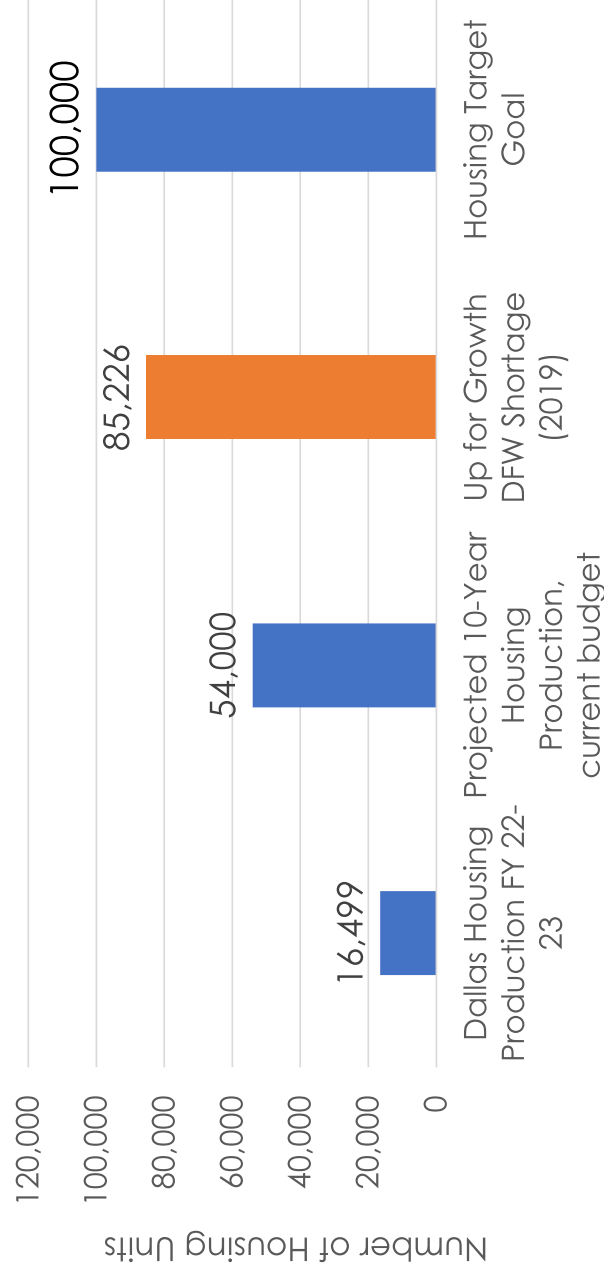


Source: data for this presentation is from the City of Dallas, the American Community Survey 2017-2021, Texas Real Estate Research Center, Zillow, the Federal Reserve of Dallas, HUD, Redfin, US Census, DCAD, Housing Forward, Moody's Analytics, and the Texas Demographic Center.

Background



- Reports suggest that Dallas/Fort Worth (DFW) has under-produced housing units by 85,226
- Dallas should aim to develop 100,000 units in the next 10 years



Background

- Of the existing 587,024 single-family and multifamily housing units, 300,184 (52%) of them were built before 1980.
- 25,542 units are in undesirable to fair condition based on Dallas Central Appraisal District (DCAD) condition data
- 13,337 units have expiring Low-Income Housing Tax Credits (LIHTC) by 2033
- 4,714 units are added to Dallas last year after accounting for demolitions
- 11,357 units permitted in FY 21-22, of which housing supported 26% of them



Background

- The U.S. Department of Housing and Urban Development (HUD) median family income for a 4-person household at 100% Area Median Income (AMI) in DFW is \$97,400
- That household needs to earn \$130,000/year to be able to afford a home with 30% housing cost to buy a median sale priced for a home - \$373,000
- Mortgage rates increased from average of 5.62% in the 3rd Quarter (Q3) 2022 to 6.66% in the 4th Quarter 2022



Background

- Poverty in Dallas has decreased from 19.4% in 2016 to 14.2% for families in Dallas, as of 2021, but the poverty rate for families is still 6.1% higher in Dallas than in the DFW region
- Dallas has disproportionately worse housing conditions than in DFW, with a 6.3% overcrowding rate versus 4.4% in the DFW region
- Dallas has a 5.1% apartment vacancy rate but 2.6% in LIHTC units
- Rents have increased: 11% from 2021 Q3 to 2022 Q3
- Minimum wage earners must work multiple jobs to afford a 1-bedroom apartment in Dallas
- Over 134,000 low-income and moderate-income renter households earning under \$75,000/year are cost-burdened - they spend 30% or more of household income on housing



Background

- Housing is the greatest reason (~40%) people move
- People are moving to surrounding counties and to other major metropolitan cities when they move out of Dallas
- People are moving to DFW from LA, San Francisco, New York, Chicago, DC

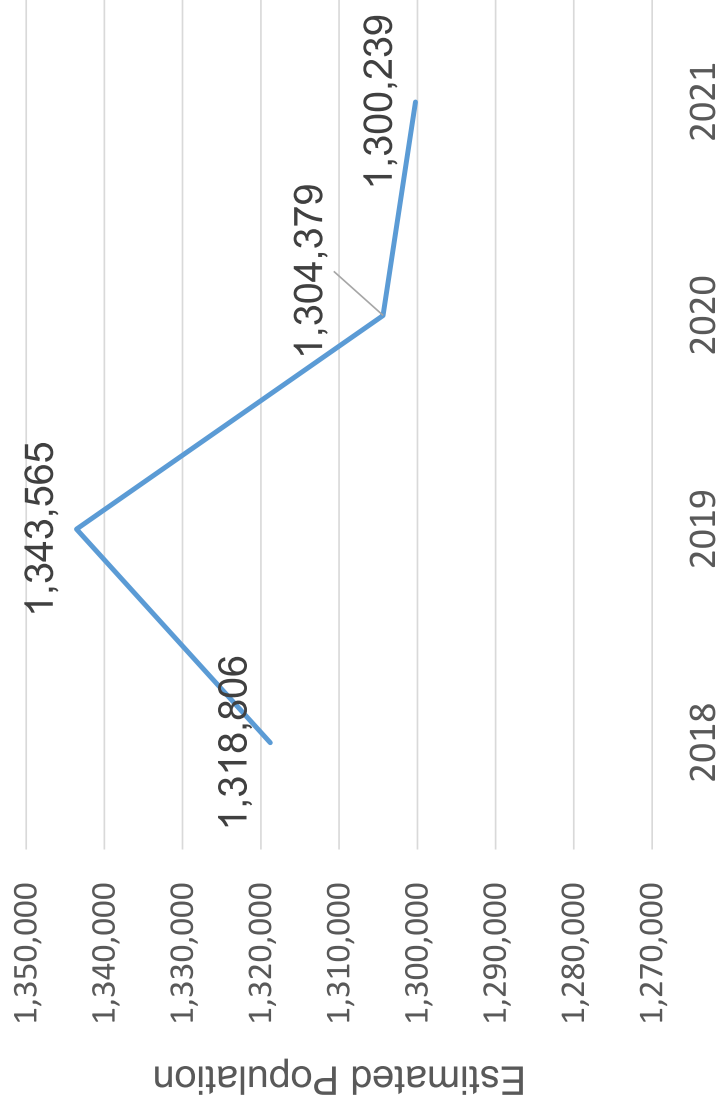


SOURCE: Map from Redfin and Graph from U.S. Census

Background

“Despite population declines in 2020 and 2021, the City of Dallas is likely to see immigration recovering to the pre-pandemic level and could see population growth if it’s enough to cancel the out-migration to the surrounding areas.”

(according to Dr. Helen You at the Texas Demographic Center)



Background

- The age 65 and over cohort is 17.4% of population, up from 14.8% in 2010. As people 55-64 age, Dallas will continue to have a growing population over age 65.
- The annual Point-In-Time homeless/unhoused count showed 4,410 unhoused individuals in Dallas and Collin Counties in 2022



Past Bond Allocations

- The 2006 Bond Program was approved by voters on November 7, 2006. Housing received \$20M
- The 2012 Bond Program was approved by voters on November 6, 2012 for \$642M. Housing received \$23M
- Voters approved the 2017 Bond Program on November 7, 2017, for \$1.05B, and Housing was allotted funds on Prop J for \$6.3M
- Total units developed from all 2006, 2012, and 2017 Bond programs are 957.



Example of 2006 Bond Project



Bexar Street Redevelopment

Funding

CDBG: \$ 222,615

Bond: \$6,569,052

HOME: \$ 550,000
\$7,341,667

- Infrastructure improvements;
- New construction of 13 affordable townhomes
- Development received NCTCOG CLIDE Award



Photo Credit: [NCTCOG 2013 CLIDE Recipients](#)



Example of 2012 Bond Project

Palladium Red Bird

Funding

CDBG: \$1,271,576

HOME: \$5,000,000

Bond: \$2,028,424

Total: \$8,300,000

- Award-Winning Mixed-Income Project with bond funds used towards infrastructure and building construction
- 300 multifamily units, 70% reserved as affordable units



Example of 2017 Bond Project



The Bottom Phase II

Funding

D4 Equity Funds:	\$1,888,974
Bond:	\$ 827,436
DWU:	<u>\$1,568,845</u>
Total:	<u>\$4,285,255</u>

- Catalyst infrastructure and housing project for neighborhood revitalization
- Single-family affordable homes, total number to be determined



Production Forecast



Fiscal Year	Department Funding – Grants/GF	Bond	Other Revenue MIHDB, DHFC/DPFC, GF,	Total Budget / Fiscal Year	City Investment/Unit	Subsidized Units	Market Rate Units	Total Units Repaired
2022-2023	\$ 20,000,000			\$ 20,000,000	10-15%	1,000	6,500	50
2023-2024	\$ 20,000,000		\$ 10,000,000	\$ 30,000,000		1,750	6,825	75
2024-2025	\$ 20,000,000		\$ 10,000,000			1,750	7,166	100
2025-2026	\$ 20,000,000		\$ 10,000,000			3,250	7,524	100
2026-2027	\$ 20,000,000	150M	\$ 10,000,000			3,250	7,900	100
2027-2028	\$ 20,000,000		\$ 10,000,000			3,250	8,295	100
2028-2029	\$ 20,000,000		\$ 10,000,000			3,250	8,709	100
2029-2030	\$ 20,000,000		\$ 10,000,000			3,375	9,144	115
2030-2031	\$ 20,000,000		\$ 10,000,000			3,375	9,601	115
2031-2032	\$ 20,000,000	150M	\$ 10,000,000			3,375	10,081	115
2032-2033	\$ 20,000,000		\$ 10,000,000		3,375	10,585	115	
TOTALS	200M	300M	100M	600M		31,000	92,330	1,085
		*150M Bond in 2024/2029				Total combined	123,330	



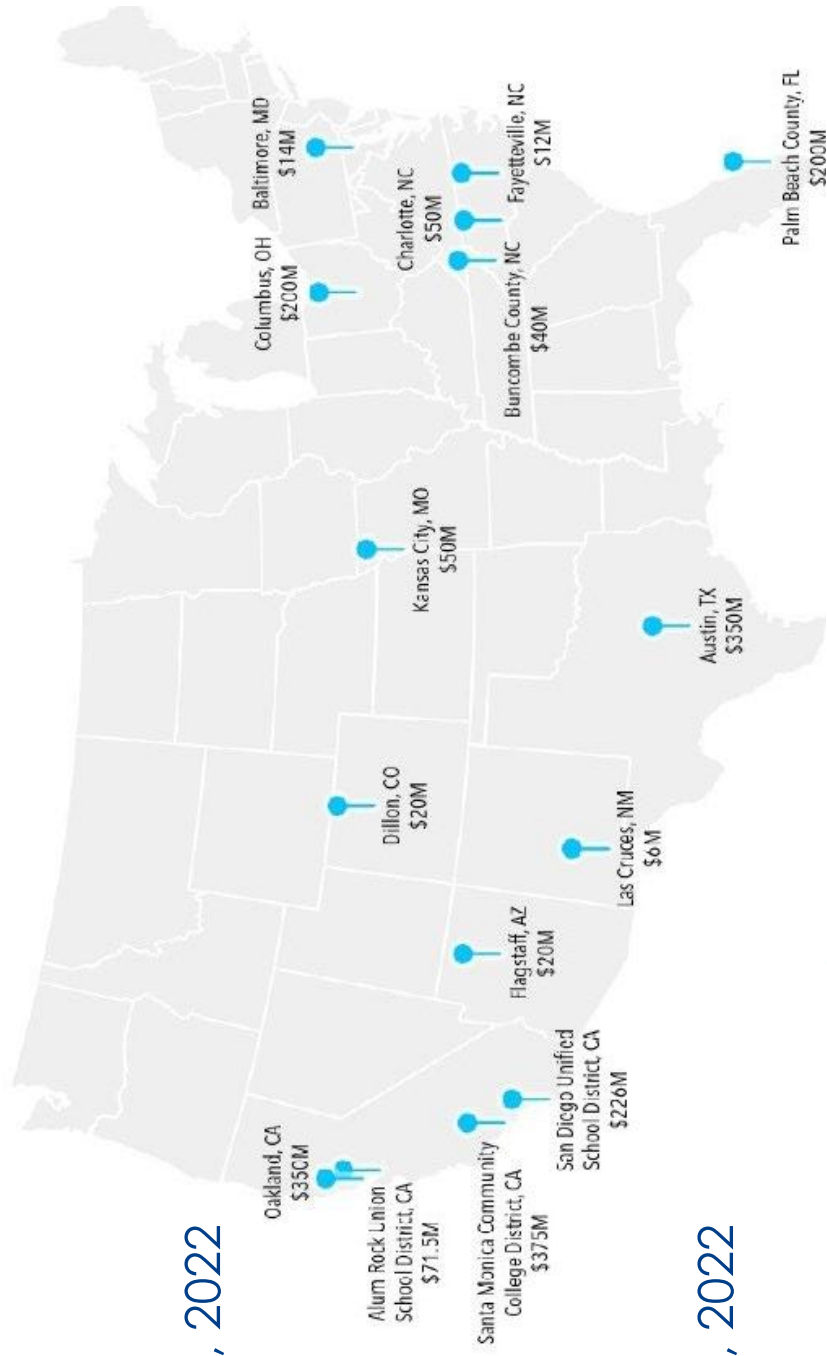
Cost to Administer

- To fully implement the new Dallas Housing Policy 2033 (DHP33) will take more than funding for direct housing development
- Staffing to administer projects and programs, compliance, administration, and budget
 - A development project manager can handle 8-10 projects
 - A home repair project manager can handle 50 projects
 - An asset manager for onsite monitoring and training can handle 8-10 projects
 - An Inspector can work on 15 home repairs + 4 developments
 - Ambassadors / Outreach Specialists are needed to focus on engagement
- Legal team staff is needed for more contracts
- Permit review staff is needed for increase in projects
- Contractors /developers partnerships need to grow



Comparable Cities

- Austin
 - Federal Budget: \$11,013,000
 - Bond, November 8, 2022 \$350M
- San Antonio
 - Federal Budget \$28,187,685
 - Bond, May 7, 2022 \$150M
- Columbus, OH
 - Federal Budget \$12,496,126
 - Bond, November 8, 2022 \$200M



Note: Santa Monica Community College District's \$375M bond will fund a variety of infrastructure projects, including affordable housing for students experiencing or at risk of homelessness.

Alignment with Dallas Housing Policy 2033 (DHP33)

- DHP33 includes goals of increasing housing production and preservation over the next 10 years utilizing a cross-departmental and stakeholder approach
- Bond funding will support housing development and preservation projects that align with the goals in DHP33
- An additional \$400M over the next ten years will ensure that DHP33 can be implemented and not just another plan or policy that sits on a shelf
- The other departments identified in the previous slide need to grow along with housing staff to fully implement the policy and address the housing challenges in Dallas



Alignment with Dallas Housing Policy 2033 (DHP33) (Cont.)

- Resources will go into partnership development and data to inform the Equity Strategy Target Areas
- To have impact in these areas, financial resources will be needed
- The 2024 Bond will allow the DHP33 to have funding needed for greater impact



Timeline for DHP33

- December 2023
 - Initiate internal / external agreements
 - Consultants hired
 - Dashboard
- March 2024
 - Establish criteria for Equity Strategy Target Areas
 - Execute internal / external agreements
- May 2024
 - Bond Election
- December 2024
 - Engagement and selection of Equity Strategy Target Areas
 - Storyboard
 - Infrastructure needs known and budgeted
- December 2027
 - Analyze implementation efforts, make adjustments
- May 2029
 - Bond Election
- December 2033
 - Evaluate projects / programs
 - Have increased development and preservation activity



Engagement

- Engagement activities related to development and preservation activities will take robust engagement which is outlined in the DHP33.
- Engagement is not a one time effort, rather it takes multiple frequent methods of connection and this may include but is not limited to:
 - Dedicated outreach staff
 - Housing Policy Task Force (HPTF) meetings
 - Committee / City Council briefings
 - Focus groups
 - Community meetings
 - Surveys
 - Canvassing
 - Combination of everything



Next Steps

- Housing Department will engage with City Council appointed Citizen Bond Committee to establish priorities on the allocation of Bond funds.





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