



Institute of Portland
Metropolitan Studies

PORTLAND STATE UNIVERSITY



Reanimating the Institute for Metropolitan Studies

A New Kind of Public Partner

June 2, 2025 | Version 2.0

Executive Summary

The Institute for Metropolitan Studies (IMS) is a tool for local governments and community leaders to solve deep-seated, systemic policy challenges related to the built environment in the greater Portland area. We convene, inform, and develop recommendations that are grounded in research, vetted by impacted parties and partners, and readied for implementation by local governments. The Institute is housed at Portland State University, in the College of Urban and Public Affairs, allowing IMS to utilize the resources of Oregon's urban research university to support local policymaking.

IMS is built around four beliefs:

- 1.) Policymaking is most successful when cross-sector, multi-jurisdictional parties take the time to sit down and work together.
- 2.) Policymaking needs to be first built around a shared vision and shared definition of the problem. The work of setting those values and developing a shared goal makes it easier to develop a path to get there, and serves as a goalpost when implementation gets tough.
- 3.) Policymaking needs to be grounded in data, utilize best practices from other jurisdictions, and center the most impacted.
- 4.) Policymaking only matters to the extent that it results in policy implementation. Policy without implementation is a plan without a way to get there.

In its first two years, IMS will engage around a handful of thorny policy challenges. Each challenge will be an opportunity for IMS to show what a creative policy think tank, dedicated to bold and innovative policy making, can contribute to the region. We will utilize our "third space" role to bring together key players and impacted parties around specific policy questions, scaffolding the discussion with PSU-led research and best practices data, with the goal of serving up politically supported, data-driven policy recommendations that are ready for local governments to implement.

IMS is not an implementing entity, but it works closely with local government and community leaders to make sure that IMS recommendations are action-oriented and

identify the key implementation steps, and to build support amongst the IMS partners to support local government action, when appropriate.

IMS focuses on systemic policy challenges felt across the greater Portland region relating to the built environment. We prioritize policy areas that are timely and where there is interest from the impacted parties in IMS support, where we believe we can make a difference, and where the scope matches our capacity.

Reanimating IMS at this time is a bet on the region and our shared potential as community-based policymakers and implementers. This Strategic Plan includes a clear-eyed assessment of the region and an effort to name what is possible when we align interests and focus on the most important parts of long-term, thoughtful policy stewardship in Greater Portland. It lays out IMS's possible role in that effort, as well as how IMS hopes to contribute to a greater sea change in policymaking and implementation in Portland.

This is an intimidating and exciting moment for Greater Portland. We are being asked big questions about who we are, who we want to be, and how we get there. IMS is a part of answering some of the questions we've hidden under the rug for years to help us come out stronger, more resilient, more equitable, and with increased confidence in our ability to do big things.

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1 | Seven Year Vision

I. (Re)introducing Greater Portland's Institute for Metropolitan Studies

A Clear Vision with Emerging Strategies

Purpose

The Institute for Metropolitan Studies is a tool for local governments and community leaders to solve deep-seated, systemic policy challenges, related to the built environment, in the greater Portland area. We convene, inform, and develop recommendations that are grounded in research, vetted by impacted parties and partners, and readied for implementation by local governments.

Greater Portland benefits from a reinvigorated Institute for Metropolitan Studies, providing a new kind of bold public policy partner. Situated usefully at Portland State University as a third-party public institution, IMS offers substantive capacity to help local governments and policymakers create conditions for a thriving Greater Portland region. As one of the early keepers of the flame for Portland's livability goals and vision, PSU and IMS specifically have a legacy to build upon and a responsibility to make sure that the next vision for greater Portland builds and improves upon what came before.



IMS understands the Greater Portland Region as the places, peoples, waters, and municipalities that extend South to Wilsonville, West to Forest Grove, East to the far edges of Gresham, and North in ways that extend at and across the Columbia River linking Portland to Vancouver, Washington. These places are intrinsically linked to each other; each can succeed on their own, but as a region we have seen time and time again that our greatest success comes when we leverage each other's strengths to build a thriving greater Portland.

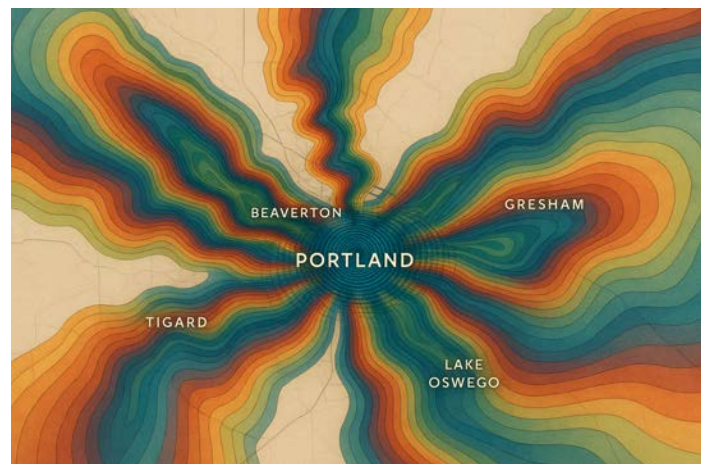
A Picture of a Thriving Region¹

What does a thriving region look like seven years from now? This “rich-picture” description illuminates what IMS thinks is possible by 2032. This future is rooted in a belief in the work of many hands across the greater region and shouldn’t be understood as what IMS is trying to accomplish on its own. Instead it offers a view of the policymaking ecosystem that a reinvigorated IMS would hope to help make possible.

Greater Portland knows what it is aiming for and has the policy depth and dialogues needed to support meaningful governance and stewardship for generations to come.

Across each jurisdiction within the region, there is a shared understanding of common policy aims, which has translated into meaningful coordination to address the most difficult policy challenges. There are shared areas of focus on livability, resilience, economic vitality, transit ridership, watershed management, modernized utility systems, and built infrastructure. Long gone are the “who’s on first” and finger pointing days. The attention to a clear generational set of policy aims has helped each jurisdiction move freely towards their distinct and unique charges while also unlocking ways to leverage resources and shared vision.

There is a clear articulation and even the beginning realization of improved regionality - including the ways various nodes, neighborhoods, and connected cores relate to each other. Duplication is strategic, not inefficient or chaotic. Distinction is celebrated as each part of the region, down to the block, invites ownership, pride, and the flourishing of community.



¹ IMS is adapting several key [Outcome Mapping](#) practices in service to understanding its contributions to the Greater Portland region. This vision for the region is written in full description of outcomes that IMS hopes to support in relationship to many other actors and leaders.

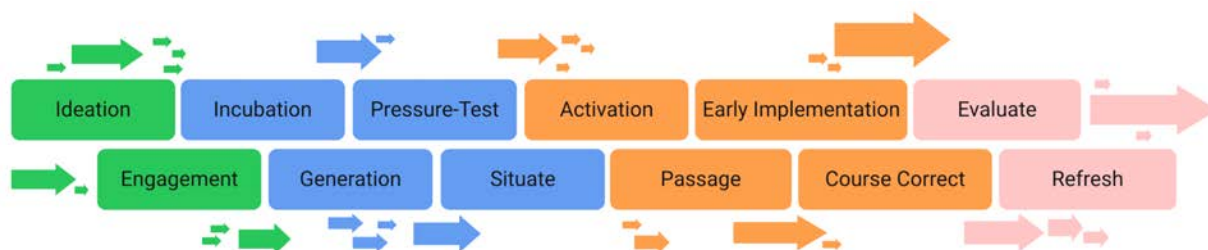
The gifts and talents of the current and future workforce are considered in both real-time and next generation planning. This includes skilled tending to rapid and immediate shifts in how work is done, spurred by the intersections of technology (AI), climate change, and rapidly moving changes in the flows of resources and policy architecture between federal, state, regional, county, and local jurisdictions.

Meaningful policy designs have been generated, pressure tested, and situated for the region on transit, job and wealth creation, community resilience, housing, taxation and spending. Policies are reviewed, considered, and adjusted as necessary to ensure they meet intended outcomes.

Policy is alive and understood as the domain of every person residing in the region. Great care and attention have helped the region move from being passionately focused on advocacy positions (with idealistic aims and the targeting and tearing down of leaders and communities) to the successful daily practices of policy stewardship and governance.

A Policy Stewardship Continuum

Stewardship is a practice that involves foresight, holding a multi-generational view, accepting a role and responsibility for events, and bringing forward sometimes challenging choices. In a policy context, IMS seeks to both identify and to act within a policy stewardship continuum. This acknowledges, again, the many actors it takes to move well together across the region, often with distinct roles. A Policy Stewardship Continuum outlines the various phases of policymaking and helps IMS think about where it can play the strongest role, and how it can work with others to support their roles and outcomes.



Policy Stewardship Continuum

A Situational Assessment on the State of the Portland Region in 2025

How did we get here and what is unfolding now, in this place called Portland?

To love Portland and the wider metropolitan region is to understand and accept its many strengths and current limitations. Portland has had and continues to have many bright spots. Still, few people would claim that Portland continues to be “the city that works”. Even at its most functional, the region was an inconsistent and uneven experience across every zip code and street corner.

Greater Portland has experienced significant whiplash over the past twenty years. We were one of the regions hardest hit by the 2009 recession, and experienced double-digit unemployment and foreclosure rates, long past the length of time that comparable metropolitan areas did. From there, we jumped into a boom time: millennials and tech workers moved to the region in significant numbers, lured by a compelling mixture of art and culture (easily caricatured in Portlandia) and the growing employment centers in downtown Portland and at Nike and Intel.

While this boom felt empowering after years of economic struggle in the region, it also highlighted the impact of decades of systematic neglect on certain parts of the region, and the increased inequality underscored the very different experiences in the greater Portland region. While downtown Portland boasted more cranes than any other city in the country, and new speakeasies, Portland-founded boutiques, and wineries filled Portland’s central neighborhoods, lower-income families moved to the edges of the region in search of affordability, whether that meant “the numbers” inside Portland, or the edges of the counties where housing was more affordable, transit was sporadic, services were dispersed, and basic amenities such as sidewalks were nonexistent. The Portland “experience,” felt very different for a young tech worker in downtown Portland than it did for an established, long-time Latino family in Forest Grove, an immigrant family in the Jade District, or a fourth-generation low-income white family in Gresham.

From 2014-2019, the greater Portland area struggled with wanting to capture the economic growth that was occurring and not having mechanisms in place to ensure that growth benefited everyone. Low-income, immigrant, and BIPOC households were the most frequently left out of the economic boom. Community leaders loudly and consistently connected the dots between

the legacy of systemic racism and the racially layered inequality of the 2000s. The Black Lives Matter movement highlighted the impacts of government inattention (at best) and racist destruction. The prior destruction of the Albina neighborhood to build a freeway destroyed millions of dollars of generational wealth, limited access to capital, and strained what had previously been a vibrant and deeply connected Black community, who had managed to thrive in the Albina neighborhood despite Oregon's history as a sundowner state and the flooding of Vanport.

The declared housing emergency of 2015 brought more multi-jurisdictional challenges than solutions. Decades of underinvestment in East County left the community there distrustful of government and with a lack of basic services that are common in other parts of the region. The Jade District, which had become a vibrant cultural mecca, was built by the community around 82nd Ave and lacked basic sidewalks despite being the most dense and multi-generational part of the greater region.

Simultaneously, some of the promises that Portland's land use planners had made moved onto shakier ground. An urban plan that deeply believed people would shed cars for bikes and buses did not result in increased bus or bike ridership as more and more folks moved to the region, creating undesirable traffic, more accidents, and more pollution. A lack of affordable housing meant more and more people were living in neighborhoods that did not meet the dense, walkable, plentiful service model envisioned by urban planners. Climate change and increased regional demands resulted in open spaces that were often dirty, stressed, and insufficient for the population using them.

Local government tried to address the worst of the challenges. The City of Portland passed an affordable housing bond, then Metro passed a regional affordable housing bond, but the pace of building did not keep up with demand. As the world headed into the COVID-19 crisis, the cracks in our region's foundation were beginning to be clear. How could we build a vision and a plan that allows everyone in the region to enjoy the things we value: clean air, clean water, vibrant, walkable, safe neighborhoods, the ability to get around without a car, and the economic mobility and time to enjoy the fact that we are an hour from the beach and an hour from the mountain?

The period of economic growth was brought to a rapid halt by the COVID-19 pandemic. What first seemed like it could be a boon for the Portland region, as remote work allowed people to live where they wanted, spiraled as more and more folks were squeezed out of housing, decades of underinvestment in mental health came to the forefront, and fentanyl rooted itself into people's recovery and behavioral health challenges.

Concurrently, the remote work phenomenon impacted all our region's downtowns, with downtown Portland being hit the worst. Even today, some of our region's most long-standing employers are struggling, and the small businesses that we have long treasured are still reconciling with the post-covid economy. The sheer overwhelming nature of the challenges fundamentally broke down many people's faith in government.



Today, there is a general feeling amongst Portland area residents that we have collectively lost our way. Rather than a long-term vision for our region, or our individual communities, we try policy approaches for a short period of time then, in desperate search of a solution, we jump to something else. People are hungry to know a path forward. The stakes of people dying on our streets and viscerally show our collective failure to live up to the version of our community that we want. Local governments and community leaders have struggled to articulate a long-term approach to challenging and complex problems while also trying to triage short term needs and goals.

Engagement Leads to a Hypothesis

As part of an IMS reinvigoration process, over one hundred conversations have taken place with elected officials, government staff, community leaders, policymakers, academics, and thought leaders, to get their feedback about what is missing in the regional civic fabric.

IMS's hypothesis is that building agreement and shared understanding around specific policy visions will help local governments and stakeholders weather the critique and inevitable bumps in a policymaking process, and make it easier for the region to stay on track towards a shared vision, adjusting and tweaking the implementation process as necessary.

This hypothesis is informed by three very consistent patterns across the conversations:

1. **Policymaking and community dialogue informing policymaking is happening without being grounded in data, or best practices research from other places.**

While we want to believe we are a special snowflake (and indeed we *are* unique), things that have worked well in other places can also work well here. We do not need to reinvent the wheel. There is benefit to learning from good policy stewardship in other states and countries.

2. **Too much of our policymaking comes in the form of negotiation.** We have a tendency to argue about the number of cookies we all get before we even decide collectively

what cookies we are making and if we have the ingredients to make them. Another way of saying this is that we are focused on equity of process at the expense of clarity and equity of outcomes.





3. **There is a genuine desire to come together, to build trust, grow a shared vision, or even fully understand each other's concerns.** This sentiment is shared across different sectors and perspectives, including environmental, community, business, neighborhood, governmental, and social justice leaders.

On Engagement: Calling Out a Deeply Ingrained and Problematic Portland Habit

Without a vision, local governments and non-profit actors can get caught up in an engagement pattern that results in people spending weeks on engagement, then struggling to articulate the proposal and plan. Attempts to articulate a clear direction are often met with critique (a well-worn habit), which then forces local governments to try and unwind that critique with more engagement. The whole thing cycles, effectively immobilizing decision making and resulting in the continuation of the status quo.

II. The Valuable History of PSU and IMS

The role and vision for what IMS can do now is in direct relationship to its history.

The Institute of Metropolitan Studies was founded in 1991 by then Portland State University (PSU) Professor Ethan Seltzer. It was intended to be a connector between policymakers, thought leaders and PSU's respected academics. Dr. Seltzer's long history as a champion and advocate for Oregon's land use system, and his personal career which included academic and practitioner experience, laid the groundwork for IMS's approach to supporting policymaking generally. IMS was initially intended to be an applied, transdisciplinary academic center that engaged directly with the messy work of policymaking, and that helped connect policymakers (be they elected officials, community leaders, thought leaders, or others) to the best ideas, research and data around the issues they were struggling with. IMS was enshrined in 1999 in Oregon State Statute with the expressed purpose to "build partnerships between Portland State University's urban studies programs and the surrounding communities of metropolitan Portland and to sponsor public service research." IMS has taken a series of other approaches and forms since its inception, but it has stayed closely aligned with its original goal of helping apply PSU-supported research and resources with local policymaking and policy leadership.

Portland State University's Role

Originally founded as the Vanport Extension School, PSU has been focused, since its inception, on equipping veterans and first-generation college students with the applied skills to contribute to their and Portland's development. PSU's motto is "Let Knowledge Serve the City," which has guided PSU's expansions and focus. PSU's commitment to public service shines through in many of its efforts, from the Mark O. Hatfield School of Government to policy-oriented centers like the National Policy and Consensus Center.

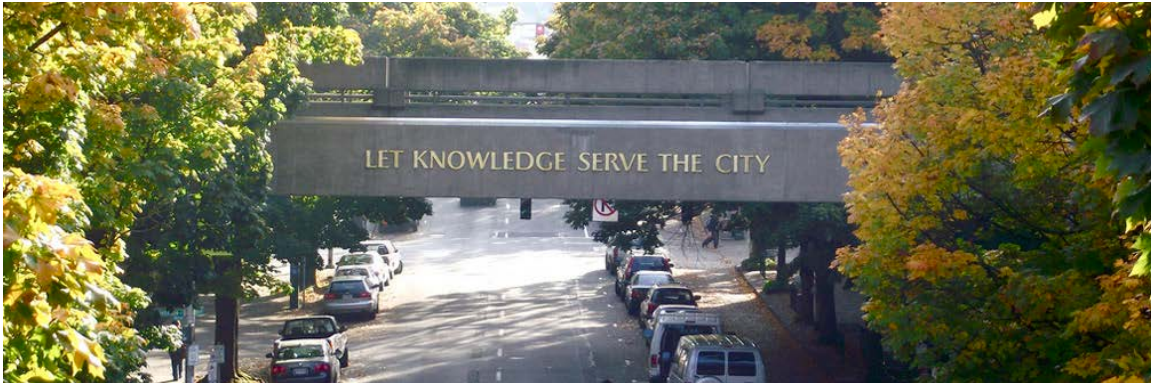
As one of the early keepers of the flame for Portland's livability goals and vision, PSU and IMS specifically have a legacy to build upon and a responsibility to make sure that the next vision for greater Portland builds and improves upon what came before. As a public institution, PSU has a responsibility to focus on the public good and center the role of government and the needs of the public in its work. As a research institution, PSU can bring data and cutting-edge research to policy conversations. As the region's only four-year college that is majority first generation college students, Portland Community College's largest collector school, and the owner of 18% of Portland's downtown acreage, PSU is

deeply committed to the future of downtown Portland and the success of the Portland region overall.

As an urban serving university, PSU is public and simultaneously separate from local government; it can serve as a third space for policymaking and implementation, and to provide data and research to inform policy discussions. PSU's 2025 Strategic Plan refers explicitly to the role it hopes IMS plays for the university and the region, by committing to "provide expertise for and convene, elected officials, civil servants, and civic leaders to help solve Portland's taxing, social and economic problems; reestablishing the city as a model for urban Renaissance."

III. The Vision of a Reinvigorated IMS

IMS's vision lives nestled within the larger hopes for the greater region. The vision is written in the language of accomplishment. It is now the year 2032 and . . .



IMS has played a meaningful role in helping the region live into a shared stewardship approach that is moving the greater Portland region forward as a place that is effectively meeting the challenges within the acceleration of climate change, technology, commerce, federal and state polarization, and great power conflicts. Regional policy and policy actors move in ways where the whole is greater than the sum of its parts. IMS partners include elected officials and local government staff, community leaders, community organizers, business leaders, and advocates.

IMS is counted upon as the place to incubate, discuss, discern, land, and consider policy ideas - including the aspects of policy that support implementation and evaluation. The focus is on locating useful policy findings, applying them, and then learning from implementation in the consideration of future policy proposals. IMS is trusted by policymakers across the political and geographic spectrum as a tool to help consider and develop local policy, and in turn empowers and supports local government, community policymakers, and other partners in the policy development space.

There is a connected and vibrant repository of generative policy solutions easily available and relatable to each governing jurisdiction in the greater Portland area. A connected web of policy ideas focused on livability, housing, transit, and community well-being have contributed to better policy development and implementation in jurisdictions across the region.

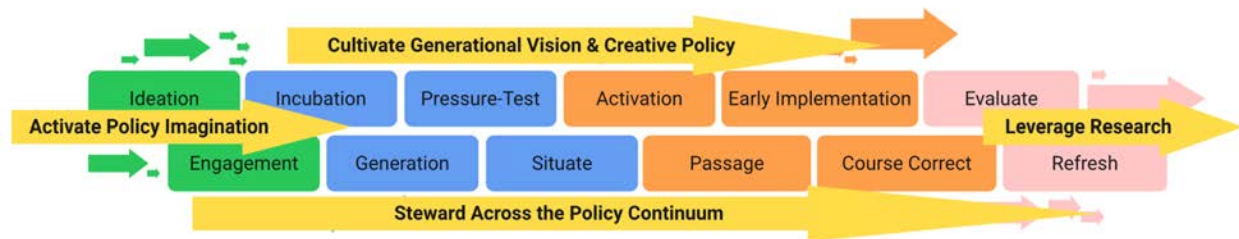
Governing bodies, elected officials, administrative staff, and policymakers have helped inform a full continuum of policy stewardship that connect with a larger shared vision for the region. While the jurisdiction of each governing and institutional entity is honored and respected, there is widely shared understanding and consideration of how the policy choices of one entity (county, city, Metro, TriMet, a coalition) have rippling and sometimes very consequential impacts on the other.

Note: IMS is in service to existing governance bodies and won't be in the business of a review of the governance bodies/structures themselves. This means IMS is structure agnostic and focused on policy stewardship and impact.

IV. Emerging Strategies: Ways IMS Advances Towards the Vision

There are a handful of emerging strategies IMS expects to activate over the next seven-years. A sharper articulation of near-term operations and activities is offered in the Two-Year Operational Roadmap.

Each of the strategies shown here is in relationship to the more general policy stewardship continuum.



Strategy 1 Cultivate Generational Vision & Creative Policy

Cultivate longer-arc visions for the Greater Portland region by creating spaces for people to build agreement for the desired policy future (and not get detoured by only focusing on the impediments). Support local partners in seeing public policy as a cumulative effort to move towards the desired future.

Example ways this strategy can be activated include:

- Build broad support for projects/concepts to support and engage with government implementation
- Build policies that have a universal vision for the region, then develop targeted strategies to achieve those visions dependent on the needs of the jurisdiction, people impacted (particularly BIPOC communities), and organizations involved.

Strategy 2 Steward Policies Across the Policy Lifecycle

Create and operationalize a more effective practice that oversees policy through its whole life cycle (see the policy stewardship continuum above), including initial incubation, implementation, and evaluation.

Example ways this strategy can be activated include:

- Convening groups to address key policy topics and track across the entire policymaking lifecycle
- Helping develop implementation plans for local governments to act (ex: landbanking)

Strategy 3 Activate Policy Imagination

Foster new ways of building collaborative relationships, seeing the world/key issues, and having creative discussions. Engage different tools and approaches to generate brainstorming, collaboration, bigger-than-policy thinking. Expand imagination.

Example ways this strategy can be activated include:

- Public events– panel discussions, presentations, etc.
- Salons (not to reach specific policy outcomes, but to support practice of policy brainstorming, showing up without roles, etc.)
- Convene in a way that encourages curiosity, an interest in identifying shared goals or needs, and does not let the perfect be the enemy of the good.

Strategy 4 Leverage Impactful Research

Undertake, identify, and compile innovative, accountable, relevant and potentially challenging research and ensure it goes to the right outlets/audiences, and track its effectiveness.

Example ways this strategy can be activated include:

- Best practices research/case studies
- Academic research
- Public Opinion Research
- Professors provide briefings
- Media strategy
- Better pipelines between PSU Research and govt regulatory processes

Strategy 5 Help Grow Effective Policymakers and Policymaking

Support policymakers by designing processes that help build relationships, provide space and time to engage deeply, and the research, data, and tools to bring about policy change and action.

Example ways this strategy can be activated include:

- Teaching/decoding the legislative and policy process
- Providing technical assistance and professional supports
- Partner development- recognizing that policymakers are not just elected leaders but are community leaders and executive staff as well



V. Key Organizational Commitments for Effectiveness

How IMS approaches innovative policymaking matters. The vision will come to life, the strategies deployed, and the activities will be made successful by building and implementing an operationally and values-aligned organization that can readily execute, learn, and adapt.

These key commitments flow across IMS's endeavors in support of long-term success:

1. **Model thriving, community-responsive policymaking and culture change** for local governments by actively creating spaces of belonging, connection, openness, relationship across difference and willingness to engage generative tension – in the smallest 1:1 & team meeting all the way to larger collaborative spaces.
2. **Stay committed to involvement in the actual, ongoing landscape of policymaking.** While there will be important research and theoretical contributions, IMS's primary function is to contribute to a thriving Greater Portland region. This means deep tracking of changes in political, cultural, social, and environmental realities and climates, and staying accountable to communities.
3. **Build an IMS team that is nimble and flexible** (whether full-, part-time, contracted, or partnered in some way) while able to effectively center the IMS vision and purpose. The team cultivates strong and healthy culture through IMS's principles and practices (more below).
4. **Continuously practice the centering of IMS's larger vision, purpose, and strategies.** For example, rather than assuming there is alignment, ask: how is this meeting our vision? This includes being community-centered and responsive and addressing systems of oppression (while recognizing there are a multitude of perspectives).
5. **Ensure that IMS is well-resourced** relationally (reciprocal & thriving relationships), financially (sustainably, adequately and intentionally funded), and energetically (tending to well-being and creativity).
6. **Utilize IMS's position within Portland State University** (and its resources, positionality, and leverage) to focus on work that other entities are not able to. This includes being able to share, learn from, and connect with kindred spirits outside the Portland region

such as other metropolitan regions and entities re-animating responsible policy and governance.

VI. Identifying Potential Barriers and Potential Solutions

Being able to articulate and address barriers to the vision and strategies IMS pursues is critical. Barriers, in this case, are not limitations as much as the strategic effort to name what could get in the way and therefore needs skillful navigation around, over, or through. This section benefits from close scrutiny, identification of other potential challenges AND potential solutions.

Potential Barrier	Brief Description	Ways to Navigate
Federal admin impacts	Navigating the rapid impacts of current federal administration	Policy designs don't rest on the expectation of a reliable federal partner Attention to significant revenue impacts and need to be creative in use of resources Emphasizes the importance of local/regional policymaking
Hesitancy to Move	Aligning with and working with all possible partners in the region is important and there can be a challenging dynamic or habit around waiting until every single person is ready and aligned to move forward	Move with the ready, willing, open while tending to dynamics of privilege and power
Duplicative Activity	Unconscious duplication of efforts, being inefficient with resources across the region	Be strategic in any actual duplication, in good communication with partners
Losing Focus Amidst Noise	Because there are many needs in the region and because there are many partners and many perspectives, it can be easy to lose focus and fail to see projects and commitments to the end or to prioritize amidst many options and hopes for IMS engagement	Stay focused on overall strategy and outcomes while navigating new openings or opportunities Underpromise, overdeliver

Having Right Capacity tied to Strategy Choices and Aims	Attention to be given to staff expectations, amount of staff, available resources for research, communications, and facilitation	Be disciplined in early, first approaches, don't get overextended Advocate for additional investment from philanthropic partner and individuals
Procurement and PSU Process and Procedures	Use of consultants and navigating government contracts can be delayed or impact implementation. Seeking additional funding requires coordination with other university partners.	Stay mindful in organizational cash flows and in execution Work with PSU staff to use pre-approved legal templates and other ways to expedite key steps/known challenges

Resource Runway to be Strategic

It is ideal to have infrastructure that is 18 months ahead of strategy and operations for what IMS seeks to accomplish... **Why?**

Even at small scales of effort, implementation works best when there is readiness and running room. You want to have the people and tools alive and moving (not just starting to be considered) at a moment of purpose. You also want to have the capacity to choose between strategic options versus only having one move and if that one move falls short you have to go back to another year's worth of drawing board.

In the early going, a clear "resource ramp" may take extra effort to develop and come in fits and starts. For IMS, based on the vision expressed, the two-year operational roadmap, and the budget work done to date, it would be ideal to raise \$350K over the next 18 months and \$1.5M over the next three years to endow IMS and allow it to move without hesitation into this reinvigorated effort.



2 | Operational Roadmap

Focus, Actions Plans and the Principles Guiding the Work Ahead

I. Issues Focus for the First Two-Years

July 2025 to June 2027

In its first two years, IMS will focus on playing a role as a local government policy think tank, focused on tackling thorny policy challenges felt across greater Portland. We will utilize our “third space” role to bring together key players and impacted parties around specific policy questions, scaffolding the discussion with PSU-led research and best practices data, with the goal of serving up politically supported, data-driven policy recommendations that are ready for local governments to implement.

Given staff capacity, IMS has initial capacity to undertake somewhere between one to three policy topics a year. IMS will prioritize topics based on their regional relevance, PSU and IMS’s ability to meaningfully contribute to the conversation, interest from impacted parties and local governments and timeliness. IMS will focus on issues relating to the region’s built environment, including transportation, housing supply and production, zoning and land use, urban design, and spending and revenue. For the first two years, IMS’s key topics will originate from this list:



- **Local transportation funding²**
- Downtown Portland Strategic Plan
- Vision for the Portland Waterfront (pending possible legislative action)
- System Development Charges: long-term impacts and best practices
- Regional Moves: What Are the Next Big Projects?

This approach, and these topics, came from the over 100 conversations with elected officials, government staff, community leaders, policymakers, academics, and thought leaders, to get their feedback about what is missing in the regional civic fabric. As part of those conversations, we’ve asked partners how (or if) they can see IMS being helpful, what roles are unfulfilled in the current policy landscape, and what topics they might like to see IMS explore. There was surprising convergence in the ideas that came forward. For our

² IMS’s likely first topic for the 2025 year, given former Congressman Blumenauer’s legacy, our faculty advisor’s expertise, and feedback from local partners.

most faithful attempt at capturing what was brought up exactly as-is, this [list](#) is presented without cleanup, rephrasing, or re-grouping and is our best attempt at a comprehensive list of every topic that came up in these conversations. Almost every single topic was raised by multiple people.

Policy Issue Selection Criteria

For the choices above and for the future, IMS plans to use the following criteria in determining issue areas as well as when/how it might engage:

- ☐ Topic has regional implications and is not state or nationally focused.
- ☐ There is interest from key impacted parties in having IMS undertake this policy exploration. This means there is an audience, community, or jurisdiction for the policy work as it develops, who sees value in IMS's support and engagement.
- ☐ Topic is focused on areas where IMS and the College of Urban and Public Affairs broadly can add value. Metropolitan Issues include transportation, zoning, land use, revenue and spending, housing supply/production, urban open space, natural disasters (and their impact on the urban form), urban design, etc.
- ☐ The relevant policy space will benefit from IMS's role and is not overly crowded.
- ☐ IMS's unique role and ability to convene and provide data and research, will benefit the conversation.
- ☐ The policy conversation is timely.
- ☐ The policy conversation benefits from engagement and research at the scale that IMS can deliver on.

II. Activities & Culture

Every policy topic that IMS engages has different partners, different needs, and requires a different approach in order to reach substantive and political consensus.

Core Activities

These will likely be a part of every policy effort we undertake, and are at the core of how IMS thinks about its approach and role in the policy realm.

- Inform via public-facing events
 - ◆ Speakers
 - ◆ Panel discussions
 - ◆ Presentations
- Ground the discussion in data
 - ◆ PSU- faculty led research specific to the topic
 - ◆ Best practices research looking at what has been implemented and what has been effective in comparable regions and cities
 - ◆ Data compiled from existing programs/relevant policies across the region
- Convene to develop multi-party agreement and build consensus for implementation
 - ◆ Convening multi-jurisdictional, cross-sector workgroups to develop in-depth policy agreement and build recommendations for local government and community partner action

Potential Activities

These are possible activities that could be used, depending on the policy topic, interest from impacted parties, and effectiveness.

- Policy Salons (not to reach specific policy outcomes, but to support practice of policy brainstorming, showing up unattached to specific roles, etc.)
- Policy generating field trips to help build a shared understanding of the challenge
- Connecting research to community and government by curating best practice research, case studies, public opinion polling, and academic research for application in the policy continuum
- Public opinion research
- Developing implementation plan for local governments to act (ex: landbanking)

First Focus Issue: Transportation Funding

(Board Ideas to Populate)

IMS Culture Principles

IMS will cultivate internal principles and practices that will help animate its strategies and operations. Most critically, these need to not just be words on a page, but living practices for involved individuals, teams and the organization. As so much of IMS's work involves convening disparate groups of partners, it is particularly important that we are clear about our culture and our values. These *initial principles* will be further developed through intentional process and reflection.

☼ **Stay Open AND Focused**

To shift the status quo and invite other possibilities, we need to welcome alternative perspectives, thought processes, ways of being, and new ideas. IMS is built on the premise that sharing perspectives and needs leads to better policymaking. Simultaneously, some perspectives seek to do harm or perpetuate injustice, so be mindful of appropriate framing and necessary response.

☼ **Be Curious**

Questions can help unlock barriers and collective work. Ask questions as they arise as opposed to holding them in as on-the-spot clarification is better than lingering thoughts that go unresolved. Seek first to understand and avoid/suspend/assess preconceived notions and biases.



☼ **Focus on Deeper Meaning and Impactful Learning; Don't Get Distracted**

Don't get lost on the metrics/data at the expense of what those are meant to point to. Re-align metrics/data when there is a disconnect with the essential questions they are meant to support. Data doesn't tell us the answers; it helps us ask better questions.

☼ **Neverending Learning Journey**

There is no "end point" for learning -- it requires ongoing learning, evolving and humility to continuously address systems of oppression. Policy and equity work are both iterative and requires practice, self-awareness, dependability, openness with established and emergent systems of support, learning, and accountability.

☼ **Transformation Requires Spaciousness**

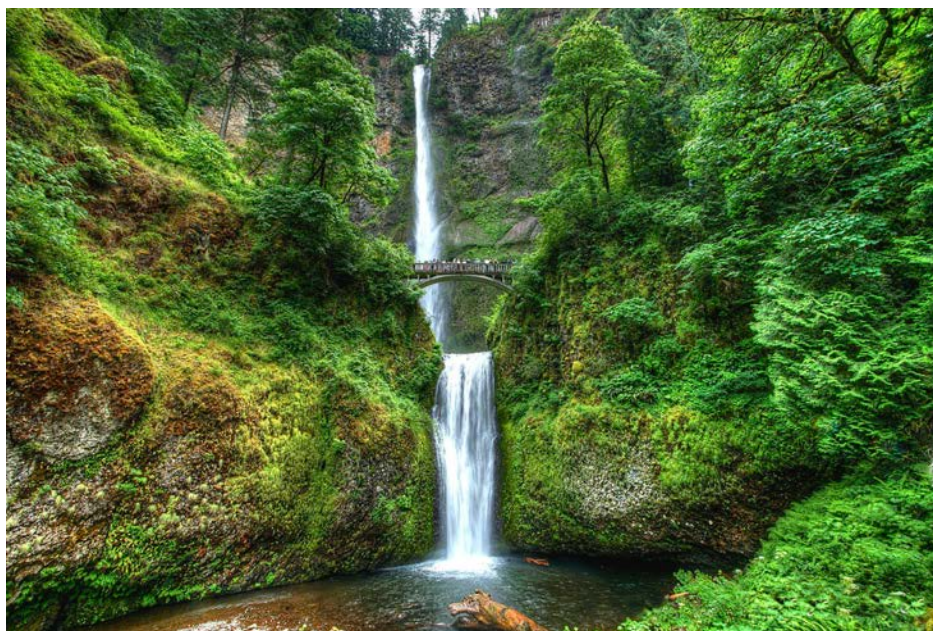
Spaciousness allows for deeper reflection, integration, learning, creativity and rest. Build processes and spaces and conversations that give people and institutions the time they need, while maintaining a focus on moving towards action.

☼ **Deepen, Build & Earn Trust**

Moving together requires a high degree of relationship through trust, mutual understanding, and accountability. Building and maintaining trust is key. Additionally, sometimes we need to move as if years of trust have been established.

☼ **Culture is the Foundation**

Culture and values create a foundation for everything. Strategy is essential but should be rooted in culture and values. Plans and activities should follow from strategy, be updated based on continuous learning, and be real.



III. Operations

IMS, like any other successful entity, needs to attend to its own operational needs in direct relationship to what it's trying to accomplish. This section will detail the high-level operational domains that are most important in the first two years.

Operational Leadership

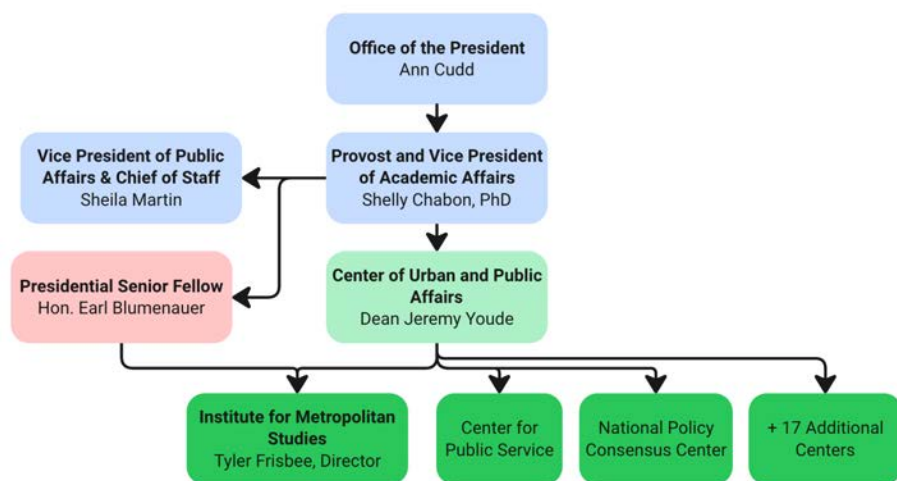
IMS is directed by Tyler Frisbee who leads day-to-day operations. Tyler benefits from the ongoing inspiration, provocation, and counsel of The Honorable Earl Blumenauer. Dr. Jennifer Dill, head of the PSU's Transportation Research and Education Center, is IMS's faculty advisor.

The IMS Advisory Board provides an authentic and meaningful body to advise, inform, and recommend how IMS envisions its role, IMS strategy, and high-level IMS decisions. The board is not formally a decision-making body but their advice and counsel is key to developing IMS direction and making sure IMS's work is aligned with partners' needs.

How Situated at PSU

IMS is formally a program within the College of Urban and Public Affairs. Tyler is the Director of the Institute and reports directly to CUPA's Dean Jeremy Youde. IMS enjoys the full support of the President's Office and President Cudd is also an ex-officio member of the advisory board.

The following organizational chart captures IMS's positioning within PSU's structure, alongside near peers within CUPA.



Staffing

IMS current staffing consists of:

Person	Role	Dedicated FTE
Hon. Earl Blumenauer	IMS Senior Advisor	0.36
Tyler Frisbee	IMS Director	0.75
Jennifer Dill	IMS Faculty Advisor	0.25
Becca Bornstein	Administrative Support	0.18
Lacey Friedly	Communications Support	0.10

Financial Stewardship

IMS has a fiscal year of July 1 to June 30, following PSU's fiscal procedures. The operational budget for the FY25-26 year is formally set but IMS can always bring in additional revenue within a given year. For the current year, the PSU contribution to the budget is \$433K, which covers 1.64 FTE across five part-time positions.

In an effort to map onto the recommended focus and thinking about the larger vision for a reinvigorated IMS, the following budget snapshot paints the resource picture that would create the optimal conditions for this effort to move with focus and maximum potency.

IMS will need to fundraise to support programming and research efforts. In specific situations, we may take additional state or local funding to support programmatic work, although it must be done in a way that is transparent and does not impact outcomes or recommendations.

Three-year budget snapshot (for now) (very draft)

	FY 2025-26	FY 2026-27	FY 2027-28
Transportation	75,000		
Issue Focus 2	10,000	50,000	15,000
Issue Focus 3	0	40,000	40,000
Issue Focus 4	0	10,000	50,000
Issue Focus 5	0	0	15,000
Issue Focus 6	0	0	20,000
PSU Led Research	25,000	60,000	80,000
Staff and Consultants	512,000	702,000	887,000
Travel and Convening	15,000	25,000	30,000
Total	\$637,000	\$887,000	\$1,137,000

IMS intends to fundraise through private donations, seek support for specific projects from relevant local governments, and pursue grant opportunities as appropriate.

IV. Learning and Evaluation: Tracking Two-Year Milestones

IMS will adapt several key [Outcome Mapping](#) practices in service to understanding its contributions to the Greater Portland region and its own organizational performance.

Why it is so important that IMS focus on contribution to impact

Change is complex, nuanced, relational, and sometimes even chaotic. Large scale community, economic, and social change count on many partners' work adding up to something greater than the whole.

Too often, models of learning and evaluation have relied on linear and causal frameworks where there is pressure to claim credit and attribute positive impact to one single entity. This creates a change impediment all by itself.

IMS will learn from and glean the wisdoms and best practice from volumes of research and practitioner insight on community, economic, and social change by practicing a model of evaluation that highlights how IMS contributes to change while being able to elevate and showcase the work of many partners and communities who all play key collaborative mutually beneficial roles.

Early indicators of progress include:

- Signals that IMS's vision is well-owned and shared by partners and communities engaged
- First activities, like salons, demonstrate an early proof concept in how IMS can meaningfully contribute to longer-arc policy development
- Willingness and interest in local governments and community organizations in participating in early IMS projects

Intermediate changes showing progress, gaining traction, include:

- IMS is beginning to be counted upon as a place to incubate, discuss, discern, land, and consider policy ideas in a few domains/issue areas.
- IMS is beginning to have a real repository of generative policy solutions that are useable and used by local governing jurisdictions and communities.
- There is a recognized uptick in the quality and awareness in the ways policymakers understand and consider how policy changes in one entity (county, city, Metro, TriMet, a coalition) have rippling and sometimes very consequential impacts on the other.

- In areas of IMS focus, local government and community leaders' behavior and attitudes reflect thinking big, attention to system gaps, and the tackling of more ambitious plans in a collaborative manner.
- IMS is sought out as a potential tool to solve policy challenges by partners, local governments, etc.

IMS will also review its own organizational performance using the following indicators³ for, at least annual, review:

Indicator	Informed by
1. Prospecting for new ideas, opportunities and resources	• Number of new ideas shared in the team • Number of new ideas integrated into the work of the program/policy approach
2. Seeking feedback from key informants	• Number of key informants from whom feedback is sought • Number of changes made to the program/approach because of feedback
3. Obtaining support of strategic partners	• Number of strategic contacts • Number of hoped for responses from strategic partners
4. Assessing and (re)designing approaches and services	• Number of small changes (tweaks) made • Number of significant enhancements
5. Checking up on those already served to add value	• Number of partners for whom additional services were provided • Timing/regularity of checking up on those already served
6. Sharing your best wisdom with the world	• Number of requests to the program for it to share its "wisdom" • Number of events/activities where program "wisdom" is shared
7. Experimenting to remain innovative	• Number of new ventures or use of exploratory approaches

³ Adapted from Outcome Mapping Performance Journal

	• Number of experimental areas that proved successful and were repeated or institutionalized
8. Engaging in organizational reflection	• Number and frequency of opportunities for organizational reflection • Number of adjustments to the program/approach coming out of a process of organizational reflection

