



LOWER SOUTHEAST RISING



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Project Advisory Committee
September 27, 2021

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Agenda

| Time | Agenda Item |
|-----------|---|
| 6:00 p.m. | Welcome, introductions and Committee check-ins |
| 6:20 p.m. | Public comment |
| 6:30 p.m. | Summary of Summer Public Involvement |
| 7:00 p.m. | Overview of Commercial Real Estate & Retail Market Analysis |
| 7:15 p.m. | Overview of Opportunity Mapping Analysis |
| 7:30 p.m. | Small group breakout discussion and questions |
| 7:50 p.m. | Wrap up and next steps |



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Welcome and Introductions

- Name
- Relationship to the project area
- Thoughts about the recent rain?



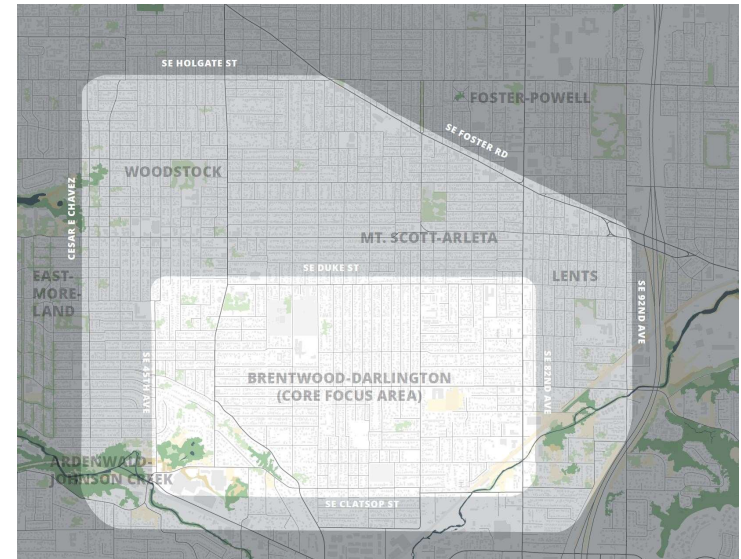
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Plan Overview and Timeline

The goal of this plan is to develop strategies to **increase livability and housing stability**, as well as improve access to employment, schools, local services and amenities, and recreational opportunities.



PROJECT TIMELINE*



*Timeline approximate and subject to change.



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Summer Public Involvement



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Summer Public Involvement

Summary of Activities

- Postcard sent to **15,000+ residents** announcing the project and kick-off survey
- **1,500 responses** to the kick-off survey
- **1,100+ subscribers** to the online newsletter
- **Nine community stakeholder interviews** averaging 90 minutes each
- **Door-to-door canvassing** at manufactured home sites and affordable housing apartments, and more than 20 informal interviews
- Tabling at Lents Farmers Market and presentations to 82nd Avenue Business Association and Southeast Active in Motion (SEAM)
- **Pedalpalooza bike ride** through the project area



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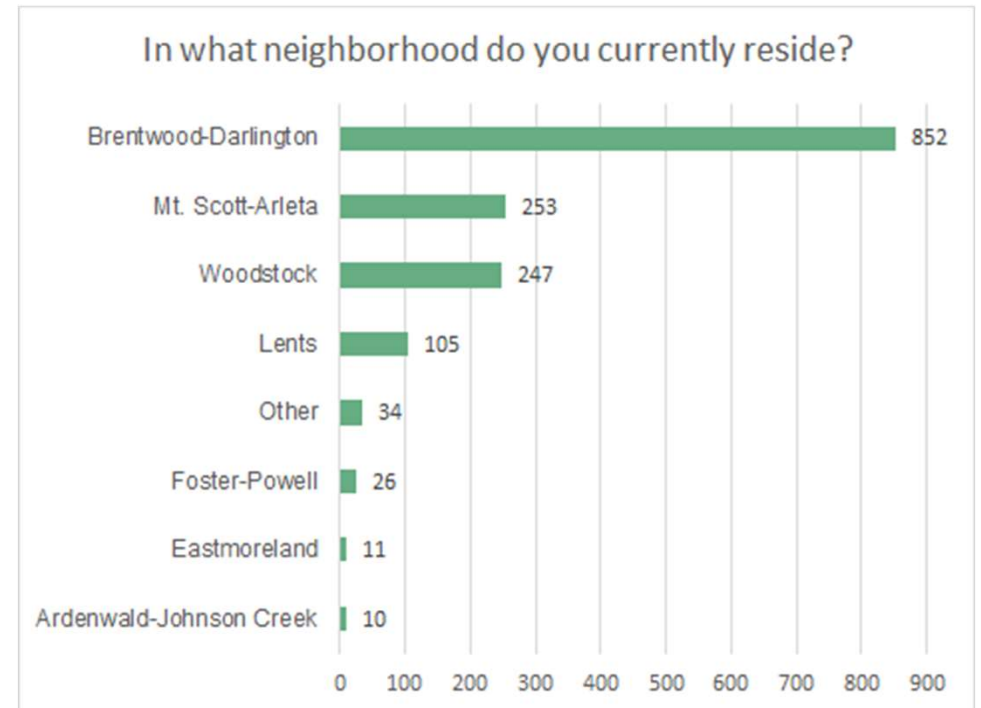
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Summer Public Involvement

Survey Results Summary

Themes when asked what residents **liked best** about their neighborhood:

- **Walkability**
- **Community/People/Neighbors**
- **Parks/trees/greenspace**
- **Nearby commercial amenities**
- **Quiet feel**



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Survey Results Summary

Themes when asked about the **biggest issue/challenge** in the neighborhood:

- **Street safety and road conditions (includes speeding, potholes, and unimproved roads)**
- **Lack of sidewalks and general walkability**
- **Crime and safety**
- **Houselessness**
- **Trash, noise and abandoned automobiles**



This road is paved, but with no sidewalk or pedestrian protections



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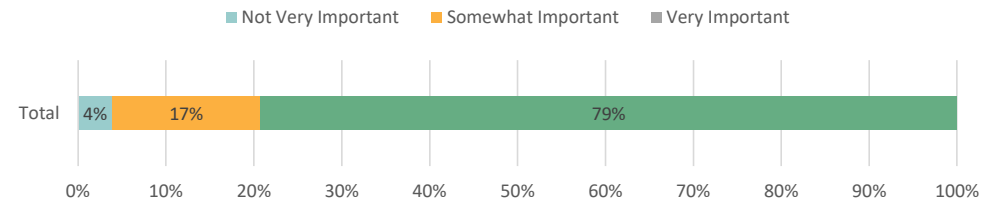
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Summer Public Involvement

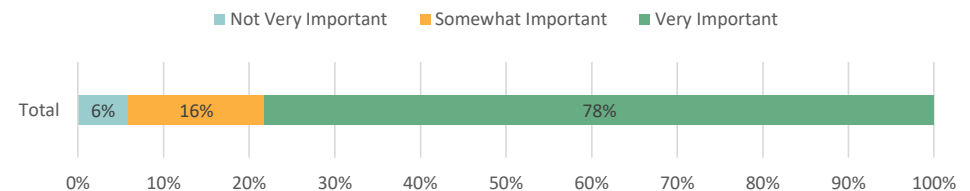
When asked to rank items for **improving the neighborhood and quality of life** as “Very Important”, “Somewhat Important,” or “Not Very Important”:

- **“Addressing houselessness”** was the most important “Very Important” issue (79%) followed by **“Making it safer to walk, bike and/or take transit”** (78%)
- Other important issues were **“Having more trees and shade and improving air quality/climate change resilience”** (75%) and **“Improving community safety”** (75%)
- Less important was **“Improving access to parks, open spaces, and recreational spaces”** (56%), **“Developing anti-displacement strategies for residents/businesses”** (49%), **“Retaining/adding more affordable housing and choices”** (45%), **“Adding more businesses/stores”** (41%), and **“Adding more frequent/accessible transit service”** (36%)

Addressing houselessness



Making it safer to walk, bike and/or take transit



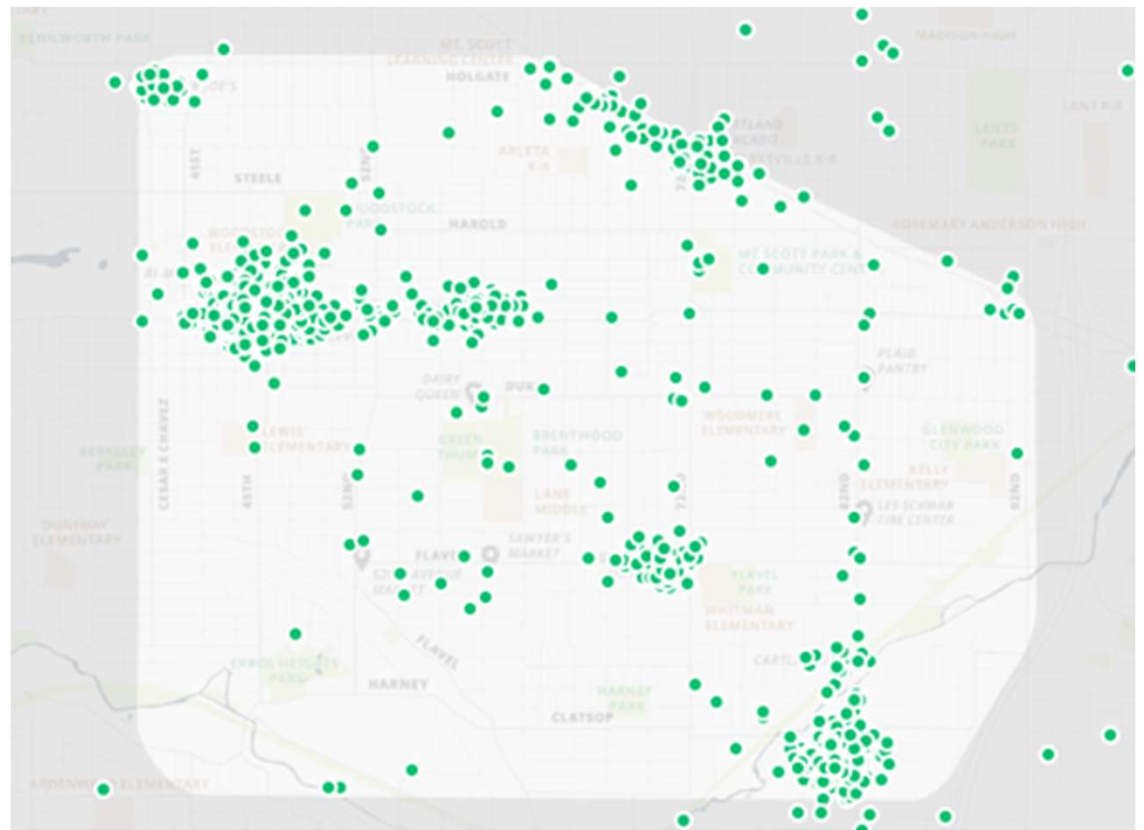
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COMMERCE: When traveling within the Lower Southeast Rising study area, where do you commonly travel to for commerce, such as groceries, shopping, dining, entertainment, etc.?



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RECREATION: When traveling within the Lower Southeast Rising study area, where do you most commonly travel to for recreation, such as parks, natural areas, sports fields, etc.?



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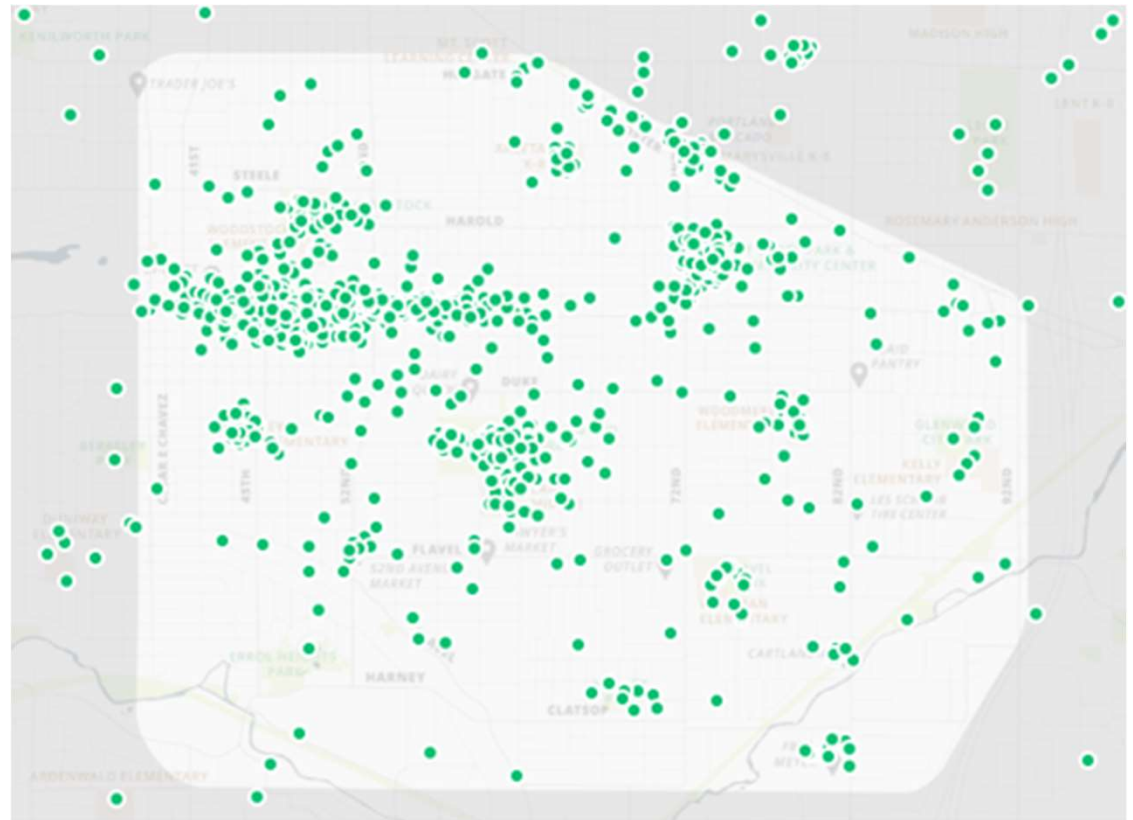


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COMMUNITY: When traveling within the Lower Southeast Rising study area, where do you commonly travel to in order to connect with community, such as community centers, religious institutions, schools, libraries, etc.?



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Summer Public Involvement

SUMMARY OF COMMUNITY INTERVIEWS

NEIGHBORHOOD ASSETS

- Resident creativity
- Generally calm and quiet
- Youth engagement
- Green Thumb has unlimited potential, but is currently underutilized
- Community led organizations and non-profits

NEIGHBORHOOD CONCERNS

- The growing houselessness crisis
- Garbage accumulation in streets
- Over-regulation from the city
- Speeding cars
- Insufficient tree canopy
- Crossing SE Woodstock Blvd and SE 72nd Ave
- Displacement



Two neighbors (and cat) discussing local assets and concerns



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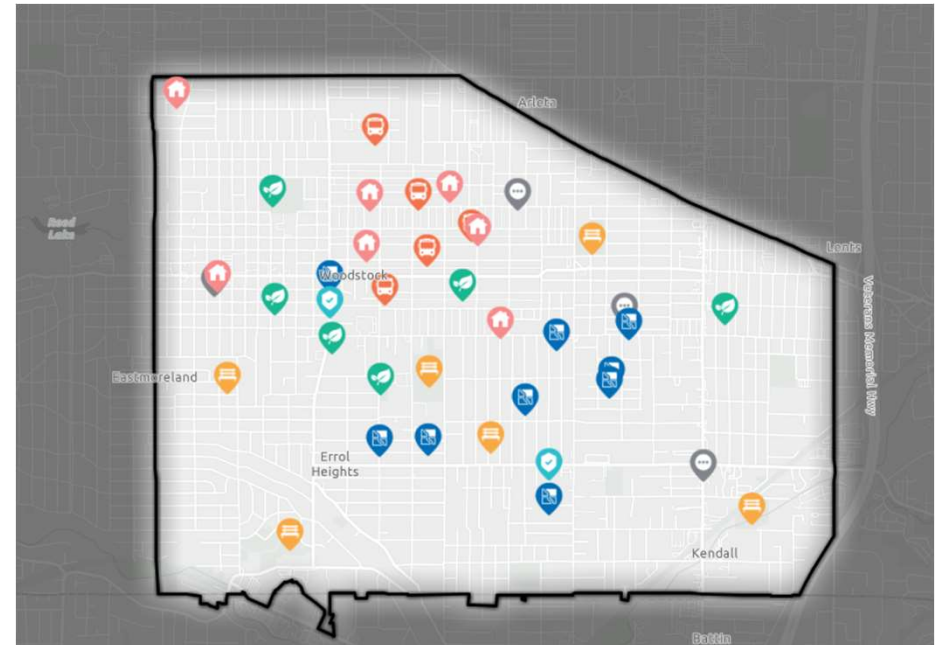
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Summer Public Involvement

NEXT STEPS

- Online **Pin it Portland** mapping tool will be released soon to help identify issues/needs
- Collaborating with Latino Network on Spanish speakers focused engagement
- Topic-based community workshops being planned for fall/winter 2021-2022

QUESTIONS?



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Commercial Real Estate & Retail Market Analysis



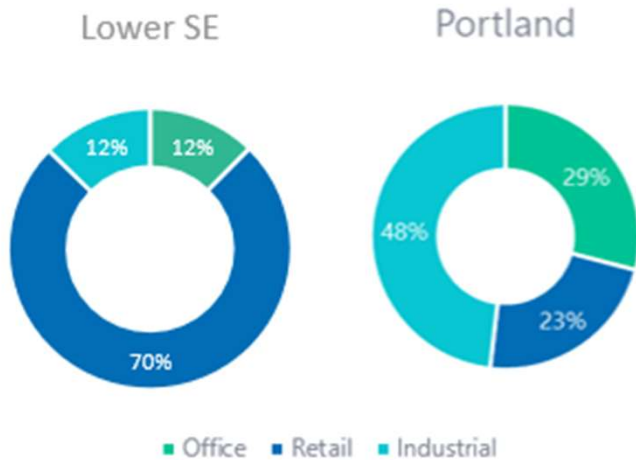
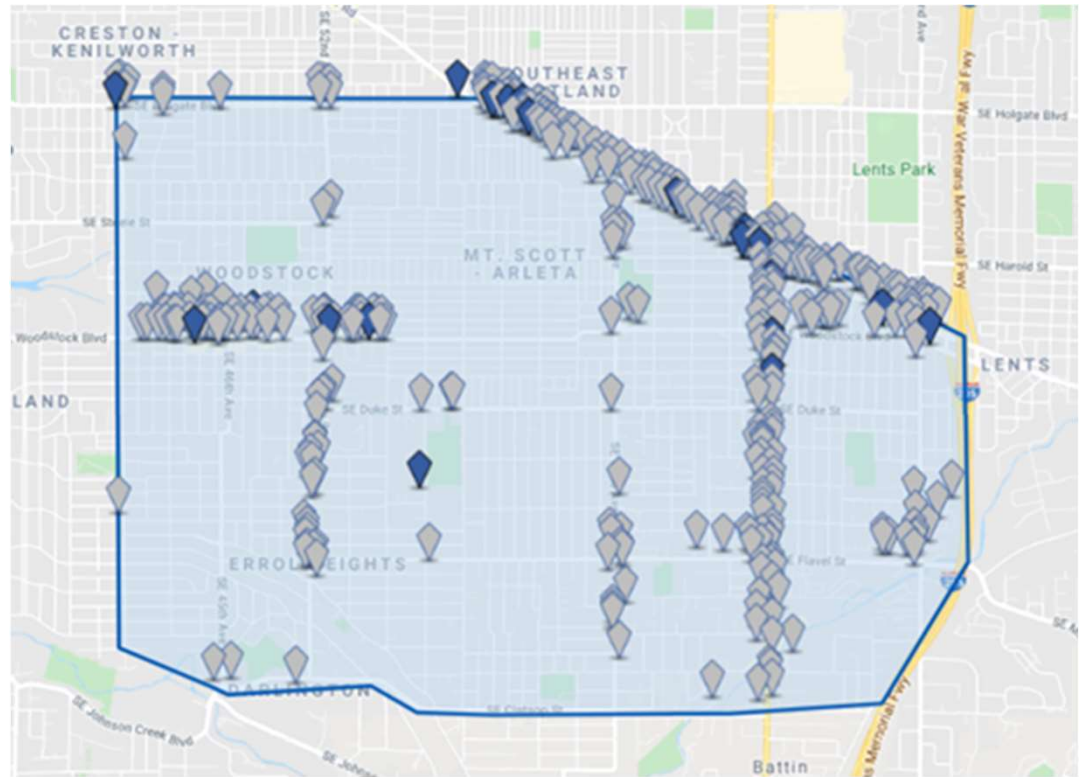
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Commercial Real Estate

- The study area has approximately **2 million square feet** of commercial real estate.
- Commercial property is commonly broken out into three main uses, **Office, Retail and Industrial**.
- The area is dominated by retail uses along these commercial corridors and neighborhood centers.



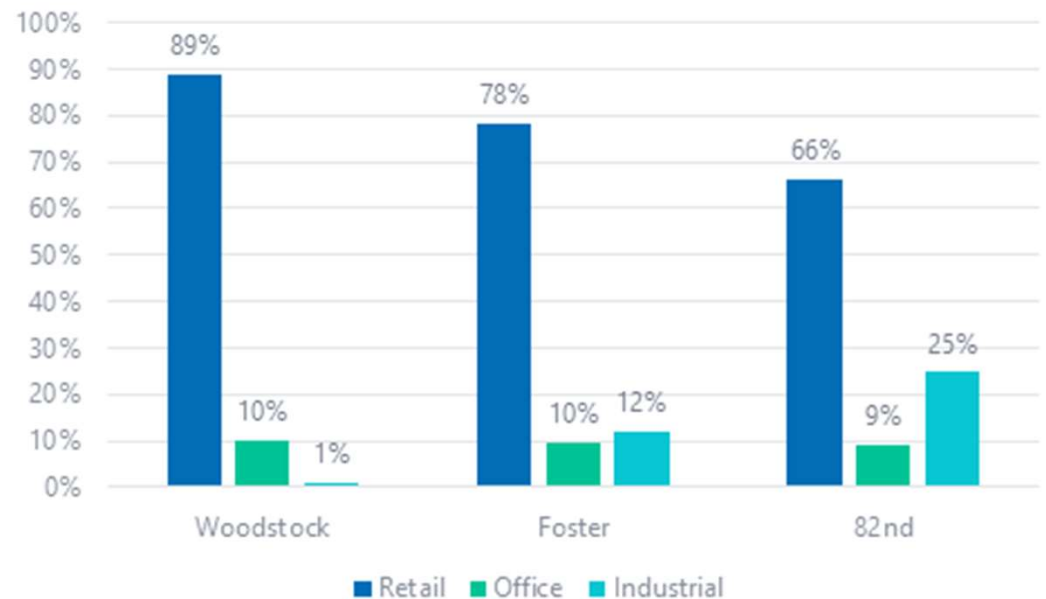
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Real Estate by Subarea

- **Woodstock neighborhood center** is overwhelmingly made up of retail commercial uses (89%), with a small percentage of offices (10%), and almost no industrial properties (1%).
- **Foster Blvd.**, is also predominantly retail (78%), but still retains a modest share of industrial uses (12%) and includes some office (10%).
- **82nd Ave.** has a significantly higher amount of Industrial uses (25%) while still mostly being dominated by retail (66%).



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Vacancy Rates

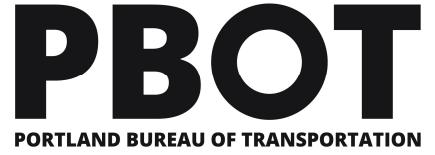
- Most of the areas have lower vacancy rates than Portland overall.
- Foster had full occupancy of its Industrial commercial real estate until the fourth quarter of 2020.
- All the subareas had vacancy rates were under 2% until 2020, which was a calamitous year for many businesses around the world due to the pandemic economic shut down.

| | Woodstock | Foster | 82nd | Portland |
|-----------------|-----------|--------|------|----------|
| Overall Current | 4.1% | 4.8% | 4.8% | 8.1% |
| Retail | 3.8% | 3.6% | 7.2% | 4.6% |
| Office | 7.2% | 0% | 0% | 13.2% |
| Industrial | 0% | 16.2% | 0% | 6.8% |

Source: CoStar, 2021



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Commercial Real Estate Rents

| | Woodstock | Foster | 82nd | Portland |
|-----------------|-----------|---------|---------|----------|
| Overall Current | \$24.17 | \$19.33 | \$17.08 | \$18.34 |
| Retail | \$24.00 | \$19.98 | \$19.48 | \$22.56 |
| Office | \$26.79 | \$22.33 | \$23.05 | \$29.64 |
| Industrial | \$10.56 | \$12.70 | \$8.47 | \$9.39 |

Source: CoStar, 2021

- **Woodstock** has the highest overall rents, based primarily on the market price of retail space in that neighborhood commercial center.
- **Foster** has higher rents than Portland overall mostly due to the higher going rate for Industrial space on Foster Blvd. The rents for Retail and Office space on Foster are lower than those found in the city more generally.
- **82nd Ave.** tends to have the lowest rents across all three real estate types and overall. 82nd Ave. has higher Retail vacancy rates than the city and the other subareas, despite its considerably lower rents, may point to the difficulties of establishing successful retail businesses on a busy highway.



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Opportunity Subareas – 52nd Ave and 72nd Ave

- **52nd between Duke and Flavel Dr.** is home to a variety of business types, including a gas station, several eating and drinking establishments, salons, a gym, a laundromat, and health and wellness providers. Rents in the area are slightly lower than those found on Woodstock Blvd, but on par or higher than those on Foster Blvd. and 82nd Ave.

| | 52nd | 72nd |
|----------------|---------|---------|
| Inventory (SF) | 78,700 | 40,700 |
| Vacancy Rate | 0% | 0% |
| Rent | \$22.60 | \$21.89 |

Source: CoStar, 2021

- **72nd Ave.** has less commercial square footage and no office space, but the commercial properties that do exist there are fully occupied. Rents are similar to those on 52nd, which are slightly lower than Woodstock, but higher than retail spaces on 82nd Ave.



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Retail Gap Analysis

- A **Retail Market Analysis** helps us better understand the opportunities that exist in the study area for expanding commercial zoning, small business development, and a more equitable complete community.
- A **gap analysis** illustrates the difference between the retail demand in an area, based on the day-time population, and the capacity to which the area's retail stores are meeting that demand.
- In the graphic, the demand is shown in green and the supply is shown in red. **Local supply exceeds the local demand in only one category, Health and Personal Care Stores.**



Source: ESRI Business Analyst, 2017.



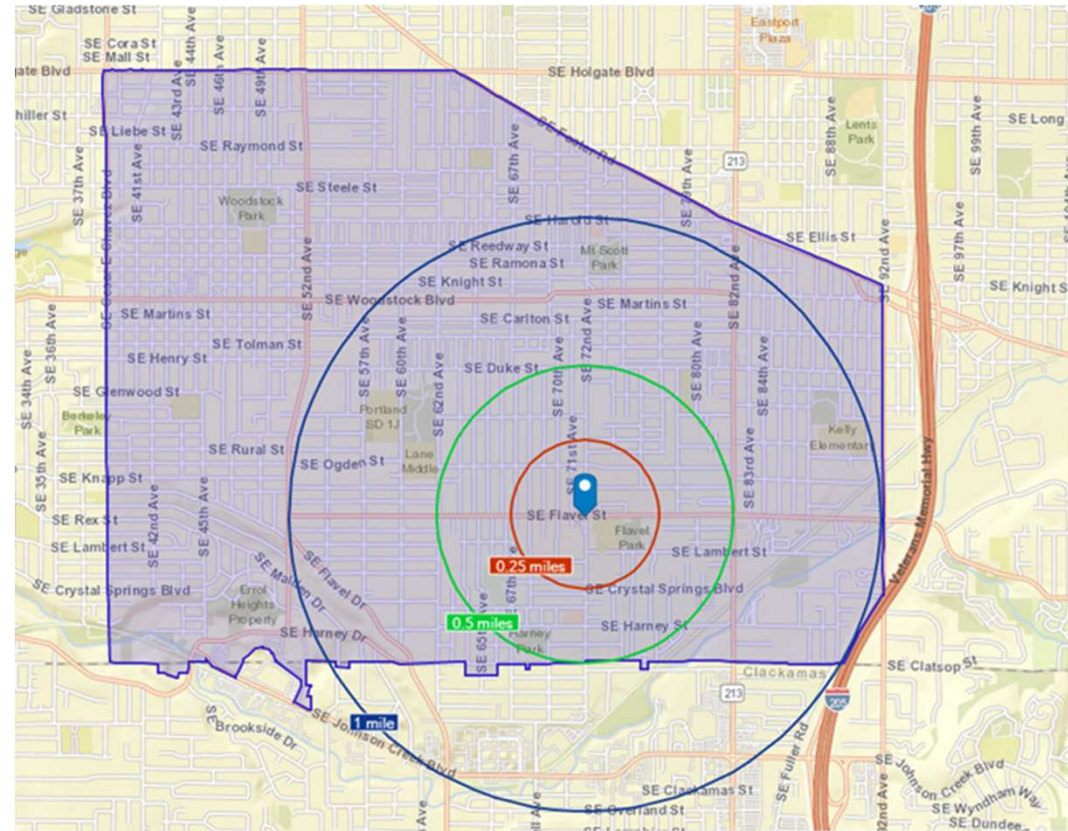
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Home-Based Businesses

- Using business license registration data, we can learn a total of **1,196 home-based businesses** exist in the study area.
- Most are categorized as other/unclassified, but a fair amount (60-70 each) are categorized as **Professional Services, Entertainment, Retail Trade**.
- Filtering the data by addresses, there are **42 home-based businesses listed on 72nd Ave. between Duke and Harney**. The stretch of **52nd between Duke and Flavel Dr. has only four listed home-based businesses**. There is likely demand for additional commercial opportunity in both real estate, and through maximizing the use of residential properties along 72nd Ave. for home-based businesses.



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Key Findings:

1. Despite the significant amount of retail that exists in Lower SE, the purchasing power of area residents, compared to the retail sales revenue of local businesses, indicates that the **population consumes heavily outside of the study area**. Local supply exceeds the local demand in only one category, Health and Personal Care Stores.
2. **To incorporate equity into this analysis, we should consider whose commercial needs are being least served**, as well as their relative ability to have their needs met elsewhere.
3. Filtering the data by addresses, we can see that there are **42 home-based businesses listed on 72nd Ave. between Duke and Harney**.
4. Given the equity considerations associated with the population found with a ½ mile of 72nd Ave., **there are strong reasons to consider expanding commercial opportunities along 72nd Ave. particularly around existing nodes such as 72nd and Flavel St.**
5. Further study should be conducted by **engaging owners of existing home-based businesses in the area to determine what regulatory changes would be most likely to help them expand their businesses.**



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Opportunity Mapping Analysis



Purpose of analysis:

Provide a baseline of information on access to commercial and community services in the Lower SE study area, considering:

- **Availability of services** and
- The presence (or lack of) **infrastructure that supports walking or biking** to these local services.

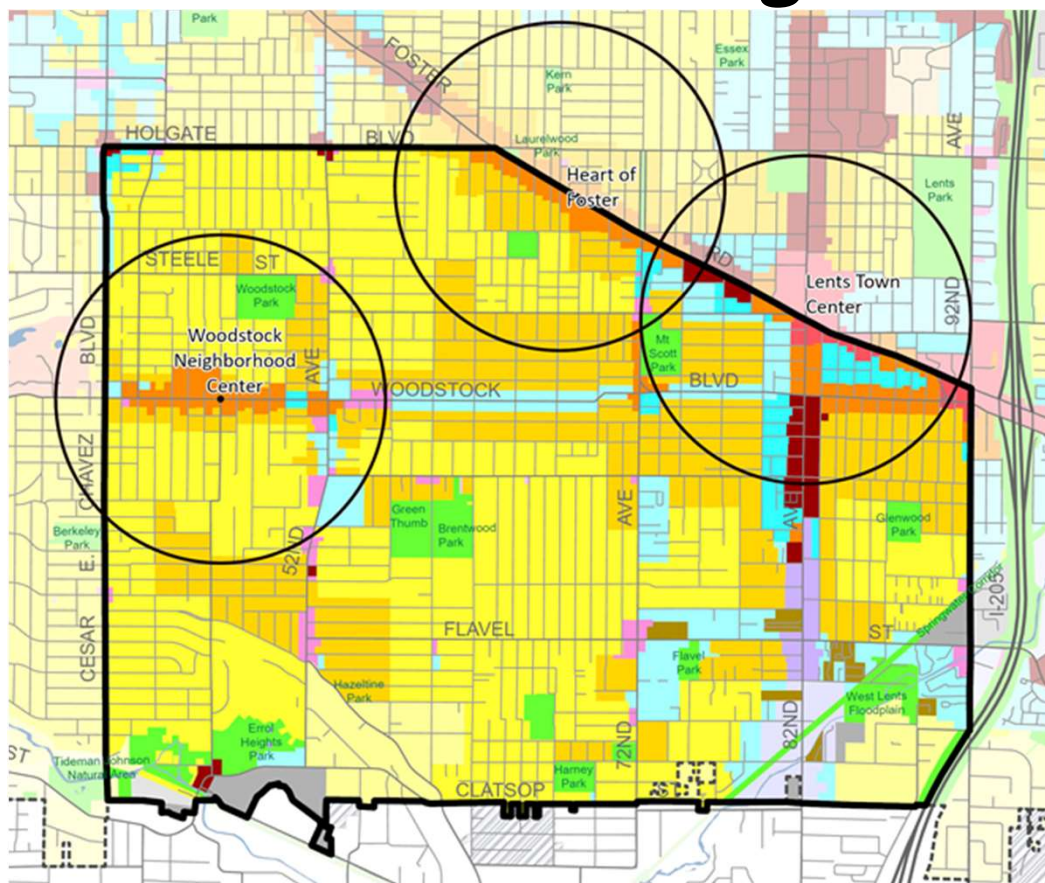


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Designated Centers



Centers: hubs for commercial and community services for the surrounding area, places for growth.

- Only 32% of area residents live within a half mile of the core of a designated center (a walkable distance), 68% live further away.
- Nearly all of the Brentwood-Darlington is outside this half-mile walkable distance to a center.

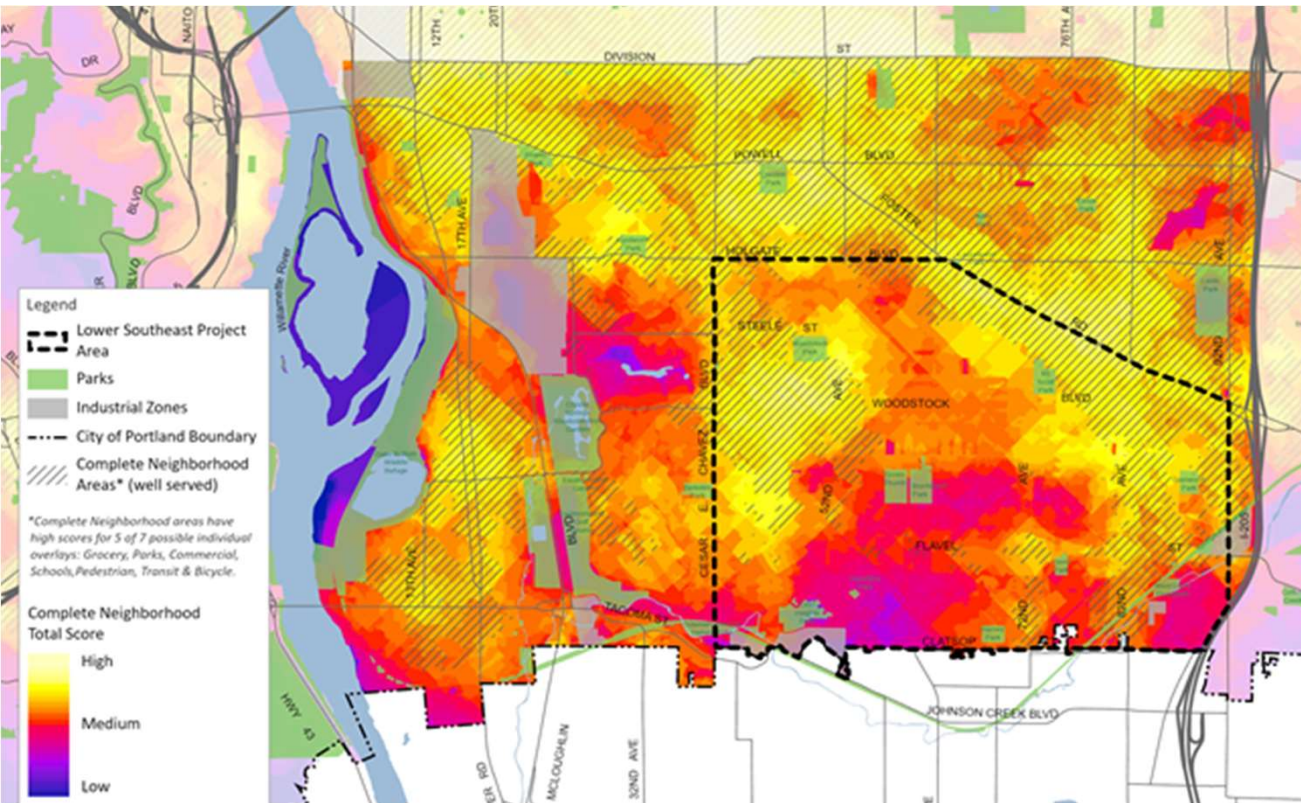


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Complete Neighborhoods Analysis - Composite



Measures features that support the ability to walk and bike to access local services, considering:

- **Destinations** – commercial services, parks, schools
- **Infrastructure** – pedestrian, bicycle, transit.

Climate Action Plan calls for most Portlanders (80%) to live in Complete Neighborhoods.

Only 33% of LSE residents live in areas with Complete Neighborhood features.

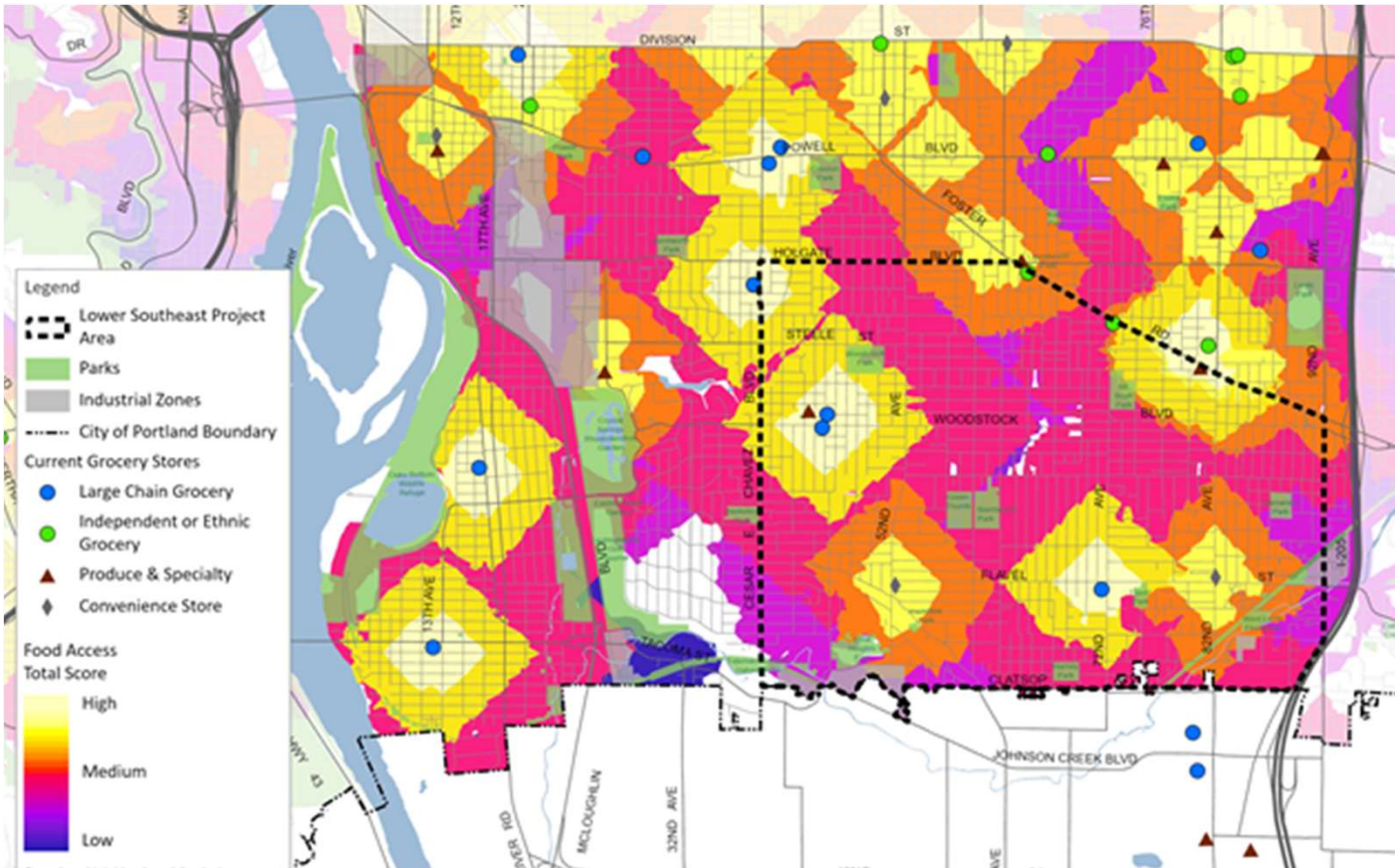


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Food Access - Grocery Stores



40% of area residents live within a half mile of a grocery store.

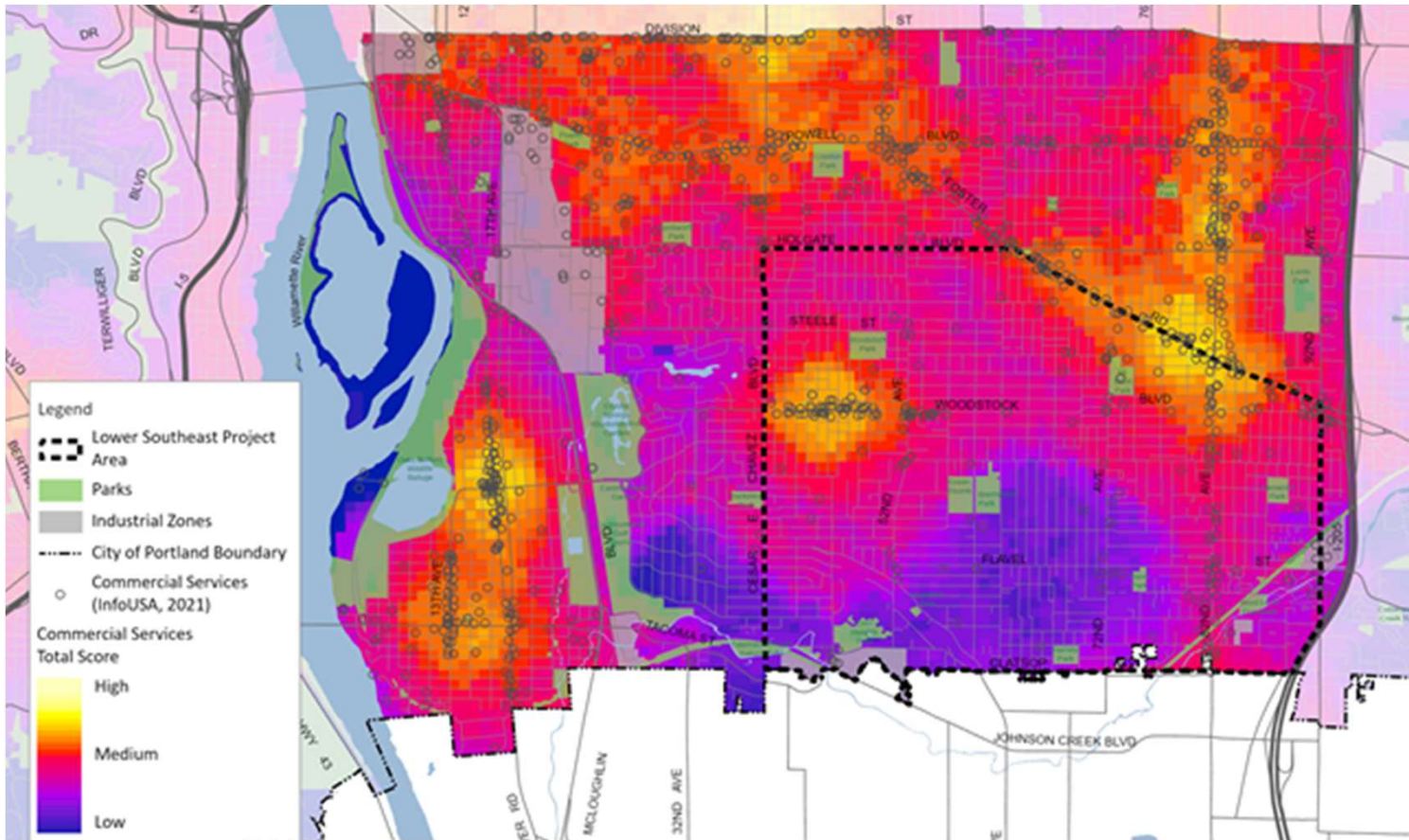


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Other Commercial Services



Most of the core of the study area lacks close proximity to clusters of commercial services.

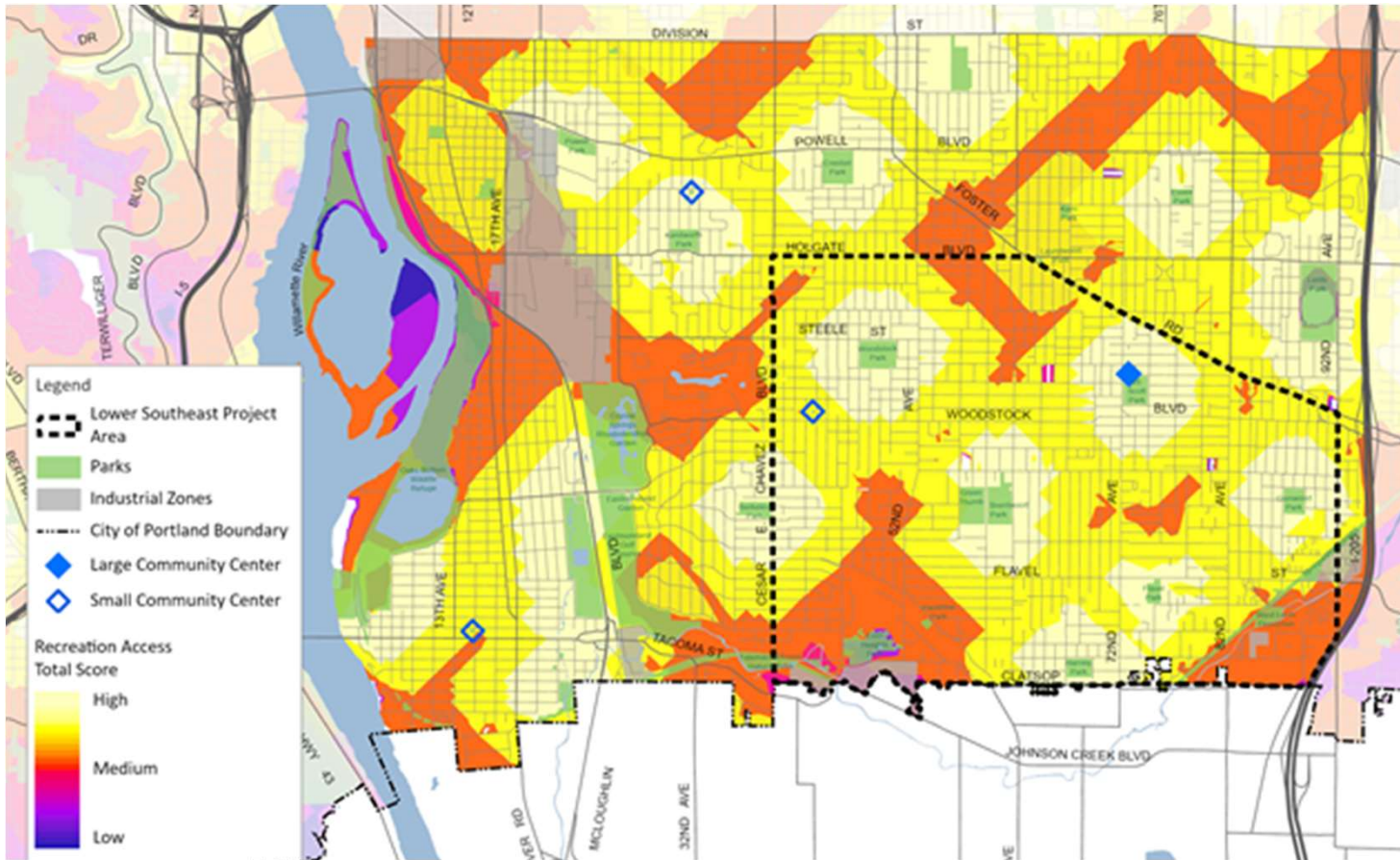


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Parks



100% of the area's residents live within a half-mile of a park or community center.

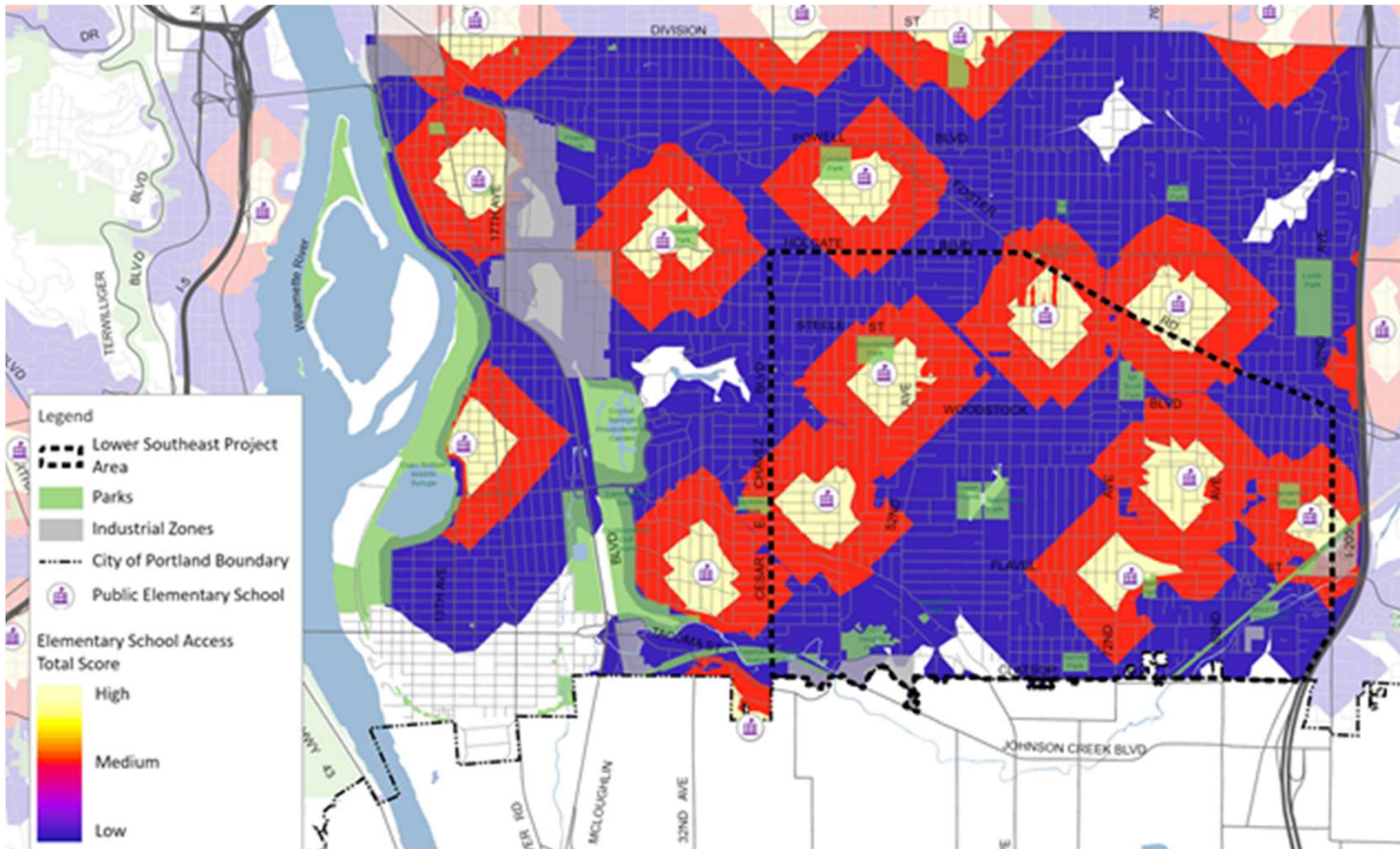


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Elementary Schools



Nearly all the study area is within a mile of an elementary school.

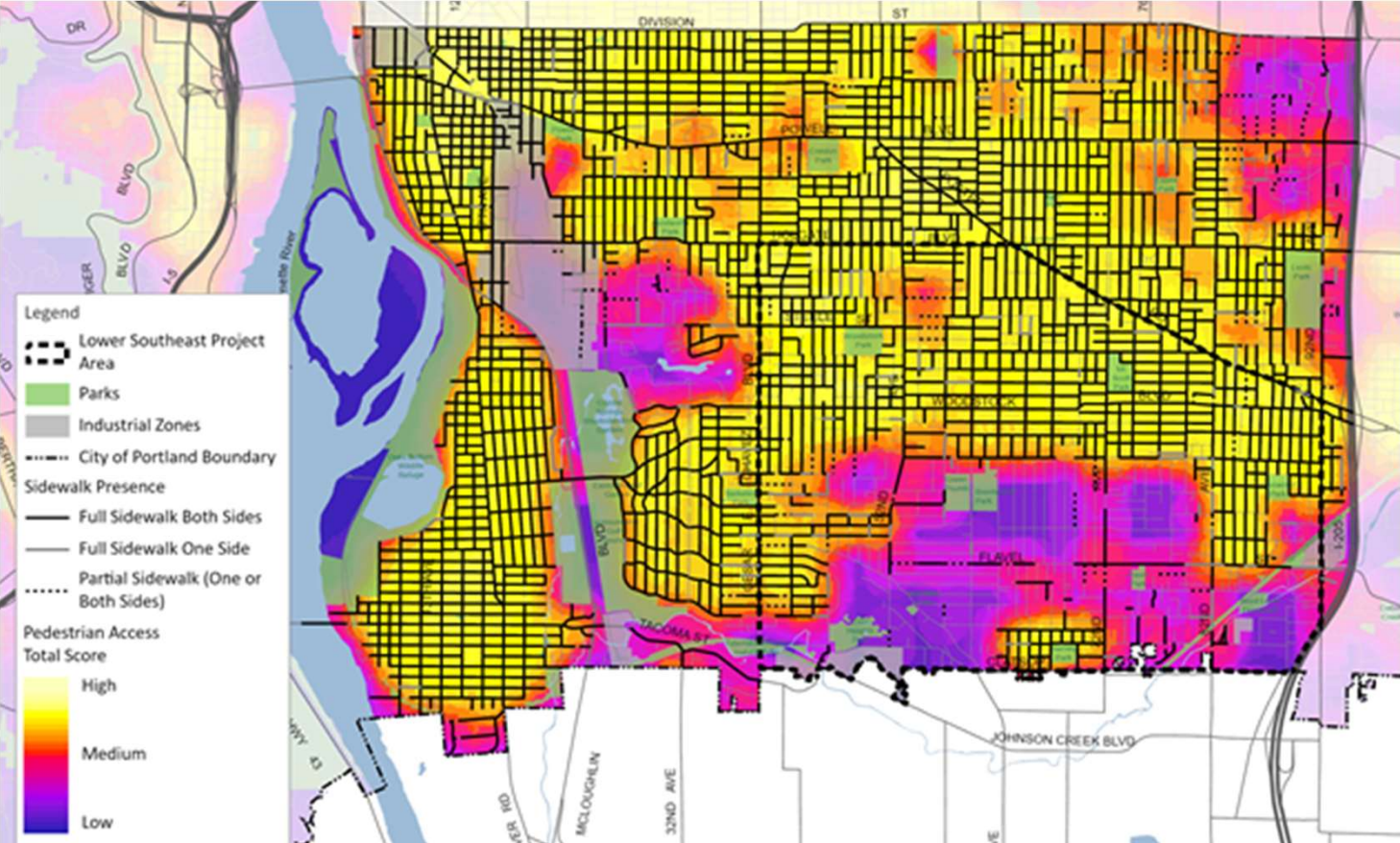


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Pedestrian Access



Measures presence of sidewalks and street connectivity.

Southern half of the study area generally lacks sidewalks and has less frequent street connections.

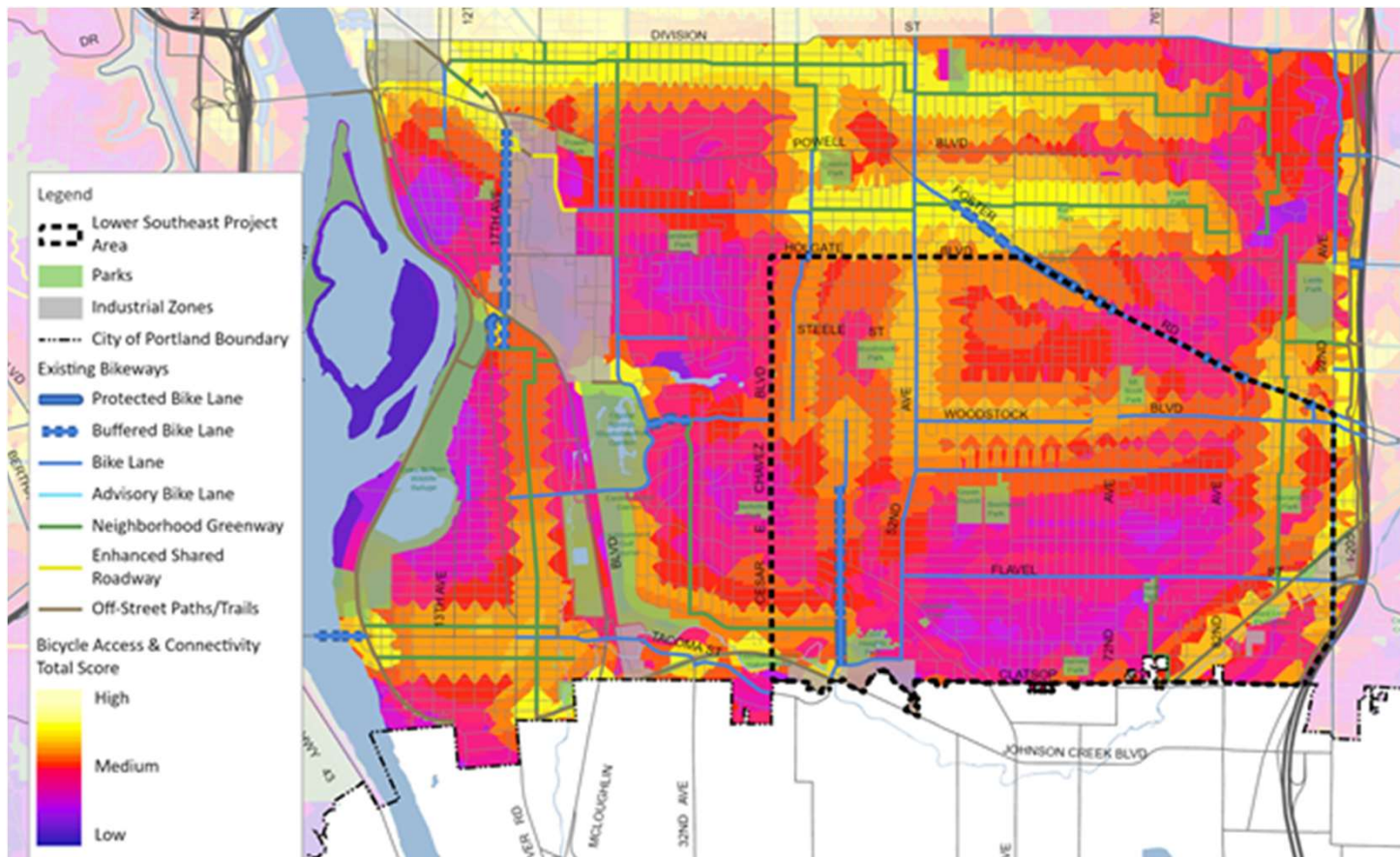


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Bicycle Access



Based on the presence and connectivity of bicycle facilities, including bike lanes, neighborhood greenways, and off-street paths.

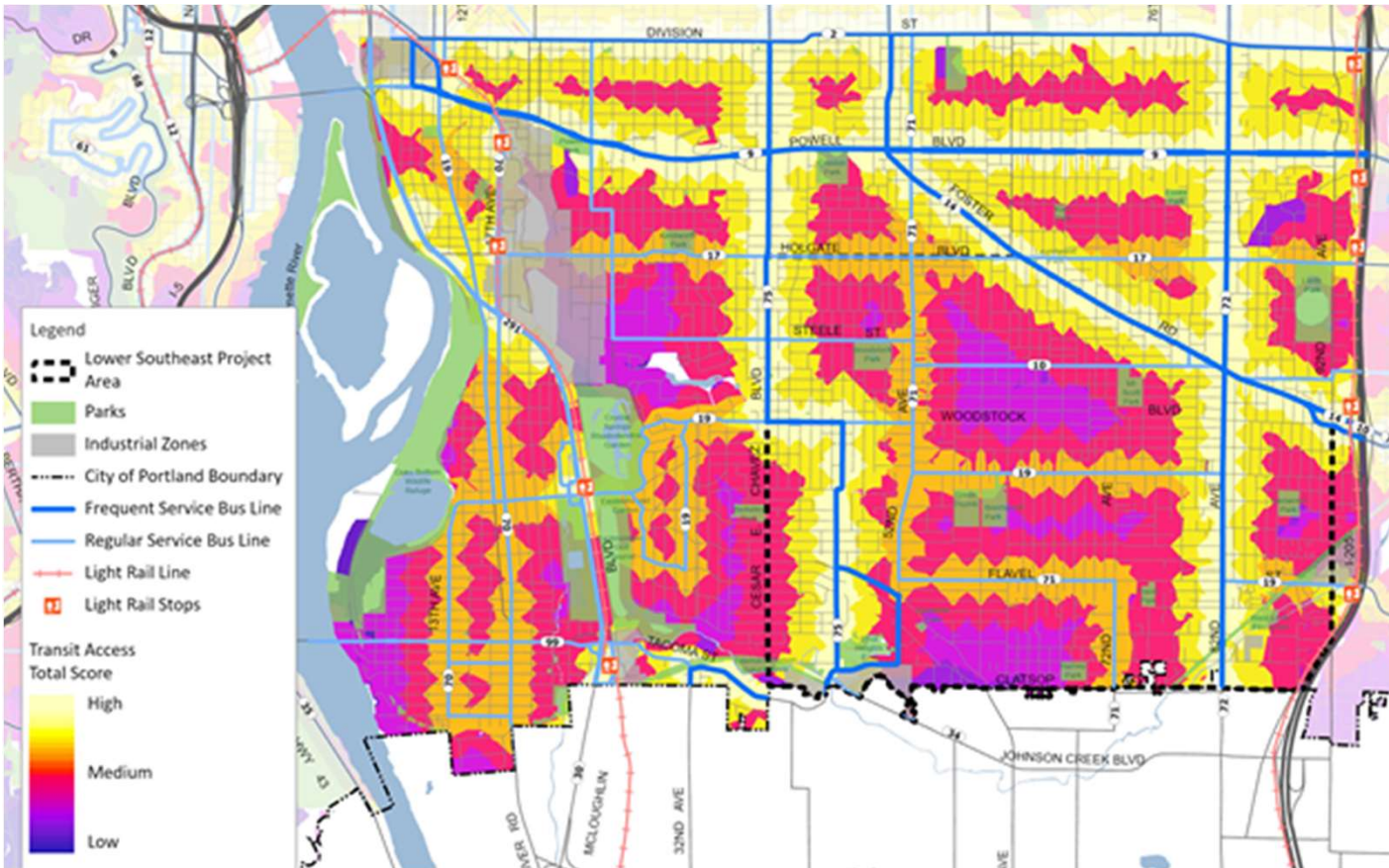


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Transit Access



Based on proximity to transit and frequency of service.

41% of the study area's residents live within a quarter mile of frequent-service transit.



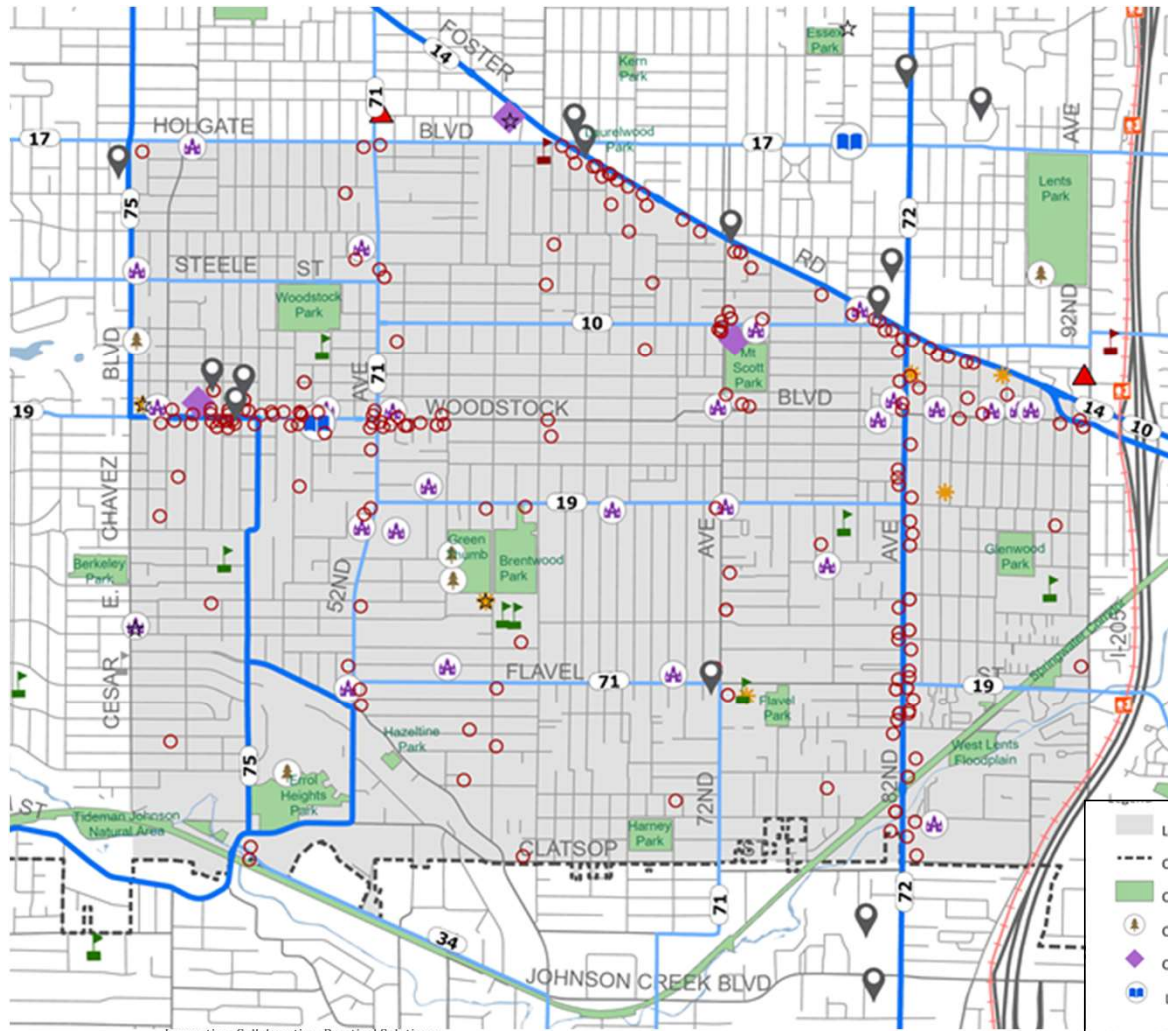
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Services and Amenities

Mapping of services and amenities in the study area. Commercial services are concentrated along the area's major corridors, such as SE Woodstock, SE Foster, and SE 82nd, with a small number of scattered commercial services within the interior of the study area.



| | | |
|------------------------------|---|---------------------------|
| Lower Southeast Project Area | Grocery Stores (chain, independent & specialty) | Public K-8 School |
| City of Portland Boundary | Other Retail and Food/Drink | Public High School |
| City of Portland Parks | Fire Station | Private Schools K-12 |
| Community Garden | Places of Worship | Frequent Service Bus Line |
| Community Centers | Day Care | Regular Service Bus Line |
| Library | Pre-School or Kindergarten | Light Rail Stops |
| | | Light Rail Line |

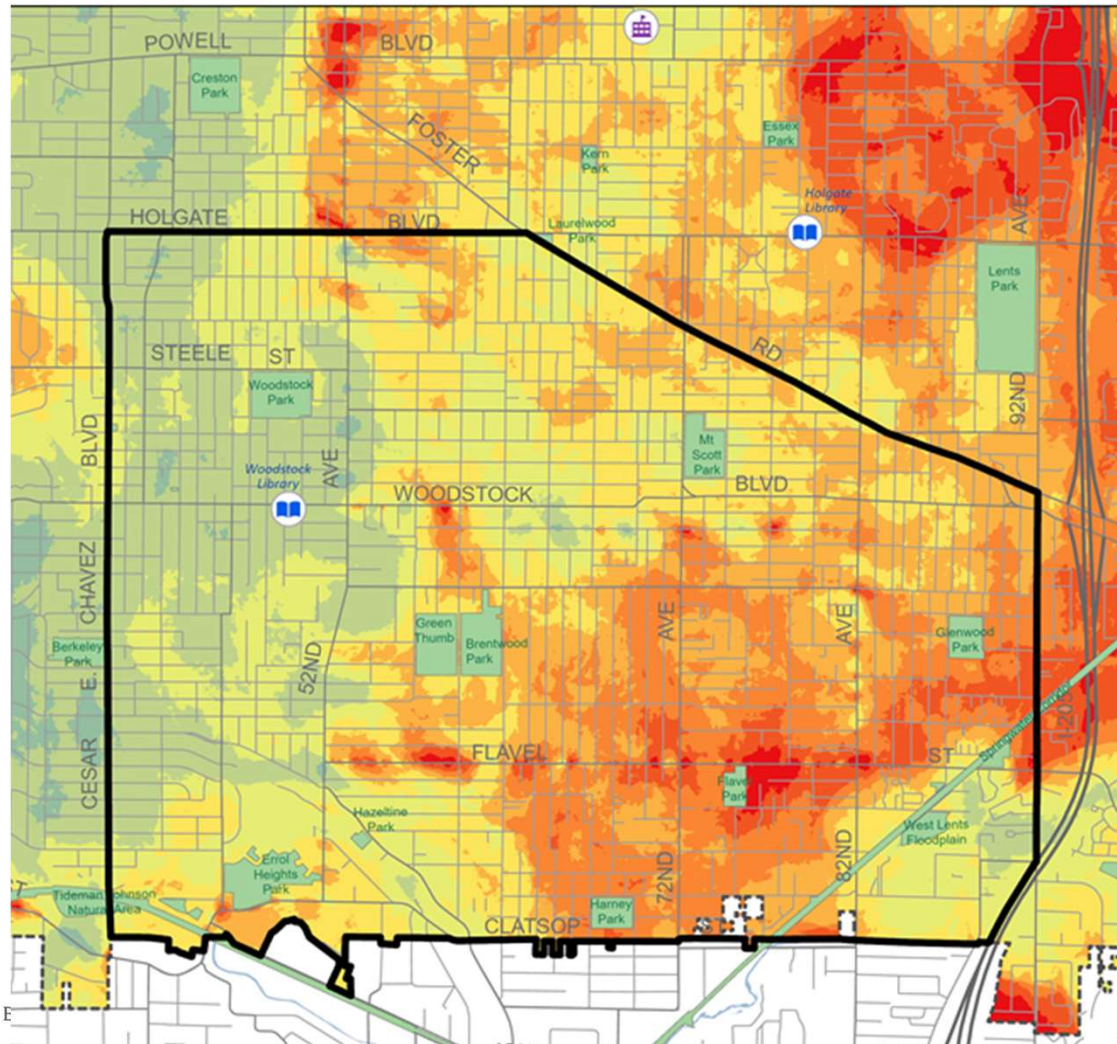
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August 18, 2021

NORTH

0 1,000 2,000
Feet

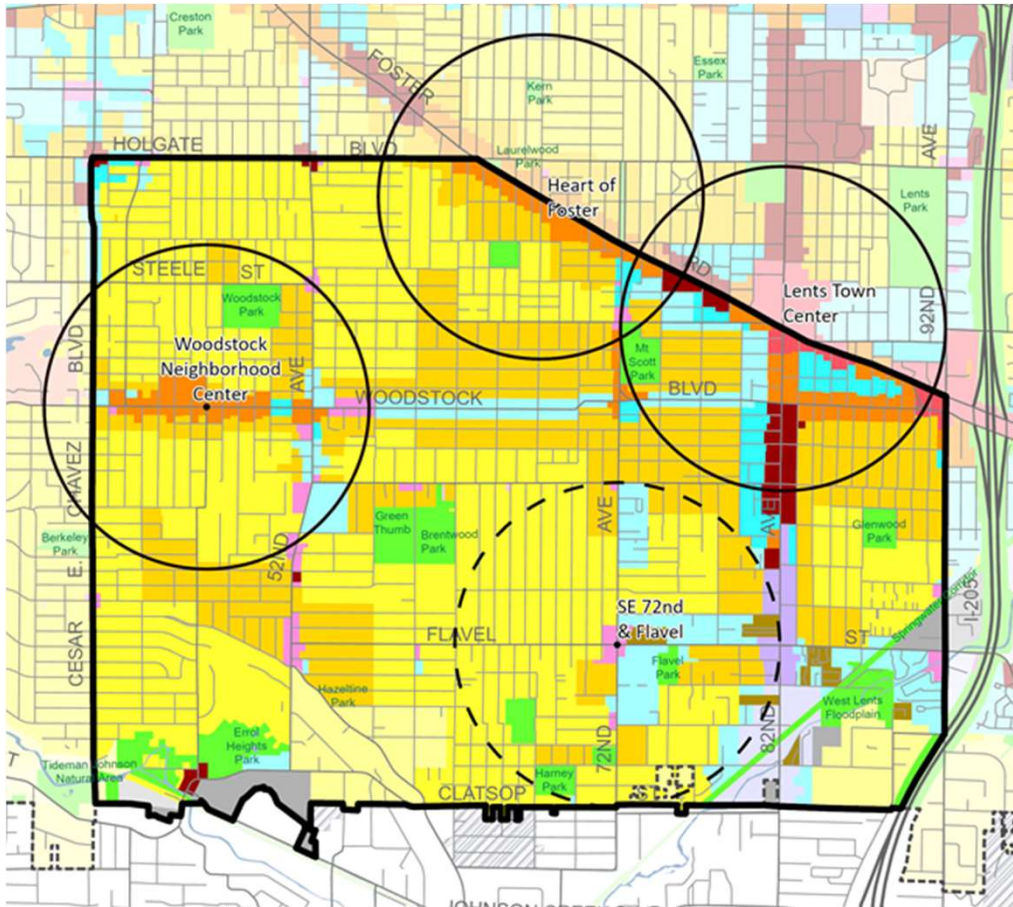
Urban Heat Islands and Cooling Centers



Shows areas with relatively cooler summer high temperatures (green tones) and areas with hotter summer temperatures (orange to red tones).

Cooling centers: during the August heat event, the Woodstock and Holgate libraries were open with extended hours to serve as cooling centers. Kellogg Middle School was a 24-hour cooling center.

Analysis for Potential Neighborhood Center at SE 72nd & Flavel



Intent: assess possibility of a new center to improve access to services in the area.

Population needed to support a business district with a broad range of services is around 6,000 to 10,000 households.

Neighborhood centers intended to have capacity for at least 3,500 households within a half mile.

Current population: 2,520 households

Zoned capacity: 3,200 total housing units

Commercial zoning: 5 acres

(most centers have 20-50 acres)



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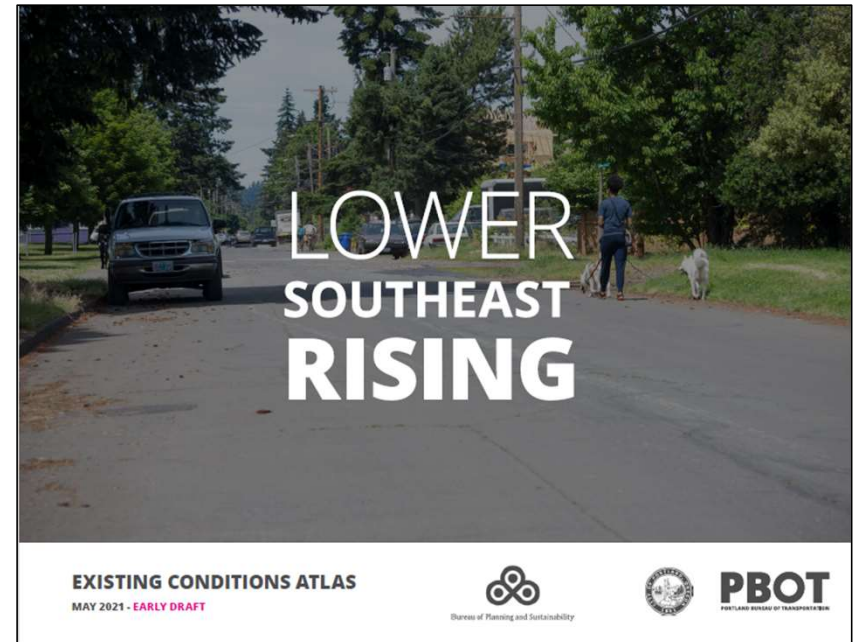
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Summer Public Involvement, Commercial Real Estate & Retail Market Analysis, and Opportunity Mapping Analysis – Break Out Group

- In smaller groups, we invite you to discuss:
 - Did any of the findings in the reports surprise you?
 - Are there key takeaways that you want to elevate?
- You will have 10-15 minutes for discussion, then we will reconvene for each group to share 1-2 key takeaways



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Next Steps

Next meeting:

- Monday, November 15, 2021

Next meeting topics:

- Task 3 deliverables:
 - Equity and Land Use Alternatives Analysis
 - Transit Network Analysis
 - Active Transportation Analysis
 - Street Improvement Analysis
- Public involvement efforts

Action items:

- Add comments to today's Jamboard by October 4, 2021



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